

A Simple Guide to Your Offboarding Process

Thank you for partnering with Predictive Sales AI. This guide walks you through what to expect as you transition away from our services, what we'll provide, and how to make the process smooth for your team.

1. At a Glance: Your Transition Timeline

When	What to Expect
60 days before end date	Submit cancellation notice. Billing continues through the full 60-day period.
Within 2 business days	Finance team confirms final billing and service end dates.
Within 5 business days	If 12 months of marketing fees are fulfilled: website files provided. DNS/domain transfer keys and instructions sent if hosted by us.
4–6 weeks before end	Notify us if porting phone numbers (especially to Twilio). Submit porting request to confirm eligibility.
Final day of service	Ensure all services are fully transitioned: website hosting, DNS/domain, phone numbers, and email (if applicable).

2. What You Have with Predictive Sales AI Today

Your partnership may include some or all of the following, which help us identify what needs to be transferred or wrapped up:

Marketing Platform	Contact management, CMS, blogs, and lead capture tools.
Lead Generation & Digital Marketing	SEO management, content creation, and strategic marketing.
Additional Support Services	Marketing admin assistance, backlink development, blog and offer management.

3. Key Transition Items

DNS & Domain Hosting	Website Files	Phone Numbers
<p>If we host your DNS/domain, transfer keys and instructions are sent within 5 business days of your cancellation request. If hosted elsewhere, coordinate directly with your current host.</p> <p>You can use a Whois Lookup to track your domain transfer- https://lookup.icann.org/</p>	<p>Eligible after 12 months of marketing fees. Delivered within 5 business days. Note: your new provider may need additional development to make all features fully functional.</p>	<p>Begin porting 4–6 weeks before your transition date. Request porting details from us → submit LOA to new provider → carriers complete the move. Port before moving your site, as phone functionality is often tied to your website.</p>

4. Support During Your Transition

Your Account Manager will continue to support you with normal tasks — reporting, analysis, and typical requests — until your final day of service.

Offboarding Team	offboarding@predictivesalesai.com
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We appreciate the opportunity to have supported your growth and are committed to making your transition as smooth as possible.