

Privilege Financial Group

Call Summary:

- Eric pitched him and he is running ads on Yelp getting nothing.
- Blake jumped over the call.
- Blake quoted \$250/month with no contract.
- He is not registered on Google but had a website.
- Blake explained him about GMB.
- 25 miles gradually.
- 5 keywords.
- Blake told him that he receives a post card within 5 working days.
- Working hours and days **Monday to Saturday 9 AM to 6 PM and Sunday appointment only.**
- Bi-weekly report.
- Blake sent him a sample website.
- Blake told him that give at least three months to this campaign to see great results.
- Create YouTube channel and post videos every month.
- Help with reviews part by generating a link and rating part.
- Create accounts for business on social media and link with GBP.
- Card charged disclaimer given.

QA Department Notes:

Client is humble and understanding. He is not registered on Google but had a website <https://privilegefinancialgroup.net/>. We have to register him on Google. Blake told him that he receives a post card within 5 working days. Blake quoted \$250 for his listing optimization. Blake told him that give at least three months to this campaign to see great results. He is looking for good results deal him accordingly.

Additional Notes:

Kindly confirm his business address where he wants to register himself.

Basic Information:

Nationality:	N/A
Previous experience with SEO Company:	N/A
For how long the client is in this business:	N/A

Cross Checking the Information on CRM:

• Owner name:	Jaffrey Taylor
• Business name:	Privilege Financial Group
• Business number:	908-937-7496
• Personal Number	908-275-3293
• Fax Number:	908-275-3295
• Business email:	privilegefinancialgroup@gmail.com
• Business address:	Not provided
• Keywords	(5)
• Radius	(25)
• Listings status	(No)
• Notes on CRM	(Yes)
• Calls Committed	(No)
• Insisting more miles	(No)
• Commitment of phone ringing	(No)
• Reg on GMB (coached)	(Yes)
• Social Media Handling	(No)
• Guarantee of ROI (First Month)	(No)
• Scrapping Reviews	(No)
• SEO Procedure Explained	(Yes)
• Information in CRM	(Yes)
• No of sale call mentioned in Notes	(Yes)
• Disclaimer Read Properly	(Yes)