

## Client Name: Service Ready Techs Heat and Air LLC

### 1st call

- Closer came on the call after agent pitched went with the basic procedure explained the plan showed him our client and our company
- Time stamp 09:45 Closer says any person looking for your service he will find you in your local area in 20-25 miles' radius and you will get direct calls from customer this is what we are offering you.
- Customer insisted for 15 miles Purcell city
- Time stamp 15:10 Closer committed that he will target 25 miles and if you want to target any cities for example Purcell we will do that for you and we will target all the cities and areas coming in those 25 miles' radius
- Scheduled a call.

### 2nd call

#### Important Points of Call:

- Quoted \$225
- Time stamp 3:45 closer took 5 cities from the client, some of the cities he took were about 33 miles away from his location from Marysville for example Norman OK.
- Client wanted to discuss all of the plan with his partner and then make a decision
- Closer took the services. and explained him the process of SEO
- Client asked about the number of calls and closer educated him that our job is to get you traffic.
- He ran google ads as well.
- Call was scheduled for next day.

### 3rd Call:

- Customer is quite confused between ads and our service that was further explained by the closer
- closer takes information
- Client chose bi weekly report.
- Time stamp 07:49 Closer committed calls in the first month, " give me the first month you will see your business coming up calls coming in and then give me a chance for next month"
- Closer sent him an email and scheduled the call.

## 4th Call:

- Closer went for the activation, payment charged, gave the disclaimer.
- Call ended.

## QA Department Notes:

Customer was very confused about ads and our services. Customer success team would need to educate him more.

### Cross Checking the Information on CRM:

*(Mentioning only incorrect Information)*

- |                                      |                    |
|--------------------------------------|--------------------|
| • Name                               |                    |
| • Email                              |                    |
| • Business Address                   |                    |
| • Cellphone Number                   |                    |
| • Services                           | (mentioned in CRM) |
| • Keywords                           | (No)               |
| • Radius Miles                       | (25 miles)         |
| • Listings Status                    | (Yes)              |
| • Notes on CRM                       | (Yes)              |
| • Calls Committed                    | (Yes)              |
| • Insisting more miles               | (Yes)              |
| • Commitment of phone ringing        | (Yes)              |
| • 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 | (No)               |
| • Disclaimer read properly           | (Yes)              |