

NEXA Mortgage, Carole Hardcastle Painter, NMLS 717505

Call Summary:

- Ross starts the call and pitched her.
- Blake jumped over the call.
- Blake quoted **\$250/month** with no contract.
- Blake shows her our client (**Wilder Perez Realtor**) and sent her a screenshot.
- Working hours and days **24/7**.
- Bi-weekly report.
- 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 and disclaimer given.

QA Department Notes:

Client is good and easy to go with. She is already registered on Google and has a website <https://www.mortgageloanswithcarole.com/>. Blake quoted **\$250** for her listing optimization. Blake told her to give at least three months to this campaign to see great results. She is looking for good results so we have to perform well to make her our permanent client. Blake pitched her for a website and quoted \$600 one-time charge but she denied.

Additional Notes:

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: | Carole Hardcastle |
| • Daughter's name: | London Painter |
| • Business name: | NEXA Mortgage, Carole Hardcastle Painter, NMLS 717505 |
| • Business number: | 801-554-7607 |
| • Daughter's number: | 801-739-2150 |
| • Business email: | cpainter@nexamortgage.com |
| • Business address: | Hidden on her listing |
| • Keywords | (5) |
| • Radius | (25) |

• Listings status	(Yes)
• Notes on CRM	(Yes)
• Calls Committed	(No)
• Insisting more miles	(No)
• Commitment of phone ringing	(No)
• Reg on GMB (coached)	(N/A)
• 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)