

My Mortgage Advisor - Home Loans by Todd Uzzell

Call Summary:

- Aaron starts the call and pitched him.
- Blake jumped over the call.
- Blake quoted **\$225/month** with no contract.
- Working hours and days **Monday to Saturday 9AM-6PM and Sunday appointment only.**
- 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 through payment link and disclaimer given.

QA Department Notes:

Client is nice and understanding. He is already registered on Google and has a website <https://todduzzell.com/>. Blake quoted **\$225** for his listing optimization. Blake told him to give at least three months to this campaign to see great results. He is looking for good results so we have to perform well to make him our permanent client. Blake pitched him for a website, sent him a sample of the website and quoted \$700 one-time charge but he denied.

Additional Notes:

Client has another website which is <https://www.todduzzellmortgage.com/>.

Basic Information:

Nationality:	N/A
Previous experience with SEO Company:	N/A
For how long the client is in this business:	5 years

Cross Checking the Information on CRM:

- | | |
|---------------------|---|
| • Owner name: | Todd Uzzell |
| • Business name: | My Mortgage Advisor - Home Loans by Todd Uzzell |
| • Business number: | (480) 330-1724 |
| • Business email: | todd.uzzell@gmail.com |
| • Business address: | 1330 South Aaron St, 216, Mesa, AZ 85209, United States |
| • 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)