

Zoom Tax Service

Call Summary:

- Client is registered on google already.
- 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.
- Blake explained the plan of action.
- Showed our client (speedy Garage repair) and (Wilder Perez).
- \$225 per month with no contract.
- She said that needs clients from this campaign so Blake said if you work with me for like 3 months can get desire results.
- Blake explain about GBP app and also train for that.
- She has knowledge about google and needs conversions.
- She wants to cancel Yelp account.
- Blake helped her to cancel Yelp but not succeeded.
- She talked to Mike Barasso.
- She looked satisfied and happy Blake also explain about SEO and SEM as well.
- She said call me tomorrow.
- Blake called her and give a recap.
- Blake asked her about SEM but she said my budged is limited so stick to SEO service.
- She gave us a chance for month and wants to see results.
- Target Services: Virtual Taxes and Remote Taxes.
- Bi-Weekly Report.
- Working days: Mon-Fri
- Working hours: 9am-7pm.
- Payment charged disclaimer given and call ended.

QA Department Notes:

Client is nice but she is curious about results and asks a lot of questions too so we have to deal accordingly. Her GBP is verified as well. We have to work on his listings. Her nature is straight forward so handle her accordingly. She talked to mike Barasso he suggested her SEO and SEM both, but she had limited budget so she will think about SEM in future.

Additional Notes:

She needs results in the first month then she will continue for the next month so handle accordingly.

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:	Stacy M Bailey
• Business name:	Zoom tax service
• Business number:	(973) 652-3183
• Personal number:	973-433-6069
• Business email:	sbaileynj@gmail.com
• Personal email:	sbaileynj@aol.com
• Business address:	10 W S Orange Ave, South Orange, NJ 07079, 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)	(No)
• 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) Incomplete.
• Disclaimer Read Properly	(Yes)

