

Appreciation Financial - Retirement/Financial Srvc

Call Summary:

- Emilia pitched him.
- Quoted \$225 per month with no contract.
- Create YouTube channel and post 2 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.
- Emma sent and client go through the proposal.
- Client don't want to go with yelp, Emma said I'll help you to cancel both.
- Emma called him, not in office he rescheduled a call on today 11am.
- Showed our client **Pasadena Insurance Agency, Inc.**
- Bi-Weekly Report.
- Disclaimer given, call ended.

QA Department Notes:

Client is very nice and easy to go with. He is doing Yelp and Google ads, not getting response. He wants to cancel both the services, Emma said I'll do it for you. She explained the plan of action and he was interested. Emma told him that it's an organic marketing and take good three months to be ranked up on top. He scheduled a call later some time because he was busy. Emma called him today, give recap. Client is already registered on Google and had a website <http://www.appreciationfinancialtx.com/>. We have to attach with his listings. Emma Canceled his yelp and asked to download GBP app, told him about the managerial access. Emma again mentioned that if he will give three months to this campaign the results will be great for his business.

GBP: \$225.

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:	Ric Carroll
• Business name:	Appreciation Financial - Retirement/Financial Srvc
• Business number:	(214) 796-5626
• Business email:	ecarroll@appreciationfinancial.com
• Personal email:	ric2791@tx.rr.com email
• Business address:	Address hidden.
• Keywords	(-)
• 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)