

Solar Tree

Call Summary:

- Nick pitched him and he is running ads on Yelp getting nothing.
- Derrick jumped over the call.
- Derrick quoted \$250/month with no contract.
- Derrick sent him a zoom link.
- Derrick show him our client (speedy garage services).
- 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 disclaimer given.

QA Department Notes:

Aaron is humble and understanding. He is already registered on Google and has a website <https://mysolartree.com/>. Derrick quoted \$250 for his listing optimization. Derrick told him to give couple of 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. Derrick pitched him for a new website and quoted \$1000 one-time charge and Aaron agreed for the website. We have to develop a new website for him. Website will be deliver within 14 working days.

Sale in Total	\$1250 (GMB: \$250 Website: \$1000)
He paid us	\$900. (GMB: \$250 Website: \$650)
Remaining	\$350 (Pending for Website)

Additional Notes:

Derrick told him that once I start optimization on your website you will pay me \$200 for GMB optimization and \$250 for website optimization. But we have to first show results for his GMB.

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: Aaron Powell
- Business name: Solar Tree
- Business number: (800) 347-2487
- Personal number: 949-689-8630
- Business email: support@mysolartree.com
- Personal email: apowell@mysolartree.com
- Business address: 15360 Barranca Pkwy, Irvine, CA 92618, 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)