

Client Name: Laguna Woods Village Realty

1st call

- Quoted \$250
- Standard call showed him the client explained the procedure as well as the plan to the customer.
- Sent him an email and starts taking the information.
- Committed 8 miles.
- Charged the payment.
- Wayne came on the call to talk about the website.
- Sent him a sample for the website.
- Client declined the proposal for website.
- Disclaimer given and call ended.

QA Department Notes:

Customer was very confident at the end of the call. It was a very good call taken by the closer as he was properly educated about the procedure and was not over-committed on the call. Customer was looking for this service as asked the closer to just go ahead and do it.

Cross Checking the Information on CRM:

(Mentioning only incorrect Information)

- | | |
|----------------------------------|--------|
| • Name | |
| • Email | |
| • Business Address | |
| • Cellphone Number | |
| • Services | (Yes) |
| • Keywords | (No) |
| • Radius Miles | (8-10) |
| • 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 (No)
- Disclaimer read properly (Yes)