

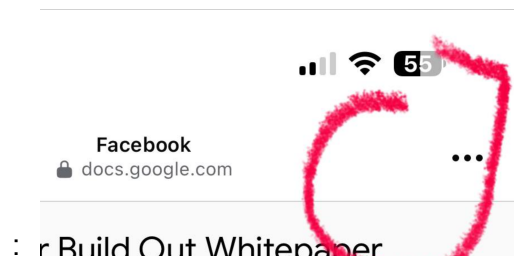
→ **Bookmark this document!** ←

Call Center Doctors Call Center Build Out

Thank you for your interest in building a Solar / Roofing / Marketing Agency / Life Insurance / Go HighLevel Call Center with CC Docs.

Please start by watching this video, I promise it will be worth your while, if not, I'll buy you a bottle of scotch.

 [Call Center Explainer Video](#) [If your looking at this document from Facebook, tap the 3 dots in the upper right hand corner And Choose: **Open in External Browser – sometimes Facebook breaks links**]



Listen, here's the bottom line and why you should read the rest of the document...

- *If you already own a call center, we can typically slash your workforce in half and increase your conversion rate of existing leads by 30%.*
- *If you don't own a call center, we can build you a vehicle where our average client adds several million to their top line every year.*
- *We have multiple clients doing > \$40m a year with their call center and we have the references to prove it.*
- *Building your own call center will get you a minimum one extra multiple at exit. If you don't have a call center, you need one.*

Some of our happy customers:

Happy Clients

 Owner: Austin Watterson Location: KS, TX 20 Deals a Month	 Owner: Kelly Wilson Location: NJ, VA, MD 75 Appointments a day	 Owner: Wilson Griffith Location: MD Over 500 Deals from their Call Center	 Owner: Elliot and Nicole Marko Location: AZ 100 Deals a Month from their call center!
 Owner: Hong Ly Location: CA Over 500 deals from their call center!	 Owner: Ty Ytturdale and Chad Elizondo Location: Nationwide Over 1,000 Appointments a month	 Owner: Michael Comino Location: FL 1,000 Deals from their call center!	 Owner: Trebor Verwey Location: WI 70 Deals a Month from their cell center
 Owner: Tyler Melton Location: TX Over 1,000 deals from their Call Center	 Owner: Adam Thau Location: PA Over 2,000 Deals from their call center!	 Owner: Grant Lindsey Location: TX 30 Insurance Deals Per Month From Their Call Center	 Owner: Justin Kihano Location: AL 30 Deals a month from their call center




We have been building Call Centers as a service since 2020. We built our very call center in 2014, we were generating over 500 consumer leads a day at our high point and needed a way to mine through them quickly. The Call Center Doctors was born from that company.

[BOOK A CALL NOW](#)

Wouldn't you like to own an in-house asset that you manage? That spits out appointments with a reliable, highly scalable CPA that works in any market. Why rely on external companies for your marketing when you can own this yourself?

Since then, we have generated over 1,000,000 high-quality appointments for our clients in every industry, from Legal, Roofing, Solar, Health Care and more.

We have recruited north of 10,000 Call Center reps, we typically hire from Mexico and we hire several hundred people per month.

We have also recruited several hundred managers to train, manage the dialer, and manage the day to ensure everything runs correctly.

We have built over 250 call centers. Trust us when we say we know dialing.

Our average Solar client sees a cost per acquisition of between \$1,500 to \$2,500. Some even in the low \$1000's; remember, this is after months, sometimes even years, of operating.

Our average Roofing client sees a cost per acquisition of between \$500 to \$1,000. remember, this is after months, sometimes even years, of operating.

Building out a call center has several critical components for it to function correctly:

The Dialer

The first is the dialer. The dialer is used to connect the agents to the leads being dialed. We have been in the call center industry for nearly ten years and have used every dialer on the market. We settled on a Vicidial platform over three years ago, too, due to the extreme customization (150+ APIs and 50 pages of documentation), phenomenal connectivity, and control over the platform.

We have ten full-time developers on staff, using a heavily modified version of Vicidial.

There are over 60 different reports inside the platform, giving you fantastic visibility into the production of the agents.

The most prominent contact center we have built on the platform has over 120 agents dialing simultaneously.

It is highly scalable and works flawlessly.

It uses predictive dialing; we all know if we dial ten people, only 3 to 5 of them might pick up. It wastes enormous time dialing people manually, listening to ringing, voicemails, disconnected numbers, etc. This dials all leads programmatically and lets you keep your reps on the phone.

The dialer must fully connect to your CRM stack, Analytics stack, and project management if necessary. For instance, when an appointment or live transfer is set inside the dialer, it needs to be sent to your CRM with full call notes, call recording, and lead contact information.

[BOOK A CALL NOW](#)

Quality Control

The second is quality control. Have you ever bought appointments from someone, and they were absolute junk? Ever had a door-knocking team set a bunch of garbage? Have you ever created your call center or outsourced another one, and they were absolute horse shit? We have. It took millions of dollars in R&D to create the masterpiece we currently have.

All appointments go through a 12-step quality control process:

- 1. Opening/Introduction**
 - Was the agent confident in their opening statement? (Spoke clearly, gave a proper introduction to who they were and what they were calling about).
- 2. Rapport Building**
 - Did the agent form a solid and deep bond with the lead?
 - Were they sympathetic and empathetic if anything happened to the lead?
 - Did they show genuine interest in the lead?
- 3. How was the vibe after 20 seconds?**
 - Does the call feel calm, natural, smooth, and good to go?
 - Or was it awkward and uncomfortable?
- 4. Script Adherence**
 - The script is a framework, and all the major points must be covered.
 - A skilled agent can ad-lib a conversation and still hit the main points.
 - Until the agent knows the script thoroughly, they need to follow it exactly.
 - No variances; if changes are needed, they will be made centrally.
 - This helps identify how to strengthen our scripts.
- 5. Steam Rolling**
 - Did the agent provide helpful information about the program?
 - Did the agent try to coerce a yes without proper fact-finding?
 - Did the agent set a fake or inappropriate appointment when the prospect objected or was unsure?
- 6. Disposition Logging**
 - Was this call logged adequately?
- 7. Notes**
 - Were the notes filled out correctly?
 - Did they contain all the necessary information to qualify the lead?
- 8. Was the lead qualified?**
 - Did the lead pass the minimum requirements?
 - Did they verbally confirm the minimum qualifications?
 - Check the SOP inside ClickUp for the current criteria for a qualified lead.
- 9. Were proper dispatch procedures followed?**
 - Was the lead booked in the correct calendar?
 - Was it submitted using the appropriate web form and lead form?
 - Were all qualifying questions accurately submitted?
- 10. End of the call**
 - Did the agent remind the homeowner that all key decision-makers need to be present?
 - Did they reconfirm the appointment time and date?
 - Did they inform the lead about how to contact us if changes are needed?
 - Did they emphasize the potential savings and the value of the consultation?

- Did they end with an invitation for any final questions and confirm the consultation as a free service?

11. General call summary

- What did the agent do well?
- What areas need improvement?
- Did anything particularly stand out?

12. Agent audio call quality

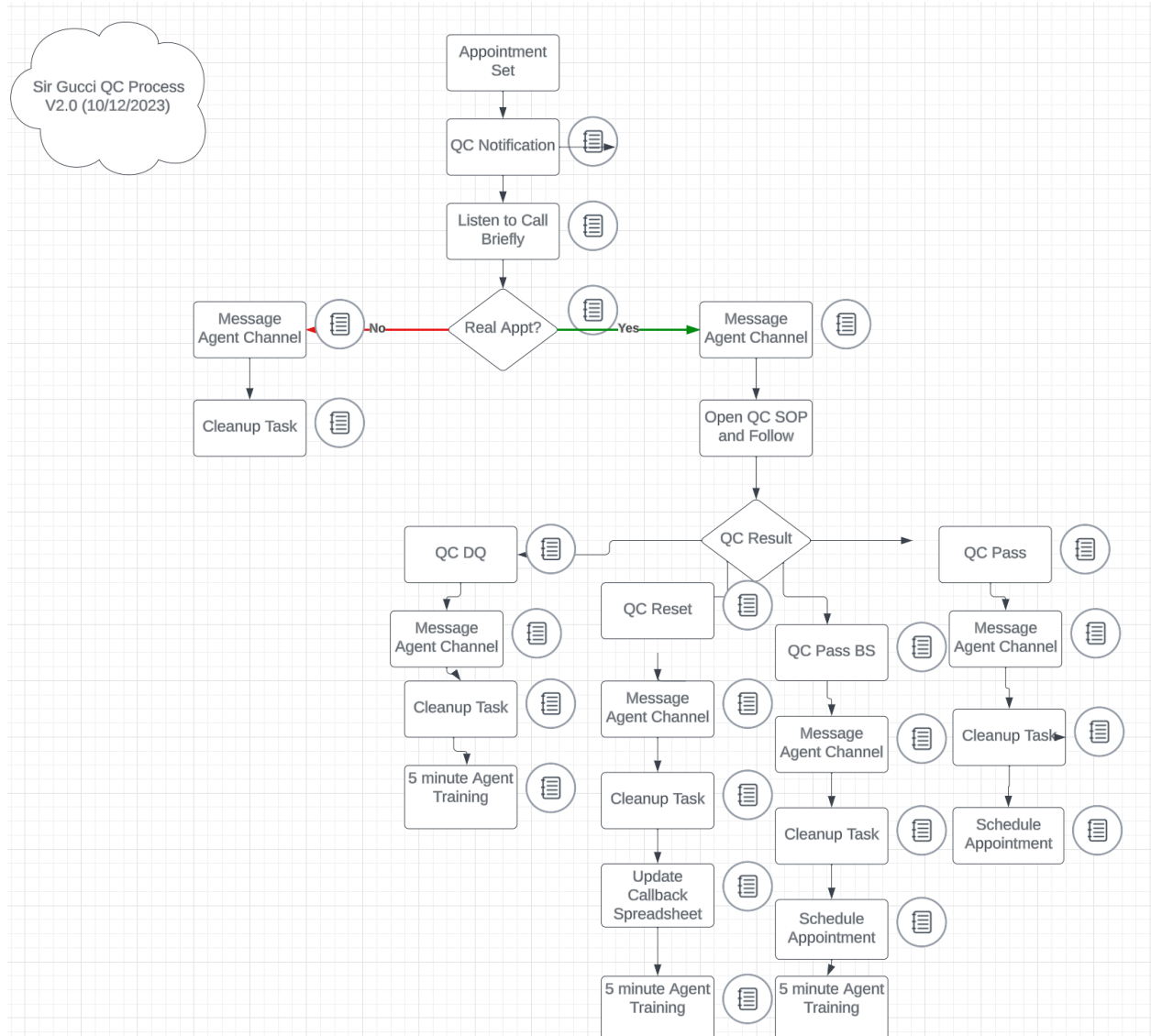
- Did the agent have a clear line?
- Were there any issues like muffling, background noise, lag, or echo?

-

We also audit all different types of dispositions, not only the appointments booked, from DNC's (why was it a do not call, how could we push harder?) Not interested, (why were they not interested, could we have pushed harder, where was the disconnect?) Call Backs, (Why was it a callback, could we not have sealed the deal right there?) Hang Ups (Why did they hang up on us, did we deliver the script wrong, was there no energy?) and so on...

Having proper quality control will make or break a call center.

Below is an example of one of our Quality Control Workflows



Mentor System

All the call centers we build are paired up with one of our Senior Call Center managers. We have multiple Sales Trainers / Call Center operators on staff who have been operating our clients Call Centers for years, we use these staff and pair them up with your call center operator to show them the ropes for quality control, sales training, call center management and more. Having a mentor plus a dedicated client success manager ensures your ultimate success with our platform. We have several layers of accountability built in to ensure you get the maximum results.

[**BOOK A CALL NOW**](#)

Recruiting

Recruiting is an art. It takes years of exposure and a big volume to get it right.

All of our reps have 1 to 2 years of experience cold calling. 80% to 90% of them are in Mexico, with the rest typically sprinkled around Egypt, the Philippines, Bangladesh, and other Asian countries.

Most of the reps we hire from Mexico lived in the USA for 10 to 20 years and are completely Americanized. This allows you to get a high quality rep at a amazing price saving you lots of money long term. We do on occasion hire from other countries, but we prefer Mexico due to the proximity of the location to the USA and Cultural understandings of America. The average American receives 20 to 30 unsolicited phone calls a week.

You want to have the highest chance of penetrating that potential customer and you only have a few seconds on the phone with them to gain their trust and begin the selling process.

Do you really want to leave this up to a bunch of people overseas?

We've also hired a lot from South America and Central America (Colombia, Nicauguara, Honduras, etc) they have amazing talent, a Mexican accent, and the cultural understanding and the level of English is pound for pound very poor compared to Mexico.

You want to stack the decks in your favor with a predominantly Mexican team, that being said, we don't discriminate, there is high-quality world-class talent everywhere, but why not focus on Mexico as your primary recruiting source?

We have a very thorough recruiting process that goes through 4 steps.

We have 10-full time recruiters who source candidates from hundreds of websites, Facebook groups, LinkedIn groups and other mediums.

You don't want to get this piece wrong, as it will make or break your contact center or put you months behind. Money is one thing, but it's the time-cost opportunity of not closing 50 to 100+ deals because you had the wrong people in place.

Step 1:

Recruiters source the agents and do a 10-15 minute interview. Assuming they pass the interview they move onto a form which they fill out.

Step 2:

The form is filled out with the following information:

- First Name
- Last Name
- Photo ID
- Picture of them holding their Photo ID
- WhatsApp Number
- Video pitch on why we should hire them
- Typing test
- Internet speed test
- Computer specs
- Power stability scale of 1 to 10
- Internet stability scale of 1 to 10
- LinkedIn profile link
- FB Profile Link
- Instagram profile link
- Job history
- Hourly rate expected
- Years in the industry
- References

... and more!

Step 3:

Our internal HR team reviews the form and if they pass, does a secondary interview.

Step 4:

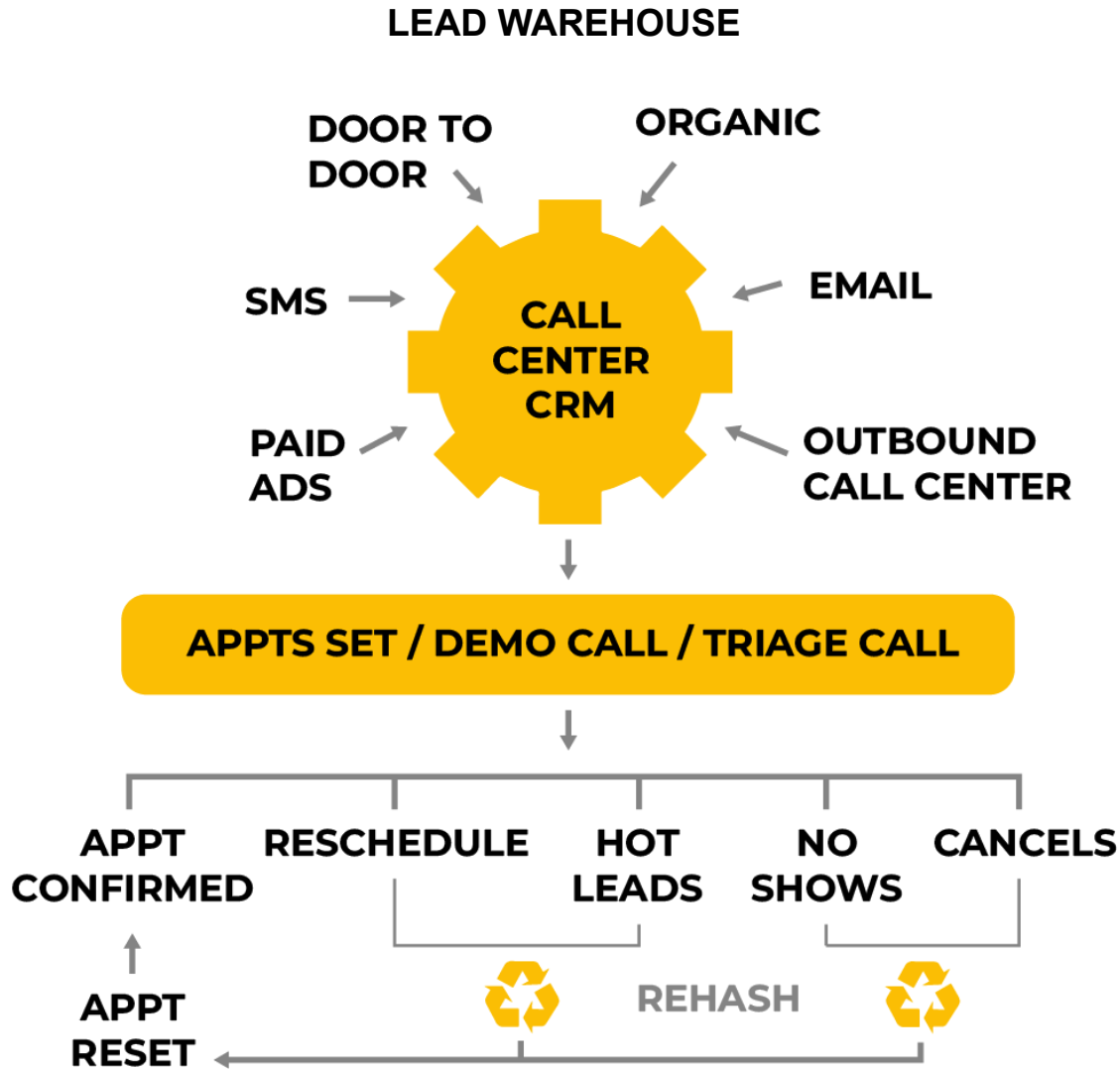
One of our sales trainers or our call center director does a third and final interview, if the candidate passes then they will be placed inside our clients call center.

During this last step, we make the agents role play through the script and we are looking for a bunch of different key factors and we rank them on a scale of 1 to 10:

- Accent
- Persuasion
- Dynamic personality
- Agent IQ
- Energy/Enthusiasm
- Demeanor/Professionalism
- Knowledge
- Addressing Lead Concerns
- Talk/Listen Ratio
- Active Listening
- Rebuttal Skills

[BOOK A CALL NOW](#)

The same process is done for managers for call centers but with more stringent criteria.



Imagine all of your leads coming from all of your sources and going directly into your contact center. Whether you are generating leads from paid ads, email, SMS, door knocking, or outbound calling, everything is sent to your call center for:

- Appointment confirmation
- Rebook/reschedules
- Closer Follow-up

Leads [Solar / Roofing Home / Improvemnt]

Leads, LeaDS, LEADS!

Your contact center needs leads to dial. We have used 15-20 different lead sources and they all sucked. They weren't consistent, some started good, then turned to hell, but most were absolute garbage.

We have a very unique method that uses Google Maps to manually look at the roofs of houses and ensure they are a good candidate for solar/roofing.

We look for:

- No significant shading from their property or neighbors
- Single-family home
- The roof is a good candidate for solar/roofing
- Home isn't abandoned
- The home doesn't already have solar/roofing
- Not a commercial property

By starting off with this data, our chances of booking an appointment are infinitely higher. The challenge with aged leads is they have been sold five times, 10 times, or even higher. You don't want to enter a bidding war with other companies on a job. Our method of finding data is unique and finds people that might be in-market or open to the idea of going Solar/Roofing.

Our data procurement team is over 300 people strong and they cumulatively collect over 2 million records per month for our clients.

The end result for you is unlimited data for you to target via zip code to sell people Solar/Roofing at 5 cents per record.

Yeehaw.

[BOOK A CALL NOW](#)
Sales Training

Having a good foundation for your outbound calling reps is paramount to your success.

We use a Learning Management System and put every single rep through over 30 hours of self-guided training which has over 50 tests.

This is coupled with 5 hours of in-classroom to ensure they are on point with their training and to answer and address any concerns or questions they may have.

If you have never used a learning management system before, they are an incredible resource to be able to measure the retention and absorption of information presented. We can tell if people are just skipping through videos or actually immersing themselves in them. This coupled with the tests and the in-class training ensures the highest quality of agents when they start dialing.

The managers go through agent training and they also go through a custom 20-hour training to ensure that they are doing it.

For a higher level of accountability, we also use a program called WebWork tracker installed on all new agents' and managers' computers.

This takes screenshots regularly, shows which apps are open shows mouse clicks and keyboard strokes, and other information about their computer. With a work-from-home environment, it's important we have these tracking tools to ensure no agents or managers are taking advantage of us and doing the work they are supposed to be doing.

Our Chief Visionary Officer Jason Shouldice and Chief Operating Officer / Managing partner Ocean Gross offer a world-class virtual platform to dramatically impact your business.

We are constantly complimented on having the best and high-quality training that the solar industry has seen.

Human Resources

Having a proper human resources department in place is paramount to your success.

Our HR department is responsible for:

- Hiring
- Firing
- Disciplinary Measures
- The whole onboarding Process
- Preparing payroll
- Helping manage your agents in general
- Collecting W8-Ben Forms

It's like having a whole virtual army in place to manage your virtual troops.

At the end of the day, our goal is to manage the day-to-day of your call center so that you can focus on scaling your installation side, let us do the heavy lifting for you.

Agent + Manager Pay

We use a hybrid model of a base sliding pay scale + hourly to pay the reps:

Less than 1.5 valid appointments a day:

\$5/hr + \$20 per sit.

8 valid appointments per week (1.5/day):

\$7/hr + \$20 per sit

2 valid appointments a day:

\$8.50/hr + \$20 per sit

3 valid appointments per day:

\$12/hr + \$20 per sit

4 valid appointments a day:

\$15/hr + \$20 per sit

5 valid appointments a day:

\$20/hr + 20 per sit

This must be in a 2-week payroll period. The rep also must maintain an absolute minimum of 40% show-up rate to get any hourly pay above \$5/hr an hour.

Our managers get paid typically between \$7.50 to \$8.50 an hour. We recommend after the manager has been with you a few months incorporate a performance-based spiff as well.

Integrations

A key part of running a contact center is ensuring that it can effectively communicate with your software stack.

We have integrated with countless CRMs, project management tools, visual dashboards, and more.

We have successfully integrated with Salesforce, Zoho, Highlevel, Job Nimbus, Enerflo, and Sunbase just to name a few. Complex integrations are our specialty.

CRM Building

If you are not leveraging a crm or are not using your crm properly, consider having us build you a custom CRM inside highlevel.

Features includes:

Pipeline management

- Calling and Texting from CRM
- Calling and Texting from Mobile
- Bill Uploads
- KPIs
- Deal Rotting
- Permission based lead management
- Complete calendar management (up to 100 reps) by market and geo
- Full two way sync with your contact center
- CRM Training
- CRM Management
- Automated text and email sequences
- Nurture Sequences
- Email integration

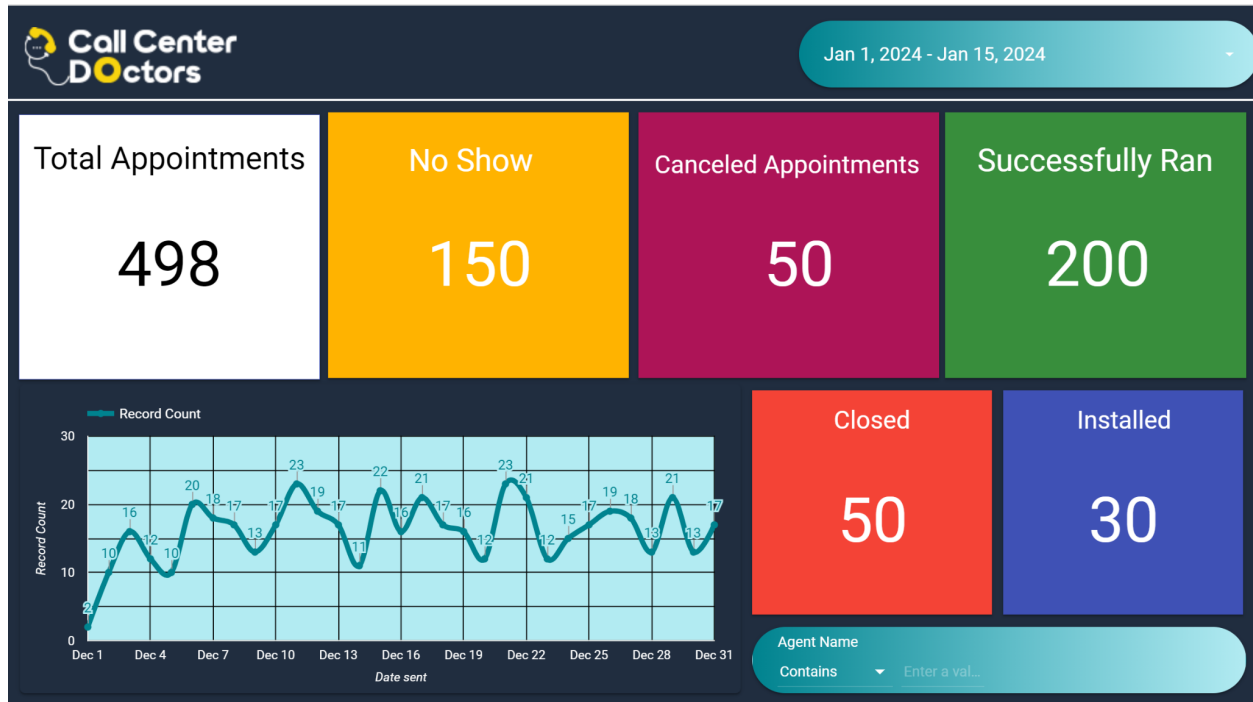
And the list continues...

When you are generating a high volume of deals, a lot gets lost due to improper pipeline management. Well fed reps get blinders on and only focus on the hottest deals. The fortune is in the follow-up and having worked and consulted with countless companies, we see a lot of deals being lost due to improper protocols, visibility, and accountability.

KPI Dashboards

One of our specialties is KPI dashboards. Check out this dashboard below that pulls data from Google Data Studio, Spreadsheets and a Client Contact Center.

We can make custom dashboards as per your spec, nothing is too complicated.



On-going Call Center Management

Not only do we build your contact center for you, but we manage it for you on a on-going basis.

Our full virtual HR team ensures you always have the highest quality of reps dialing and producing appointments for you.

We train your managers on a daily basis and once a quarter do a intensive 10 hour upgrade of their skills.

We are looking at multiple KPI's on a daily basis for your contact center these include but are not limited too:

- Calls
- Leads
- Contacts
- Contact Ratio
- Non-pause time (how long they have been dialing)
- System time (how long they have been logged in)
- Talk time (How long they are on the phone)
- Appointments Set
- Appointments Set per working hour
- Sales Per working Hour
- Sales to Leads Ratio
- Average sales time

BOOK A CALL NOW

We also monitor their daily quality control to ensure they are only letting appointments through that have passed our stringent criteria.

We monitor daily calendar booking to ensure your managers are putting all appointments inside your calendar.

We ensure the daily appointment report is compiled fully.

We record all manager's meetings with their agents to ensure they are properly coaching and training the agents.

We monitor the daily morning huddle to ensure that the agents are motivated and ready to go.

We monitor your daily data to ensure it's fresh and ready to go.

We check daily to ensure any reps that have been offboarded have been done so properly.

We monitor both your agent and manager channel on our communication platform to ensure all information is being transmitted succinctly.

We have a full reschedule campaign for all no-shows and reschedules to ensure all your appointments are put back on the board.

This is not an exhaustive list by any means, but we ensure that your call center is being monitored very closely at all times to get you the best results.

Rehash campaign

No shows and cancels, our worst enemy!

How do we handle this? We have a rehash campaign for every contact center we create. All no-shows and cancels are dialed aggressively on a daily basis to get those appointments back on the calendar for your reps to close.

We believe it's the sum of a bunch of small things which creates the bigger outcome.

This allows you to recoup a lot of opportunities that would have been lost.

Key Performance Indicators / Checks and balances

We constantly monitor over 100 KPI's inside your call center to ensure you are getting the maximum results.

At the end of the day, accountability and visibility is what makes a well oiled call center run.

Client Success Team

If we decide to work together, you will have an account manager who will meet with you multiple times per week in the beginning to ensure things are running smoothly.

Outside of meeting times, your account manager is always a phone call, text or email away. If they aren't currently in another meeting they will be able to meet with you real time. Typically we can get clients in meetings within 1 to 2 hours of a request.

There is a significant investment to build a call center with us and we believe you deserve world-class support and access to us.

Discord Support

Every call center we build comes with full support over Discord. For those of you who are not familiar with Discord, it is similar to slack but infinitely more powerful.

We create 3 channels for every client that works with us.

Agent channel:

The agent channel is where your executive team, our team, and your call center managers communicate directly with your reps. They ask questions there, team huddles are organized through it and any communication with regards to the dialer, scripts, objections, rebuttals and more is communicated through there.

Admin channel:

This is direct communication between our executive team, your executive team, your call center manager and our developers. This is to discuss any questions, concerns, COMPLIMENTS 😊 and to communicate with regards to payroll, performance issues or anything else for that matter.

And last but not least our favorite channel, the appointment booking channel:

Appointment Booking Channel:

This is an example of an appointment booked in the appointment booking channel:

New Appointment 01/06/2023 6:58 PM

Set By: Gil Hernandez -

Client Name: Lawrence Burns Valerie Burns

Phone: 7813071264

Email:

Address: 63 Georgia Ave

City: Lowell

State: MA

List ID: 1258

List Name: SolarNation-15-12-2022-1851-AS

Zip Code:

Notes: Any trees in property - 2 trees (trees on north of home and the other on north west of home)

Googlemaps/ project sunroof link-
<https://www.google.com/maps/place/63+Georgia+Ave,+Lowell,+MA+01851,+EE,+UU./@42.6303602,-71.3417488,79m/data=!3m1!1e3!4m5!3m4!1s0x89e3a4822cdfc069:0x8278283cd7bb1bb518m2!3d42.6302408!4d-71.3414229>

Type of roof - shingle roof

Age of the roof - 5 years(no damages) new roof

Date of appt- MM/DD/YY- 01/07/23

Time of the appt - Saturday@3pm

Email - burnsboysinc@gmail.com

Average bill - 500\$\$\$\$

Electric Provider - national grid

Credit Score 650+ -yes

Annual Income 40k+ - yes

Both home owners present?- yes both

Additional Notes - cx has had several solar consultation ...whee they informed cx that the house cannot have more than 22 solar do to the house having an window attic on the house they inform cx that they can not have her get off the grid because that what cx wants to get of the grid.

Comments:

63 Georgia Ave - 63 Georgia Ave, Lowell, MA 01851

[63 Georgia Ave - 63 Georgia Ave, Lowell, MA 01851](#)

Building

As you can see, there is a lot of thorough information collected with every appointment and there are very few better adrenaline hits in life than seeing fresh appointments coming in ready to be closed by your team!

Appointments

After setting > 1,00,000 appointments between ourselves and our clients, we know what it takes to create an incredible appointment.

All appointments come with the information below as follows:

- First Name
- Last Name
- Email
- Phone Number
- Google Maps View
- Project Sunroof Evaluation
- City
- State
- Street Address
- Zip Code

- Tree Shading Report
- Type Of Roof
- Age Of Roof
- Condition of Roof
- Time of Appointment
- Date of Appointment
- Average Electric Bill Amount
- Electric Provider
- Credit Score
- Taxable Income
- Both Decision-makers present
- Lead Notes
- Full Call Recording
-
- ... and more!

Script

Over 200 million phone calls and counting. Our Solar/Roofing script has literally been rewritten almost 50 times. We learn new things almost daily and when we do a script update, we update the script for all clients.

The script takes approximately twelve to fifteen minutes to deliver.

It is designed to deliver conviction, excitement, and value and actually gets people to show up for the #!%\$^#!@ appointment.

There is a difference between setting an appointment, setting a quality appointment, and getting them to actually show up.

Tech Support

Our world-class tech support team works 5 days a week Mon-Friday from 9 a.m. to 10 p.m. Eastern time. Our average response time is typically under 2 minutes.

We help with:

- Loading new data
- Integrations
- Onboarding agents
- Offboarding agents
- Dialer tweaks
- KPI Reporting

- System Reporting
- General questions

... and more.

[BOOK A CALL NOW](#)

We also have several different levels of support and an escalation queue in case you get stuck on anything.

Call Center Doctors is a medium sized startup employing over 150 people. We are scaling rapidly. We will be releasing our own CRM, our own D2D platform, our own proposal design tool, our own AI sales intelligence tool, and finally a route logistics planning tool.

We are one of the few Business Vendors in the Solar Space who generate appointments and actually close them ourselves as well.

Our goal is 20,000 installs in 2024. Will you join us for the ride?

Sincerely,



Jason Shouldice
CEO - Call Center Doctors
Jason@ccdcs.com
343-204-2353
Facebook: [Personal Link](#)
IG: shouldicejason
Website: [Link](#)
Sales Talk with Solar Pros: [Link](#)
Book with us: [Link](#)

FREQUENTLY ASKED QUESTIONS

Is there a trial and error period? Starting CPA?

There is a 90-day ramp-up period. The vast majority of our clients close 5 to 15 deals per month with our base agent configuration. Whatever you end up hitting in your first 30 days after launch, you typically see an increase of 10 to 30% in close deals per month.

So if you landed on the middle end, you'd see an extra deal or two closed every month. Once your team is fully trained up after 90 days you would want to add more reps.

What does the pass-off look like? What is the transfer verbiage?

The majority of our clients don't do live transfers, they do booked appointments. The script is designed to take upwards of fifteen minutes to deliver. It's very thorough to set a high-quality appointment.

Is it a present we need to confirm or do they book directly? How does scheduling work?

Most of our clients give their call center manager a calendar booking link and after the appointment passes qc it is booked directly into their calendar.

Is the show-up rate run rate? What is the average run rate?

The average is 50%. If you double confirm your appointments and have a GPS route for all no-shows, cancels, and reschedules, it can easily be in the 70 to 80% or greater realm. All of our clients have a different dispatch process which dramatically affects the show-up rate. The rehash process will also affect this as you may realize a 60 to 70% show after a couple attempted bookings.

Is a sit a scheduled meeting or a completed meeting?

Completed meeting.

Are the reps pitch ownership, PPA, or both?

The script is designed to cater to both. We aren't talking about PPA/Lease or Financing/Cash specifically. We are getting them extremely excited about the prospect of going Solar and then the sales rep will use that momentum to guide them to what is best for their specific client.

Are you able to provide any script examples?

Our script is proprietary, we have spent millions developing it. Rest assured it works it has set > 125,000 appointments. It is about as ethical as it can get. It is the best in the market place. Once your contract is signed and you have made your first payment we will be glad to share a copy of it.

What are your qualifiers/required information?

- First Name
- Last Name
- Email
- Phone Number
- Google Maps View
- Project Sunroof Evaluation
- City
- State
- Street Address
- Zip Code
- Tree Shading Report
- Type Of Roof
- Age Of Roof
- Condition of Roof
- Time of Appointment
- Date of Appointment
- Average Electric Bill Amount
- Electric Provider
- Credit Score
- Taxable Income
- Both Decision-makers present
- Lead Notes
- Full Call Recording
-
- ... and more!

Then our clients set minimums for each qualifying question, credit score, utility bill amount, shading, etc.

How would we disengage if we were to do so?

We ask for 60 days notice and we hand off everything to your team so that you feel confident in running your contact center yourself.

IT/Integrations

How much access would we have in Vicidial?

Our clients have full root access to their dialing platform.

What privacy measures are put in place in regard to CRM?

All of our employees have NDA's signed. Only key members of our development team have access to your CRM.

How much access is needed to the CRM? Would setting up a Zap be enough?

During the setup process probably not, after setup, we could probably get away with Zapier. That being said, we don't typically use Zapier or Make, we do a direct API to your CRM. That being said, everything is custom for our clients, so as you wish.

Does there need to be 2-way integration?

There doesn't need to be, but this will dramatically affect sit and closing rates due to no-shows, cancels, reschedules, confirmations and post-sales not being confirmed. We would not recommend this.

How is payroll managed? Is it included in the monthly costs?

We prepare it inside Wise and send all the source spreadsheets, you approve and send it. It is included in the monthly cost.

Do we get any info on the hired persons? If so, how much?

We collect ID, address, resume, NDA, Non-Compete, Non-Solicit and Employment Contract. They technically are your contractors, so as much as you want.

Do we get to review a copy of the training documents and have any customization?

Yes, you can have as much access as you want. Customization typically isn't necessary as this is all we do day in and day out, we don't recommend too much customization it as it would hamper performance. But we would be willing to look at things on a case-by-case basis, and give you our professional opinion, and if you want to do it, then completely up to you.

Being a local company is important. Having local accents is important. Is that an issue?

It isn't an issue. They will have Hispanic accents. The goal is to set high-quality appointments, accent is 20% of that. Charisma, Sales Ability, Interpersonal Skills, Bonding, Product Knowledge, Script Adherence, and Coachability, are really what we are looking for as well.

Are there any measures in place to comply with the new FCC laws?

If you are referring to the new TCPA law with aged leads, that doesn't go into affect until 2026 and we don't use aged data, so it isn't relevant to your contact center.

[BOOK A CALL NOW](#)

