PitchProX Call Report

Every Dial, Backed By a Pro

Agent-Only Analysis (No Transcript, No Lead Data Recorded or Scored)

Call Report for Call ID: Call ID Number
Use: User's Name
Lead Source: Lead Source Selected at the Prior to the Start of the Call
Date: Date of the Call
Recording Length: Minutes and Seconds

Call Summary

Please write 5-8 sentences that is an Agent-Centric Overview, but without the use of transcripts. Focus only on summarizing the user's actions during the call. You can timestamp talking points, but do not transcribe, but rather explain or sum up the point.

- Call Overview

Create 3 bullet points for this section that focuses on high-level AI-generated summary based solely on the agent's call behavior, highlights purpose of the call, overall strategy, objection navigation, and closing effort, and do not use references to or analysis of lead-specific language or emotional state. You need to use this format when speaking of the lead:"You slowed your pacing after early hesitation — supports trust-building."

- Key Moments Log

Timestamped agent actions only for key moments. Please write out 3-5 key moments, each with a general timestamp and exclamation. Highlight why it was significant and use a reference to some kind of statistic data, case study and or psychological principle. Hyperlinked to the article if possible for the user to explore for further referencing if desired.

Please capture 4 defining moments of prompt usage, objection navigation attempts, rapport-building moments, and CTAs issued or missed. Captures need to be generally timestamped. Please write 1-2 sentences clarifying the how, why, and when it took place and evaluate the effectiveness of the captures.

- **Summary Disclosure**
  Write disclosure as is. "This coaching report was generated solely from the agent's side of the conversation. No audio, transcript, behavioral analysis, or identifiable data from the other party was recorded, captured, stored, or processed. PitchProX is designed to be fully compliant with all applicable federal and state laws, including but not limited to two-party consent statutes, by restricting analysis exclusively to the agent's speech and observable agent-side behavior."

2. Performance Metrics

Call Duration

Total time elapsed

- (in seconds and minutes)

Response Timing

- (Average time between AI prompt display and agent's verbal response noted in seconds.) Then elaborate on this information to explain the used of pacing and adaptability during the call.

Prompt Utilization

- _____% of AI prompts used as-is

- _____% modified or personalized by agent

- _____% of off-script commentary

- Coaching insights: How effectively the agent used guidance while maintaining natural delivery. Explain the benefits and anything else that can be inferred from the call on the agents side of the communication.

3. Conversion Indicators

- Call Status

  - Classify the call into one of the three sections: Success / In Progress / Needs Revisit. This state your explanation and reason win 2-4 sentences for further clarify. Based solely on agent-side behaviors (e.g., scheduling attempt, CTA issued, closing language)

- Follow-Up Suggestion

  - AI will generate the users next step based on behavioral patterns that took place during the call. E.g., "Re-engage in 3 days," "Send market report," "Soft text follow-up recommended"

4. Agent Tone & Delivery Feedback

- Tone Alignment

  o Evaluation of tone shifts in the user's delivery at key moments. State your reasoning and clarification in 2-3 sentences and use timestamps. Assesses calmness, warmth, clarity, confidence during objection points. Use timestamps and a 3-4 sentence reasoning and clarification statement.

- Energy Profile

  o Agent vocal energy classified as Low / Neutral / High. State your reasoning and clarification in 2-3 sentences and use timestamps. Insights on how pacing and in flection supported conversational momentum. Reference any stats, case studies and or psychological principles in support that the user can further explore. Hyperlink and articles if applicable.

5. Agent Sentiment & Responsiveness

- Sentiment Signal

  o Scored between -1.0 and +1.0 to reflect agent's emotional tone. Explain the score system and why it is useful and an effective tool. Timestamp moments for clarity and explanation when possible. Explanations to be 1-2 sentences. Coaching tied to observable speech qualities — not subjective emotion inference.

- Adaptability Moments

  o Timestamped points where agent adjusted tone, pacing, or strategy. Identify 1-2 moments of each category with 1-2 sentences of reasoning and or timestamps. E.g., "You slowed your pacing after early hesitation — supports trust-building." Reference any stats, case studies and or psychological principles in support that the user can further explore. Hyperlink and articles if applicable.

- Coaching Tags

  o Tags like: reassuring, assertive, empathetic, hesitant. Identify 1-2 moments of each category with 1-2 sentences of reasoning and or timestamps. Used to structure feedback and reinforcement. Use 1-3 sentences in explaining and clarifying your reasoning.

6. Behavioral Coaching – Hypothetical Emotional Support

- Supportive Language Use

- o Identifies where agent used phrasing that aligns with moments where someone *may* need reassurance, clarity, or space. E.g., "You mirrored tone and phrased gently at 04:12, supporting potential hesitation."

- Conversational Flexibility

  - o Evaluates how well the agent adapted delivery style. Use 2-3 sentences when answering. Focuses on agent decision-making — not lead reaction only.

- Trust-Oriented Behaviors

  - o Pinpoints 2-3 verbal cues that reinforce confidence, calm, and consistency, etc. Example: "Used time-cushioning language before close — avoids pressure buildup." Use 2-3 sentences when answering. Reference any stats, case studies and or psychological principles in support that the user can further explore. Hyperlink and articles if applicable.

7. PitchProX Coaching Summary

- Performance Score (0–100) Give a score between 0-100

  - o The score is weighted on prompt responsiveness, objection handling, CTA usage, tone control, and behavioral alignment. Use 2-3 sentences when answering. Scoring is based entirely on what the agent said and how they said it.

- Improvement Areas

  - o Specific guidance for tone shifts, prompt skipping, emotional pacing, and close delivery. Use 2-3 sentences when answering. Includes timestamped suggestions (e.g., "At 06:42, soft-close CTA would improve flow.")

- AI Coaching Highlights

  - o 3–5 positive + constructive notes and reasoning and explanations for each statement. Motivational in tone, behavior-specific, no assumptions about lead Examples: "You managed the mid-call transition smoothly — maintain that pacing." Or "Consider softening rebuttal phrasing in early objection response."

Please include a COMPLIANCE FOOTER at the end of the report: "*This report was generated by analyzing only the agent's speech patterns and verbal actions. No call audio or transcripts were stored. No data, behavior, or language from the other party was recorded, interpreted, or processed. This tool exists solely to coach the agent's delivery and performance.*"

What you'll need (quick)

1. **A JSON payload** from your call pipeline (timestamps, prompt usage %, etc.).

2. **This master prompt** (below) to feed an LLM.

3. **An output format** (HTML or Markdown) you pass to your PDF renderer (Puppeteer, wkhtmltopdf, or similar).

1) Data contract (JSON you send to the model)

Use this as your source of truth. Add/remove fields if your telemetry differs.

```json
CopyEdit
{
  "call_meta": {
    "call_id": "ABC123",
    "agent_name": "Jordan Lee",
    "lead_source": "Expired Listing",
    "date_iso": "2025-08-08",
    "recording_length_sec": 431
  },
  "behavioral_events": [
    {
      "t": "00:42",
      "agent_action": "Opened with value framing about timing",
      "ai_prompt_used": true,
      "category": "opening"
    },
    {
      "t": "04:12",
      "agent_action": "Slowed pacing and mirrored tone",
      "ai_prompt_used": false,
      "category": "rapport"
    }
```

```
  ],
  "prompt_utilization": {
    "used_as_is_pct": 62,
    "modified_pct": 28,
    "off_script_pct": 10
  },
  "response_timing": {
    "avg_sec_between_prompt_and_agent_talk": 1.9
  },
  "closing_activity": {
    "cta_issued": true,
    "appointment_attempted": true,
    "status_guess": "success"
  },
  "tone_samples": [
    {"t":"02:55","tone":"warm","energy":"neutral"},
    {"t":"06:10","tone":"confident","energy":"high"}
  ],
  "adaptability_moments": [
    {"t":"04:12","type":"pacing_shift","note":"slowed
pacing after early hesitation"},
    {"t":"07:20","type":"strategy_shift","note":"softened
rebuttal phrasing"}
  ],
  "coaching_tags_raw": [
    {"t":"03:18","tag":"reassuring"},
    {"t":"05:44","tag":"assertive"}
  ],
  "links_library": [
    {
      "name":"Trust-building via pace",
      "url":"https://example.com/trust-study",
      "topic":"pacing"
    }
  ]
}
```

2) Master prompt (paste directly into your LLM "instructions")

This prompt enforces your section structure, wording, and length. It also forces the exact disclosure language your template requires.

SYSTEM

You are PitchProX's report writer. Produce an **agent-only** call report using the provided JSON. Do **not**analyze, infer, or quote the lead. Base all analysis solely on **agent speech/behavior** and telemetry. Output valid **HTML** ready for PDF rendering. Use semantic headings and simple CSS classes. Follow all length rules exactly. Hyperlink studies/case-references when URLs are provided.

DEVELOPER (format + rules)

- Use this section order and headings:

  1. **PitchProX Call Report** (subhead: *Agent-Only Analysis (No Transcript, No Lead Data Recorded or Scored)*)

  2. **Call Report for Call ID**, **Use**, **Lead Source**, **Date**, **Recording Length**

  3. **1. Call Summary**

     - *Call Overview:* **5–8 sentences**; agent-centric; no transcripts; you may reference timestamps but **never** transcribe the other party.

     - *Key Moments Log:* **3–5** timestamped agent actions; each 1–2 sentences explaining significance + a stat/case study/psych principle (hyperlink if available). Capture **4 defining moments** across prompt usage, objections, rapport, and CTAs; include general timestamps and effectiveness notes.

     - *Summary Disclosure:* include this **verbatim** blockquote: "This coaching report was generated solely from the agent's side of the conversation… [full paragraph required]."

  4. **2. Performance Metrics** — duration (min+sec **and** total secs), response timing with **2 sentences**on pacing/adaptability, prompt utilization 3 percentages, plus **2–4 sentences** coaching insights.

  5. **3. Conversion Indicators** — *Call Status* (Success/In Progress/Needs Revisit) with **2–4 sentences**, and a concrete *Follow-Up Suggestion*.

  6. **4. Agent Tone & Delivery Feedback** — *Tone Alignment* (**2–3 sentences** with timestamps) and *Energy Profile* (**2–3 sentences** + reference/hyperlink if applicable).

  7. **5. Agent Sentiment & Responsiveness** — *Sentiment Signal* (score −1.0..+1.0 with **1–2 sentences** + timestamp examples), *Adaptability Moments* (identify **1–2** moments of each category, **1–2 sentences** each + timestamps), *Coaching Tags* (identify **1–2** moments per tag, **1–3 sentences** reasoning).

8. **6. Behavioral Coaching – Hypothetical Emotional Support** — *Supportive Language Use*(examples), *Conversational Flexibility* (**2–3 sentences**), *Trust-Oriented Behaviors* (**2–3 sentences** + references/links if available).

9. **7. PitchProX Coaching Summary** — *Performance Score (0–100)* (**2–3 sentences** on weighting); *Improvement Areas* (**2–3 sentences** with timestamped suggestions); *AI Coaching Highlights* (**3–5** positive + constructive notes). Close with the **COMPLIANCE FOOTER**verbatim.

- **Length discipline:** obey sentence counts exactly where specified above.

- **No lead analysis.** All claims must be attributable to agent actions/telemetry.

- **Terminology:** use neutral, coaching-forward language (e.g., "You slowed your pacing after early hesitation — supports trust-building.").

- **Compliance:** include both the *Summary Disclosure* and the final **COMPLIANCE FOOTER** exactly as written in the template.

- **Output shape:** return **one HTML document string** (no JSON wrapper). Use `<h1>..</h1>`, `<h2>..</h2>`, `<ul>`, `<li>`, `<p>`, `<blockquote>`, and minimal inline CSS classes (e.g., `class="meta"`, `class="section"`).

USER (the data)
{{inject the JSON from section 1 verbatim}}

3) Minimal HTML skeleton the model should emit

This is what the model's output will roughly look like (you don't send this—just showing expected structure for your renderer):

```html
CopyEdit
<h1>PitchProX Call Report</h1>
<p><em>Agent-Only Analysis (No Transcript, No Lead Data
Recorded or Scored)</em></p>

<div class="meta">
  <p><strong>Call Report for Call ID:</strong> ABC123</p>
  <p><strong>Use:</strong> Jordan Lee</p>
  <p><strong>Lead Source:</strong> Expired Listing</p>
```

```
  <p><strong>Date:</strong> 2025-08-08</p>
  <p><strong>Recording Length:</strong> 7:11 (431s)</p>
</div>

<h2>1. Call Summary</h2>
<h3>Call Overview</h3>
<p>…5–8 sentences…</p>

<h3>Key Moments Log</h3>
<ul>
  <li><strong>[00:42]</strong> … 1–2 sentences + linked
reference …</li>
  <!-- 3–5 items -->
</ul>

<blockquote>…Summary Disclosure (verbatim)…</blockquote>

<!-- Sections 2–7 as specified -->
<p class="compliance-footer">…COMPLIANCE FOOTER (verbatim)…
</p>
```

4) PDF generation note (tech-agnostic)

- **Best fidelity:** render the HTML via **Puppeteer** (Node) or **wkhtmltopdf** (server) with a print-CSS file (A4/Letter, margins, page-break rules between sections).

- If you prefer **client-side only**, use **jsPDF + html2canvas** (lower fidelity for long pages).

- Add print CSS: `h2 { page-break-after: avoid; } .section { page-break-inside: avoid; }`.

5) Quick success checklist

- ✅ Your backend sends the JSON (section 1) + master prompt (section 2) to the LLM.

- ✅ Capture the returned **HTML** and pipe to PDF renderer.

- ✅ Store the final PDF with `call_id` in the filename.

- ✅ QA: verify each section obeys **sentence counts** and includes the **two required compliance blocks**.