

EVALUATION FOR LEDANA (9546001023)

Call Information:

Date: 2024-09-30 14:33:15

Phone number dialed: +1 7574207366

Duration: 224 seconds

Lead Name/ID: FAMOUS UNCLE ALS (898674)

Location: VIRGINIA BEACH (Unknown)

Company: Unknown

Performance Evaluation Report

Overall Performance Score

- Fronter:** 22/30
- Closer:** 15/20

Detailed Performance Breakdown

Fronter Evaluation

- Engagement and Introduction:** 8/10
 - The fronter, Ladina, initiated the conversation well with a friendly tone and clear introduction. She effectively built rapport by asking about the business owner's current situation and showing interest in their needs.
- Value Proposition Communication:** 7/10
 - Ladina communicated the value proposition clearly, explaining the benefits of the new federal policy and the potential savings on transaction fees. However, she could have provided more specific details to make the value proposition more compelling.
- Transition to Closer:** 7/10
 - The transition to the closer was smooth, but it could have been more effective if Ladina had better prepared the business owner for the next steps and set clearer expectations.

Closer Evaluation

- Objection Handling:** 8/10
 - Jeff handled the business owner's objections well, acknowledging their busy schedule and offering to send an email with more information. He also reassured the owner about the compatibility of their current system with the proposed solution.
- Closing Attempt:** 7/10
 - Jeff made a good attempt to close by setting up a follow-up call and agreeing to send an email. However, he could have been more assertive in securing a specific time for the follow-up call to ensure the next steps are clear.

Strengths and Areas for Improvement

Fronter Strengths

1. **Friendly and Professional Tone:** Ladina maintained a friendly and professional tone throughout the call, which helped build rapport with the business owner.
2. **Clear Communication:** She clearly communicated the purpose of the call and the value proposition.
3. **Rapport Building:** Ladina showed genuine interest in the business owner's situation, which helped in building a connection.

Closer Strengths

1. **Objection Handling:** Jeff effectively handled the business owner's objections and concerns, showing empathy and understanding.
2. **Follow-Up Setup:** He successfully set up a follow-up call and agreed to send an email with more information.
3. **Reassurance:** Jeff reassured the business owner about the compatibility of their current system with the proposed solution.

Fronter Areas for Improvement

1. **Detailed Value Proposition:** Provide more specific details about the benefits and savings to make the value proposition more compelling.
2. **Transition Preparation:** Better prepare the business owner for the transition to the closer by setting clearer expectations.
3. **Handling Busy Prospects:** Develop strategies to handle prospects who are busy and may not have time to talk, such as scheduling a more convenient time for the call.

Closer Areas for Improvement

1. **Assertiveness in Closing:** Be more assertive in securing a specific time for the follow-up call to ensure the next steps are clear.
2. **Detailed Follow-Up:** Provide more detailed information in the follow-up email to address any potential questions or concerns the business owner may have.
3. **Building Urgency:** Create a sense of urgency to encourage the business owner to take action sooner rather than later.

Recommendations

1. **For Fronter:**
 - **Enhance Value Proposition:** Include more specific details and examples to make the value proposition more compelling.
 - **Improve Transition:** Set clearer expectations and better prepare the business owner for the transition to the closer.
 - **Handle Busy Prospects:** Develop strategies to handle busy prospects, such as scheduling a more convenient time for the call.
2. **For Closer:**
 - **Be Assertive:** Be more assertive in securing a specific time for the follow-up call.
 - **Provide Detailed Follow-Up:** Ensure the follow-up email contains detailed information to address potential questions or concerns.
 - **Create Urgency:** Build a sense of urgency to encourage the business owner to take action sooner.

Final Comments

Overall, both the fronter and closer demonstrated strong communication skills and a professional demeanor. By focusing on the areas for improvement and implementing the recommendations, they can enhance their performance and increase their success rate in future calls. Keep up the good work and continue to refine your approach to achieve even better results.

Transcript

CUSTOMER: Hello? Hello? Hi, how are you today? Good, how are you doing? I'm doing wonderful, thank you. Am I speaking to the business owner? Yes, ma'am. Okay, great. So my name is Ladina, and I'm calling with InventivePay. And the only reason I was calling today is because of a new federal policy where you no longer have to pay transaction fees for your business when you accept debit and credit as a form of payment. Are you currently paying those fees for your business at the moment? What do you mean? Like when you accept debit and credit cards, do you have to pay a transaction fee for that? It depends through my system. Okay, so it depends. Alright, so there's no problem. So, um, we do offer, you know, 10% processing to business owners. When you, um, accept debit and credit cards as a form of payment, um, do you process \$5,000 monthly with that? Uh, over that, yeah. Okay, great. So, I didn't get your name yet again. I just want to address you better. I don't want to be rude. No, my name's Kaylee. Is there like a... Can I give you my email and you can send me something over? We're just at lunch and I'm not like a office owner type thing. You're not... Okay, you're not available to chat with me. Okay, I do have a manager on the line and it'll only take like a couple minutes for you to get some information for them and to give your information to them.

FRONTER/CLOSER: Hey Kaylee, I can send you an email with some information. I understand you're real busy right now. My name's Jeff. What's your email address?

CUSTOMER: Hi Jeff, it is K-L-E-I-G-H dot F-U-A at Yahoo dot com.

FRONTER/CLOSER: At Yahoo. And you said F like Frank, U-A?

CUSTOMER: Yes, like as in Famous Uncle Al's, but just F-U-A.

FRONTER/CLOSER: Okay, that would make sense, yahoo.com. Okay, that's a cool spelling of your name.

CUSTOMER: Thank you, it's different.

FRONTER/CLOSER: Yeah, that's really cool. You said it's K-L-E-I-G-H?

CUSTOMER: Yes, sir.

FRONTER/CLOSER: Okay. All right, very good. And you said you do more than 10,000 a month right now in processing, right? How do you do that?

CUSTOMER: Like, do you have... I have Clover, so I have a Clover system. So it goes through with my Clover fees, like Beyond is my merchant.

FRONTER/CLOSER: Beyond is the merchant, okay. Yeah, we deal with Clover, so what we would do is give you the same exact system as what you have or newer, we would provide that. And our technology, the way we process it, just a \$25 a month flat rate, there's no extra fees, nothing else, which is beautiful because you're probably paying at least 2.5% to 3% now. That's \$300 to \$600 a month depending on how much you're processing.

CUSTOMER: I'm not trying to be rude at all. I am very interested in this because I am in the middle of hating clover right now, but I have four tickets on the grill and I'm the only cook. So if you could just send me that email tomorrow is my admin day. So if you want to send me that email, I'll look at it when we close up. And then if you want to give me a call tomorrow around two, I can, that'll give me some time to look at it and actually hear you out. I just don't want to be rude.

FRONTER/CLOSER: Yeah, no problem. I appreciate it. And I don't want to be rude either. I know you're very busy right now.

CUSTOMER: Yes, sir. Thanks, Jeff. I will talk to you tomorrow.

FRONTER/CLOSER: Okay. Nice talking to you.

CUSTOMER: You too.

EVALUATION FOR MAKIYA (9546001002)

Call Information:

Date: 2024-09-30 16:45:47

Phone number dialed: +1 7734291061

Duration: 221 seconds

Lead Name/ID: MR ALAN CAIN (792327)

Location: CHICAGO (IL)

Company: Unknown

Performance Evaluation Report

Overall Performance Score

- **Fronter:** 18/30
- **Closer:** 10/20

Detailed Performance Breakdown

Fronter Evaluation

- **Engagement and Introduction:** 6/10
 - The fronter, Michaela, initiated the conversation with a polite and professional tone. However, she did not effectively build rapport, especially given the prospect's busy situation.
- **Value Proposition Communication:** 6/10
 - Michaela communicated the value proposition but did not tailor it to the prospect's specific business needs. The explanation was somewhat generic and did not fully engage the prospect.
- **Transition to Closer:** 6/10
 - The transition to the closer was somewhat abrupt and did not adequately prepare the prospect for the next part of the conversation.

Closer Evaluation

- **Objection Handling:** 5/10
 - The closer, Adam, attempted to handle objections but did not fully address the prospect's concerns about the relevance of the program to their business model.
- **Closing Attempt:** 5/10
 - Adam made an effort to explain the program but did not make a strong closing attempt or set up clear next steps, especially given the prospect's busy situation.

Strengths and Areas for Improvement

Fronter Strengths

1. **Polite and Professional Tone:** Michaela maintained a courteous and professional demeanor throughout the call.
2. **Clear Communication:** The initial explanation of the value proposition was clear and concise.

Closer Strengths

1. **Detailed Explanation:** Adam provided a thorough explanation of the cash discount program.
2. **Persistence:** Adam continued to engage the prospect despite initial objections.

Frontier Areas for Improvement

1. **Rapport Building:** Michaela should work on building rapport more effectively, especially when the prospect indicates they are busy.
 - **Suggestion:** Acknowledge the prospect's situation and ask if there is a better time to call back.
2. **Tailoring the Value Proposition:** Michaela should tailor the value proposition to the specific needs of the prospect's business.
 - **Suggestion:** Ask more questions about the business to better understand their needs before presenting the value proposition.
3. **Smoother Transition:** The transition to the closer should be smoother and better prepare the prospect.
 - **Suggestion:** Provide a brief summary and introduce the closer more naturally.

Closer Areas for Improvement

1. **Objection Handling:** Adam needs to improve on addressing specific objections more effectively.
 - **Suggestion:** Listen carefully to the prospect's concerns and provide tailored responses that directly address those concerns.
2. **Closing Techniques:** Adam should work on making stronger closing attempts or setting up clear next steps.
 - **Suggestion:** Ask for a commitment or schedule a follow-up call to discuss further.

Recommendations

1. **For Michaela:**
 - **Improve Rapport Building:** Practice techniques for building rapport quickly, such as acknowledging the prospect's current situation and showing empathy.
 - **Tailor Value Propositions:** Develop a set of questions to better understand the prospect's business before presenting the value proposition.
 - **Smooth Transitions:** Work on making transitions to the closer more seamless by summarizing the conversation and setting the stage for the closer.
2. **For Adam:**
 - **Enhance Objection Handling:** Participate in role-playing exercises to practice handling common objections more effectively.
 - **Strengthen Closing Techniques:** Focus on learning and applying different closing techniques to secure commitments or next steps.

Final Comments

Both Michaela and Adam demonstrated professionalism and persistence during the call. However, there are clear areas for improvement that can significantly enhance their effectiveness. By focusing on building rapport, tailoring value propositions, handling objections more effectively, and making stronger closing attempts, both agents can improve their performance and increase their success rates in future calls. Keep up the good work and continue to refine your skills!

Transcript

CUSTOMER: Hi, can I help you? Hi, good afternoon. This is Michaela with the Vintage Pay. How are you today? Okay. That's great. I am calling to speak with the business owner. Are they available? That's me. Yep, that's me. Great. I am just reaching out regarding a new federal policy that just simply

states that you as a business owner are not required to pay processing fees when you accept debit and credit cards. And you are currently paying those fees, correct? Yeah, what is it that you're at here? I'm extremely busy. I'm not in the office right now. What is it that you need? What are you selling? I'm calling regarding your processing fees. We're trying to get those eliminated for you. Does your business process 5,000 monthly in debit or credit card transactions? I can't imagine. They're going to eliminate the fees with the credit card companies that make money off of that. Right. They'll eliminate them for you. I do have my manager on the line. Why would they eliminate them for me? Why would they eliminate them from me? I'm glad you asked.

FRONTER/CLOSER: I would love to tell you. So my name is Adam Pierce. I'm one of the sales managers here. How are you?

CUSTOMER: I'm extremely busy. I'm at the emergency room right now with my mom. Is there something I can help you with?

FRONTER/CLOSER: Well, I was just going to be real brief here. So we do a program that does eliminate the processing fees for you. Rather than having your prices increased across the board for everyone, which Frankly, a lot of businesses do to offset the cost of processing. This is a cash discount program. Have you ever heard of anything like that before?

CUSTOMER: No, it doesn't make much sense to me either.

FRONTER/CLOSER: So a cash discount sets your base item to where it should be, to where it offsets the cost of processing. So if you had a \$10 ticket, it would normally supposed to be at \$10.40. If it were \$100, it should be at \$104. But the way that this program works is it actually gives a discount to anyone wanting to use cash or check. So you say my base price is \$104, but if you want to pay with cash or check or whatever, I will give it to you for \$100 even. So rather than surcharging folks or just raising prices across the board, this program allows you to actually offer a discount from the base price when someone wants to use cash.

CUSTOMER: And what they're going on is your system and they're putting in their ACH information. How are they using cash to get this?

FRONTER/CLOSER: We do have the ability to accept ACH, but do you accept cash at your business right now?

CUSTOMER: Not usually. Okay. We don't have that kind of business.

FRONTER/CLOSER: Sure. And frankly, most people don't carry cash now anyway. But this program, you know, if you walk into Walmart, what separates it out is Walmart sets their prices in the assumption that someone's going to use a card, because that's primarily what people do now. They don't lose money to accept Visa. They just don't. They bake their costs into the price. But they don't give anyone a break if they want to use cash there. So anyone that uses cash will lose. They're paying for a card that they don't have. The point of this program is you get to offer a discount if they want to use cash. But if they want to use a card, you still don't take the loss. Your pricing is now included.

CUSTOMER: Yeah, I think it's a different kind of business than what we have. We're not a walk-in business, so I don't really think that this would work for us.

FRONTER/CLOSER: Visas, appointments, and invoicing as well. Still there?

CUSTOMER: All right.

FRONTER/CLOSER: Oh, well.

CUSTOMER: Thank you.

FRONTER/CLOSER: No problem.