

EVALUATION FOR LEDANA

Performance Evaluation Report

Overall Performance Score

- **Fronter:** 22/30
- **Closer:** 16/20

Detailed Performance Breakdown

Fronter Evaluation

- **Engagement and Introduction:** 8/10
 - The fronter, Ladina, initiated the conversation effectively with a clear introduction and polite request to speak to the business owner. The tone was professional and friendly.
- **Value Proposition Communication:** 7/10
 - Ladina communicated the key benefits of the program, such as 0% processing fees and no contracts, but could have provided more detailed information to address the prospect's concerns about past bad experiences.
- **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 prospect by addressing her concerns more thoroughly before handing over the call.

Closer Evaluation

- **Objection Handling:** 8/10
 - Treasure handled objections well, providing detailed responses about chargebacks and the company's policies. However, there was some repetition, and the responses could have been more concise.
- **Closing Attempt:** 8/10
 - Treasure made a strong attempt to close by addressing the prospect's concerns and setting up a follow-up call. However, the closing could have been more assertive in securing a commitment.

Strengths and Areas for Improvement

Fronter Strengths

1. **Clear and Professional Introduction:** Ladina started the call with a clear and professional introduction, setting a positive tone.
2. **Polite and Friendly Tone:** Maintained a polite and friendly tone throughout the conversation.
3. **Basic Value Proposition Communication:** Communicated the basic benefits of the program effectively.

Closer Strengths

1. **Detailed Objection Handling:** Treasure provided detailed responses to the prospect's objections, showing a good understanding of the company's policies.
2. **Persistence:** Demonstrated persistence in addressing the prospect's concerns and attempting to close the deal.
3. **Setting Up Follow-Up:** Successfully set up a follow-up call, ensuring the conversation would continue.

Fronter Areas for Improvement

1. **Addressing Concerns More Thoroughly:** Ladina could improve by addressing the prospect's concerns about past bad experiences more thoroughly before transitioning the call.
 - **Suggestion:** Provide more detailed information about how the company handles disputes and ensures a positive experience.
2. **Providing More Detailed Information:** Could have provided more detailed information about the program's benefits and how it differs from the prospect's current solution.
 - **Suggestion:** Prepare a more detailed script or FAQ to address common concerns and provide more comprehensive information.
3. **Smoother Transition:** The transition to the closer could be smoother by summarizing the conversation and setting clear expectations for the next part of the call.
 - **Suggestion:** Use a transition script that summarizes the key points discussed and introduces the closer more effectively.

Closer Areas for Improvement

1. **Conciseness in Responses:** Treasure could improve by making responses more concise and to the point.
 - **Suggestion:** Practice summarizing key points and avoiding repetition to keep the conversation focused and efficient.
2. **More Assertive Closing:** The closing attempt could be more assertive in securing a commitment from the prospect.
 - **Suggestion:** Use closing techniques that encourage the prospect to make a decision, such as offering limited-time incentives or emphasizing the benefits of immediate action.
3. **Clarifying Technical Details:** There was some uncertainty in explaining technical details about chargebacks and dispute resolution.
 - **Suggestion:** Gain a deeper understanding of the technical aspects of the service to provide clearer and more confident explanations.

Recommendations

1. **For Fronter (Ladina):**
 - **Enhance Training on Objection Handling:** Participate in additional training sessions focused on handling objections and providing detailed responses to common concerns.
 - **Develop a Detailed Script:** Create a more detailed script or FAQ to address common questions and provide comprehensive information about the program.
 - **Practice Smooth Transitions:** Practice transitioning calls to the closer by summarizing key points and setting clear expectations.
2. **For Closer (Treasure):**
 - **Improve Conciseness:** Work on making responses more concise and to the point to keep the conversation focused.
 - **Use Assertive Closing Techniques:** Implement more assertive closing techniques to encourage prospects to make a decision.
 - **Deepen Technical Knowledge:** Gain a deeper understanding of the technical aspects of the service to provide clearer and more confident explanations.

Final Comments

Both Ladina and Treasure demonstrated strong communication skills and a good understanding of the company's value proposition. By addressing the areas for improvement and implementing the recommendations, they can enhance their performance and increase their success rates in future calls. Keep up the good work and continue to refine your techniques!

Transcript

USER: Hi, my name is Ladina, and I'm calling with Adventist Pay. May I speak to the business owner, please? It's her. Okay, great. So I was just reaching out about a new federal policy, and it simply states that you no longer have to pay transaction fees. You are currently paying those fees for your business, correct? No, we don't take credit cards. Is there a reason why you don't take credit cards now? Yeah, bad experiences. Okay. Well, you know, we do offer 0% processing, and I can really assure you that you won't have any bad experience with us, because it's only \$25 a month, and we don't have contracts, so you won't be in a contract or anything. It'll just be a month-to-month type of thing. My manager could explain more to you, and she did just have them call. Okay, so what if the client defeats the charge after we did the work?

DIALER: Hi, this is Treasure, one of the managers here at Adventist Pay. How are you, ma'am?

USER: I'm fine.

DIALER: Great. So you were asking about disputes. So we take our disputes very seriously, and we do investigate. So if the client disputes the charge, you're still going to receive those funds. We do same-day processing. So you're still going to receive those funds, and we're going to gather information from you, and the bank is going to do their investigation.

USER: Yeah, and then the client's disputed again, and then You guys send them a message, and then they dispute it again, and you guys end up giving in to them.

DIALER: No, we have very low chargebacks. We have very, very low chargebacks. So you don't have to worry about that with us, because we take that part of the business very, very seriously. And as the associate were stating, it's a 60-day free trial. And that's just for you to try out the services to see if it evaluates. and for you to evaluate it and see if it works well with your company. But we have really low charge back rates here at Aventus Pay. We do not grant. We know customers like to dispute charges and try to get their money back, and that's considered as fraud. So we do not. We take it serious. We don't just give them a slap on the back and send them their funds. So if they made that purchase and we can prove it, they will not get that money back.

USER: They're going to have... How do you prove it when it's labor done?

DIALER: I'm sorry?

USER: When we go and do a job and it's labor, how do you prove that they got the merchandise?

DIALER: Well, we take, you know, we have you send over stuff on our end. We do our investigation, so we may ask you for documentation and we may, you know, the bank does things like, they go into the customer's app and look at their location. If they're sharing their location with that app, they can see where were they at this time. I mean, it's not my field, so I can't really break it down exactly how it will work. But I do know here at Eventus Pay, our chargebacks are really, really low. So we do not rent.

USER: We're mostly commercial, so we deal with management companies. And they don't use credit cards. So that's 95% of our business. So basically, I would be paying \$25 a month and lucky if I do one transaction during that month.

DIALER: So do you accept? So you do accept debit and credit cards at the moment, but you just don't take many of them?

USER: Well, no, they pay through Intuit, our accounting program. So that's the way we do it. But we don't do actual credit cards through a machine anymore.

DIALER: Yeah, you do it through invoice, correct?

USER: Right. But we have to do it through Intuit, the accounting program. Yeah, so we have a virtual terminal.

DIALER: We have a virtual terminal where you will be able to send those invoices out via email or text message as well.

USER: But I already have that and I don't have to pay a high fee. So how much do you pay now? We had to pay, we were paying for a credit card machine and we were barely using it and paying all these fees. So we were losing money on it and then We had a couple people dispute that we did the work. I then sent the text messages between the client and how they were happy and blah, blah, blah. And then they disputed it two times. They first sided with us, and then the customer kept disputing it, and the bank just gave up and said we would have to take them to small claims court.

DIALER: Oh, no. Yeah, no. We don't work like that. We're not going to give, you know, if that work was done and you can prove it, we can prove it. We're not going to just give the customers their

money no matter how many times they dispute it. You know, we don't operate that way. And as far as you, you're saying that you were paying fees and you wasn't using the credit card machine, with us, there's no processing fee. It's just a \$25 monthly fee. And if you went all month and you haven't had not one credit or debit card transaction, We will waive that \$25 monthly payment from you. So you don't have to worry about that. All right.

USER: Let me talk to my husband. Let me talk to my husband and see if he wants to try it again.

DIALER: OK. And I just have one question. So when you do accept Deben credit cards, how much would you say that you do monthly?

USER: Hardly anything. Everything's done through track or electronic.

DIALER: OK. OK. So you're not, yeah. OK. All right. So yeah, just go ahead and check with your husband. What is your first name? April. April, okay April, my name is Treasure. So you can go ahead and check with your husband and when would you like for me to follow up? Is Monday morning okay or maybe later today?

USER: Monday morning is fine.

DIALER: Alrighty, perfect. Okay April, you'll be looking for McCaw for me, okay?

USER: Thanks.

DIALER: Okay, bye-bye.

USER: Bye.

EVALUATION FOR ALEXIS R

Performance Evaluation Report

Overall Performance Score

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

Detailed Performance Breakdown

Fronter Evaluation

- **Engagement and Introduction:** 8/10
 - The fronter, Alexis, initiated the conversation effectively, using a polite and professional tone. They confirmed they were speaking with the business owner and introduced themselves clearly.
- **Value Proposition Communication:** 7/10
 - Alexis communicated the key benefits of the program but could have been clearer and more concise. There was some confusion regarding the federal policy, which could have been avoided with a more straightforward explanation.
- **Transition to Closer:** 7/10
 - The transition to the closer was smooth, but there was a slight delay and some confusion before the closer took over. Ensuring a seamless handoff could improve the overall flow of the call.

Closer Evaluation

- **Objection Handling:** 8/10
 - Aliyah handled objections well, providing detailed explanations and addressing the business owner's concerns about the new policy and their current contract with Heartland.

- **Closing Attempt:** 7/10
 - Aliyah made a strong attempt to close the deal by offering a 60-day free trial and explaining the benefits. However, the business owner was not ready to commit and requested more information via email.

Strengths and Areas for Improvement

Fronter Strengths

1. **Polite and Professional Tone:** Alexis maintained a courteous and professional demeanor throughout the call.
2. **Clear Introduction:** The introduction was clear, and Alexis confirmed they were speaking with the business owner.
3. **Initial Engagement:** Alexis effectively engaged the business owner by asking relevant questions about their current processing fees.

Closer Strengths

1. **Detailed Explanations:** Aliyah provided thorough explanations about the policy and the benefits of their service.
2. **Handling Objections:** Aliyah addressed the business owner's concerns effectively, particularly regarding the existing contract with Heartland.
3. **Offering Solutions:** Aliyah offered practical solutions, such as the 60-day free trial and contract buyout options.

Fronter Areas for Improvement

1. **Clarity in Communication:** Alexis should work on providing clearer and more concise explanations to avoid confusion.
 - **Suggestion:** Practice delivering the value proposition in a straightforward manner, focusing on key points.
2. **Smooth Transition:** Ensure a seamless handoff to the closer to maintain the flow of the conversation.
 - **Suggestion:** Coordinate with the closer beforehand to ensure a smooth transition.
3. **Handling Interruptions:** Alexis should be prepared to handle interruptions and steer the conversation back on track.
 - **Suggestion:** Develop strategies to manage interruptions and keep the conversation focused.

Closer Areas for Improvement

1. **Building Urgency:** Aliyah could work on creating a sense of urgency to encourage the business owner to make a decision.
 - **Suggestion:** Highlight the limited-time offer and the immediate benefits of switching to their service.
2. **Follow-Up Strategy:** Ensure a clear follow-up plan is communicated to the business owner.
 - **Suggestion:** Confirm a specific time for the follow-up call and send the requested information promptly.
3. **Addressing Contract Concerns:** Provide more detailed information about how the contract buyout works.
 - **Suggestion:** Prepare a clear explanation of the contract buyout process and any associated costs.

Recommendations

1. **For Fronter (Alexis):**
 - Practice delivering the value proposition clearly and concisely.
 - Coordinate with the closer to ensure a smooth transition.
 - Develop strategies to handle interruptions and keep the conversation on track.
2. **For Closer (Aliyah):**
 - Create a sense of urgency to encourage quicker decision-making.
 - Ensure a clear follow-up plan is communicated and executed.
 - Provide detailed information about the contract buyout process.

Final Comments

Both Alexis and Aliyah demonstrated strong skills in their respective roles. With some improvements in clarity, transition, and urgency, they can enhance their effectiveness in cold calling. Keep up the good work and continue to refine your approach based on the feedback provided.

Transcript

USER: Good afternoon, may I ask is the business owner available? Yes, I'm in.

DIALER: Hello, one second one more, how can I help you?

USER: Hi, good afternoon, my name is Alexis. May I ask am I speaking with the business owner?

DIALER: Yeah, where are you calling from?

USER: Hey, I'm calling from Inventus Pay. I'm very briefly reaching out to you about a new federal policy that simply states you as the owner are no longer required to pay any processing fees from your business except debit or credit card. You are currently paying fees, correct, sir?

DIALER: Wait, there's a new federal law passed that we're not supposed to pay processing fees for debit and credit?

USER: So it's a new federal policy, yes, that you're no longer required to pay those processing fees. But can I ask if Christmas came in 2000?

DIALER: I'm sorry, let me cut you off. When did this go into effect?

USER: So this went into effect in 2019, if I'm not mistaken. May I ask if Christmas came in 2000? That's not possible. That's not possible. Yeah, hello? Yeah. I do have my manager on the line as well, sir, and they can explain how that is possible. I do have to ask, does your business currently process \$10,000 monthly in debit or credit transactions? I think so, yeah.

DIALER: We do quite a bit, it's a gas station.

USER: Okay, yeah. So my manager is on the line and we can explain.

DIALER: Hello?

USER: Yeah, hi.

DIALER: Hi, sir. This is Aliyah, one of the managers here at Adventures Pay. How are you today? I'm good. Okay, great. So pretty much what we do here is eliminate the fees on your end so that you would start to receive your full proceeds. And how we're able to do so is because of that class action lawsuit that happened against Visa and MasterCard that ruled in the business owner's favor. So now you have the option to either continue taking on the fees or pass over the fees to your consumer. We do have a toggle option where you can split that fee with the customer 50-50. Our services here are \$25 monthly, and that's for unlimited processing. And we also integrate with 95% of POS systems. I'm sorry, did you not know of that, you know, that class action lawsuit? No, I never heard of this policy regarding the processing fees. This is new to me. I mean, I've never been told by any other company. So you're no longer required to pay those processing fees, like I said, due to Visa and MasterCard. It actually went on the news, on CBNC News, I believe so. It happened about a few years ago. So you guys, you know, are no longer required to pay those processing fees. And a lot of business owners are still paying those processing fees when they don't have to. So that's the reason why we reach out. Are you currently accepting cards? Do we take, I'm sorry, say it again? Do we take what? Are you currently accepting cards right now? Yeah, I do. Okay, and who's your current merchant? Uh, Heartland. Oh, no. Are you happy with the services with Heartland? I mean, so far so good. No complaints yet.

USER: I mean, besides what you're telling me.

DIALER: And what are you currently using when you accept the payments from Heartland? Is it like a terminal? Yeah, it's a separate terminal from my main register. Okay, are you paying to use their terminal as far as the equipment? Like, are you paying... Yeah, yeah, for sure. There is for sure processing fees. Okay, and how much are they charging you monthly? Is it like a flat monthly rate fee? No, it's based off the quantitative transactions we do. Okay, okay. So here we actually, you know, we don't charge any other fees. Our services are completely free because we do have a 60-day free trial going on right now. And it just gives business owners a chance to evaluate our services and see how their customers react. We actually do integrate with Heartland and we can also, you

know, provide you with a brand new terminal or the same one that you're currently using. Your only obligation would be if you would like to stay with our services, a flat rate of \$25 monthly after. You know, like after the 60 days they would apply. So our services are completely free and you know, you'll receive 100% of your full proceeds per transaction. Um, you know, your own, your only obligation is that \$25 and that's pretty much it. Okay. Um, just, uh, you can, uh, Oh, another one of our perks here at our company. You'll be set up on automatic batches. So you'll receive those proceeds the same day. And the process is pretty simple, pretty quick. Like I said, I can provide you a brand new terminal, or you can continue to use the same one. And you'll do an information sheet over the phone with me, and then I'll send you over a docu-sign while I'm on the phone. Are you interested in moving forward? What's Advancespay? Yes. OK. I just never heard of the company. Where are you guys based out of? So we are in Michigan, New York, and Florida. We're a partner with MX Connect, PCs, and Deja Vu Impacts. So we integrate with about 95% of the POS systems out there. What is your name? My name's Omar. Omar? OK. And what kind of business do you guys do, Omar? It's a gas station. OK. So with, um, so with Harlan, are they doing like your store or are they doing the pump? No, just the store. Look at it. It's nothing to do with the pumps. Do you guys have a website? I'm sorry, let me catch you up.

USER: Yeah, we do. You guys have a website? Uh huh.

DIALER: Yeah, you can actually Google, you can actually Google us right now. We're called Aventus Pay. Okay. What is this? Just AventusPay.com? AventusPay.com. Okay. You guys don't have a website? We do. It's called Aventus Pay. A as in apple, V as in Victor, E as in egg, N as in knife, T as in two, U as in umbrella, and S as in sausage. Pay. P-A-Y. If you're looking, you know, from your phone or whatever, it should be a blue website and it says Aventus K. He says A, A, V, say it again one more time, I'm sorry. A, it's okay, A, yes, A, N, T, U, S, T, A, Y. Did you find us, Omar? Yeah, I found you, yeah. Okay. So how much would you say... It's like blue and orange. Yeah. Yeah. How much would you say that you're processing monthly with the credit card sales? Like a rough estimate. Like, the amount of... It doesn't have to be exact.

USER: Okay.

DIALER: I don't know, I mean, quantity of transactions is probably doing about four or five hundred a month. Okay. So, you know, are you interested in moving forward and, you know, setting up on an information sheet to start the DocuSign or? I get to talk it over with my business partner. I would like for you to at least send me an email so I can take a look at it. Because we just switched to Heartland a few months ago, so it's not going to be that simple for me to be able to get away from them because then obviously they lock you into a contract. It's not that simple to get out. So you're in a contract with Heartland right now? Oh yeah, for sure. They all, any company that does the processing, they always sign you up for a minimum of a year to three years. Okay, just starting, they guys put you guys in a contract instantly? Oh yeah, they always, yeah. There's no way around it. Wow, see that's why we offer, you know, a 60-day free trial to give owners the chance to see for themselves, you know? We actually do buyout contracts here. That's why I said I'm placing you on a 60-day free trial. Did you want to start an information sheet? Um, just, like I said, send me an email. I have to, again, double check with my business partner. I gotta see what, you know, if he wants to, if he's interested in doing it. I think it's a good idea, but I still gotta talk to him. Okay, is there a time I can give you a call back when you think you'll be done? Yeah, tomorrow morning he'll be in and I'll be able to talk to him. Okay, definitely, Omar. I'll definitely give you a call tomorrow. And once again, my name is Aliyah. Alright, Aliyah, thanks so much. Thank you. Have a great day.