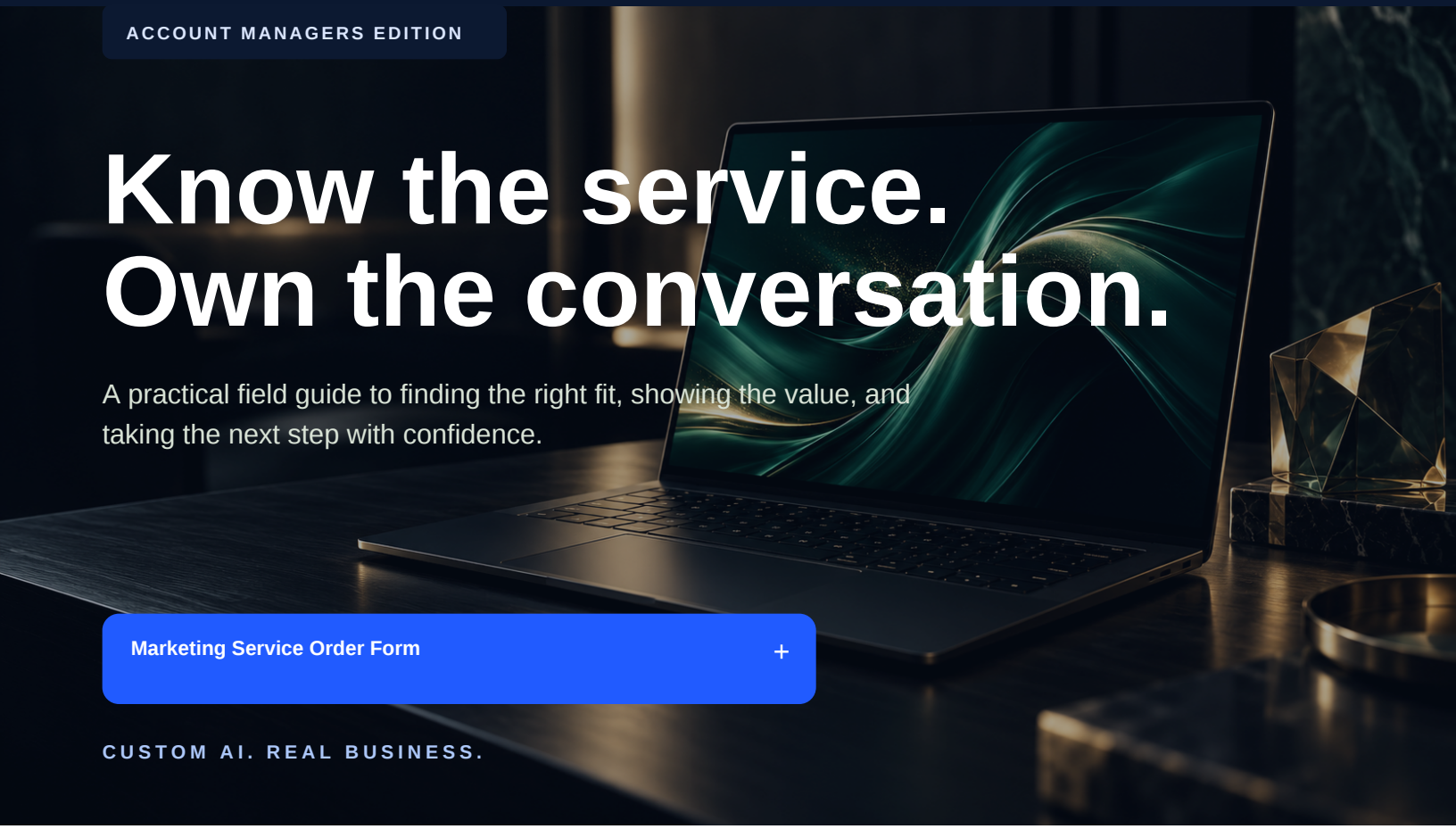
ACCOUNT MANAGERS EDITION



Know the service. Own the conversation.

A practical field guide to finding the right fit, showing the value, and taking the next step with confidence.

Marketing Service Order Form +

CUSTOM AI. REAL BUSINESS.

YOUR GUIDE AT A GLANCE

01 Learn the fit

Marketing, Websites and AI - one clear role for each service.

02 Lead the conversation

Discovery questions, demonstrations, scripts and objections.

03 Move it forward

Prospecting practice, pricing, ordering and planning tools.

01 / DISCOVERY

Start with the problem.

A good recommendation begins with a better question.

THE CONVERSATION STARTER

“We help business owners attract the right inquiries and make it easier to turn them into customers. What part of that process would you most like to improve?”

Ask: Where do your best customers come from? What happens between their first inquiry and a booked appointment or purchase? Where does that process break down? What would a better result look like? What have you already tried?

Listen for one primary need. Hard to find online → SEO. Ready buyers searching → Google Ads. An offer that needs discovery → Facebook Ads or TikTok Ads. Inconsistent presence → Social Media Content & Posting. Visitors cannot understand or act → Business Website. Missed conversations → the appropriate AI channel.

Confirm business type, service area, capacity, customer value, current website and channels, decision maker, goals, and a realistic budget conversation. A small business may need one fix first. Do not bundle services without a reason.

Marketing Service Order Form +

02 / MARKETING

Google Ads

Reach people actively searching

What it does: search campaign planning around relevant keywords, locations, messaging, supported conversion tracking, and optimization. **Best fit:** service businesses with clear search demand and a working inquiry path, such as roofing, construction, and dent repair.

Pain relieved / value: the owner relies on referrals alone or misses people searching for the service. A focused search campaign can put a relevant offer in front of those searchers and make calls or quote requests measurable.

Illustrative example: a homeowner searches for roof repair, sees a relevant ad, opens a service page, and requests an estimate. Show the sample campaign first, then explain what the monthly report helps the owner understand.

Discovery: Which services and cities matter most? Which jobs are profitable? Who answers new inquiries? What counts as a qualified lead? Confirm tracking and landing-page readiness.

Opener: “When someone searches for your service in your area, how are they finding you today?” **Objection -** “Ads did not work before”: “What happened: too few inquiries, poor fit, or trouble converting them? Let’s understand that before recommending another campaign.”

PUT IT INTO PRACTICE

Follow the step-by-step prospecting playbook on the next page. Research one suitable business, start with a specific observation, and earn a discovery conversation.

SHOW THE VALUE

- Google Ads | Roofing case study +
- Google Ads | Construction case study +
- Google Ads | Dent Repair case study +
- Google Ads | Strategy approval +
- Google Ads | Monthly report +

GOOGLE ADS / PUT IT INTO PRACTICE

Find the fit.
Earn the conversation.

A repeatable Google Ads prospecting playbook.

1) Pick one service and one market.

Choose a niche such as personal training and a defined city. Focus on a service the owner wants to sell more of, rather than pitching every business.

2) Build a small, researched prospect list.

Search Google and Maps as a customer would: “personal training Dallas.” Review five businesses. Record the website, public business contact, service area and one factual observation. Avoid repeatedly clicking paid ads.

3) Look for a useful conversation starter.

Check the mobile website, offer and contact path. Note something specific: a strong small-group program, an unclear trial offer, or a form that is hard to find. An absent ad does not prove they never advertise.

4) Reach the owner with a relevant question.

Use the public business phone or email, a local introduction, or an in-person visit. Ask: “I saw your small-group training program. Are you looking to fill more classes this month, or are you already at capacity?”

5) Discover the business case.

Ask which services and areas matter most, how inquiries arrive today, what a good lead looks like, and who follows up. Discuss past ads, available capacity and a comfortable budget before recommending a campaign.

6) Connect one example to their goal.

Show the search ad on the following page. Explain the connection between the customer’s search, the offer and the landing page. Ask: “Which offer would give your ideal customer a reason to contact you?”

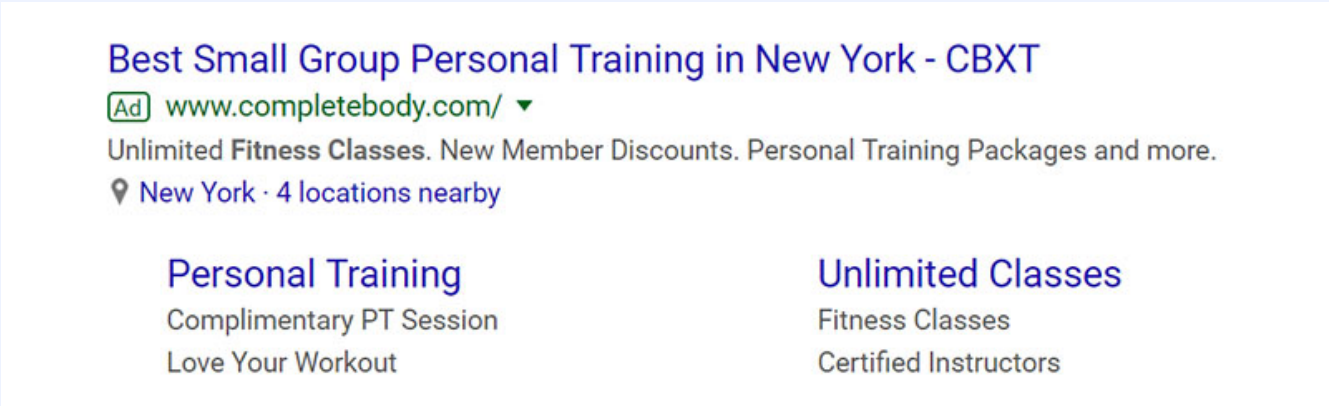
7) Agree on one next step.

Offer a focused strategy conversation. Confirm who will attend, what needs reviewing and when you will reconnect. Log the need, owner’s words and agreed next action. Respect a no and any request to stop.

GOOGLE ADS / VISUAL EXAMPLE

The search becomes the starting point.

Actual Google Search ad / CompleteBody, New York.



WHAT TO NOTICE

A specific service and location anchor the headline. Supporting text introduces membership benefits, while sitelinks give the searcher relevant ways to continue.

Use it in a conversation: “This ad makes the service clear immediately. If someone searched for your specialty nearby, which offer would you want them to see - and where would the click take them?”

Google Search is primarily a text-led format. Compelling people photography belongs on a matching landing page or in an appropriate visual campaign; the search headline still needs to answer the customer’s intent.

Source | Chainlink Marketing ad example +

Historical screenshot; layouts and offers change. Third-party example, not an AI Dealer campaign or a promise of results. Creative belongs to the advertiser.

03 / MARKETING

Facebook Ads

Put a relevant offer in front of new audiences

What it does: offer and audience planning, creative coordination, supported tracking, and optimization. Agreed Instagram placements may be included. **Best fit:** a business with a visual service, local offer, defined audience, and capacity to respond to inquiries.

Pain relieved / value: good services get little attention outside existing followers. Campaigns can introduce the offer and generate interest beyond the current audience.

Illustrative example: an owner-approved backyard project image introduces an outdoor renovation consultation; interested viewers request more information. Distinguish campaign exposure, inquiries, appointments, and sales.

Discovery: Who is the intended customer? Why act on this offer? What approved images or videos exist? Who follows up? **Opener:** “Do people usually know they want your service, or do they need to see what’s possible first?”

Objection - “We already post on Facebook”: “That gives you a presence. Paid campaigns serve a different job: putting a specific offer in front of a selected audience. Let’s see whether that would add value for you.”

PUT IT INTO PRACTICE

1. Review five local businesses with strong project photos but unclear next steps. 2. Attend a local business meetup and ask how owners promote seasonal offers. 3. Invite an owner to discuss one existing offer and the audience it fits; use their materials only with permission.

SHOW THE VALUE

- Facebook Ads | Landscaping case study +
- Facebook Ads | Real Estate Marketing case study +
- Facebook Ads | Plastic Surgery Clinic case study +
- Facebook Ads | Strategy approval +
- Facebook Ads | Weekly report +

FACEBOOK + INSTAGRAM / CREATIVE EXAMPLES

Make them stop. Give them a reason.

Real Meta ad creative / lifestyle, beauty and self-care.





NATURIUM / INNISFREE

Study the visual choices: playful adult talent in Naturium's creative; bold color, a product close-up and a simple offer in Innisfree's. A strong face or striking product can draw attention - the benefit and action must still be clear.

Apply the lesson: for a gym, salon or wellness brand, ask which real customer experience you could show. Pair an authentic face with one relevant benefit and a clear action. Adapt the format for Facebook feeds or Instagram placements after confirming the campaign scope.

Source | View real Meta ad creative gallery +

Sourced examples from a gallery of Meta Ad Library creative; exact placement is not independently verified. Third-party brands, not AI Dealer clients. Images are educational references, not reusable client assets.

04 / MARKETING

TikTok Ads

Show the service through short video

What it does: video-ad campaign planning, audience targeting, agreed creative coordination, supported tracking, and optimization. **Best fit:** businesses with a demonstrable offer, suitable customers on the platform, and usable or planned video assets.

Pain relieved / value: the benefit is difficult to communicate in a static description. Short video can show a product, process, transformation, or experience and invite the next step.

Illustrative example: a short car-detailing transformation introduces an offer and directs viewers to an inquiry page. A reference case study illustrates the approach; it does not predict results.

Discovery: What can we show in a few seconds? Who supplies footage? What approvals are needed? Is the destination ready? **Opener:** “What part of your service makes more sense when someone sees it?”

Objection - “TikTok is not for our customers”: “It may not be the right channel. Let’s confirm the audience and how you would demonstrate the offer before considering it.”

PUT IT INTO PRACTICE

1. List five businesses whose work has a clear visual transformation. 2. Identify owners already making useful short videos and ask about their next-step strategy. 3. Bring one simple storyboard idea to a discovery call. Do not promise filming, creators, or a fixed video count before scope approval.

SHOW THE VALUE

- TikTok Ads | Car Shop case study +
- TikTok Ads | Furniture Discount Store case study +
- TikTok Ads | Strategy approval +
- TikTok Ads | Weekly report +

05 / MARKETING

SEO

Help relevant customers find the business organically

What it does: keyword research, on-page improvements, local visibility priorities, and an agreed performance review. **Best fit:** a business that wants stronger ongoing search visibility and can support a sustained improvement process.

Pain relieved / value: useful services are hard to discover through search, or the site does not clearly describe services and locations. SEO improves relevance and discoverability over time.

Illustrative example: a cleaning company's service page clearly explains recurring cleaning and the towns served. Show a relevant SEO reference, then discuss what the owner would want people to find.

Discovery: Which services and locations matter? Who controls the site and business profile? What visibility do they have now? **Opener:** "When customers search for what you do, which services would you most like them to find?"

Objection - "Can you put us first on Google?": "We can improve the agreed search foundations and track progress. We cannot promise a ranking or deadline."

PUT IT INTO PRACTICE

1. Review five local websites for missing service descriptions or confusing location information. 2. Ask existing contacts which services customers struggle to find online. 3. Prepare three factual observations for an owner-approved review; do not call it a technical audit without doing one.

Reporting: agree the SEO review measures and cadence with management. The Google Business Profile/social analytics example below illustrates a report format; it is not a dedicated SEO deliverables promise.

SHOW THE VALUE

SEO | Cleaning Services case study +

SEO | Landscaping case study +

SEO | Real Estate Photography Signage case study +

GBP & social analytics | Monthly Report Example +

06 / MARKETING

Social Media Content & Posting

Stay visible with useful messages

What it does: create brand-aligned content and captions, then schedule or publish agreed posts. Supported platforms: Facebook, Instagram, LinkedIn, Twitter (X), Pinterest, and Google Business Profile. Posting volume and account coverage are agreed in scope; TikTok posting is not included.

Best fit / value: busy owners with inactive profiles, inconsistent messaging, or no time to keep customers informed. Content can explain services, answer common questions, show approved work, and keep the brand present between purchases.

Illustrative post: “Not sure whether your home needs a deep clean or recurring service? Here’s how to choose.” Add an approved photo and a relevant booking link. This is a training concept, not an existing client result.

Discovery: What should customers understand? Which accounts matter? Who approves posts? How often? **Opener:** “What do you wish customers knew before they contacted you?”

Objection - “Likes do not pay the bills”: “Agreed. Content should support a useful goal, such as understanding an offer or taking the next step. We’ll define that goal and the schedule before starting.”

PUT IT INTO PRACTICE

1. Find five businesses with strong service delivery and outdated public profiles. 2. Ask owners for their three most common customer questions and suggest a content theme. 3. Review an upcoming seasonal offer and propose an approval-ready topic list.

SHOW THE VALUE

Social Content | Post Approval Example +

GBP & social analytics | Monthly Report Example +

07 / WEBSITES

Business Website

Give visitors a clear, confident next step.

What it does: a custom mobile-optimized website, up to five custom pages, with the owner's brand, approved business content, and clear calls to action. Connect agreed contact forms, booking, or payment links. Hosting and ongoing support follow the agreed scope.

Best fit: no website, outdated presentation, confusing mobile navigation, or visitors unsure how to contact or book. Value: explain the offer clearly and make the next step easy. A new website does not create traffic by itself.

Demonstration: open a relevant design example on a phone. Point out the offer, trust cues, and call-to-action. Ask the owner to find the next step. These are design examples, not traffic or revenue case studies.

Discovery: new build or replacement? Domain ownership? Which five pages? Call, quote, book, or buy? Who supplies content and approves design? Confirm additional pages, integrations, domain arrangements, and timeline with Kenneth.

Opener: "If someone opens your site on their phone, what is the one thing you want them to do?" **Objection -** "I already have a site": "Great. Let's see whether it explains your offer and helps visitors take that step. You may only need an improvement."

PUT IT INTO PRACTICE

1. Inspect five local sites on mobile for confusing contact or booking paths. 2. Ask a referral partner about established businesses launching a new service. 3. Offer an owner a brief walkthrough of one relevant design and discuss one friction point.

Handoff: business contact, page list, goal, domain and access coordination, brand assets, approved content, forms and links, approval owner, and agreed scope. Any analytics or ongoing reporting must be agreed; do not present a marketing report as included website reporting.

SHOW THE VALUE

- Website example | Simplified Roofing +
- Website example | Yoga & wellness +
- Website example | Business coaching +
- Live website | Nortex Elite +

08 / AI SERVICES

Website AI Chat Agent

Help website visitors by text

What it does: answer approved business questions, capture lead details, and direct visitors to agreed booking or purchase links on a compatible website. **Best fit:** repeat questions, unanswered website inquiries, and visitors needing guidance before taking the next step.

Value / pain: give visitors a useful response while the owner is busy and collect the details needed to follow up. Illustrative conversation: visitor asks about a service → agent answers from approved FAQs → offers the agreed booking link.

Demo: show the typed chat path if active on the site. If a microphone appears, explain that voice is separately scoped. For a tailored chat demonstration, ask management to confirm the current demo before presenting it.

Discovery: website, questions, training sources, restricted topics, lead destination, next-step links, and installation contact. **Opener:** “What do visitors ask before they’re ready to book?”

Objection - “AI will get answers wrong”: “We define the approved information, limits, and next steps, then test the agreed answers. Let’s identify the questions it should handle and what should be escalated.”

PUT IT INTO PRACTICE

1. Find five appointment-based sites with repeated FAQ needs. 2. Ask owners which questions interrupt their day. 3. Role-play three common visitor questions using their approved answers, then arrange a tailored demo.

SHOW THE VALUE

Explore the website experience | The AI Dealer +

09 / AI SERVICES

Website AI Voice Agent

Let visitors speak on the website

What it does: a browser-microphone conversation trained around approved business information and agreed next steps. **Best fit:** a website audience that benefits from a spoken explanation or prefers talking to typing.

Value / pain: make conversational help available directly on the site. **Illustrative experience:** visitor taps the microphone, allows browser access, asks a question, and receives guidance toward an agreed next step. This does not answer calls to a phone number.

Discovery: visitor tasks, voice/language preferences, training, lead destination, installation, browser compatibility, handoff, and supported integrations. Confirm the active voice experience with management before a live demo.

Opener: “Would some of your visitors rather ask a question aloud than fill out a form?” **Objection -** “Is this the same as a phone receptionist?”: “The website agent lives in the browser. The phone receptionist answers calls to a business number. We’ll match the channel to your need.”

PUT IT INTO PRACTICE

1. List businesses with consultative services that need explanation. 2. Ask existing website owners whether visitors need spoken help. 3. Offer a short comparison of text chat, website voice, and phone reception using one common inquiry.

SHOW THE VALUE

Explore a live website voice/chat experience | Nortex Elite +

10 / AI SERVICES

AI Phone Receptionist

Answer and organize incoming calls

What it does: answer approved FAQs, gather essential caller details, support connected-calendar booking, and route a transfer or message as agreed. **Best fit:** owners missing calls while working, after-hours callers, or inconsistent intake.

Value / pain: keep inquiries moving when the team cannot answer. Demonstrate with Morgan, clearly introduced as a demo AI agent; ask for a hypothetical industry intake and booking conversation.

Discovery: current number, routing, opening hours, intake questions, calendar, transfer rules, lead notifications, usage, and escalation. Confirm phone and usage charges, supported functionality, and launch timing before collecting payment.

Opener: “What happens when a new customer calls while everyone is busy?” **Objection -** “Customers want a person”: “That matters. Let’s define which calls can be handled helpfully and when a person should be reached. The call experience should fit your customers.”

PUT IT INTO PRACTICE

1. Ask five owner-operators how they handle missed calls. 2. Seek referrals from businesses that regularly receive urgent inquiries. 3. Schedule a demo with owners who describe a specific coverage gap. Do not make repeated test calls or claim they miss calls without evidence.

SHOW THE VALUE

Call Morgan | Live AI demonstration | (469) 210-3518 +

11 / AI SERVICES

AI Reputation Manager

Make review follow-up consistent

What it does: agreed text/email review requests, approved response rules on connected sources, and a branded website review display. **Best fit:** happy customers but inconsistent review requests, slow replies, or little social proof on the website.

Value / pain: turn a manual follow-up task into a more consistent process and make useful customer feedback easier to see. The optional video collector invites customers to record or upload a video; it is an additional package option.

Demo: show the written review widget first, then the video invitation/record/upload flow. Say these are customizable widget examples and sample review content demonstrates design.

Discovery: review profiles, request trigger/timing, reminders, reply approval, website placement, and whether video is needed. Collect genuine feedback; do not promise positive reviews or removal of public negative reviews.

Opener: “When a customer has a great experience, how do you ask for a review?” **Objection -** “Can we remove bad reviews?”: “A website display setting does not remove reviews from Google or Facebook. We can agree how to request feedback, respond, and present the website widget.”

PUT IT INTO PRACTICE

1. Review public profiles for inconsistent recent feedback and ask about the process, without assuming service quality. 2. Ask satisfied existing clients how feedback is collected. 3. Show one approved widget example to an owner with testimonials but no clear website display.

SHOW THE VALUE

Show written reviews and the video collector +

AI REPUTATION MANAGER / WORKFLOW

A great experience. A visible reputation.

How review follow-up becomes a connected customer journey.

1 / ASK PROACTIVELY

After a customer visit or completed job, send a timely SMS or email with a clear invitation to leave an honest review.

2 / GOOGLE

The customer follows the review request and posts on Google Business Profile.

2 / FACEBOOK

Alternatively, the request directs the customer to leave feedback on Facebook.

3 / OWNER REPLY

Connected Google reviews receive an automatic branded response under approved rules.

3 / OWNER REPLY

Connected Facebook reviews receive a response under the configured platform rules.

4 / WEBSITE REVIEW WIDGET

Bring supported, connected reviews together in the business's custom website widget so visitors can see customer feedback.

Explain it simply: "We help you ask consistently, respond promptly in your brand's voice, and put customer feedback to work on your website."

Requests can be distributed between Google and Facebook; a review is not automatically copied from one platform to another. Reply timing, supported reviews and display depend on connected accounts and approved settings.

See the live review widget | The AI Dealer +

12 / DEMONSTRATIONS

Show one relevant example.

Make the example serve the conversation.

Use one relevant example after discovery. Say: “This is a supplied historical channel example showing the approach and reporting format.” Confirm attribution with management before presenting results as The AI Dealer’s work. Do not imply a previous result predicts the prospect’s outcome.

Google Ads sample reporting is monthly. Facebook and TikTok samples are weekly. Social/Google Business Profile reporting is monthly. Show the actual sample cadence; agree each client’s reporting before the order. Sample metrics and report layouts do not automatically define the purchased scope.

THREE CHANNELS. THREE DIFFERENT JOBS.

Typed website chat, spoken website help, and incoming telephone calls are separate experiences. Match the channel to how the business’s customers ask for help.

Confirm each channel separately. Outbound calls, email campaigns, direct social messaging, custom integrations, and other automation requests require management scope approval; do not assume they are included in a core agent package.

For AI reporting, agree what will be reviewed: captured inquiries, booked appointments, call outcomes, or review activity. Logs and reporting access depend on the agreed setup. Ask management for a suitable example; no dedicated AI report sample is established by this handbook.

Ask for an approved example +

CURRENT PRICING AND COMMISSIONS

All published service prices are minimums. Account managers may quote above the minimum for eligible setup and recurring services.

Use the current commission calculator and signed agreement for the minimum prices, eligible commission rates and current terms.

Advertising packages above $10,000 per month require scope confirmation. Do not quote below minimums or expand scope without written approval.

Confirm the final client scope, setup, monthly amount, ad spend allocation and any separate usage charges before completing the approved order.

Open the training presentations and calculator from the Resource Library.

14 / ORDERING & PRACTICE

A clean handoff builds trust.

From an agreed recommendation to a confirmed order.

1. Confirm the problem, recommended service, scope, setup and recurring amount, and any separately agreed usage.

2. Open the universal form and select the approved service(s). Enter the client details and Account Manager attribution.

3. Collect the relevant approved branding, training, access contact, and next-step links. Coordinate access securely.

4. Review the actual total with the client; the client enters payment details and authorizes billing.

5. Verify successful payment as well as form submission. Send management the order reference, scope, goal, missing items, and next action.

6. Follow up after launch; route technical work and scope changes to management.

Marketing Service Order Form +

Website and AI orders use the same universal form. A submitted form is not proof of successful payment.

PRACTICE BEFORE PROSPECTING

Choose one business, identify one bottleneck, ask three discovery questions, show one relevant example, respond to one objection, and recommend one next step.

Optional prospecting practice: research five suitable businesses, record one factual observation each, start three personalized conversations, and record agreed next steps. Respect opt-outs. These are practice suggestions, not required quotas.

Ask management for scope or an example +

Commission Calculator | Internal planning +

Estimates are not promised earnings. Use collected payments and approved agreement terms for reconciliation.

DAILY PROSPECTING / START HERE

Your first five days.

Build the habit. Keep the details. Hand off by 5:00.

DAILY DEADLINE | DAYS 1-5

Email your daily CSV to Kenneth at support@theaidealer.com by 5:00 p.m. Central Time. Kenneth will upload the contacts into GHL. You will learn the GHL resources after your first five days.

DAILY PROSPECTING TRACKER

YOUR NAME Jordan / Day 1	**BUSINESS** Example Fitness Studio
CONTACT Taylor - owner	**NEED** Wants more trial bookings
STAGE Conversation	**NEXT ACTION** Send example, call tomorrow

Illustrative entry only - enter real, verified prospect details.

1) Open the live tracker.

Open the live tracker using the button below. No download is needed. Keep using the same device and browser. Entries save locally; they are not automatically sent to Kenneth.

2) Record activity as it happens.

Enter today’s conversation date, Day 1-5, your name, business, contact and known email/phone. Add the need, relevant service, current stage, what they said and an agreed next action/date. Leave unknown facts blank.

3) Keep one record per business per activity day.

Edit that day’s entry as the conversation progresses. On a later day, add a new dated entry for the follow-up. Keep past days; do not clear the tracker after sending the CSV.

Open Daily Prospecting Tracker +

DAILY PROSPECTING / EXPORT + EMAIL

At 5:00, send the handoff.

A simple daily routine for Days 1 through 5.

4) Review today's records.

Confirm dates, names and known contact details. Record objections, follow-up permission and opt-outs accurately. A conversation, demo, booking and paid order are different stages.

5) Export today's CSV.

Click "Export today's CSV." It exports entries dated today in Central Time, including records hidden by the search/status filter. Check the downloaded file. If there are no entries today, email Kenneth a brief activity update.

6) Email the actual CSV attachment.

Send to support@theaidealer.com by 5:00 p.m. Central Time. Subject: Day [1-5] Prospecting CSV | [Your name] | [YYYY-MM-DD]. Answer what went well, what did not, questions and your next action. A screenshot is not the CSV.

7) Back up and prepare for tomorrow.

Export JSON backup for your own recovery. If changing browsers or devices, import that JSON backup. Kenneth handles CRM import during the first five days; keep completing the follow-ups you agreed with owners.

EMAIL + REFLECTIONS

Open the tracker's end-of-day reflection panel. Enter your name, activity date and Day 1-5. Answer what went well, what did not go well, your questions and next action. Click "Download CSV + prepare email to Kenneth." Attach the CSV, review the draft and send.

Email Kenneth | Attach your downloaded CSV +

FIRST FIVE DAYS / DAILY EXERCISE

Day 1: Start a real conversation

Introduce one useful outcome and listen before recommending.

Read the discovery page and choose one service you can explain in 30 seconds. Open the client guide and tracker.

Build a familiar-business list

Choose five businesses you know or can reasonably approach. Record a public business contact and one factual observation for each.

Practice a short introduction

Role-play twice: “I noticed [fact]. How are you handling [related task] today?” Keep it under 30 seconds and ask one open question.

Have two individual conversations

Use an appropriate business phone, a welcome in-person visit or an existing permitted channel. Ask about their process and listen. If no owner is available, record the attempt honestly.

Log the facts and a next step

Capture their words, known contact details and whether any follow-up was agreed. Use Research or Contacted when there was no conversation.

END-OF-DAY REFLECTIONS

What went well? What did not go well, and what would you change? What questions do you have (or “none”)? What is your next follow-up or action?

By 5:00 p.m. Central: open the tracker’s reflection panel, select Day 1, answer the prompts and click “Download CSV + prepare email to Kenneth.” Attach the CSV manually and send the draft. Kenneth handles GHL import for Days 1-5.

Open tracker | Reflection + email +

Download Day 1 handout +

FIRST FIVE DAYS / DAILY EXERCISE

Day 2: Find a need worth solving

Research one niche and connect observations to discovery questions.

Read the Google Ads prospecting playbook. Choose one niche, one city and one service the business could reasonably want to grow.

Research five local businesses

Search Google and Maps manually. Open each business's own website on mobile. Record a specific observation about the offer, inquiry path or service area.

Prepare three discovery questions

Ask which jobs they want more of, how inquiries arrive now, and who follows up. An absent search ad does not prove they never advertise.

Start two tailored conversations

Use the observation to ask a relevant question. Find out whether the owner wants growth and has capacity before suggesting a service.

Write a short fit statement

For one prospect, record: "They want [goal]; today [process]; the gap is [confirmed need]; [service] may help because [reason]." If the fit is unknown, say so.

END-OF-DAY REFLECTIONS

What went well? What did not go well, and what would you change? What questions do you have (or "none")? What is your next follow-up or action?

By 5:00 p.m. Central: open the tracker's reflection panel, select Day 2, answer the prompts and click "Download CSV + prepare email to Kenneth." Attach the CSV manually and send the draft. Kenneth handles GHL import for Days 1-5.

Open tracker | Reflection + email +

Download Day 2 handout +

FIRST FIVE DAYS / DAILY EXERCISE

Day 3: Show one relevant example

Turn a service explanation into a useful demonstration.

Review the sourced Google/social ads, the reputation workflow and the live widget. Pick one example that matches a prospect's actual need.

Choose the right example

Match the example to the owner's goal. Use the client guide for benefits and the handbook for internal preparation. Keep pricing out of the opening pitch.

Rehearse a 60-second demonstration

Explain the customer's starting point, what the service does, and the next action. Name third-party examples accurately and avoid predicting the prospect's results.

Offer a demonstration where welcome

Follow up with two suitable prospects or use two role-plays if live access is unavailable. Ask permission to show the example, then ask what would be most useful for their business.

Record the response and next action

Log whether the demo actually happened, the owner's question, and any agreed follow-up. Request an approved example from management if the match is weak.

END-OF-DAY REFLECTIONS

What went well? What did not go well, and what would you change? What questions do you have (or "none")? What is your next follow-up or action?

By 5:00 p.m. Central: open the tracker's reflection panel, select Day 3, answer the prompts and click "Download CSV + prepare email to Kenneth." Attach the CSV manually and send the draft. Kenneth handles GHL import for Days 1-5.

Open tracker | Reflection + email +

Download Day 3 handout +

FIRST FIVE DAYS / DAILY EXERCISE

Day 4: Follow up with a purpose

Explore objections and agree on a specific next action.

Review your existing tracker entries. Choose three prospects with an agreed follow-up or a valid open question. Respect opt-outs.

Prepare a personal follow-up

Reference what the owner actually said. Bring one useful answer, example or question; avoid a generic “just checking in.”

Practice two objection conversations

Role-play “We already have someone” and “It costs too much.” Acknowledge the concern, ask what is behind it, and respond only to that need.

Complete three appropriate follow-ups

Use the agreed channel and timing. Ask for one clear next action: a focused strategy discussion, an approved example, a later follow-up or a no-fit decision.

Update the activity record

Record today’s date, current stage, response and next action/date. Keep the earlier activity history. Flag any opt-out clearly.

END-OF-DAY REFLECTIONS

What went well? What did not go well, and what would you change? What questions do you have (or “none”)? What is your next follow-up or action?

By 5:00 p.m. Central: open the tracker’s reflection panel, select Day 4, answer the prompts and click “Download CSV + prepare email to Kenneth.” Attach the CSV manually and send the draft. Kenneth handles GHL import for Days 1-5.

Open tracker | Reflection + email +

Download Day 4 handout +

FIRST FIVE DAYS / DAILY EXERCISE

Day 5: Connect the whole workflow

Demonstrate readiness before direct GHL training.

Select one real prospect with enough context, or use a clearly labeled practice business. Review discovery, examples, scope and ordering.

Run a full conversation

Explain the need, ask discovery questions, recommend one service, show one example and handle one objection. Use a role-play if the prospect is unavailable.

Practice an accurate handoff

Prepare the known business contact, goal, service, agreed next step and missing information. Review the universal order form with management; do not submit a practice order or payment.

Review five days of activity

Identify the clearest fit, the most common objection and one skill to improve. Clean up missing next actions and flag records needing management help.

Complete the final daily submission

Export Day 5's activity and send the reflections by 5:00 p.m. Central. Ask what you need to learn first in GHL. Continue agreed prospect follow-ups.

END-OF-DAY REFLECTIONS

What went well? What did not go well, and what would you change? What questions do you have (or "none")? What is your next follow-up or action?

By 5:00 p.m. Central: open the tracker's reflection panel, select Day 5, answer the prompts and click "Download CSV + prepare email to Kenneth." Attach the CSV manually and send the draft. Kenneth handles GHL import for Days 1-5.

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