Swashi

INTERNAL · SALES TEAM

SALES ENABLEMENT · CLOSER MANUAL

The Swashi Sales Closer Manual

Everything a Swashi sales rep needs to open, run and close a conversation from the sales portal: who we sell to, what to say, what to show, what you may quote, how the dialer and texting work, and the rules that keep every deal clean. Interactive — scripts unfold, objections flip, checklists remember your progress.

DOCUMENT
Sales Closer Manual

FOR
Sales reps on sales.swashi.io

OWNER
Founder & CEO · Sales Enablement

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Two rules every rep signs. Never "you are losing revenue" — we cannot measure their revenue. Never "guaranteed results" — we show measured evidence and written success criteria. Say what the dossier says: "we checked your public channels and here is what we found."

CHAPTER 1 · KNOW

Why Swashi wins

Swashi replaces the 12–15-tool growth stack a business pays roughly $1,500 a month for — and then does the work those tools left to people. One platform: content, social, SEO and AI-search visibility, verified leads, cold email that lands, an AI receptionist and outbound voice, in 18 languages. You sell the work getting done, not software.

26
SPECIALISED AI AGENTS
one platform, working 24/7

18
LANGUAGES, NATIVELY
app · email · voice · chat · site

$99
ENTRY PRICE / MONTH
vs a ~$1,500 stack

23/24
PAYING CUSTOMERS ARE AGENCIES
they resell Swashi to clients

Lead with the value anchor

"Replace your $1,500-a-month growth stack with one AI — from $99." Anchor on displaced cost, never on "cheap". For agencies: "one platform for every client, and you keep the margin."

Lead with the differentiator

"Cold email that actually lands — every mailbox is verified on our own validation server before a single send. Nothing goes out unless the address is validated." Most competitors cannot say that.

Sell outcomes, not features

"It finds the companies, researches them, writes and sends the outreach in the prospect's language, books the meetings, and calls the ones who don't reply." Then show it on **their** market.

The one-breath pitch

YOU · 12 SECONDS

"Swashi gives a business its own AI team — it writes and publishes your content, finds and verifies your leads, runs the outreach in the buyer's language, answers your phone 24/7 and calls the leads who don't reply. It replaces the stack you're paying for and does the work you don't have time for. Can I show you on your own market?"

WHY THIS WORKS

Evidence before the ask.

Every prospect can get 20 free leads at signup and a 7-day Starter trial. The demo runs on the prospect's real market — a live search, a research dossier, a validated draft, a voice call. You never need to promise; you show.

CHAPTER 2 · KNOW

Who we sell to

Agencies first, then digital-first SMB. Enterprise is a human-sold, pilot-led motion of its own. This is not a guess: 23 of 24 paying customers are agencies — the cohort that feels the stack pain most and resells Swashi to its own clients.

SEGMENT	PAIN YOU WILL HEAR	PRIORITY	MOTION	TIER THEY LAND ON
Marketing & growth agencies	12–15 tools across many clients; margin pressure; want to sell outcomes, not hours	PRIMARY	Human-sold + partner programme; they resell to clients	Agency · $499
Enterprise / multi-brand groups	Governed AI across brands and regions; security review, integrations, SLAs	PRIMARY	Pilot-led scoped deployment (Enterprise AE + engineer)	Enterprise · $1,999 or custom
SMB owners / founders	No time; cannot afford a growth team	SECONDARY	Self-serve with your assist on hot replies	Starter / Growth

SEGMENT	PAIN YOU WILL HEAR	PRIORITY	MOTION	TIER THEY LAND ON
Consultants / solopreneurs	Need leverage to look like a full team	SECONDARY	Self-serve	Starter / Growth
Ecommerce / DTC	Product + commerce intelligence	TERTIARY	Self-serve; Ecommerce Intelligence (Agency+)	Agency

ICP score → what you do

TIER	SCORE	ACTION
A	75–100	Perfect fit — call today, full discovery
B	55–74	Strong fit — prioritise this week
C	35–54	Moderate — text + short call, template-led
D	0–34	Poor fit — do not work it; release the account

The score and the research dossier are on every account page in the portal. Read the **Findings** first: they tell you what to say in the first 20 seconds.

Disqualify early — it saves your day

- No website and no public channel to research → nothing for the agents to work with.
- A single-person business with no ambition to grow → Free plan, not a sale.
- Buyer wants a human agency to run everything for them → refer to a partner agency (that is a sale too, for the partner).
- Regulated industries needing bespoke compliance review → route to the Enterprise AE, do not pitch tiers.
- Asked not to be contacted (human-closed) → the portal refuses the call; respect it.

HARD-WON LESSON

Cold outbound to enterprise buyers with automation alone was a mismatch.

We re-aimed at agencies and digital-first SMB and ARPU rose from $97 to $413 in two months without raising a price. Enterprise is sold by a person, with a pilot and written success criteria — never as a cold pitch from you.

CHAPTER 3 · KNOW

The product in 9 lessons

Watch all nine tutorials at swashi.io/tutorials (about two hours) before your first call, then again after your first week — you will hear them differently. Each row says what the lesson teaches and what you demo from it.

#	LESSON	LENGTH	WHAT THE BUYER SEES	WHAT YOU DEMO
01	Core features of the platform	9 min	One workspace, 24 sidebar surfaces, the Business Brain	The Brain: "upload your brand docs once, every agent writes and speaks with them"
02	High-ticket lead generation	12 min	Search criteria, targeting, ICP scoring	A live search on their city + niche — real companies appear
03	Automating social media	15 min	Connect profiles, AI agents generate, adapt, publish	A week of posts for their brand in 60 seconds
04	Website content for SEO, AEO, GEO	11 min	Structured articles and landing pages, auto-published	An article outline on a topic they rank nowhere for
05	SERP AI for AEO / GEO / SEO	13 min	How Google and AI answers see the brand	Their own visibility score — this is where "we checked your channels" lands
06	Verified leads	10 min	Validation workflow, cleaned lists, verified emails and phones	The validation state next to each contact — the differentiator, visible
07	The Outreach Agent	14 min	Personalised campaigns, sequenced follow-ups, warm-up, unified inbox	A validated draft in the prospect's language, ready to send
08	Voice AI	22 min	AI Receptionist for inbound; outbound campaigns; 15 personas; 18 languages	Call the receptionist live from your phone — let them hear it
09	Reports	16 min	Automated analytics, campaign performance, ROI reports	What lands in their inbox every week without asking

What each surface is called (say it the way the buyer sees it)

CREATE
Dashboard (articles) · Trending Articles · Website Content · Content Library · Social Studio · Advertising · Ecommerce

GROW
Lead Generation · Email Outreach (Unified Inbox) · Voice Outreach (AI Receptionist + outbound) · SEO AI Rankings · Business (opportunities, lead journeys)

RUN
Reports · Performance · Automations · Schedule · Agent Monitor · Bot Channels (Line, WhatsApp, Telegram) · Swashi Academy · User Settings (Business Brain, team, language) · Billing

NEVER SAY

Model names, cloud vendors, the phone carrier, database names.

The buyer hears "our own validation server", "our voice runtime", "one governed AI gateway", "enterprise cloud infrastructure". The stack is ours to run, not theirs to audit — unless an enterprise security review is scoped by the Enterprise AE.

CHAPTER 4 · KNOW

Pricing you may quote

Four published tiers. Quote exactly these numbers and nothing else — no invented discounts, no retired ladders. Annual is ten months for twelve. The 7-day free trial exists on Starter only; Growth, Agency and Enterprise are bought directly.

PLAN	MONTHLY	ANNUAL	BUYER	ARTICLES / MO	SOCIAL / MO	LEADS / MO	EMAILS / MO · MAILBOXE
Free	$0	—	Try it	1	1	20 at signup	0
Starter	$99	$990	Solo / small business	10	30	250	300 · 1
Growth MOST POPULAR	$249	$2,490	Growing SMB	75	350	1,500	1,800 · 6
Agency CORE ICP	$499	$4,990	Marketing agencies	350	1,500	5,000	5,400 · 18
Enterprise	$1,999	$19,990	Larger organisations	Unlimited	Unlimited	15,000	16,500 · 55

Add-ons you may offer

Lead Pack	$49 one-time	+500 AI leads
Extra Inbox	$19 / mo	+1 mailbox (+300 sends)
Outreach Pack	$39 / mo	+3 mailboxes (+900 sends)
Website Pack	$29 / mo	+5 connected sites
Research Pack	$25 one-time	+100 research scans
Image Pack	$25 one-time	+200 HD images
Auto-Post Pack	$29 one-time	+25 articles
Social Pack	$19 one-time	+250 social posts
Receptionist Pack	$29 / mo	+100 receptionist calls

Retired — never offer: "Outreach Boost (+1,000 emails)", the $19/49/99/299 and $69/149/349/999 ladders.

Trial and billing facts

- Trial: **Starter only, 7 days**, capped at 20 leads, 50 sends, 1 mailbox, 10 voice calls; export off. A trial demonstrates, it does not deliver.
- Every new account gets **20 free leads** at signup, including Free.
- Card billing monthly or annual; invoices and tax supported; cancel anytime, no contract.
- Outbound voice minutes come from the prepaid Voice wallet — the per-minute rate is shown live in the app. **Never quote it from memory.**
- Starter is "voice-ready": a number activates for $19.99, then minutes from the wallet.

The stack-replacement calculator — run it live on a call

Ask what they pay today for each function, type it in, and let the number speak. Defaults are typical SMB list prices — replace them with the prospect's real figures.

Content writing / blog tool	99
Social scheduling	99
SEO / rank tracking	129
Lead data / prospecting	149
Cold email sending + warm-up	97
Email verification	49
Phone answering / receptionist	299
Design / images	55
Reporting / analytics	79
Swashi plan	Growth · $249

$1,055

THEIR STACK TODAY / MONTH

$806 saved

PER MONTH ON GROWTH · 76% LESS

"You're paying about $1,055 a month for 9 tools that still leave the work to you. Growth is $249 and does the work."

CHAPTER 5 · DO

Your day in the sales portal

sales.swashi.io is your only workspace: your allocated accounts, the research on each, the dialer, texting, the timeline, follow-ups and your numbers. One prospect, one rep — what is yours is yours, and the portal enforces it.

08:45
Notifications
Callbacks, texts back, replies, follow-ups due. Act on these first — a reply left 24 h goes cold.

09:00
Prospects → yours
Your allocation, priority order. Open the account, read Findings, pick the number.

CALL
Dial from the account
Call button or the floating dialer. The call logs itself; you log the outcome.

AFTER
Text, note, follow-up
Text lands pre-written with your name and your signup link. Set the next touch.

17:30
Calls page
Today's dials vs your cap, answered, minutes. Tomorrow's list is what you left un-worked.

What the portal decides for you

- **Territory:** you only ever see and reach accounts in your assigned countries (for US/Canada reps, only US and Canadian numbers can be dialed or texted).
- **Ownership:** an account allocated to you or claimed by your first call is invisible to other reps; theirs are invisible to you. No "proceed anyway" — a manager reassigns.
- **Calling hours:** the prospect's local clock, from their area code — Mon–Fri 9 am–8 pm, Sat 10–6, never Sunday. Outside that, the call is refused with the reason.
- **Do-not-call & STOP:** refused automatically; a text reply of STOP opts the number out for everyone.
- **Daily cap:** calls + texts per day, set per rep by your manager; the Calls page shows where you are.
- **Suppressed email:** an account whose email bounced can still be phoned or texted **once**; a conversation keeps it open.

What you decide

- **The outcome** after every call: Spoke · Called — no answer · Voicemail · Callback requested · Meeting booked · Positive · Not interested · Wrong contact. That is what moves the stage.
- **Start working / claim** an unowned account in your territory (within your claim limit).
- **The note** — one line a colleague could pick up from.
- **The follow-up** — date and time; the dashboard reminds you.
- **Stage changes** — Interested, Meeting, Lost. Signup and Paid are set by the system from real customer data.

The callback loop — why you call from the Swashi number

When a prospect calls the Swashi number back, the AI Receptionist recognises that **you** reached out, takes a message for you instead of pitching, and emails it to your work mailbox with the transcript — it also appears on the account timeline and as an urgent notification. Same for a text reply. Nothing you start gets lost.

The complete cycle

1
Allocated
Manager hands you the top Sales-Ready accounts with verified numbers.

2
Worked
Call, text, log the outcome, set the follow-up. Un-worked accounts are tomorrow's list.

3
Interested / Meeting
Stage moves with outcomes. Book the demo from the call.

4
Signup → Paid
Through your link. The system marks it; your Earnings page shows the commission ledger.

5
Released
Lost / not interested closes it; 14 days of silence makes it stale and it returns to the pool.

Before your first call — checklist

- [ ] I have signed in to sales.swashi.io on Chrome or Safari and allowed the microphone.
- [ ] I called my own phone from the dialer once and heard the Swashi caller ID.
- [ ] I have watched all nine tutorials (Chapter 3).
- [ ] My display name and work email are correct in Settings (they appear in texts and receive callbacks).
- [ ] I know my daily cap and claim limit (Calls page, top tiles).
- [ ] I can find Findings, the phone row, Call, Text and Mark contacted on an account page without looking.
- [ ] I have read Chapter 10 and can recite the two rules.

CHAPTER 6 · DO

The discovery call

Seven minutes, one goal: earn a 20-minute demo on their own market. Open with what the dossier found, ask five questions, listen for the pain that maps to a Swashi surface, and book the demo before you hang up.

The opener — 20 seconds

SAY THIS

> **YOU**
> "Hi {first name}, this is {your name} from Swashi. I'm calling because we looked at {company}'s public channels this week — your site and social — and I noticed {the top Finding: e.g. "your last article went up 384 days ago"}. Do you have two minutes for me to tell you what else we found?"

The Finding is on the account page. It is measured, dated and sourced — it is the reason the call is not cold. Never open with "how are you today".

Five discovery questions and what to listen for

ASK	LISTEN FOR	MAPS TO
"Who does your marketing and lead generation today — a person, an agency, or you at 11 pm?"	Time pain, agency cost, no one	Value anchor · Agency motion
"How do new customers find you right now, and how many came from search or referrals last month?"	They don't know · "word of mouth" · a number	SEO AI Rankings · Findings
"When someone calls and you can't answer, what happens?"	Voicemail, missed calls, after-hours	AI Receptionist (Starter+)
"Have you tried cold email? What happened to the replies — and the bounces?"	Burned domain, no replies, gave up	Verified sending · differentiator
"If this worked, what would you want to see in 30 days?"	Their success criterion — write it down	The demo's goal · pilot criteria

Write the answer to the last question in the account note. It is the sentence you close with.

Booking the demo — the transition

> YOU
>
> "Here's what I'd suggest: give me 20 minutes on a screen share and I'll run Swashi on {company} live — a real lead search for {their niche} in {their city}, a research dossier on one of your competitors, and I'll have the AI receptionist take your call. If it's not obviously worth $249 a month, you'll know in the first ten minutes. Tomorrow at 10 or Thursday at 2?"

Book it in the meeting, set the follow-up in the portal, and send the text template (Chapter 9) while you are still on the line.

If they only have a minute

> YOU
>
> "Then just one thing: I'll text you a link with 20 free leads for {their niche} and a 7-day trial — no card. Look at the leads tonight; if they're the kind of customer you want, call me back on this number and the receptionist will put a message straight through to me."

Send the text, log **Callback requested** or **Spoke**, set a 2-day follow-up.

CHAPTER 7 · DO

The 20-minute demo

The demo runs on the prospect's own market, never on a sample account. Four moments, in this order. Each one ends with a question, not a feature.

MIN 0–3
Their Findings
Screen-share the account page: "we checked your channels — here's what we found, dated and sourced."

MIN 3–8
Live lead search
Lead Generation → their niche + city. Real companies, ICP scores, verified contacts appear.

MIN 8–13
The validated draft
Email Outreach → a personalised draft in the buyer's language, with the validation state visible.

MIN 13–17
The receptionist
They call the number from their phone; the AI answers in their language and books a slot.

MIN 17–20
The ask
Back to their 30-day criterion. Tier, price, start today.

Moment 2 — the live search, word for word

> YOU
> "Let's not use a sample. Give me your best customer type and your city." (type it) "These are real businesses, scored against your ideal customer. See the verification state next to each email — that's checked on our own server before anything is ever sent. Which three of these would you want to talk to this week?"

Let them pick. Their picks become the follow-up: "I'll have the outreach agent write to those three in your voice and show you the drafts."

Moment 3 — the draft, and the differentiator

> YOU
> "Here's the draft for the first one — written from their research, in their language, in your Business Brain's voice. Notice what it doesn't do: it won't send to an unverified address, it paces itself so your domain stays clean, and every reply lands in one inbox. Most tools sell you sends; we sell you deliverability."

Moment 4 — the receptionist, live

> YOU
> "Call this number from your phone right now and ask it anything about {company} — I loaded your website into the Brain before the call. Ask for an appointment."

Say nothing while it rings. The receptionist greets in their timezone, answers from the Brain, books, and confirms by email in the caller's language. That silence is the best ninety seconds of the demo.

Moment 5 — the ask

> YOU
> "You said in 30 days you'd want {their criterion}. Growth gives you 1,500 leads, six mailboxes and 200 receptionist calls a month for $249 — the stack you showed me is about {calculator figure}. Shall we start it today so the first drafts are ready tomorrow morning?"

Then be quiet. If they hesitate, go to Chapter 8. If they say yes, Chapter 9.

DEMO HYGIENE

Load the Brain before the call. Test the receptionist yourself an hour before. Have their account page open.

A demo that fumbles a login sells nothing. Ten minutes of prep is the whole difference.

CHAPTER 8 · DO

Objections — open the one you hear

Every objection is a request for evidence. Answer with what the platform measures, then return to their 30-day criterion. Never argue; never invent a number.

"Too cheap to be good?"

"One platform, not twelve subscriptions — you're paying for AI doing the work, not for licences. It replaces a stack of about $1,500 a month. The question isn't the price; it's whether the leads I just showed you are your customers."

"Will emails bounce and hurt my domain?"

"That's the reason people choose us. Every mailbox is verified on our own validation server before a single send; nothing goes out unless the address is validated; sending is paced and warmed. On our own fleet that has meant near-zero bounces and zero spam complaints."

"Is the AI actually any good?"

"Don't take my word — the demo runs on your market. Frontier models through one governed gateway, plus a Business Brain that learns your business, so nothing is generic. You saw the draft."

"I don't have time to learn another tool."

"You don't learn it, you approve it. The agents run on autopilot and ask you before anything irreversible. Onboarding is done with you, and the nine tutorials are two hours total."

"We already have a CRM / an agency."

"Swashi does the work the CRM records and the agency bills for — and it feeds your system of record. Agencies are our best customers: 23 of 24 paying customers resell Swashi to their own clients. If you're an agency, this is margin."

"Guarantee me results."

"I won't, and you should be suspicious of anyone who does. What I can do is show measured evidence — your dossier, verified contacts, a trial with the criterion you named — and we review it together in 30 days."

"Does it work in our language / market?"

"Eighteen languages natively — the outreach, the replies, the phone agent, the content and the product itself. The receptionist switched language mid-call in the demo; that's the same engine everywhere."

"Where does our data go?"

"Each customer is isolated; sensitive data is redacted before any model sees it; nothing learns across customers; every action is audited. For a formal security review, I'll bring in our enterprise engineer." **(Enterprise only — do not improvise further.)**

"Send me something and I'll think about it."

"Happy to — I'll text you the link with 20 free leads for {niche} and your trial right now, while we're talking. What day should I call to hear what you thought — Thursday or Friday?" **Send the text before you hang up; log Callback requested.**

"Can you do it cheaper?"

"The prices are the prices — the only discount is annual billing, which is two months free. What I can change is the tier: Starter at $99 is real, and you can move up the day you need more."

"We tried AI content and it was generic."

"Generic is what you get without a Brain. You upload your brand documents once and every agent writes, speaks and sells with them. Let me show you an article outline on your voice, not mine."

"Call me next quarter."

"Sure. Before I go — the 20 free leads are yours either way and they don't expire on my side. If any of them are the customer you want, that's the reason to talk sooner. I'll set a note for {date}." **Log Not interested only if they said no; otherwise Follow-up.**

PROHIBITED CLAIMS — EVERY REP SIGNS

Never "you are losing revenue". Never "guaranteed results". Never a number Swashi did not measure. Never a customer named without consent. Never a feature that is not live.

Talk tracks are audited against this list monthly. A claim you cannot show on a screen is a claim you do not make.

CHAPTER 9 · DO

Closing & follow-up

Close on the criterion they named, on the tier that fits, through your link. Then follow up like a professional: the same day, in writing, with the next step already in the calendar.

Self-serve close (Starter / Growth)

"I'll text you your signup link now — it's your account, and it credits me. Start Growth today, cancel any time; I'll check your first drafts with you tomorrow." Signup through **your** link is what attributes the customer to you.

Agency close

"You keep the margin: one Agency plan runs 35 client sites, 18 mailboxes and a receptionist per brand. Let's onboard your first two clients this week and I'll introduce you to the partner programme." Loop in Partnerships after the first client is live.

Enterprise hand-off

Multi-brand, security review, integrations or a custom scope → "This deserves a scoped pilot with written success criteria. I'll bring in our Enterprise AE and engineer." Log **Meeting**, add the note, tell your manager the same day. You do not price it.

Follow-up cadence — every touch is logged

WHEN	CHANNEL	WHAT
During the call	Text	Your link + 20 free leads. The template is pre-filled with your name; edit one line to reference what they said.
Same day	Email (from your work mailbox)	Three lines: what we found, what we showed, the one next step with a date.
Day 2	Call	"Did you look at the leads?" — the answer tells you the tier.
Day 4	Text	One proof point relevant to their niche (from the dossier or a live search).
Day 7	Call	Trial ends today for Starter trials — the natural close.
Day 14	Decide	Interested → keep; silent → Follow-up in 30 days or release the account. Do not hoard.

Text templates (edit, don't paste)

After a call they answered

> TEXT · PRE-FILLED BY THE PORTAL
>
> "Hi {first name}, this is {your name} from Swashi — thanks for your time on the phone just now about {company}. Swashi gives a business its own AI agents for outreach, content and phone calls, live in a few minutes. Here is a link to try it: {your signup link}. Happy to answer any question here. Reply STOP to opt out."

Add one line before the link: **"You mentioned {their criterion} — the first search I ran found {n} companies in {city}."**

After no answer

> TEXT · PRE-FILLED BY THE PORTAL
>
> "Hi {first name}, this is {your name} from Swashi — I just tried to reach you about {company}. ..." **(same body, same link)**

Then set a 2-day follow-up. Two no-answers → one voicemail with the Finding, then the text; three → release.

The same-day email

> EMAIL · FROM YOUR WORK MAILBOX
>
> Subject: {company} — what we found and what you saw
>
> {first name}, three things from today:
> 1. We checked your public channels: {top Finding, dated}.
> 2. You saw a live search for {niche} in {city} — {n} companies with verified contacts — and the receptionist booked a slot in {language}.
> 3. Next step: {tier} at {price}/mo through this link: {your signup link}. I'll call {day} at {time} to review the first drafts.
>
> {your name} · Swashi

CHAPTER 10 · STAY

Rules of the road

These are not suggestions. The portal enforces most of them; you enforce the rest. They keep our number clean, our claims honest and our customers ours.

Calling and texting

- US and Canada only, from the Swashi number, inside the prospect's local hours. The portal refuses anything else and tells you why.
- Do-not-call and STOP are absolute. A text reply of STOP opts the number out for everyone; never work around it.
- No recording. If recording is ever enabled, the prospect hears a notice first.
- Stay under your daily cap; a shared number's reputation belongs to the whole team.
- Log the outcome after every call. An unlogged call did not happen.

Claims and money

- Quote only the published prices and add-ons in Chapter 4. Annual billing is the only discount.
- Never guarantee results; never say "losing revenue"; never quote a number the platform did not measure.
- Never name a customer without consent.
- Never describe the technology stack, vendors or model names.
- Enterprise and custom deployments are priced by the Enterprise AE after a pilot — not by you.

Accounts and territory

- Work only what is allocated to you or unowned in your territory. Another rep's account is off-limits, full stop; a manager reassigns.
- Release what you will not work; 14 days of silence releases it anyway.
- A human-closed "asked not to be contacted" is final.
- Every signup goes through your link; that is how commissions attribute.

Security

- Your portal login is device-bound; sign out of shared devices in Settings → Security.
- Prospect data stays in the portal — no exports to personal tools.
- Report anything odd (a login you don't recognise, a prospect claiming a promise you never made) to your manager the same day.

CHAPTER 11 · STAY

Scorecard & 30-day ramp

What good looks like for a full-time closer on the US/Canada territory, and how to get there in four weeks. Your Calls page and Performance page show every number below.

120–200	≥ 25%	≥ 4	≥ 1
DIALS / DAY	ANSWERED	DEMOS BOOKED / DAY	SIGNUP / DAY
within your daily cap	calling hours + verified numbers	from answered conversations	through your link · then Paid

WEEK 1
Learn and dial

- All nine tutorials, twice
- Manual read; quizzes green
- 50 dials/day on Tier C accounts to find your voice
- Shadow two demos

WEEK 2
Full cadence

- Your allocation live; 100+ dials/day
- Every call logged, every follow-up set
- First demos on Tier A/B
- Text after every conversation

WEEK 3
Close

- Calculator on every demo
- First signups through your link
- Objection review with your manager — which ones you hear most

WEEK 4
Own the number

- Cap-level dialing
- Trials converting on day 7
- Pipeline review: Interested → Meeting → Signup ratios
- Ask for more allocation when un-worked drops under 100

Weekly self-review — check what you did this week

- [ ] I dialed at least 80% of my cap every day.
- [ ] Every answered call ended with a booked demo, a follow-up date or a clear Not interested.
- [ ] Every conversation got a text within the hour and an email the same day.
- [ ] Every demo ran on the prospect's own market and ended with the ask.
- [ ] I quoted only published prices; I made no claim I couldn't show on a screen.
- [ ] I released the accounts I will not work.

WHERE THE NUMBERS LIVE

Calls page · Performance · Earnings.

Dials, answered, minutes and today's cap on Calls; stages and ratios on Performance; the commission ledger on Earnings. If a number in this manual and a number on those pages ever disagree, the pages win — tell Sales Enablement.