



callfluent

## 10-STEP Checklist

**For Agencies To Skyrocket Profits by  
Selling AI-Powered Voice Calling Services**

*Using CallFluent AI to Offer Cutting-Edge, High-Demand  
Voice Calling Solutions with Zero Coding Required*



#1

Introduction

*Adrian Isfan*

Co-Founder &amp; CEO

**callfluent**

## Brief Overview of CallFluent AI

- ✓ CallFluent AI is a leading provider of AI-powered phone call solutions designed to revolutionize customer interactions.

Our technology leverages advanced AI to automate and optimize inbound and outbound calls, significantly enhancing efficiency and customer satisfaction.

## Mission Statement

- ✓ This practical step-by-step checklist will guide marketing agency owners on how to effectively sell and implement CallFluent AI voice calling services to local businesses, enhancing their profitability and operational efficiency.



#1

Introduction

*Adrian Isfan*

Co-Founder &amp; CEO



callfluent

## Key Value Propositions

- ✓ **Automate Call Handling:** Handle 100% of calls with AI, ensuring no missed opportunities and optimal client interactions.
- ✓ **Cost Reduction:** Significantly lower operational costs by reducing the need for extensive sales and support teams.
- ✓ **24/7 Availability:** Unlike human agents, AI voice calling agents can operate around the clock, providing support at any time of day or night.
- ✓ **Enhanced Customer Satisfaction:** Deliver consistent, high-quality interactions that exceed customer expectations.



## The BIG 10'th Checklist:

- ✓ Step 1: Identify Target Markets and Niche Segments
- ✓ Step 2: Introduce CallFluent AI to Clients
- ✓ Step 3: Develop Custom AI Voice Scripts with CallFluent AI
- ✓ Step 4: Integrate CallFluent AI with Existing Systems
- ✓ Step 5: Train Client's Staff and Stakeholders on CallFluent AI
- ✓ Step 6: Set Up Monitoring and Reporting with CallFluent AI
- ✓ Step 7: Test and Optimize CallFluent AI Implementation
- ✓ Step 8: Launch CallFluent AI Voice Calling Service
- ✓ Step 9: Gather Feedback and Iterate
- ✓ Step 10: Scale and Expand CallFluent AI Services



*[RSVP Your Seat to Free Expert Training Webinar \(Click Here\)](https://callfluent.com/workshop-invite)*

<https://callfluent.com/workshop-invite>



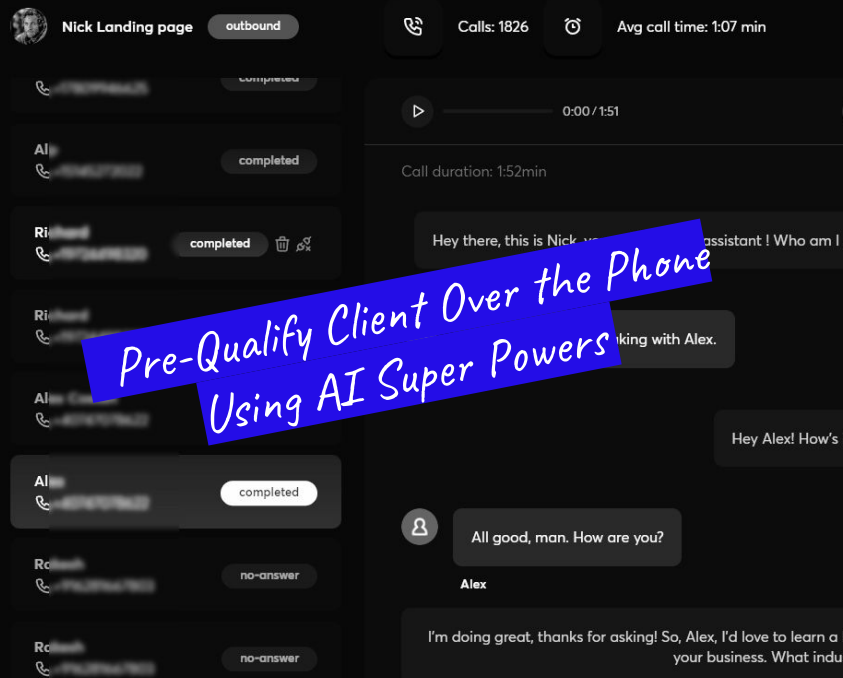
Step #1

Understand Client Needs and Objectives

# Understand Clients Need

## Discover High-Potential Markets and Pinpoint Niche Segments

- ✓ **Conduct Market Research:**  
Identify industries and local businesses that would benefit the most from AI-powered voice calling services.
- ✓ **Analyze Competition:**  
Find niches with high demand and low competition to position your agency strategically.





Step #1

Understand Client Needs and Objectives

# Understand Clients Need

## Discover High-Potential Markets and Pinpoint Niche Segments

- ✓ **Segment Your Audience:**  
Create detailed profiles of your target customers. Focus on demographics, business size, and specific needs.
- ✓ **Assess Business Potential:**  
Evaluate the revenue potential of different segments. Prioritize markets that offer the highest ROI.

The screenshot displays a CRM interface for managing calls. At the top, it shows a profile for 'Nick Landing page' with 'outbound' status, 'Calls: 1826', and 'Avg call time: 1:07 min'. Below this is a list of individual calls with status indicators like 'completed' or 'no-answer'. A detailed view of a call is shown on the right, featuring a play button and a duration of '0:00 / 1:51'. The call transcript includes the following text:

Hey there, this is Nick, your AI assistant! Who am I?

working with Alex.

Hey Alex! How's it

All good, man. How are you?

Alex

I'm doing great, thanks for asking! So, Alex, I'd love to learn a bit about your business. What indus

*Pre-Qualify Client Over the Phone  
Using AI Super Powers*



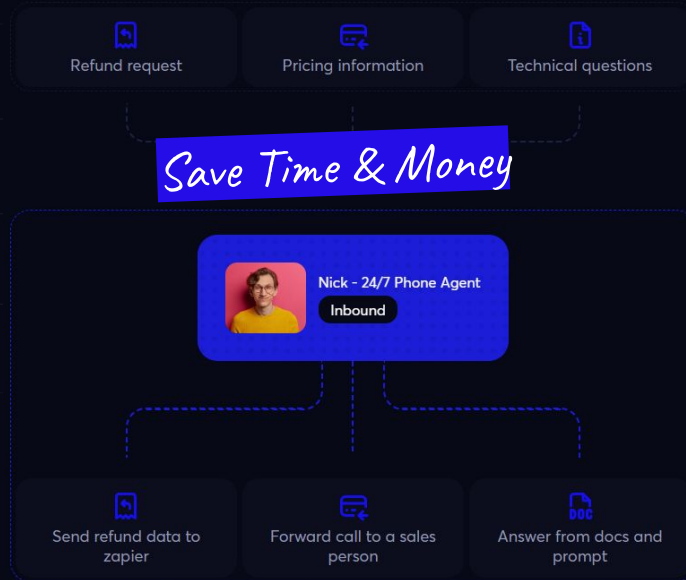
Step #2

Develop a Compelling Value Proposition

# Give a Mind-Boggling Presentation

## Craft a Value Proposition That Resonates and Converts

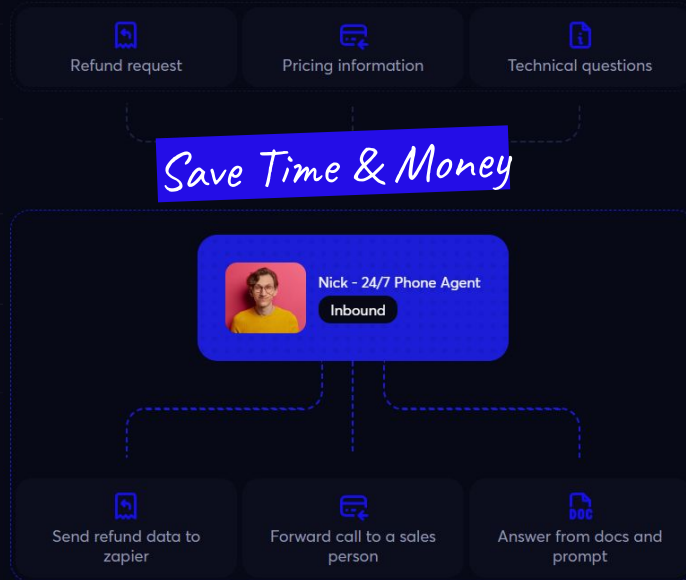
- ✓ **Highlight Unique Benefits:**  
Emphasize the benefits of 24/7 availability, increased efficiency, and enhanced customer engagement. Show how AI can transform business operations.
- ✓ **Address Pain Points:**  
Focus on how your service solves specific problems for local businesses. Provide examples of common issues and how AI resolves them.



# Give a Mind-Boggling Presentation

## Craft a Value Proposition That Resonates and Converts

- ✓ **Showcase Success Stories:**  
Use case studies and testimonials to demonstrate proven results. Highlight success metrics and client feedback.
- ✓ **Promise ROI:**  
Clearly articulate the return on investment clients can expect. Use numbers and projections to make a strong case.







Step #3

Create a Customized Sales Pitch

# Design a **Persuasive Sales Pitch** That Closes Deals

- ✓ **Tailor Your Message:**  
Customize your pitch to align with the needs of each potential client. Address their unique challenges and goals.
- ✓ **Use Real-World Examples:**  
Incorporate case studies and success stories. Demonstrate the effectiveness of AI-powered calls.



*Leads To Increase Sales & Bookings!*



Step #3

Create a Customized Sales Pitch

# Design a **Persuasive Sales Pitch** That Closes Deals

- ✓ **Highlight CallFluent AI:**  
Explain how CallFluent AI enables seamless, zero-code AI agent creation. Emphasize ease of use and rapid deployment.
- ✓ **Include a Strong CTA:**  
End with a clear and compelling call to action. Encourage immediate engagement and next steps.



*Leads To Increase Sales & Bookings!*

# Establish an Online Presence That Attracts and Engages Clients

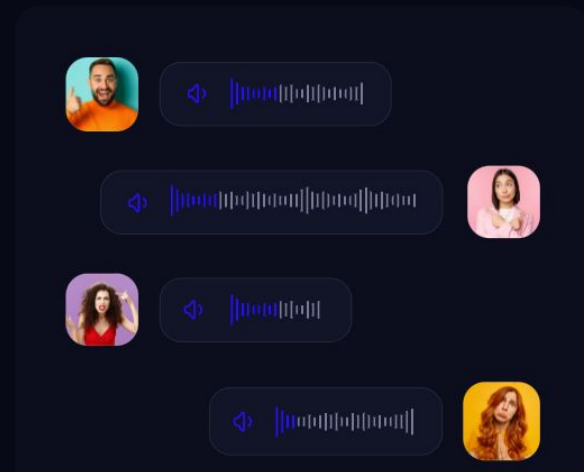
- ✓ **Create a Professional Website:**  
Develop a website that showcases your services, expertise, and success stories. Ensure it is user-friendly and visually appealing.
- ✓ **Leverage SEO:**  
Use search engine optimization to attract organic traffic. Focus on relevant keywords and high-quality content.



*Socialize More On business Mediums*

# Establish an Online Presence That Attracts and Engages Clients

- ✓ **Create a Professional Website:**  
Develop a website that showcases your services, expertise, and success stories. Ensure it is user-friendly and visually appealing.
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*Socialize More On business Mediums*



Step #5

Develop Marketing and Outreach Strategies

# Execute **Targeted Campaigns** to Reach Your Ideal Clients

- ✓ **Email Marketing:**  
Create email campaigns that nurture leads and drive conversions. Use personalized and segmented email lists.
- ✓ **Social Media Advertising:**  
Utilize targeted ads on platforms like Facebook and LinkedIn. Focus on your identified niche segments.

*Target Ideal Active Customers*



Jeanne

outbound

**Agent type**

Select the type of agent you wanna use

Sales representative ▾

**Tone**

Select the tone of your agent

Professional

**Goal**

Tell your agent what is his goal during each call

Convert leads into cust...

**Background**

Explain your agent's backg...

As a state-of-t...

**Script**

Toggle if you want your agent to follow a sales script, during the conversation

OFF

ON



Step #5

Develop Marketing and Outreach Strategies

# Execute **Targeted Campaigns** to Reach Your Ideal Clients

- ✓ **Content Marketing:**  
Develop and distribute content that addresses your audience's needs. Webinars, eBooks, and whitepapers can attract and educate prospects.
- ✓ **Attend Industry Events:**  
Network and promote your services at relevant events. Webinars, trade shows, and conferences are key opportunities.

*Target Ideal Active Customers*



Jeanne

outbound

**Agent type**

Select the type of agent you wanna use

Sales representative ▾

**Tone**

Select the tone of your agent

Professional

**Goal**

Tell your agent what is his goal during each call

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**Script**

Toggle if you want your agent to follow a sales script, during the conversation

OFF

ON

# Streamline **Client Onboarding** for a Smooth Start

- ✓ **Create Onboarding Materials:**  
Develop guides and resources to help clients understand your services. Include setup instructions, FAQs, and support contacts.
- ✓ **Use Welcome Emails:**  
Send personalized welcome emails to new clients. Outline next steps and set expectations.



*Initial Setup Integration & Onboard*

# Streamline **Client Onboarding** for a Smooth Start

- ✓ **Schedule Kickoff Meetings:**  
old initial meetings to discuss goals and timelines. Ensure alignment and clarity on objectives.
- ✓ **Provide Ongoing Support:**  
Offer continuous support to address any issues. Regular check-ins and a dedicated support team are essential.



*Initial Setup Integration & Onboard*





Step #7

Customize AI Voice Scripts for Clients

# Tailor **AI Voice Scripts** to Enhance Client Calls Interactions

- ✓ **Understand Client Needs:**  
Learn about each client's brand voice and customer interaction style. Conduct interviews and gather feedback.
- ✓ **Develop Personalized Scripts:**  
Create scripts that align with the client's branding and objectives. Focus on clarity, engagement, and conversion.

Hello and thank you for taking the time to speak with me today! My name is Thomas, your CallFluent AI assistant.



Who am I speaking to?



Hey, Thomas. This is Adrian.

Hey Adrian! How can I assist you today?



*Perfect AI-Voice Scripts*



Step #7

Customize AI Voice Scripts for Clients

# Tailor **AI Voice Scripts** to Enhance Client Calls Interactions

- ✓ **Test and Optimize:**  
Conduct test calls to refine scripts and improve performance. Use client feedback to make adjustments.
- ✓ **Utilize CallFluent AI:**  
Leverage CallFluent AI's tools to create and deploy scripts with zero coding. Highlight the efficiency and ease of use.

Hello and thank you for taking the time to speak with me today! My name is Thomas, your CallFluent AI assistant.



Who am I speaking to?



Hey, Thomas. This is Adrian.



Hey Adrian! How can I assist you today?



*Perfect AI-Voice Scripts*



Step #8

Monitor and Optimize Service Performance

# Implement Continuous Monitoring for Optimal Performance

- ✓ **Set Up Analytics:**  
Use CallFluent AI's analytics tools to track performance metrics. Monitor call quality, conversion rates, and customer satisfaction.
- ✓ **Regular Reviews:**  
Conduct regular performance reviews with clients. Discuss results and identify areas for improvement.

The screenshot displays the CallFluent AI interface. On the left, a list of call logs is visible, including entries for 'Nick Landing page' (outbound), 'AI' (completed), 'Ri' (completed), 'Ri' (completed), 'AI' (busy), 'AI' (completed), 'Rc' (no-answer), 'Rc' (no-answer), 'Fi' (completed), and 'Fi' (completed). On the right, a chat window is open for 'Nick Landing page'. The chat shows a conversation with 'Alex', an AI assistant. The chat history includes: 'Hey there, this is Nick, your callfluent AI assistant! Who am I speaking with?' (Agent), 'Hey, Nick. You're speaking with Alex.' (Alex), 'Hey Alex! How's it going today?' (Agent), 'All good, man. How are you?' (Alex), 'I'm doing great, thanks for asking! So, Alex, I'd love to learn a bit more about your business. What industry are you in?' (Agent), and 'That's awesome! How are you currently managing your customer support and sales calls?' (Agent). A blue banner at the bottom of the chat window reads 'Make Your Agent A Better Iteration'.

# Implement Continuous Monitoring for Optimal Performance

- ✓ **Optimize Based on Data:**  
Make data-driven adjustments to improve outcomes. Continuously refine scripts and processes.
- ✓ **Report Successes:**  
Share performance reports with clients to demonstrate value. Highlight key achievements and improvements.

The screenshot displays a customer support interface. On the left, a list of calls is shown with status indicators: 'outbound', 'completed', 'completed', 'completed', 'busy', 'completed', 'no-answer', 'no-answer', 'completed', and 'completed'. On the right, a detailed chat conversation is visible. The chat header shows 'Calls: 1826' and 'Avg call time: 1:07 min'. The chat content includes a greeting from the AI assistant, a response from the customer 'Alex', and a follow-up question from the AI assistant. A blue banner at the bottom of the chat area reads 'Make Your Agent A Better Iteration'.

Nick Landing page **outbound** Calls: 1826 Avg call time: 1:07 min

0:00 / 1:51 downloads

Call duration: 1:52min 15/05/2024

Hey there, this is Nick, your callfluent AI assistant! Who am I speaking with?

Agent

Hey, Nick. You're speaking with Alex.

Alex

Hey Alex! How's it going today?

Agent

All good, man. How are you?

Alex

I'm doing great, thanks for asking! So, Alex, I'd love to learn a bit more about your business. What industry are you in?

Agent

Alex

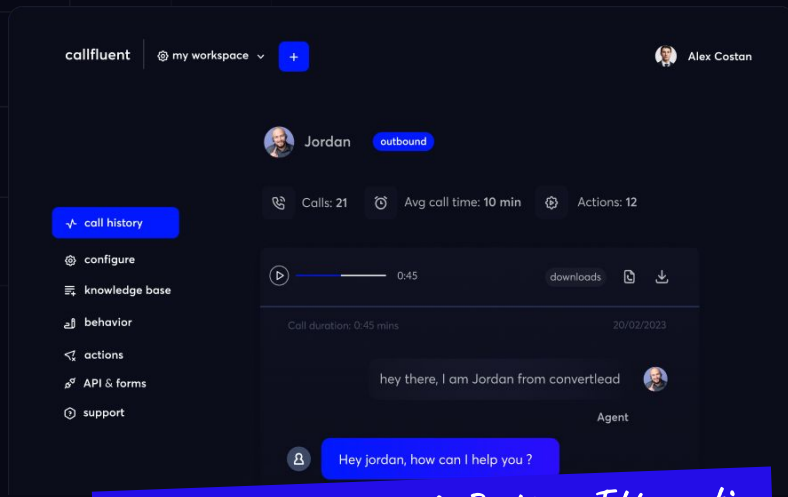
That's awesome! How are you currently managing your customer support and sales calls?

Agent

*Make Your Agent A Better Iteration*

# Ensure Client Success with Continuous Support and Education

- ✓ **Offer Continuous Training:**
  - Provide regular training sessions to keep clients updated. Introduce new features and best practices.
- ✓ **Dedicated Support Team:**
  - Maintain a support team to handle client inquiries. Ensure quick resolution of any issues.



*Make Your Agent A Better Iteration*



Step #9

Provide Ongoing Support and Training

# Ensure Client Success with Continuous Support and Education

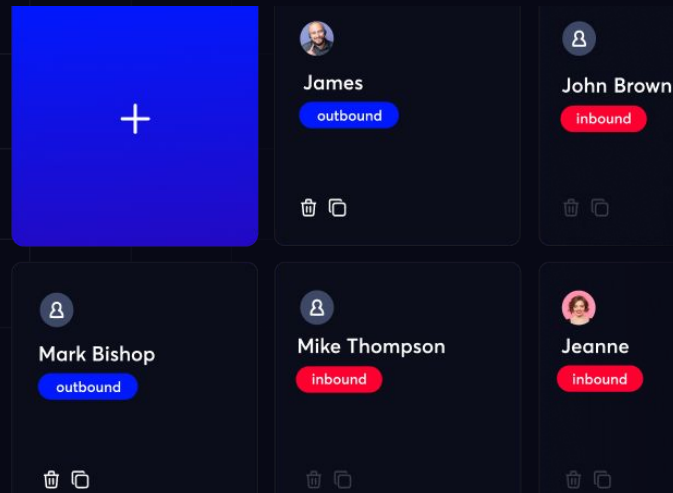
- ✓ **Create Resource Library:**
  - Develop a library of resources and guides.
  - Make it easy for clients to find information and troubleshoot.
- ✓ **Gather Feedback:**
  - Regularly solicit client feedback to improve your services. Use surveys and direct communication.

The screenshot displays the Callfluent interface. At the top, it shows 'callfluent' and 'my workspace'. A user profile for 'Alex Costan' is visible in the top right. Below this, a call log entry for 'Jordan' is shown with a status of 'outbound'. The call log includes statistics: 'Calls: 21', 'Avg call time: 10 min', and 'Actions: 12'. A 'call history' button is highlighted. Below the call log, there are several menu items: 'configure', 'knowledge base', 'behavior', 'actions', 'API & forms', and 'support'. The main area shows a call transcript for a call on 20/02/2023. The transcript includes a play button, a progress bar at 0:45, and a 'downloads' button. The transcript text reads: 'Call duration: 0:45 mins' and '20/02/2023'. Below the transcript, there is a chat window with a message from 'Agent': 'hey there, I am Jordan from convertlead'. A response bubble from the user says: 'Hey jordan, how can I help you ?'.

*Make Your Agent A Better Iteration*

# Grow and **Diversify Your Offerings** for Long-Term Success

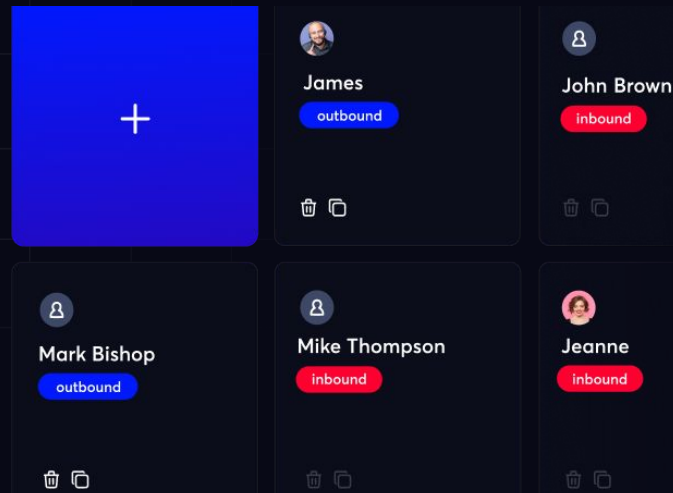
- ✓ **Assess Scalability:**  
Evaluate how well your services can scale to new markets and clients. Identify potential challenges and solutions.
- ✓ **Expand to New Markets:**  
Look for opportunities to offer services in new regions or industries. Conduct market research to guide expansion.



*Multiply Your Clients & Services*

# Grow and **Diversify Your Offerings** for Long-Term Success

- ✓ **Innovate Continuously:**  
Keep updating and diversifying your service offerings. Stay ahead of industry trends and client needs.
- ✓ **Develop a Long-Term Strategy:**  
Create a strategic plan for sustained growth and innovation. Set clear goals and milestones.



*Multiply Your Clients & Services*



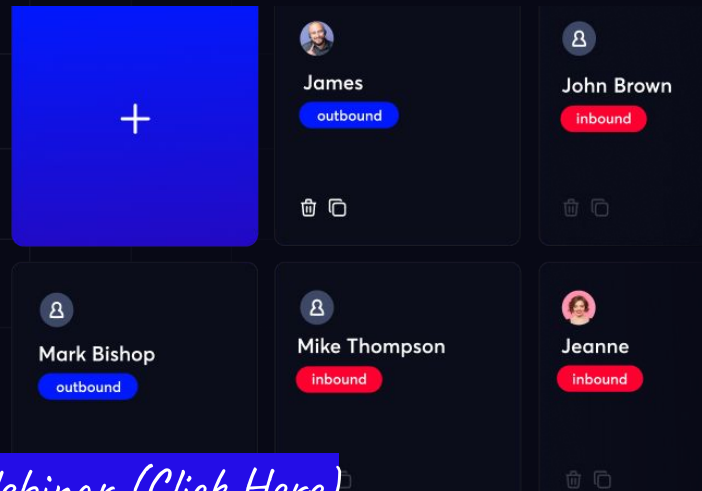


# The **HOTTEST** Service In Marketing Industry!

Implementing AI-powered voice calling services using CallFluent AI can significantly enhance a local business's efficiency and profitability.

- ✓ **Follow This Expert Checklist**  
All Marketing agency owners can ensure a smooth and successful integration, delivering outstanding results for their clients.

- ✓ **Register To Our Expert Webinar Session**  
Jump-Start Your Journey Into AI-Powered Phone Calling Agent Profits by simply joining our expert webinar Sessions!



Register Here:

[RSVP Your Seat to Free Training Webinar \(Click Here\)](https://callfluent.com/workshop-invite)

<https://callfluent.com/workshop-invite>



Now Picture This

# Your Business's phone lines are **ALWAYS ANSWERED**

*—all because you embraced AI-powered phone call agents*



every call is handled  
with precision.



Your team is free to focus  
on high-value tasks



You are seeing  
your agency profits soar

*This is not some distant dream; it's a reality businesses can benefit Today*



# INTRODUCING



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## Traditional costly phone agents

- Lack of 24/7 Availability
- High Operational Costs
- Missed Sales Opportunities
- Inconsistent Customer Experience

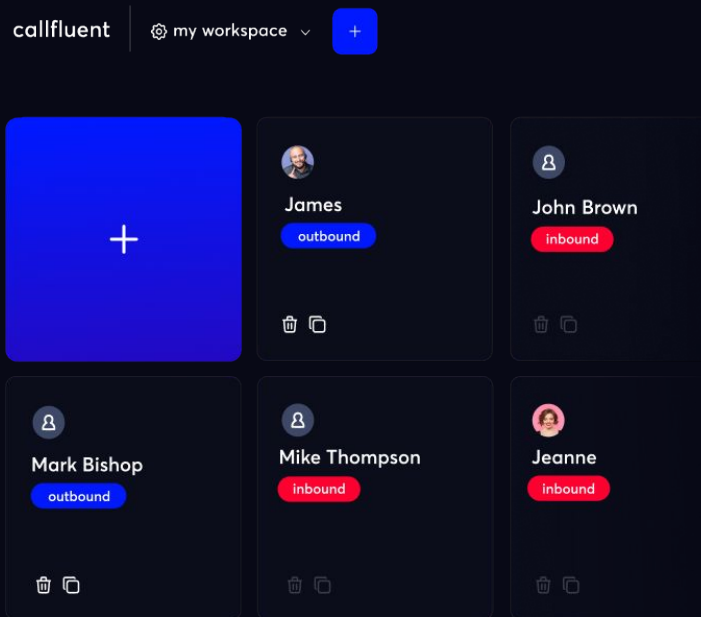
## Human-like AI phone agents

- 24/7/365 Availability
- Cost-Effective Solution
- Maximized Sales Opportunities
- Consistent, High-Quality Interactions

# AI Calls In Action:

Handling Complex Customer Interaction **Day & Night** Seamlessly

- ✓ **Automate Call Handling:** AI agents can handle 100% of calls, ensuring no missed opportunities and freeing up human agents to focus on high-value tasks."
- ✓ **24/7 Availability:** AI-driven agents provide round-the-clock service, capturing leads and closing sales at any hour, ensuring continuous revenue generation.
- ✓ **Reduce Operational Costs:** Significantly lower costs by reducing the need for a large sales and support team. AI agents require no salaries, training, or overhead.



*Your AI Dedicated Call Center!*



# The Ultimate Solution: AI Sales & Support Team Working 24/7



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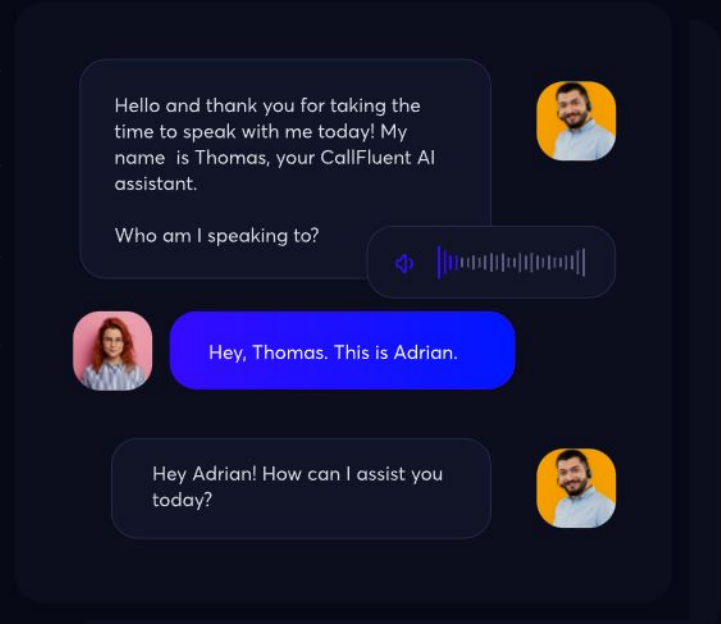
- ✓ Automate Lead Qualification & Follow-ups
- ✓ No more \$100,000/month High Salaries
- ✓ No more Spendings in Training Agents
- ✓ Consistent and personalized interactions
- ✓ Close more deals faster Day & Night!

The screenshot shows the configuration interface for an AI agent named 'Jeanne'. At the top left is a profile picture of a woman and the name 'Jeanne' next to a blue 'outbound' button. Below this are four configuration sections: 'Agent type' with a dropdown menu set to 'Sales representative', 'Tone' with a button set to 'Professional', 'Goal' with a dropdown menu set to 'Convert leads into cust...', and 'Background' with a dropdown menu set to 'As a state-of-t...'. At the bottom right, there is a 'Script' section with a toggle switch set to 'ON'. A red banner at the bottom of the screenshot contains the text 'AI-Driven Sales & Support Team'.



# Is The Complete AI-powered Call Handling Solution for your Business.

- ✓ Automate All Inbound & Outbound Calls
- ✓ Enhanced Human-Like AI Interactions
- ✓ Captures Every Revenue Opportunity
- ✓ Operates 24/7 Without Additional Costs!
- ✓ Schedule Appointments & Calendar Bookings!





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# Let's Take a Deep Dive Into The UNPARALLELED **FEATURES & WORKFLOWS**



Use **1-click recordings** to capture and store every interaction.

Male - Friendly and ... ▾

Select from diverse **lifelike voices** to enhance customer engagement

My workspace ▾



Collaborate effectively with **workspaces & team members**

John Doe

Outbound ▾

Create agents for both **incoming and outgoing calls** with 1 click



send SMS



Instantly **send SMS messages** to customers during phone calls.



forward call



**Forward ongoing calls** to relevant team members or departments.



data to zapier



Gather customer data during calls and automatically send it to **Zapier & Webhooks**.



send email



Seamlessly **send emails** while on a call to provide detailed information or follow-up instructions.



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# Supercharge Your **Outbound Sales** Calls

**Increase your reach and close more deals effortlessly.**

- ✓ Automated Lead Outreach 24/7 - Never Miss a Sale
- ✓ Increase Conversion Rates with timely follow-up calls
- ✓ Personalized Call Scripts for Audience Segments
- ✓ Gain Valuable Insights & Data from Call Analytics
- ✓ Scale Your Cold Calling To Thousands of Prospects

The screenshot shows the configuration interface for an agent named Jeanne. At the top, there is a profile picture of Jeanne and a blue button labeled "outbound". Below this, there are four main configuration sections:

- Agent type:** Select the type of agent you wanna use. A dropdown menu is set to "Sales representative".
- Tone:** Select the tone of your agent. A button labeled "Professional" is selected.
- Goal:** Tell your agent what is his goal during each call. A button labeled "Convert leads into cust..." is selected.
- Background:** Explain your agent's backg... A button labeled "As a state-of-t..." is selected.

At the bottom, there is a **Script** section with the text "Toggle if you want your agent to follow a sales script during the conversation" and a toggle switch that is currently turned **ON**.





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# Revolutionize Inbound Support Calls

Handle customer inquiries with ease and provide exceptional support

- ✓ AI-Driven Smart Conversational Support Agents
- ✓ Instant Answers To Common Customer Questions
- ✓ 24/7 availability for uninterrupted phone support
- ✓ Consistent & Emphatic customer interactions
- ✓ Automating Ticket Opening & Call Forwarding

Hello and thank you for taking the time to speak with me today! My name is Thomas, your CallFluent AI assistant.



Who am I speaking to?



Hey, Thomas. This is Adrian.

Hey Adrian! How can I assist you today?





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# Effortless Smart Calendar Booking

Automate appointment scheduling and never miss an meeting again .

- ✓ AI-assisted scheduling for convenience
- ✓ Automated reminders to reduce no-shows
- ✓ Integration with popular calendar apps
- ✓ Real-time availability checking
- ✓ In-call Appointment Booking Confirmation & SMS





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# Support For Over **30+ Languages**



## Communicate effectively with clients worldwide - extensive languages

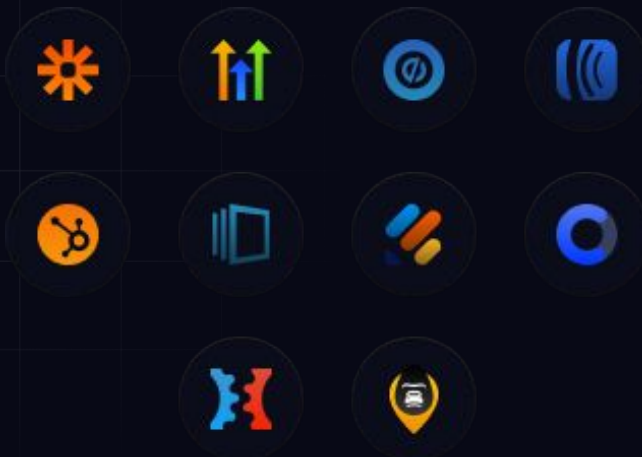
- ✓ AI-powered voice agents fluent in over 30 languages
- ✓ Tailored communication for global markets
- ✓ Seamless switching between languages during calls
- ✓ Natural-sounding speech in multiple languages
- ✓ Expand your reach and customer base internationally



# Seamless Integration with 3000+ Apps

**Connect with your favorite tools to streamline workflows.**

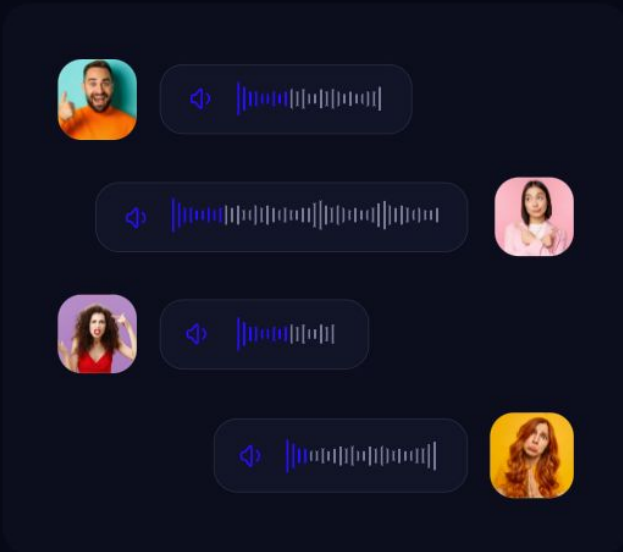
- ✓ Integration with CRMs, ERPs, CSX and more
- ✓ Automated data sync across platforms
- ✓ Customizable workflows through Zapier or Make
- ✓ Trigger actions based on call events
- ✓ Expand capabilities with third-party apps





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# Gather Valuable **Customer Feedback**



## Collect actionable feedback effortlessly to improve your services

- ✓ Automated post-call Transcriptions and Summary
- ✓ Sentiment analysis for deeper insights
- ✓ Integration with feedback platforms
- ✓ Comprehensive reporting on customer satisfaction
- ✓ Initiate Automated follow-up calls Automations.

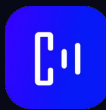


# Eliminate **Wait Times** During Peak Hours

**Ensure your customers never wait in line, even during the busiest times.**

- ✓ Exceed customer experience with ZERO wait time
- ✓ Instant Answers To Common Customer Questions
- ✓ 24/7 availability for uninterrupted phone support
- ✓ Consistent & Emphatic customer interactions
- ✓ Automating Ticket Opening & Call Forwarding





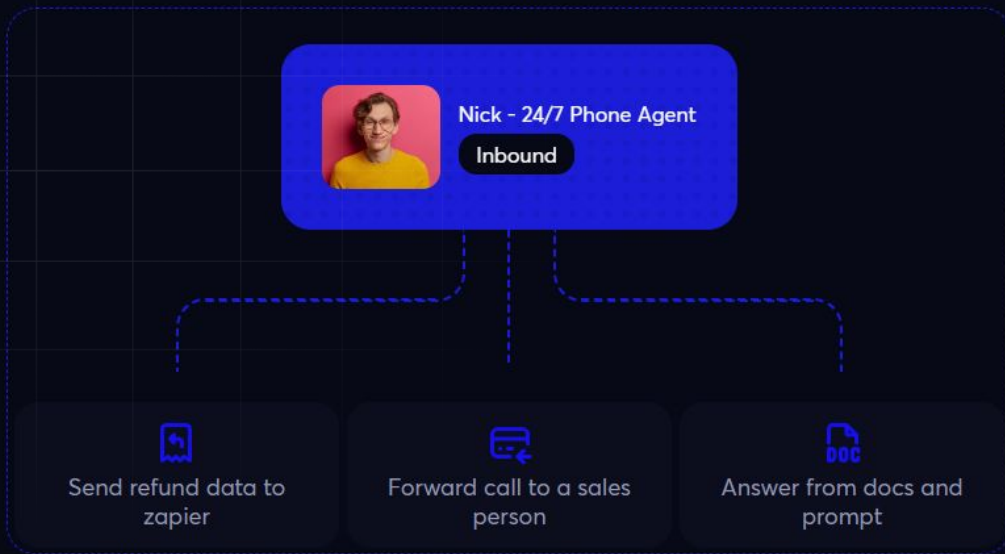
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# Integrations And Implementation

## Integration Process with Existing Systems:

CallFluent AI seamlessly integrates with your existing infrastructure, ensuring a smooth transition to AI-powered call handling.

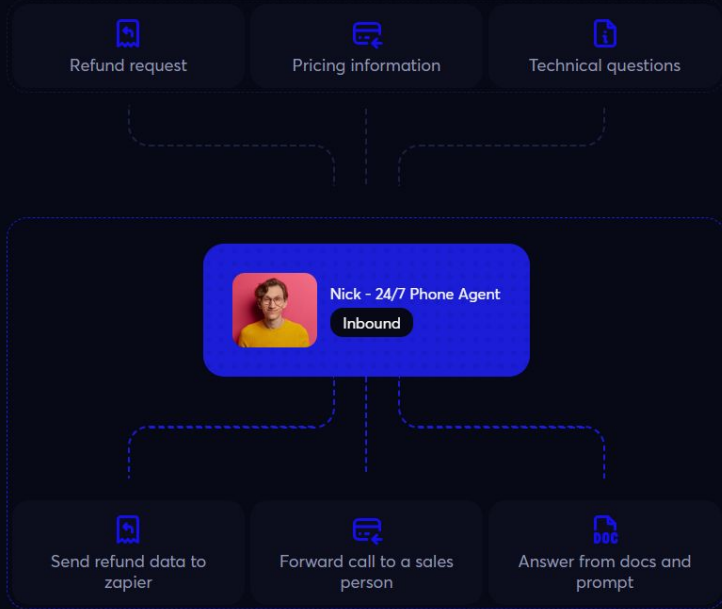
Our platform is designed to work with a wide range of CRM, ERP, and customer support systems.





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# Integrations And Implementation



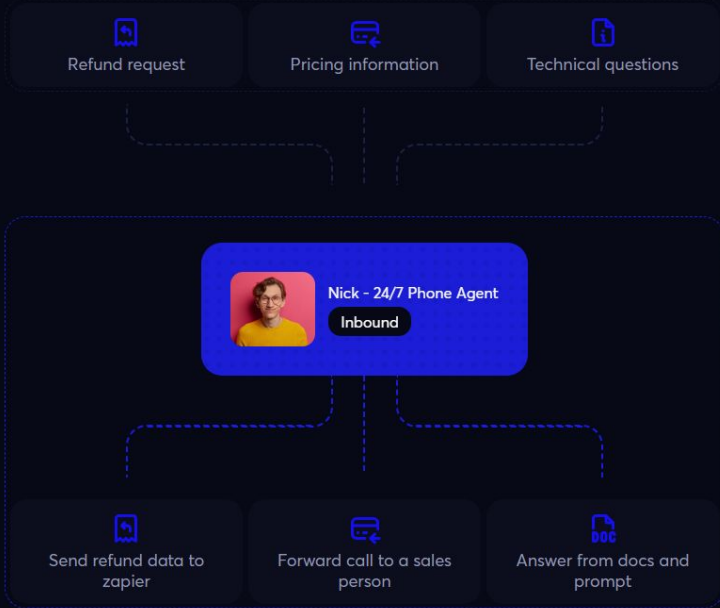
## Implementation and Customization

- ✓ **Quick Setup:** Our intuitive setup process ensures minimal disruption to your current operations.
- ✓ **Customizable AI Agents:** Tailor our AI agents to meet your specific business needs. Customize call scripts, workflows, and responses to align with your brand.
- ✓ **Scalable Solutions:** Whether you're a mid-size company or a large enterprise, our solutions scale with your business, accommodating increasing call volumes and complexity.





# Integrations And **Implementation**



## Training & Onboarding Process

- ✓ **White-Glove Onboarding:** Our dedicated onboarding team will guide you through the entire setup process, ensuring everything is configured to your satisfaction.
- ✓ **Comprehensive Training:** Receive detailed training for your team on how to leverage CallFluent AI to its full potential.
- ✓ **Ongoing Support:** Benefit from continuous support and updates. Our customer success team is always available to assist you with any questions or issues you may encounter



# Welcome to the **Future** Of AI-Powered Support & Sales Team!

*Welcome to CallFluent AI!*

*RSVP Your Seat to Free Expert Training Webinar (Click Here)*

<https://callfluent.com/workshop-invite>