UNDISCOVERED PROFITS

Undiscovered Profits : Pay Per call Mastery

First edition

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PPC Fundamentals & Business Models

S1. Definitions — Pay-Per-Call (PPCall)

This course is about Pay-Per-Call. In every chapter, when you see "PPC" or "PPCall," we mean Pay-Per-Call, not pay-per-click advertising. In this section we fix the vocabulary and set the ground rules so buyers, networks, and publishers talk the same language and avoid disputes later.

What "Pay-Per-Call" Means

In Pay-Per-Call, the product you sell is **a live phone call session** that reaches a buyer's phone system and meets agreed-upon rules. Those rules decide whether the call is **qualified** (billable) or **non-qualified** (not billable). You are not selling a spreadsheet of emails and phone numbers. You are not selling a warm agent-to-agent handoff. You are selling **time on the line** with a real consumer who matches the buyer's filters.

Think of it this way: a prospect sees an ad or page, taps the number, passes through your phone system (often with a short menu), and is routed to the buyer. If the call meets the pre-defined criteria, the buyer pays a fixed amount per qualified call.

The Parties and Their Responsibilities

There are three roles you will work with again and again.

Publisher (you). You attract the consumer, provide the tracking numbers, handle any IVR (phone menu), and route calls to the right buyer. You must also keep evidence that proves the call quality and the consumer's path (logs, recordings, metadata).

Buyer (advertiser/brand). The buyer answers the calls, serves the consumer, and pays for calls that meet the definition of a qualified call. They set filters (for example, geography, language, product eligibility, open hours) and they agree to acceptance and refund terms with you in writing.

Network or Platform (sometimes). Some deals go through a PPCall network. The network provides offers, insertion orders (IOs), routing technology, and payment operations. Even if a network is involved, your day-to-day success still depends on how precisely you define a qualified call and how you manage your traffic and telephony.

The Billable Event: "Qualified Call"

Everything revolves around a single idea: **the call only becomes billable when it satisfies the qualified-call definition in your IO or master services agreement.** Do not leave this definition vague. Write it in plain language and keep it short enough that a new agent can understand it.

A solid qualified-call definition usually covers five dimensions:

Time on the line. Most buyers use a duration threshold measured **after** the call is connected to the buyer (for example, at least 60, 90, or 120 seconds). This protects both sides from wrong numbers and instant hang-ups. Longer thresholds typically justify higher payouts.

Fit and intent. The caller must match the buyer's targeting: the right product category and any must-have qualifiers (for example, "homeowner," "Medicare-eligible," "in market for auto insurance," "debt amount above $10,000"). Light filtering can happen in your IVR ("Press 1 if you're a homeowner") or via a short agent screen if your model includes a pre-qual step before routing.

Geography. Calls need to come from allowed regions. That can be defined by the caller's number (ANI area code), by an IVR-captured ZIP code, or by other data you collect. If only certain states or postal codes are valuable, say so in the IO.

Uniqueness. Buyers usually do not want to pay for the same person multiple times in a short window. State how repeat callers are handled—billable once per campaign, or once per 7/14/30 days, for example.

Operating hours. If the buyer answers calls only during specific hours, decide what happens outside those hours. You can route to a backup buyer, send to voicemail (often non-billable), or provide a callback option with different rules. Whatever you choose, write it down.

When those criteria are met, the call is "accepted." If they are not, the call is "non-qualified." In later sections you will formalize refunds and make-goods, but at the definition stage you just need to be unambiguous about what "counts."

How a PPCall Session Flows

Let's describe the journey in simple steps, without jargon. A consumer has a problem and sees your message—an ad, a map listing, a landing page, or even a QR code. They tap to call. The number they dial is a **tracking number** (also called a DID) that you control. Your system can ask one or two quick questions in an IVR to make sure the call belongs to this buyer. Then the call connects to the buyer's phone system or call center. A timer runs only after the connection to the buyer. If the conversation continues long enough and the caller fits the agreed filters, the call logs as qualified and becomes payable.

Two details make this flow reliable over time. First, your routing logic should send calls only to buyers who are open and ready to answer; unanswered calls create frustration and disputes. Second, your data layer—call detail records, IVR selections, recordings—must be complete and easy to export, because this is the proof that resolves any disagreement.

What Pay-Per-Call Is Not (Brief Clarifications)

You will hear adjacent terms. It helps to anchor them so you can politely redirect conversations back to the PPCall model.

Not a lead file. In a lead sale you deliver contact records and the buyer does the calling later. In PPCall you deliver a live conversation now. If someone asks you to email yesterday's callers, they are asking for a different product.

Not a live (warm) transfer. A live transfer is a handoff from your agent to the buyer's agent while both are on the line. Pay-Per-Call does not require your agent to stay on the call; the consumer can be moved by IVR directly to the buyer. Some PPCall campaigns include a brief agent screen before routing, but the acceptance metric remains a qualified call, not an agent-to-agent handoff.

Keeping these boundaries clear protects your margins and your relationships. If a buyer really wants live transfers, scope that as a different product with different pricing and acceptance rules.

Evidence and Attribution: How You Prove a Call Qualified

Good PPCall operations feel smooth because the data is organized. Every call should produce a small, trustworthy dossier. At minimum you need the caller number (ANI), time stamps for each leg of the call, the IVR path or answers, the buyer destination that received the call, the duration after connection, and a recording. Many platforms also attach UTM parameters from the landing page and a session or click ID, so you can tie the call back to the traffic source.

Keep this evidence for the full dispute window you've agreed to with the buyer or network. When questions come—"This caller was out of state," "This was a duplicate"—you will resolve them in minutes, not days, because you can pull a recording and a clear log.

A Working Definition You Can Reuse

Here is plain language you can adapt. Notice how each element maps to the five dimensions above.

"A **qualified call** is an inbound consumer call routed by Publisher to Buyer's number that (1) lasts at least **120 seconds** after connection to Buyer, (2) originates from consumers in **Texas, Florida, or Georgia**, (3) concerns **Medicare plan review** as indicated by IVR responses, and (4) is **unique** per caller for **14 days**. Calls outside Buyer's business hours or failing these criteria are not billable."

For a different niche, the same structure holds:

"A **qualified call** is an inbound call seeking **auto insurance quotes**, connected to Buyer and lasting **90 seconds** or more post-connect, with callers located in the **state of Illinois**. Repeat callers within **30 days** or calls outside Buyer's posted hours are not billable."

Write it simply; avoid hidden conditions. If you need an exception, add a sentence rather than clever legal phrasing.

Edge Cases You Should Anticipate (Explained, Not Listed)

Some calls are short because an agent transferred internally, placed the consumer on hold, or the buyer's phone system failed. Decide early how those situations are handled. Many teams agree that system failures on the buyer side should not penalize the publisher, while true consumer hang-ups remain non-qualified. Another common edge case is multilingual traffic. If the buyer cannot serve Spanish-speaking callers, include that in the definition or route those calls to a different buyer who can. Lastly, think about repeat intent: a consumer might call again after gathering documents. If your uniqueness window is too long, you may block real demand; if it is too short, you may flood the buyer with the same prospect. Tune the window to the sales cycle of the niche.

Language for International Buyers

If you work across countries, convert "states" to "regions/provinces," and replace "ZIP code" with the local postal code term. Spell out time zones explicitly ("9:00–18:00 Central Time" or "09:00–18:00 GMT+1") and keep numbers in ISO date and time formats when you write IOs. Simple, universal phrasing reduces confusion and keeps your acceptance rate predictable.

S2. Payout Types & Net Terms (Duration, Accepted, Per Transfer)

This chapter explains **how money changes hands in Pay-Per-Call**. You will learn the three common ways a call becomes payable and the timing rules that decide when you get paid. Keep the language simple in your contracts and you will prevent most disputes before they start.

The Purpose of a Payout Definition

A payout definition answers one question: **when does an inbound call become billable?** In Pay-Per-Call (PPCall), you are not selling a lead file or a warm agent-to-agent handoff. You are selling a **live phone session** that meets clear rules. Those rules are your "qualified call" definition from S1. Now we attach a price to that event and decide when funds are released.

There are three practical payout styles in PPCall: **duration-based**, **accepted-call**, and **per transfer** (meaning "per connected handoff" inside a PPCall flow, not the separate live-transfer product). Many campaigns mix elements of these, but each one has a different risk split between you and the buyer.

Duration-Based Payouts

In a duration-based model, a call is payable when it reaches a **minimum talk-time** after connection to the buyer. The timer should start **only when the buyer's system actually answers**. Ring time and your IVR do not count. This keeps things fair: if a consumer hangs up during ringing, nobody pays; if the buyer answers and has a real conversation, you get paid.

Duration thresholds are usually **60, 90, 120, or 180 seconds**. Higher thresholds normally come with higher prices because short wrong-number calls are filtered out before billing. Some buyers prefer **tiered payouts**. For example, a call might pay a small amount if it lasts 30–59 seconds, a standard amount at 60–119 seconds, and a premium amount at 120 seconds or more. Tiering can stabilize cash flow while you test traffic, because not every legitimate inquiry needs two full minutes to prove intent.

Two details prevent disagreements. First, define precisely **where the platform measures time**: "post-connect talk-time to Buyer," not "total call length." Second, state how **internal transfers inside the buyer** are treated. If their IVR answers and then moves the caller to an agent, the clock should continue. If their system plays a long hold message, the clock should still run, or you will be punished for their queue delays.

Duration models work best for **urgent, short-cycle** services—insurance quotes, home services, travel bookings—where real buyers can qualify a caller quickly. They are also easy for networks to standardize, which is why you see them often in public offers.

Accepted-Call Payouts

In an accepted-call model, the buyer pays only when they **accept** the call according to written criteria. Duration may exist, but acceptance is the gate. The criteria should be the same elements you defined in S1: correct geography, product fit, language, uniqueness window, and hours. The difference is **who decides**. With duration billing, the platform decides automatically with a timer. With acceptance billing, the buyer (or the network) reviews and marks each call "accepted" or "returned."

This model shifts more quality risk to the publisher, so you must demand **tight, objective reasons** for returns. "Not interested" after a two-minute conversation is not a valid return unless you both agreed to that. "Out of state," "duplicate within 14 days," or "under 65 for Medicare" are valid if they are written in the insertion order. To keep cash moving, many teams use **auto-accept after X days**: if the buyer does not review within, say, five business days, the call becomes accepted by default.

Accepted-call payouts fit **niches with strict qualifiers** or compliance sensitivity—certain legal intakes, healthcare, or finance—where a timer alone does not guarantee value. They also help in multi-state campaigns where geography errors can be expensive. The trade-off is slower reconciliation unless you enforce clear review windows.

"Per Transfer" Inside PPCall (Not Live Transfers)

The phrase "per transfer" confuses many teams, because it sounds like live (warm) transfers. In this course we stay inside **PPCall**. Here, "per transfer" means you are paid each time your system **successfully connects** a caller to the buyer's destination—**a bridge event**—often with a **very short confirmation window** (for example, at least 15–30 seconds connected to a live endpoint rather than voicemail). You are not staying on the line to introduce the caller; you are proving that your platform delivered a real person to a real agent.

This payout style is useful when a buyer's agents pick up very fast and close quickly, and when both sides want to keep the definition simple. It does require strict handling of **voicemail, busy signals, and IVR loops**. Your contract should clarify that a "transfer" means a connection to a live queue or agent, not a voicemail inbox, and that the platform excludes obvious system failures or carrier errors.

Per-transfer PPCall payouts are common in **high-volume routing** setups with many buyers and dynamic rules. They let you monetize more of the short but valid inquiries that do not need a long timer. Prices are usually lower than duration-based payouts of 90–180 seconds, because the buyer is accepting a wider range of call lengths.

Hybrid Structures and Quality Guards

Real campaigns often blend the ideas above. A common hybrid is **duration with limited return reasons**: once a call hits 90 seconds post-connect, it is auto-accepted unless it violates a small list of objective rules (wrong state, repeat within 14 days, prohibited product). Another hybrid is **per transfer with a micro-duration**: transfers that drop in under 20 seconds are non-billable; everything above that is payable. You will also see **quality bonuses** (for example, extra $5 for calls over 5 minutes) or **seasonal tiers** to match staffing.

Whatever you choose, remember the rule of thumb: **timers prevent disputes; acceptance lists resolve edge cases.** Keep both short and precise.

Net Terms: When You Actually Get Paid

"Net terms" describe **when funds are due** after the billable event. The two clocks you must define are **what starts the clock** and **how long it runs**.

There are two common start points:

1. **Net X from acceptance.** The clock starts when the call status becomes "accepted." If you use auto-accept after five days, a call on September 1st that is not reviewed becomes accepted on September 6th; **Net-15** would pay on September 21st.
2.
3. **Net X from invoice period close.** The clock starts when a weekly or monthly invoice is issued. In this case, the cut-off day matters. For example, a weekly cycle closing each Sunday might pay the following Friday (effectively Net-5 to Net-7).
4.

Shorter nets reduce your financing cost; longer nets increase buyer comfort. **Net-7 and Net-15** are common with networks. **Net-30 or Net-45** appear with new direct buyers who need internal approvals. If you are taking real traffic risk, ask for **pre-funded credit** or a **deposit** for the first week, then migrate to standard net terms after performance is proven.

Two more mechanics keep cash predictable:

Holdbacks and thresholds. A buyer or network may hold a small percentage (for example, 10%) as a reserve until the dispute window closes, or require a minimum payout amount before wiring. Reserves should be time-boxed ("released after 30 days").

Currency, fees, and time zones. Write the settlement currency, who pays bank fees, and which time zone controls the cut-off. Many arguments start here, not in quality.

Cash-Flow Timeline (A Simple Example)

Imagine you launch a PPCall insurance campaign on **September 1** with these terms:

- Payout: **$45 per qualified call** at **90-second** post-connect duration.
- Acceptance: auto-accept after **5 business days** unless returned for "out of state" or "duplicate within 14 days."
- Net terms: **Net-15 from acceptance.**
- Cycle: weekly invoice closing Sundays, New York time.

A call arrives and hits 90 seconds on **Wednesday, September 3**. The buyer does not return it by **Wednesday, September 10**. It auto-accepts that day. Your Net-15 puts the due date on **Thursday, September 25**. If the network wires only on Fridays, you likely see funds on **September 26**. That single paragraph in your IO turns a vague promise into a date you can plan around.

Protecting Yourself When You Extend Credit

As soon as you send calls before receiving money, you are extending credit. Protect it with **caps and credit checks**. Set a daily or weekly cap for new buyers until they build a payment history. If a buyer wants high volume from day one, ask for a **prepayment** or an **escrow balance** equal to several days of expected spend. For networks, ask how they fund publisher payments if an advertiser is late; some pay publishers on time regardless, others pass through the delay.

When a payment is late, be specific and calm. Send a reconciliation with call IDs, dates, and amounts due. Most delays are operational. If the issue is cash, reduce caps until the account is current. You are running a business, not a bank.

Writing It Down: Clean, Re-usable Clauses

Clear writing prevents grey areas. Here are two short models you can adapt.

Duration-based.

"Publisher will be paid **USD $45 per qualified call**. A qualified call is an inbound consumer call connected to Buyer and lasting **≥ 90 seconds post-connect**. Time prior to Buyer connection (ring/IVR) does not count. Calls are **auto-accepted after 5 business days** unless returned for **out-of-state** or **duplicate within 14 days**. Payment terms are **Net-15 from acceptance**; settlement currency **USD**; bank fees paid by Buyer."

Per transfer (PPCall).

"Publisher will be paid **USD $28 per connected transfer**. A connected transfer occurs when a live consumer is bridged to Buyer's agent or live queue and remains connected **≥ 20 seconds**. Voicemail and system errors are excluded. Duplicate callers within **14 days** are non-billable. Calls not reviewed within **5 business days** are deemed accepted. Payment terms **weekly, Net-7 from week close**, New York time."

Keep the language short. Avoid hidden "gotchas." If a rule matters, write it in plain English.

How Payout Style Changes Your Operations

Your payout definition influences **everything** you build next. Duration-based campaigns push you to optimize IVR paths and staffing so more calls cross the timer. Accepted-call campaigns push you to improve geography and qualifier accuracy so fewer calls are returned. Per-transfer campaigns reward tight carrier monitoring and live-answer detection, because every successful bridge is revenue.

There is no single "best" payout style. Pick the one that matches your **traffic source**, your **routing stack**, and your **buyer's process**. If you are new to a vertical, start with a **simple duration threshold** and a **short list of return reasons**, then adjust once you see real conversations and hear real objections.

S3. Acceptance & refund mechanics (and what controls them)

What "accepted" means in pay-per-call.

In pay-per-call (PPCall), you get paid when a call meets the buyer's *qualified* criteria. Those criteria are agreed up front (insertion order, offer page, or network dashboard) and typically include: a minimum **connected duration** (e.g., 60/90/120 seconds), approved **geography**, **business hours**, and caller **intent** (e.g., residential HVAC vs. commercial). Most buyers count only the time after the agent answers—called *connected duration*—not time spent in your IVR. Platforms like Invoca track both *Total Duration* (includes IVR) and *Connected Duration* (agent talk time) so everyone can see exactly what qualifies the call. Invoca Developer Portal

Common non-payable calls.

Across networks and direct buyers, the most frequent exclusions are unanswered/abandoned calls, repeat callers within a cool-off window, out-of-region calls, after-hours calls, and callers who self-disqualify in IVR (e.g., choose "commercial" when the buyer only accepts "residential"). Invoca's reporting explicitly flags *repeat callers* and shows *payin/payout conditions* so you can see which rule blocked payment; buyers often set conditions like "duration > 90 seconds AND in_region." Invoca Developer Portal

Networks also publish plain-language versions of these rules. For example, Soleo's overview calls out the "qualified if duration + business-hours + category fit" pattern, and their vertical pages note typical durations (e.g., dental often 30–90 seconds). Soleo+1

Acceptance and return states—real network example.

Marketcall labels each call with a state. "Non-qualified" means the call didn't meet payout conditions; "Refused" means the merchant or QA denied it; neither is billed. They also provide a dispute flow with a clear window—affiliates can *appeal within two days* of status assignment from inside the dashboard. This is a concrete example of how return windows work in practice. MarketcallMarketcall Help Center

How acceptance is actually measured (and why it matters).

Because *connected duration* is the gate for many offers, you should design your IVR to gather only what is necessary to route the call, then connect quickly. Long menus depress connected talk time and can turn a 95-second total call into a 45-second connected call that misses payout. Invoca's field definitions make the distinction explicit—*duration* includes IVR time; *connect_duration* is what most buyers pay on. Build scorecards and QA around *connect_duration* to align your scripting and routing with buyer rules. Invoca Developer Portal

Refund/chargeback mechanics.

Refunds (or "returns") occur when a call was initially marked payable but later fails buyer QA (e.g., wrong geo, under-age for a Medicare offer, duplicate customer). The mechanics vary by partner, but you'll commonly see: (1) a defined review period; (2) specific evidence requirements (recordings, IVR keypress, agent notes); and (3) an appeal path. Again, Marketcall's two-day appeal window is a useful benchmark; other partners use different windows but the process—submit the call ID and evidence via dashboard—tends to look similar. Marketcall Help Center

What controls acceptance (and what you can tune):

- **Traffic intent & targeting.** Sources with high intent (search, map-based queries) produce longer connected talk time. Make sure your media only targets the geos and categories the buyer accepts (e.g., "furnace repair near me" to residential HVAC in allowed ZIPs). Buyer business-hour settings in PPCall platforms help enforce time windows. Soleo
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- **IVR design.** Use just-enough branching to (a) confirm the service type, (b) capture a ZIP, and (c) route to the correct buyer immediately. Every extra prompt risks shrinking *connected duration*. Invoca's reports even store IVR keypresses so you can prove intent on disputes. Invoca Developer Portal
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- **Answer rates & call identity.** If the buyer doesn't pick up, nobody gets paid. STIR/SHAKEN caller-ID authentication and branded calling can materially lift answer rates; the FCC mandates STIR/SHAKEN deployment, and multiple telecom studies report answer-rate increases when calls are authenticated and branded. Federal Communications CommissionTransNexusTNS
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- **Agent handling.** Scripted qualification within the first minute—right after connection—prevents wasted talk time and supports acceptance on duration-based offers (see S7 for scripting).
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- **Routing logic.** Ensure geo and schedule filters run *before* you ring the buyer to avoid quick refusals and returns.
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Quick scenario.

You promote "AC repair—same day" for one metro. Your IVR asks: "Residential or commercial?" → "Enter ZIP." Calls with "residential" + in-metro ZIP route to Buyer A; "commercial" goes to Buyer B. After 10 days, your *connected duration* is 92 seconds median and acceptance is 83%. You notice many short calls from a neighboring area—expand geo *only* after adding a second buyer who wants that area. You track acceptance by *payout_conditions* in your call logs to see which rule gate causes most denials. Invoca Developer Po

S4. Choosing your first vertical & model

Start where the phone is already the natural next step.

Your first wins usually come from "urgent-need" or "high-consideration" services where people *want* to talk to a human: home services (HVAC, plumbing, pest), insurance, health appointments, legal intake. Industry guides from Invoca and others consistently highlight these categories because inbound calls convert well and buyers know how to staff for them. InvocaSoleo

Reality-check the rules before you launch.

Each vertical has its own acceptance logic and seasonality:

- **Home services (HVAC, plumbing).** Easy qualifiers (residential, ZIP code), clear business hours, strong local intent. Seasonality is real: demand spikes during weather extremes and shoulder-season maintenance pushes; multiple datasets show peaks outside the obvious mid-summer window too (e.g., fall tune-ups). That makes dayparting and geo routing simple for a first-timer. Franchising.com Samsara

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- **Healthcare & insurance.** Excellent payouts but heavier compliance. Medicare calls cluster around **AEP, October 15–December 7**, and marketing has strict CMS rules (e.g., required TPMO disclaimer on *sales* calls and materials). If you're new, either partner with a network that manages compliance or start with simpler health appointment categories. MedicareCenters for Medicare & Medicaid Services
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- **Legal.** High ticket but stringent intake rules and potential for long QA review windows. New buyers should have crystal-clear acceptance definitions (case type, state, incident date windows, etc.).
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Pick a *model* that matches your risk tolerance.

- **Duration-based accepted call.** You're paid when connected talk time crosses the threshold (e.g., 60/90/120s) and other conditions are met. This is the most common entry point and it's easy to optimize toward because *connected duration* is visible in every call log. Guides and network docs frequently cite these thresholds, and some verticals (e.g., dental) accept as low as 30s, which lowers risk on new tests. resources.callthread.comSoleo
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- **Per-transfer (warm transfer).** You connect the caller to a buyer and get paid per successful transfer. Great if your team can do fast pre-qual on the line. (We cover transfer technique in S7.)
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- **Performance hybrids.** Some buyers layer revenue share or bonus signals on top of duration (e.g., "quote given" or "appointment set"). Platforms like Invoca expose *payout_conditions* and *signals* so you can prove the bonus criteria were met. Invoca Developer Portal
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Where to source your very first offers.

Use established PPCall networks with transparent rules and dashboards. Aragon (ranked highly in industry lists), RingPartner, Soleo, and Marketcall all publish program details and vertical coverage. You'll see the exact duration thresholds, geo, and hours before you send traffic, and you'll get a built-in dispute path for returns. mThinkRingPartner SoleoMarketcall

A simple selection rubric you can apply today.

1. **Acceptance clarity:** Can you write the buyer's acceptance rule in one sentence ("Residential HVAC in [metro], 90-sec connected duration, 8a–6p local")? If not, choose another offer. (Soleo's docs show how hours and categories are set; aim for that level of clarity.) Soleo
2.
3. **Buyer density:** Is there more than one buyer for the same intent? If yes, you can add backup routing (see C6).
4.
5. **Seasonality plan:** Do you know when demand peaks (AEP dates for Medicare; weather windows for HVAC)? If yes, align budgets, dayparting, and staffing. MedicareFranchising.com
6.
7. **Compliance load:** If CMS/TSR/TCPA makes you hesitate, start with local services first and revisit regulated verticals later.
8.

Mini case—why HVAC wins for beginners.

You launch with "AC repair—same day" in one metro. Your network specifies: residential only, in-metro ZIPs, 90s connected duration, M–Sat 8a–6p. You add a two-question IVR to filter commercial calls and collect ZIP, then connect immediately. Early acceptance is 80%+, returns are low, and you have multiple backup buyers. That fast feedback loop makes it an ideal training ground. (Soleo's and Marketcall's materials map to this type of setup.) SoleoMarketcall

S5. Minimum-viable stack (tracking, telephony, analytics)

You don't need a big call center or fancy software to start in pay-per-call. In fact, many call buyers and call networks already give you the basics for free. They often hand you **tracking phone numbers**, simple **reports**, and built-in **routing**. If your buyer runs on a platform like **Ringba**, they can even route your calls to the best buyer in real time with a "ring tree" and **real-time bidding**. In that case, your "stack" can be very light—you just add analytics on your side so you can see which ads and pages send good calls. If a buyer does **not** give you numbers or tracking, you can still be live fast with a small, cheap setup of your own. This chapter shows both paths and keeps the steps simple. CJRingba+1

What you may already get for free

Many pay-per-call programs assign a **unique tracking number** to each campaign or publisher. You place that number in your ad or on your page. When a person calls it, the platform logs the source and sends the call to the buyer. Big networks and platforms explain it the same way: publishers get unique, trackable numbers; all publisher-referred calls are logged and routed based on the campaign rules. If your buyer or network already gives you this, you can start driving calls today without buying your own tracking tool. InvocaCJCallerReady

Some buyers and networks also run on **Ringba**, which was built for pay-per-call. Ringba supports "**ring trees**" and **RTB (real-time bidding)**. That means a call can "ping" approved buyers, check their bid and availability, and then route to the winner. The buyer pays more during busy times, and you get better yield, while good callers connect faster. If your partner already runs this setup, you get strong routing and tracking without lifting a finger. RingbaRingba+1

Bottom line: if your buyer or network covers numbers and tracking, your minimum stack is "**analytics on top**." If they don't, you can add your own numbers and a tiny IVR and be fine.

Why add your own light stack anyway?

Even when a buyer gives you numbers, it still helps to **own a bit of data** yourself. You want to know which **ad, keyword, or post** started each call, and whether that traffic tends to pass the buyer's timer. A simple way to do this is to track the **tap-to-call** clicks on your page and tag your traffic with **UTMs**. Later, you can match those clicks to the call logs your buyer or network gives you. This gives you one view of "what we paid for" vs. "what got accepted." Analytics Mania

Owning a light stack also gives you **backup options**. If one buyer is full, you can switch to another. If your network gives you a high-level report, you can still combine it with your ad data to make fast changes.

The truly minimum stack when the buyer covers tracking

Let's say your pest control buyer gives you a tracking number and reports. Here is the smallest setup that still runs like a pro, told as a story.

You publish a one-page site: "Phoenix Pest Help." On the page, your main button is **tap-to-call**. In **Google Tag Manager**, you fire a **GA4** event whenever someone taps a tel: link. You add **UTMs** to your ads (source, campaign, keyword). By the end of the day, GA4 shows you how many people tapped the number from each ad group. Tomorrow, you download the buyer's call log and see which calls were accepted. You match the two sets by **time and landing page**. If one ad group sends many taps but few accepted calls, you lower that bid. If one article sends fewer taps but longer accepted calls, you keep it and write a second article like it. This is simple, and it works. Analytics Mania

If you also run **Google Ads**, you can go one step further and **import phone call conversions** so bidding learns from your best calls, not just clicks. Google's own help docs and API docs show how to import call conversions (even offline), which lets Smart Bidding aim at qualified calls. This closes the loop without heavy tools. Google HelpGoogle for Developers

That's all you truly need if your buyer or network already gives you the numbers and the call logs: **track taps, tag traffic, import conversions, and compare to the buyer report**. You will know where to put your money tomorrow.

When numbers and tracking are NOT covered: add tiny, proven pieces

If a buyer does not give you numbers or reports, you can add your own with two small parts: a **tracking layer** and a **telephony/IVR layer**.

For the tracking layer, many teams start with a simple vendor that supports **DNI (dynamic number insertion)**. DNI swaps the phone number on your page for a **session-unique** number, so you can tie each call to a source or keyword. CallRail explains DNI clearly and shows how to test it: you add a short script to your site, and it shows the right tracking number to each visitor. This is a fast way to see where calls come from, even if you don't own a big system. CallRail Help Center+1 CallRail

For the telephony/IVR layer, you can use a **low-code IVR** from **Twilio Studio** or use **Telnyx Call Control** (their Voice API) if you want web-hook-style control. Keep the IVR short: get **consent to record**, ask for **ZIP**, and route to the buyer. If the buyer does not answer in 20 seconds, route to a backup. Twilio's docs show how to build IVRs without code, and Telnyx explains how Call Control and webhooks help with custom routing. Both support call **status webhooks** so you can see "answered," "busy," or "no answer," which helps you debug the difference between bad traffic and a buyer who is just full. TwilioTelnyx Help CenterTelnyx Developers

For **recording and transcripts** (great for QA and disputes), Twilio provides call recording and supports transcription; it also shows how to start recording only **after** you say your recording notice. That keeps you safe and keeps buyers happy. Telnyx also supports programmatic controls and media handling if you prefer their stack. Use whichever you can set up the fastest. Twilio+1Twilio Help CenterTelnyx

Put these small parts together and you're live: tracking numbers (via DNI) on the page, a two-question IVR (consent + ZIP), fast routing, and recordings. This is not heavy. This is a **weekend** build.

Real-life example: HVAC with and without buyer tools

Case A: Buyer has you covered.

Your HVAC buyer runs on Ringba and gives you two local numbers and a report. They also use a **ring tree** with **RTB** to sell calls to the highest, available bidder in their pool, so answer rates stay high. You focus on traffic and page clarity. On your side, you track tel: clicks with GA4 and import call conversions into Google Ads. You check the buyer report at night and shift bids based on accepted calls, not just clicks. You ship fast and skip heavy setup. RingbaRingbaGoogle HelpGoogle for Developers

Case B: You need your own basics.

A smaller plumbing buyer wants calls but does not have tracking for you. You add CallRail DNI to your page so each visitor sees a unique number. You build a tiny Twilio Studio IVR: "This call may be recorded—ok to continue?" then "Please enter your ZIP." If ZIP is inside the buyer's area, you call them; if they don't answer in 20 seconds, your flow tries Buyer B. You enable status webhooks so you can see if "no answer" is the problem. You import call conversions to Google Ads so bids find the hours that produce **accepted** calls. In three days, you see afternoons pass the timer more; you day-part spend to 3–6 p.m. and acceptance climbs. CallRail Help CenterTwilioTelnyx DevelopersGoogle Help

What to measure from day one (simple wins)

Measure **taps** on your phone number so you know demand. GA4 + GTM can do this in minutes. Name the event something obvious like phone_call. Look at it by source, campaign, and page. If taps are high but calls are short, check your IVR length and buyer answer rate. If taps are low, fix the headline and make the button larger. Analytics Mania

Measure **accepted calls** using the report your buyer or network gives you. If you own the numbers, export from your tracking tool and note **connect duration** and **final status**. "Over the timer" with "accepted" is what pays. If you see many "no answer by buyer," turn on overflow or ask for a staffing window.

Measure **call quality** with recordings and transcripts. Once a day, listen to two short calls. Check that your script starts with the recording notice, asks for ZIP early, and transfers within a minute once a fit is clear. If the start is slow, shorten the opener by one sentence. Small script fixes raise minutes and lower refunds. Twilio

Measure **cost per accepted call** by matching your ad spend to accepted calls. If one source is high cost but low acceptance, pause it for a day while you adjust targeting. If one hour is a winner, shift budget there.

A simple 10-step "first vertical" build (read like a checklist, run like a story)

Start with what your **buyer or network** already offers. If they give you numbers and tracking, accept them and plug in analytics on your side. If not, add a tiny layer yourself.

Set up **GA4 tap-to-call tracking** on your page. This shows demand by source today, not later. Keep the page fast and simple so the number shows right away. Analytics Mania

If needed, add **DNI** so each visitor sees a unique tracking number tied to their source. This lets you see which ad or post caused the phone to ring. CallRail Help Center

If needed, build a tiny **IVR** in Twilio Studio or Telnyx: recording notice → ZIP → connect to Buyer A, with overflow to Buyer B after 20 seconds. Turn on **webhooks** so you can see answer/busy/no-answer. TwilioTelnyx Developers

Turn on **recording/transcripts** so you can fix script problems fast and create proof for disputes. Always announce recording first. Twilio

If you buy media, **import call conversions** back into Google Ads so bidding learns from your good calls. Keep the import window current and follow Google's steps. Google Help+1

Watch one **live metric** every morning: accepted rate by source for yesterday. If one source drops, listen to two calls and check for a pattern like "warranty" or "out of area." Make one change. Tomorrow, check again.

If your buyer or network runs **Ringba RTB**, lean on it. Their **ring tree** plus your clean IVR and page will carry a lot of the weight. You can focus on making the right people tap your number at the right hours. Ringba

Keep notes. Write what you changed and what happened. After a week, you'll have a small playbook that works in the next city or next niche.

The short version (so you remember)

If your buyer or network provides **phone numbers and tracking**, use them. Many do. Some run **Ringba** with **RTB** and ring trees, which means strong routing and solid reports out of the box. Layer **GA4 tap tracking** and **Google Ads call imports** on top so you can see which ads create accepted calls. That's the whole stack for now. CJRingbaAnalytics Mania Google Help

If your buyer does **not** provide numbers or tracking, add two tiny pieces: **DNI** for numbers on your site and a **short IVR** for consent, ZIP, and routing. Twilio Studio or Telnyx Call Control can handle the IVR in hours, not weeks. Record and (optionally) transcribe calls so you can coach and win disputes. Then feed your results back to your ads. That's it. Keep it small. Keep it clear. And keep shipping. CallRail Help Center Twilio+1

With this minimum-viable stack, you can launch a new pay-per-call vertical with calm steps, see what works, and grow only after you have proof. The goal isn't tools. The goal is **more accepted calls** from people who get help fast.

2

Compliance & Risk Management (TCPA, TSR, DNC)

S1. TCPA & Consent Essentials for Calls and Callbacks

Think of the **Telephone Consumer Protection Act (TCPA)** like guardrails on a mountain road. It keeps you on track so your pay-per-call business does not slide into trouble. The rule is simple to say, but you must follow it in detail: get the **right kind of permission** from the person before you call or text them, and pay attention to **how** your call is made.

First, what is a "call"? For the TCPA, **a text message counts as a call**. That means if you send a text to try to sell something or to get someone to call you back, you must treat it like a phone call under the rules. In late 2023 and early 2024, the FCC explained again that texts are covered and that **Do Not Call** protections apply to **marketing texts**. So your "call me back" text is inside the same rulebook as your voice dial. Federal RegisterFCC Apps

Second, the law cares about **the tool you use**. In 2021, the **U.S. Supreme Court** said a device is an "autodialer" only if it **uses a random or sequential number generator** to store or produce numbers and dial them. This narrowed the old, broader view. Many call systems today dial from a stored list, not by random number. Those may not be autodialers under that Supreme Court ruling. But that does **not** mean you're free to ignore the TCPA: if you use a **prerecorded or artificial voice**, or if you call or text people on Do Not Call lists without the proper consent, you can still break the rules. Supreme Court

Now let's talk about **consent**. For **telemarketing** to a wireless number that uses an **autodialer** or an **artificial/prerecorded voice**, you need **prior express written consent**. This is a signed agreement (the signature can be electronic) that clearly lets **one** identified seller (more on that in a moment) call or text with ads or telemarketing. The agreement can't be a condition of buying something. If you are only giving information the person asked for and you are **manually** dialing and not using recorded voices, **prior express consent** (not written) may be enough. But be careful: if the call turns into selling, you bounce right back into the stricter, **written** consent box. The core rule sits in **47 C.F.R. § 64.1200**. Legal Information Institute

What about **lead generation** and comparison sites? In **December 2023**, the FCC adopted rules that said **written consent must be for a single named seller** and the call or text must be **logically and topically related** to the site where the person gave consent. The FCC used an example from **Assurance IQ** to show why hiding huge "partner" lists behind a link is not clear consent. The order also stressed that the **caller carries the burden** to prove consent. Then, in **January 2025**, the **Eleventh Circuit** court **vacated** the "one-to-one consent" part of the FCC's approach, saying the FCC went too far under the TCPA. Even so, many buyers still **contractually require named-seller consent**. It's smart to build for that anyway: it lowers fights with buyers and carriers and shows good faith with regulators. Federal Register Public InspectionFCC Docsapi.ctia.org

Here's a real story. **Maya** runs a Medicare pay-per-call flow. Her landing page used to say "We and our partners may contact you," with "partners" hidden behind a link that listed dozens of companies. After reading about the FCC's concerns and the Assurance IQ example, she rebuilt the page. Now, it shows **one local insurance agency by name**, explains exactly what the person will get, and collects an e-signature box that is not required for any purchase. Complaints dropped. Transfers held up in QA. Carriers stopped flagging her numbers. When a buyer asked for proof, Maya sent a PDF screenshot of the exact opt-in page with timestamp, IP, and full disclosure. The invoice was paid.

Revocation is easy for the consumer and must be honored **fast**. If a person replies **STOP** (or similar words), tells you to **"do not call"**, or asks you to stop in **any reasonable way**, you must process it **within a reasonable time not to exceed 10 business days**. You may send **one** confirming text that the opt-out worked, but no more marketing after that. Build your workflow so STOP and DNC flow right into suppression. Federal Register

Callbacks bring nuance. If a person calls your tracking number on their own, your TCPA risk is low because they started the call. For **outbound callbacks** (like after a web form or a text opt-in), dial **soon** while the person still expects your call. Keep your call on the **topic** they agreed to. If the call leans into selling, make sure your **consent supports sales** (and, where possible, **names the seller**) even after the Eleventh Circuit pause. This "topic-matched" idea comes straight from the FCC's text-messaging work and is a good risk control. Federal Register Public Inspection

Time windows and **Do Not Call (DNC)** also matter. The federal telemarketing rule says do **not** call before **8 a.m.** or after **9 p.m.** local time. Keep your DNC scrubs fresh; sellers must use a **DNC list updated within 31 days** to fit the safe harbor. Also keep an **internal DNC list**, and honor those requests promptly. Your internal DNC obligations sit in **FCC** and **FTC** rules, and the internal DNC record must be maintained for years (see S2 for how long). GovInfoeCFR

Build a **consent packet** for every source. Save a **screenshot or PDF** of the exact page where the person saw and agreed to the disclosures (with the seller's name if you have it). Keep the **full disclosure text**, the **timestamp**, **IP**, **user agent**, and the form values. For voice consents, save the **audio** with the clear notice and the person's "yes." Store a **hash** or tamper-evident log. And make sure your system can **export** all of this quickly. Remember: **you** have to prove consent. The FCC has said the **burden of proof is on the caller**. FCC Docs

A cautionary example: the FCC criticized **Assurance IQ** because consumers gave consent on a page where a long list of "partners" was hidden behind a link and some listed companies were not even closely related to the topic. If your page looks like that, expect headaches with buyers and carriers—and extra risk. Clean, **named-seller** language is safer. Federal Register Public Inspection

One more late-breaking point. In **June 2025**, the **U.S. Supreme Court** ruled that district courts **do not have to defer** to the FCC's TCPA interpretations in the same way as before. That adds legal uncertainty in some areas. For a PPCall shop, the practical move is simple: keep strong consent, honor STOP and DNC fast, and store your proofs. Those steps protect you even as court views shift. Reuters

Bottom line: For pay-per-call, the TCPA is not just a law—it's your best friend when you build for **clear, seller-named (when possible) consent**, fast opt-out handling, and tight records. Do that every time, and your calls connect, your buyers stay happy, and your invoices keep getting paid.

S2. DNC, SMS, and Call-Recording Disclosures (One-Party / Two-Party)

The **Do Not Call (DNC) Registry** is simple in theory. People add their number because they do **not** want sales calls. As a telemarketer or seller, you must **check the Registry at least every 31 days** and **not** call those numbers, unless an exception applies. The **FTC** enforces the Registry, and the FCC helps, too. When you access the Registry, you get a **Subscription Account Number (SAN)**. Keep proof of **who** accessed it, **when** you accessed it, which **area codes** you pulled, and which **campaigns** used that download. This record often settles disputes fast. eCFRFederal Trade Commission

What about numbers you can still call? The **Established Business Relationship (EBR)** rule says you may call someone on the DNC list for **up to 18 months** after a **purchase** or **transaction**, or for **3 months** after an **inquiry**. If they say "do not call me," the EBR ends right there. Do **not** rely on stale EBRs; this is a common mistake. Track your 18-month and 3-month clocks in your CRM. If the clock runs out, stop unless you have fresh consent. Federal Trade CommissioneCFR

There is also **internal DNC**. This is your **own list** of people who told **you** not to call again. The FCC's rule says you must honor company-specific DNC requests and **keep** that list. How long? FCC rules point to **five years** of honoring and recordkeeping for company-specific DNC, and many compliance teams choose to honor **indefinitely** to be safe, especially because the FTC's general guidance pushes you to **respect the consumer's wish** even if not time-boxed by the TSR text. Build your suppression system to hold at least five years—and in many verticals, forever. eCFR CallShaper

Texts are covered by DNC when they are **marketing**. The FCC codified that National DNC protections apply to marketing texts. So your "flash sale" SMS must obey DNC scrubbing and proper consent, and you must

honor STOP quickly. This is not optional; carriers also expect you to follow SMS best practices. Federal Register

Carriers and the **CTIA** (the wireless trade group) publish SMS **best practices**. They expect you to show your **program name**, the **type** of messages ("alerts," "promos," "appointment reminders"), **"Msg&Data rates may apply,"** your **frequency** (or "freq varies"), simple **HELP/STOP** instructions, and links to **Terms** and **Privacy**. If you run a "text to get a call now" flow, put the disclosures at **opt-in** and again in the **confirmation**. Non-compliant SMS programs get filtered or shut off by carriers. Keep your messaging clean so your numbers stay healthy. Morrison FoersterConsumer Financial Services Law Monitor

Let's cover **call recording**. Many PPCall teams record calls for training and quality checks. U.S. states split into **one-party consent** (only one person on the call needs to agree—often you) and **all-party (two-party) consent** states where **everyone** on the call must agree. **California** is an all-party state. If you call a California mobile phone and record the call, you must say so at the start and get a clear "yes." When two states have different rules, many lawyers advise using the **stricter** (all-party) approach. A simple script works: "This call is recorded for quality and compliance—may I continue?" Wait for yes, then go on. Keep the recording as proof. CTIAsupport.callhub.ioDIDforSale

A quick real-life example. **Andre** runs a home-warranty campaign from Arizona. He calls a lead who moved from California and kept the same cell number. Andre's dialer is set to play the recording notice at the start of every call. If the person says "no," Andre stops the recording and continues, or he ends the call. Because he logs consent for recording at the top, he is protected when his buyer requests a sample. If Andre had skipped the disclosure, he could face a state privacy claim even if his sales pitch was clean.

Now back to **time of day**. Do **not** call before **8 a.m.** or after **9 p.m.** local time. This rule is easy to program, so there is no excuse. If your data does not include time zone, infer it from area code and prefix, and add a buffer in case of mobile number moves. Also check **state** rules—some states are tighter. When in doubt, shut off dialing outside the safest window. GovInfo

What about **business-to-business (B2B)** calls? The national DNC rules focus on calls to **residential** and **wireless** consumers. Pure B2B sales calls can be outside some DNC limits, but that does **not** mean "no rules." You still must follow time-of-day limits, respect internal DNC if they tell you to stop, follow prerecorded/AI-voice limits, and watch state laws. Many companies choose to **scrub** and **honor opt-outs** for B2B anyway—less hassle, fewer complaints, and stronger buyer trust. Legal Information Institute

Why does all this matter? Look at **Dish Network**. After years of DNC-related issues, a court ordered **$280 million** in penalties and strong court orders. Parts of the case went up on appeal and later settled with the **Department of Justice** for **$210 million** in 2020, but the message is the same: if your sellers or affiliates break the rules, you can pay a heavy price. If you rely on publishers or outside call centers, you are still responsible. Train them, monitor them, and cut them off if they won't comply. Federal Trade CommissionJustiaDepartment of Justice

Here is a simple checklist you can follow in daily work—written as steps, not bullets. Start your SMS and voice programs with **clear consent** and clean disclosures. Scrub your lists against the **DNC Registry** at least every **31 days**, and keep proof with **SAN** and **access dates**. Maintain your **internal DNC** and honor requests fast. Use **recording disclosures** up front in all-party states and keep the tapes. Watch the **time window** on every dial. And remember, a **STOP** or "do not call" from the consumer ends the game; be quick and polite when it comes in.

If you do these basics well, you avoid most of the costly mistakes. Your calls connect, your texts deliver, and your PPCall revenue stays steady.

S3. Lead-Source Documentation & Audit Trails

In pay-per-call, you **only win the dispute you can prove**. That is why your **paper trail** matters as much as your ads and scripts. Bad actors hide behind messy records. Good operators keep neat, fast files. When buyers ask questions or regulators knock, you can answer in minutes, not weeks.

Start with the **newer recordkeeping** picture. In **April 2024**, the **FTC updated the Telemarketing Sales Rule (TSR)** to require **call detail records** for most telemarketing activity. That means keeping the **calling and called numbers**, **date**, **time**, **duration**, and **disposition** (for example: answered, transferred, dropped). There is a limited exemption for **manually dialed one-off calls**, but most PPCall activity uses automated tech, so plan to keep the records. The rule gave a **180-day runway** to set up systems. Many teams circled **October 15, 2024** as the date to have call-detail storage humming. Also, the **retention period** for many TSR records expanded to **five years**. This change lines up with the five-year civil-penalty window. Federal RegisterFederal Register Public InspectionKelley Drye & Warren LLPFederal Trade Commission

Next, your **consent proof** is your heaviest lifter. Under the TCPA, the **caller has the burden** to show valid consent. So save the **artifacts**. Keep a PDF or screenshot of the **exact opt-in page** the person saw, with the **full disclosure text** visible, the **date/time**, and identifiers like **IP** and **user agent**. If you collect **written** consent, keep the **e-signature** details. If consent is **verbal**, store the **audio** that includes both the disclosure and the clear "yes." If you rely on **named-seller** language (and you should, even after the Eleventh Circuit pause), make sure the seller's **name** is on the page and in the consent text. Add **hash-locked** logs to show the data has not been changed. These artifacts should export in a **single zip** in minutes. FCC Docs

Then, keep **DNC access** proof. For every campaign, you should be able to show **(1) the entity** that accessed the Registry, **(2) the access date**, **(3) the SAN**, and **(4) which campaigns** used that download. If a complaint says, "You called me even though I am on DNC," you can match the call date to your **most recent 31-day DNC download** and show your process. This often ends a fight early. Federal Trade CommissioneCFR

Scripts and media are part of the record too. Save each **meaningfully different script** and each **unique prerecorded** message. If you update your IVR or change your recording disclosure, **archive the old version** with dates and a campaign tag. If you use **digital soundboards** or **voice tech**, keep vendor info and contracts for **five years after** they end, so a regulator can trace the stack. These details are now a normal part of the TSR file cabinet. Federal Register Public Inspection

Here is how to link IVR data to **buyer outcomes**. Store the call **audio** and the **key-press path** taken in the IVR (for example: "Press 1 if you are over 65." "Press 2 for Medicare Advantage."). Keep the **buyer mapping** that was live at the time, so you can show why the call was transferred and how it met the buyer's rules. When a buyer claims "non-qualifying," your IVR map and the person's key presses can prove the call **did** qualify, or help you fix your screening if it did not.

Let's walk a **24-hour dispute** play. Your buyer emails: "These six transfers were not qualified. We're rejecting the invoice." Your reply is fast and calm. You attach the **call detail record** and **audio** for each call. You export the **IVR branch** showing the key presses and the path to live agent. You add the **consent screenshot** with timestamp and IP. You include the **DNC scrub log** with SAN and access date. You add the **UTM** markings and number pool. If applicable, you include agent **notes** and the **transfer timestamp**. Most buyers will resolve the issue right there because you showed **proof** instead of arguing.

Here is a story about speed. **Nora** runs a home-insurance campaign. A carrier flagged her number "Spam Likely," and a buyer questioned three short calls. Nora paused the number, pulled her files, and sent the bundle within four hours: consent PDFs, IVR maps, and CDRs showing each call lasted more than 90 seconds after transfer. She also showed that two of the three people clicked her ad within the last 15 minutes—fresh leads. The buyer restored credit and extended the test. The carrier removed the label after Nora worked with them and stabilized volume (see S4).

A few more tricks that help. Save **per-source** complaint logs so you can see which ad, landing page, or number pool drives heat. Keep a simple **"consent audit" dashboard** that shows at a glance which sources have seller-named consent, which have only broad consent, and which need a rebuild. Schedule a **monthly record check**: pull one random lead, export its entire file in under 10 minutes, and fix what took too long.

The reason for all this? Regulators and courts have long said "**Show me**." The FCC says clearly that **consent proof is your burden**. The FTC updated the TSR to **expand recordkeeping**, including **call detail** records. If your files tell a clean story, you turn a conflict into a paid invoice—or a small refund instead of a chargeback and a shutdown. FCC DocsFederal Register

S4. STIR/SHAKEN, Branded Calling, & Carrier Reputation

Even with perfect consent, people won't answer a call they don't **trust**. In PPCall, your **connect rate** decides your revenue. Two big forces shape trust today: **authentication** (STIR/SHAKEN) and **reputation** (carrier and analytics labels). A third force—**branded calling**—can help you stand out.

STIR/SHAKEN is a system that lets phone providers **sign** and **verify** caller ID on IP networks. The FCC rolled it out across networks, with deadlines that pushed even small or non-facilities-based providers to comply. STIR/SHAKEN does not stop all spam by itself, but it **reduces spoofing** and **feeds analytics** that decide if a call looks risky.

If your provider's setup is weak—or your calls pass through non-IP segments—your verification can be lost, which **hurts answer rates**. Work with a provider who takes this seriously. Federal Communications CommissionFCC Docs

On top of that, carriers and analytics add **labels** like "Spam Likely" or "Scam Risk." The FCC encourages **blocking and labeling tools** to protect consumers. For you, those labels are like black ice: you often don't see them until your **answer rate crashes**. Watch your **KPIs** closely. When you see a sudden drop, check your numbers for labels and work with your carrier or analytics partners to **remediate**. Keep volumes **stable** and complaints **low** so your numbers stay clean. Federal Communications Commission+1

Now the upside: **branded calling**. This lets a supported phone display your **name**, maybe your **logo**, and a **call reason**. Many providers offer it: Hiya, TNS, TransUnion (Neustar), First Orion, and others. Results vary, but case studies show **big lifts** in answer rates. For example, TNS reported a **42%** answer-rate increase for a nonprofit and strong lifts in other verticals. Hiya reports large gains when the **brand name** and **call reason** show. These are not promises; they are signals that branding helps people pick up. TNSblog.hiya.com

The next step is **Rich Call Data (RCD)**. RCD rides with STIR/SHAKEN to carry your **name**, **logo**, and **reason** inside a signed identity token. As it spreads across networks and devices, more buyers will ask for **branded + authenticated** calls as a condition of scale. If your PPCall flows can brand the **transfer number** to the buyer, you can set the person's **screen** to match their **expectation**, and acceptance usually improves. TransUnion

Here is a simple plan to improve your **reputation hygiene**. Keep **complaints low**: honor **DNC/STOP** instantly and avoid aggressive redialing. **Stabilize** your volumes—don't surge traffic suddenly. Use **consistent intent** per number; don't mix sales, support, and collections on the same caller ID. **Register** your numbers with major analytics services and **monitor** labels. Align your **CNAM** (display name) and, where supported, your **branded caller ID** with the landing page or ad that generated the call. These habits pay off. Federal Communications Commission

A real story. **Leo** runs a life-insurance PPCall program. His answer rates slid from 28% to 12% in one week. He checked his numbers and saw "Spam Likely" on three DIDs. He paused those numbers, contacted his carrier's **remediation desk**, and registered his campaign and brand. He also slowed his dial pace and narrowed his retry logic. Within five days, labels dropped off, and answer rates climbed back. Then he added **branded calling** on his transfer DIDs to match the buyer's brand, and acceptance ticked up further.

Reminder: even the FCC says call-auth and blocking tools are **not magic**. You still need **clean consent**, **fair pacing**, and **clear branding**. Get those right, and your transfers connect more often—and convert with less stress. Federal Communications Commission

S5. Policy Red Flags & Escalation Playbook

Speed is money in PPCall. But speed without guardrails invites **enforcement**, **chargebacks**, and **blocked numbers**. Here are the **blinking lights** that should make you pause and fix, and a **fast playbook** to get back on the road.

Red flag 1: Consent ambiguity. If your page hides a huge list of "partners" behind a link or asks for blanket permission without showing the **seller's name**, you are replaying patterns the **FCC** criticized. Even after the Eleventh Circuit paused the "one-to-one" rule, the risk remains. Clean, **seller-named** disclosures and **topic-matched** follow-ups are safer and easier to defend. Federal Register Public Inspectionapi.ctia.org

Red flag 2: DNC hygiene gaps. If you cannot show your **SAN**, your **access date**, and **which campaign** used which Registry download, you're outside the **TSR** safe harbor. Fix your DNC logs before you dial again. Federal Trade Commission

Red flag 3: Internal DNC not honored fast. The FCC now requires you to honor **company-specific DNC** and **revocations** within a **reasonable time not to exceed 10 business days**. If your queue is backlogged, pause affected sources until you catch up. Federal Register

Red flag 4: Recording without disclosure in an all-party state. If your script doesn't capture verbal permission up front, stop recording and fix the script. Get a clean "yes" and keep the recording. CTIA support.callhub.io

Red flag 5: Spam-label spikes. A sudden answer-rate crash plus "Spam Likely" flags means your **reputation** is damaged. Keep calling and you risk **blocking**. Stop, remediate labels, stabilize volumes, and relaunch. Federal Communications Commission

Here's the **escalation playbook** to use when any of those lights flash.

Within 24 hours you **freeze** the affected numbers or campaigns so you don't burn more reputation. You **pull the file**: consent artifacts, call recordings, IVR paths, DNC logs, script versions, and any carrier traces. You **notify** your compliance lead, the account owner, and, if buyer SLAs are touched, the buyer's QA contact with a short, factual note: "We paused traffic and are investigating."

Within 72 hours you run a **gap analysis**. Which requirement failed? Was it consent clarity, DNC access evidence, internal DNC timing, or recording disclosure? You map each gap to a **fix** (for example, a script patch, a landing-page update, or a workflow change). You file **labeling disputes** where appropriate and **register** your numbers with major analytics entities if you haven't already. You share a brief **fix plan** with the buyer, including any IVR changes that tighten qualification.

Within 7 days you **deploy** fixes and **re-train** agents or VAs on updated scripts and opt-out handling. You **pilot** a small relaunch with extra monitoring: hour-by-hour dashboards for connect rate, average call duration, and complaint flags. Then write a short **post-mortem**: timeline, root cause, fixes, and early metrics. Save it with your campaign records. If a regulator asks later, you have the story and the receipts.

Why this urgency? Again, look at **Dish Network**. The case ended with hundreds of millions at stake and strong court orders, in part because of failures to control sellers and to honor DNC rules. PPCall is not immune. If your publisher or buyer chain is sloppy, **liability** can flow up the chain. Your contracts must require—and your **SOPs** must verify—compliance. Federal Trade Commission

Reference points to cite in your SOPs are simple. Keep a copy of the **TSR compliance guide** so your team knows the time-of-day limits and required disclosures. Keep the **TSR 2024 recordkeeping update** to remind everyone about call-detail records, script storage, and DNC version tracking. Keep **FCC TCPA rules (47 C.F.R. § 64.1200)** handy, especially company-specific DNC and **revocation** handling. And keep the **FCC consumer guidance** on blocking/labeling to explain reputation workflows internally. Federal Trade CommissionFederal RegisterLegal Information InstituteFederal Communications Commission

A final note on the legal landscape. In **2025**, the Supreme Court said courts **don't have to defer** to the FCC's views in TCPA disputes the way they once did. That doesn't remove your duties. It just means cases may turn more on **your facts** and **your records**. Design for **proof**, default to **clarity**, and keep learning. That is how PPCall teams grow without fear. Reuters

Final notes for PPCall teams

Design for **proof**. If you can't export it in 10 minutes, you don't really have it.

Default to **clarity**. Clear disclosures and seller-named consent reduce refunds, chargebacks, and carrier friction.

Monitor and adapt. The rules and tools keep evolving. Assign one owner to track **FCC/FTC** updates and push SOP changes on a set schedule. Federal Register Public InspectionFederal Register

3

Vertical Selection & Economics

S1. Profitability matrix (payout × acceptance × cost)

Think of every call you send to a buyer like a lemonade stand sale. You only keep money when three simple things work together. First, the buyer pays you a set amount—the payout. Second, the call counts as "qualified" under the rules—your acceptance rate. Third, you spend money to get the call and run your phones—your cost. Your profit for each routed call is:

Profit per routed call = (Payout × Acceptance Rate) – Cost per routed call.

That single line is your steering wheel. It tells you where to push and where to stop. If you raise payout, you make more per accepted call. If you raise acceptance, more of your calls get paid. If you lower cost, you keep more of what you earn. Every tool you build—your ad copy, your interactive voice menu (IVR), your routing plan, your caller ID setup, your staffing—exists to move one of those three parts.

Let's break each part down in simple terms.

Payout, in plain English.

“Payout” is what the buyer agrees to pay you for a qualified call. Most new partners pay you when the call reaches a minimum **connected** talk time after an agent answers—often 60, 90, or 120 seconds. Some deals add bonuses when the caller stays past a longer mark, like 3–5 minutes. Prices change a lot by niche. For example, search advertising in insurance and legal is famously competitive, which usually lines up with higher call payouts and tighter quality rules. You can’t say payout is “caused” by cost-per-click, but seeing high search costs is a useful signal that attention is expensive in that niche. WordStream’s industry benchmark posts are a good pulse check and show that some categories, like legal, sit at the top of CPC tables most years. That tells you competition is fierce there. WordStream+1

Acceptance rate, in plain English.

“Acceptance” is the share of routed calls that the buyer marks as billable under your insertion order (IO). Five gates usually decide it: did the call pass the time threshold, come from the allowed area, arrive during staffed hours, come from a unique caller, and show the right intent? The key word is **connected** time—the seconds after the call reaches a human at the call center. Enterprise call-tracking tools name this field clearly. In Invoca’s developer docs, **connect_duration** is “duration in seconds that the call was connected to the call center,” and it’s different from the **total** duration that also counts IVR time. Build your reporting and coaching around **connect_duration** because that’s what buyers usually pay on. developers.invoca.net

Cost per routed call, in plain English.

“Cost” is not only ad spend. It also includes the phone minutes you burn, the numbers you rent, any transcription, and the time your team spends reviewing calls, fighting disputes, and keeping your caller ID reputation clean. If your traffic plan leans on Google Local Services Ads (LSA), remember that Google charges per valid lead and that **lead prices vary by location, job type, lead type, and bidding mode**. That “floor price" tells you roughly what a buyer can get without you and helps you judge whether your payout ask is realistic. Google Help

A real-life style example.

Picture an HVAC test in Dallas during a hot week. Your buyer pays **$45** when connected talk time hits **90 seconds** or more. Your all-in cost per routed call—including ads, IVR minutes, and QA time—is **$20**. You ask one IVR question to separate residential vs. commercial and capture a ZIP to route coverage. Your buyer answers from **8 a.m. to 6 p.m.** In week one, **75%** of routed calls pass the gates. Your math is:

- Payout × Acceptance = $45 × 0.75 = $33.75
- Profit per routed call = $33.75 - $20 = **$13.75**

You shorten the IVR by 10 seconds and tighten your dayparting so fewer calls arrive near closing time. Now **82%** of routed calls qualify. The new math is:

- Payout × Acceptance = $45 × 0.82 = $36.90
- Profit per routed call = $36.90 - $20 = **$16.90**

Your profit per routed call rose **$3.15**. Divide **$3.15** by the old **$13.75**, and you get about **23%** growth. You changed **no** traffic budget and **no** payout. You just made the path to a qualified call a little smoother.

Why this beats bragging about "total calls."

You can't deposit "calls." You deposit **payout × acceptance**, and you keep what's left after cost. This is why small, boring changes—like registering your business name for caller ID or making sure your calls are authenticated—can beat a big traffic push. When your caller identity is clear and authenticated, more people answer and stay on the line, which lifts connected talk time and acceptance. The FCC's pages explain how Caller ID authentication (the STIR/SHAKEN framework) helps people trust calls by reducing spoofing; several carrier and industry reports connect branded calling with higher answer rates. Vendor studies differ on the exact lift, but they all point the same direction: branded, authenticated calls are answered more. Federal Communications Commission FCC DocsVerizonFirst Orion6751436.fs1.hubspotusercontent-na1.net

Use market signals to pick your battles.

Seasons and market cycles change both sides of your matrix. In Medicare, the **Annual Enrollment Period** (AEP) runs **October 15–December 7**, and the **Medicare Advantage Open Enrollment Period** runs **January 1–March 31**. Buyers staff up for those windows and may tighten acceptance rules because demand is high. Outside those windows, the rules can feel different. Knowing the calendar helps you plan your budgets and scripts so your matrix stays healthy. Medicare+1

A note on tiers and bonuses.

If a deal pays a bonus for longer calls, model it. Suppose 20% of your HVAC calls last **5+ minutes** and earn **$55** instead of **$45**. Your **expected** payout is **$45 × 0.8 + $55 × 0.2**. Multiply 45 by 0.8 to get **$36.00**. Multiply 55 by 0.2 to get **$11.00**. Add them for **$47.00** expected payout. Then multiply by your acceptance rate to get realistic revenue per routed call.

Bottom line for S1.

Write down your acceptance rules. Log the fields that prove it—especially **connect_duration**. Track your costs honestly, not just ads. And watch market signals like LSA pricing rules and industry CPC benchmarks so you don't walk into a buzzsaw. Keep the triangle—**payout, acceptance, cost**—tight, and your PPCall shop won't just make noise; it will make money. developers.invoca.netGoogle HelpWordStream

S2. Seasonality & competitiveness by niche

Not every phone call happens for the same reason or at the same time of year. Some services are driven by **weather**. Some are governed by the **calendar**. Others move with **prices** and **regulation**. If you pick one niche in each of these groups, you can keep revenue coming all year.

Weather-driven services: HVAC

HVAC demand rises and falls with **degree days**. A "cooling degree day" or **CDD** is a simple weather measure: how much warmer the day was than 65°F, summed over time. More CDDs means more hot days, which means more "my AC is broken" calls. The U.S. Energy Information Administration (EIA) defines and tracks degree days and even uses **population-weighted** degree days to model energy use. The EPA's climate indicator pages show a long-term pattern: fewer **heating** degree days in many regions and more **cooling** degree days in much of the country, which supports what HVAC owners call "the busy season" in summer. U.S. Energy Information Administration+1US EPA

Now imagine you run calls for a contractor in Phoenix in July. You see a spike in AC repair intent. Your plan is simple: keep the IVR short, route by ZIP to match coverage, and extend buyer hours on the hottest days so more callers speak to an agent before they give up. The hotter the stretch, the more you lean into **connected** talk time, because that's the acceptance gate you must cross.

Weather-driven services: pest control

Pests follow the seasons. The National Pest Management Association calls summer **peak pest season**, and public-health pages note that **mosquito season** starts in summer and continues into fall, especially in the South. That shows up in your calls. In late spring and summer you hear "wasps," "mosquitoes," and "ants." In late fall, rodent calls climb. You can reflect that rhythm in your IVR by offering a problem-type menu and routing by ZIP to the right crews. PestWorldCDC

A simple example: In Orlando, your June campaigns hear more "mosquito control" phrases. You route those to a buyer who treats standing water and sets traps. In November in Chicago, you see more "mice in attic," so you shift budget and change the IVR greeting to mention rodent proofing first. The demand season changed; your calls changed with it.

Calendar-regulated services: Medicare

Medicare has hard dates that you cannot move. The **Annual Enrollment Period** is **October 15–December 7**. Many seniors shop then, and buyers staff up. There is also a **Medicare Advantage Open Enrollment Period** from **January 1–March 31** for people already in Medicare Advantage who want to switch or go back to Original Medicare. If you plan ahead—scripts approved, disclosures ready, agents trained—acceptance can be excellent because intent is dense and call centers are waiting. If you enter late, you can still help during the January–March window, but the intent pattern is different, so your acceptance model should expect different talk times. Medicare+1

A real-life style example: You set up a small AEP test for a licensed agency in Ohio. Your payout is $65 at 120-second connected talk time. You prepare scripts in September, confirm disclaimers, and run a tight IVR: "Are you Medicare-eligible? Press 1 if yes." During AEP, answer rates are high, and talk-time distributions shift right because shoppers are ready. Your acceptance clears break-even early, and you scale. In late January, you run a small MA OEP campaign with modest goals and stricter dayparting to match the agency's winter hours.

Rate- and regulation-driven services: auto insurance

Auto insurance shopping has been unusually elevated in 2024–2025 as carriers reset rates. Market trackers reported higher-than-usual shopping into Q1 and Q2 2025. In May 2025, TransUnion said auto insurance shopping in Q1 was up about **10%** year-over-year, and by Q2 2025 it reported an **18%** increase versus Q2 2024, with activity peaking around March and remaining elevated through May. LexisNexis's "Insurance Demand Meter" likewise described "hot" or "sizzling" shopping levels into early 2025. For PPCall, that means more people are actively looking, which can improve answer rates and connected talk time. As rates stabilize, competition for clicks can cool a bit and buyers may tighten acceptance again. Time your tests to those waves. TransUnion Newsroom+1LexisNexis Risk Solutions

A practical story: You run auto insurance calls in Georgia. In March, you notice stronger intent—callers stay on longer, ask about switching, and accept transfers to agents more often. Your acceptance climbs from 48% to 55% with no script change, just better consumer motivation. In July, shopping cools. Your acceptance slides back to 50%, so you reduce caps, keep a backup buyer for overflow, and adjust your profit model before the slide erases your gains.

Competitiveness signals: why CPCs still matter.

Even if you don't buy search ads, CPC benchmarks are a clean proxy for competition. WordStream's updates consistently show categories like **legal** and **insurance** running at the top of CPC charts. High CPC usually means tougher attention and buyers who want longer talk-time to feel comfortable paying. Low CPC niches pay less but can be easier to qualify if staffing is steady. Benchmarks won't predict your exact call payout, but they'll keep you from walking into a market that's too crowded for your bankroll. WordStream+1

Turning seasonality into operations.

Seasonality only helps if you act on it. For weather-bound niches, extend buyer coverage on the hottest or coldest days and trim the IVR so people reach agents fast. For Medicare, get compliance out of the way **before** AEP. For auto insurance, keep an eye on market trackers so you ramp when shopping spikes and cool down when it softens. That way, acceptance strengthens **before** you pour on spend.

Bottom line.

Pick one weather niche (HVAC or pest), one calendar niche (Medicare), and one market-cycle niche (auto insurance). This mix gives you steady work and teaches three different reasons a phone rings: heat and cold, the calendar, and price shock. When you plan with those forces in mind, your matrix from S1 stays in your favor. U.S. Energy Information AdministrationUS EPAPestWorldCDCMedicare

S3. Acceptance-rate modeling (break-even & margin)

Acceptance is the **hinge** of your profit. If you model it, you know when to scale, when to pause, and when to negotiate. If you ignore it, you chase ghosts.

First, define your denominator.

Acceptance rate is **accepted calls divided by routed calls** for one buyer in a time window. Keep "routed" clean. If your IVR filtered a caller out before dialing the buyer, don't count that in the denominator. If a caller hung up before connect, don't count that either. Most buyers measure connected talk time, so you should too. Use your tracking system's **connect_duration** field (seconds after the call reaches the call center) to judge success. Invoca's docs call this out by name and separate it from total duration, which includes IVR time. That simple split helps you coach and fix real problems. developers.invoca.net

Break-even acceptance: the one number to memorize.

Go back to our steering wheel:

Profit per routed call = (Payout × Acceptance) − Cost.

Set profit to **zero** and solve for Acceptance:

Break-even acceptance **A*** = Cost ÷ Payout.

If payout is **$45** and cost is **$20**, divide 20 by 45. First, 45 goes into 200 **4** times (4×45=180) with **20** left. That's **0.4** so far. Bring down a zero to make **200** again; 45 goes into 200 **4** times (4×45=180) with **20** left again. You can see the pattern: **0.444...**, or about **44.4%**. Anything above that prints money. Anything below that bleeds. Keep this number on your wall.

Seeing acceptance as gates.

It helps to picture acceptance as gates that callers pass through. Did they reach the time threshold? Were they in the allowed ZIPs? Did they call during buyer hours? Were they new, not repeats? Did they have the right intent? These gates are not perfectly independent, but the "weakest link" idea works in practice. If your calls arrive after hours, fixing that one gate may be the fastest path from a losing week to a winning one.

Watch the shape, not just the average.

If your buyer pays at **90 seconds**, the **distribution** of connected talk times matters. Plot it weekly. If you see many calls dying between **50–80 seconds**, ask why. Is your IVR too long before agent connect? Is the agent intro slow or unclear? Are you routing to a general queue that places people on hold? When you cut one IVR question or route to a priority queue, a chunk of those near-miss calls can cross the line next week.

A live rescue story with the math.

You run auto insurance calls at a **$60** payout with a **90-second** threshold. Your cost per routed call is **$28**. Break-even acceptance is 28 ÷ 60. Sixty goes into 280 four times (4×60=240), remainder 40. So **0.4** so far. Bring down a zero to 400; 60 goes into 400 **6** times (6×60=360), remainder **40** again. That's **0.46...**, or about **46.7%**. In your first week, acceptance is **43%**—below break-even. You check the gates and find allowed geo is fine, uniqueness is fine, and intent is okay, but **hours** is bad (calls arriving near closing) and **connected time** is fragile (lots of 70–85-second calls). You extend buyer coverage by an hour and switch your overflow to a second buyer after **5:30 p.m.** You trim one IVR prompt and share a 20-second intro script with the call center supervisor. Hours improves from **0.70** to **0.85**, and connected time improves from **0.80** to **0.87**. Your overall acceptance jumps to about **0.51**. Before the fix, revenue per routed call was **$60 × 0.41 = $24.60**, so you were losing **$3.40** after the **$28** cost. After the fix, revenue per routed call is **$60 × 0.51 = $30.60**, so you're **+$2.60** after cost. Same payout. Same traffic plan. You just fixed gates.

Confidence and sample size, without scary math.

Acceptance is a "yes/no" outcome; statisticians call that a **binomial**. The fewer calls you've routed, the more your measured acceptance can bounce around by chance. As a rule of thumb, judging a buyer on **50 calls** is risky. At **200–400 routed calls**, your estimate tightens enough that you can trust it. Make decisions on that kind of sample, not on a "hot Wednesday."

Seasonality as a tailwind or headwind.

When auto insurance shopping surges, consumers call more ready to switch, which lengthens talk times and lifts acceptance. In early and mid-2025, several trackers reported elevated shopping; many shops felt it as longer conversations and higher answer rates. When the cycle cools, you'll feel the reverse. Build acceptance targets that flex with those outside signals so you're not surprised. TransUnion Newsroom+1

Bottom line for S3.

Instrument the gates, read the distributions, and move fast on the weakest link. Keep your break-even acceptance where you can see it. When you respect the math, break-even doesn't sneak up on you—you steer around it.

S4. Test budgets & risk caps

You don't "discover" a niche. You **buy** the right to learn it, carefully. A good test gets you enough signal—enough routed calls—to measure acceptance and unit economics **without** risking the business.

Pick a learning unit you can afford.

Aim for **200–400 routed calls** per buyer or offer. That gives you acceptance data you can trust. Work backward from your cost per routed call. If HVAC costs you **$18** per routed call and you want **300** calls, your learning budget is **$5,400**. If that feels heavy, don't shrink the sample to a useless size. Spread the same sample across more days, cap daily flow, and give yourself time to learn.

Know your two kinds of risk.

There's your **media exposure** (what you spend on traffic before any invoices are paid) and your **credit exposure** (what buyers owe you for qualified calls under net terms). Put caps on both. For a brand-new buyer, try deposits or tight daily caps until they pay you on time twice. If you test a new **vertical** with a **known network**, you can push media a bit harder because credit risk is lower.

A simple stop-loss rule that works.

Set a weekly media stop-loss at about **1.25×** your expected **gross revenue at break-even acceptance**. Example: your payout is **$45** and break-even acceptance is **44%**. Your expected revenue per routed call at the break-even line is **45 × 0.44 = $19.80**. If your cost per routed call is **$20**, your margin is razor thin. If you plan **300** routed calls, that's about **$6,000** in cost. Cap your weekly spend at **$6,000**, or stop earlier if you're **five points** under the break-even acceptance **for three days** in a row. This rule protects you from death by optimism.

Stage your test so you don't trip.

In the first few days, your only goal is to prove the plumbing: **connect_duration** logging, IVR branches, recordings, answer rates. Then you ramp to a few hundred routed calls, with dayparting live and a backup buyer waiting. In the final stretch, you lock scripts, push (in writing) for **auto-accept** after a short window, and tighten return reasons to objective ones you can check: geography, duplicate within the cool-off period, or underage. The clearer the rules, the cleaner your acceptance.

Time your test to the market.

Lean on outside calendars and trackers. If you're piloting **auto**

insurance, recent quarters showed that shopping spiked in Q1 and Q2 2025; testing into that tide is easier than swimming against it. If you're piloting **Medicare**, do your prep before AEP so you can "print" during the window. For **HVAC** and **pest**, watch local weather and degree days; the heat and the bugs won't wait for your dashboards. Public sources summarize all of this: TransUnion's insurance shopping reports, LexisNexis's Demand Meter updates, Medicare's official pages for enrollment windows, the EIA's degree-day explainer, and CDC mosquito guidance. TransUnion Newsroom+1MedicareU.S. Energy Information AdministrationCDC

Cap by reliability, not just by payout.

A $70 payout with slow, messy quality review can be worse than $45 with clean, fast acceptance. Prefer buyers who show you a transparent dashboard, log **connected** vs. **IVR** time, and post predictable dispute windows. If you must try the high payout, cut your daily cap in half until they prove they can pay on time.

Document stop conditions before you start.

Write them down in one plain sentence each. For example, "If acceptance stays **≥5 points** below break-even for three days, we pause," or "If answer rate drops below **65%** for two days, we fix staffing or reroute." Clarity saves your budget when emotions run hot.

A test-and-learn example that paid off.

You trial pest control calls in Houston in late May. You set a budget for **250 routed calls** and a stop-loss at **$4,500**. On day two, your answer rate is shaky because the buyer's lines are slammed. You add a second buyer for overflow after **4 p.m.** Acceptance climbs above break-even by day five. By day eight, you have clean enough data to show the first buyer that your calls are strong during evening storms, so they add staff after **6 p.m.** Your acceptance ticks up again. You finish the two-week test under budget and with a clear case for scale as summer mosquito season peaks—a pattern public-health pages recognize. CDC

S5. Building a vertical backlog

A single niche, no matter how hot, is still one point of failure. You need a **backlog**—a simple, ranked list of verticals you can enter over the next 6–12 months, each with notes on offers, seasonality, compliance, and first-pass economics. Treat it like a product roadmap.

Start with a friendly scoring sketch.

Give each candidate a **1–5** on six things: payout potential, buyer density in your regions, compliance load, seasonality window, traffic competitiveness, and operational fit. This is not a fancy model. It's a tool to **rank** and focus. For competitiveness, lean on public CPC tables. WordStream's ongoing benchmarks show how expensive attention gets in some categories, which hints at higher potential payouts but also tougher quality bars. WordStream

Layer in seasonality and cycles.

Mark **when** demand peaks. HVAC follows degree days. Pest spikes in late spring and summer, with a rodent bump in late fall. Medicare squeezes into **Oct 15–Dec 7**, with a smaller window **Jan–Mar** for Medicare Advantage changes. Auto insurance has been elevated as carriers reset rates, with documented spikes into Q1 and Q2 2025. Stagger your launches so you enter each niche **before** or **as** intent rises, not after it crests. Tie those notes to primary sources: EIA for degree days, EPA for long-term CDD/HDD shifts, NPMA and CDC for pest/mosquito season, Medicare.gov for enrollment windows, and TransUnion/LexisNexis for auto insurance shopping. U.S. Energy Information Administration US EPAPestWorldCDCMedicareTransUnion NewsroomLexisNexis Risk Solutions

Source offers before you write copy.

Identify a main and a backup buyer for each vertical. When you discuss terms, remember that **Google Local Services Ads** set a kind of "floor" for lead costs because buyers can get leads there directly, and those prices

vary by location, job type, lead type, and bidding mode. If your payout ask is far above that floor, you'll need unusually strong acceptance or bonuses to make the deal feel fair. Use LSA's own help pages to guide those conversations. Google Help

Sketch first-pass economics.

Do a napkin sketch per vertical: assumed payout, target acceptance, and estimated cost per routed call. If **Cost ÷ Payout** is above **0.60** in your first pass, you'll need exceptional acceptance or tiers to justify early attention. That doesn't mean "never." It means "later" while you stack cash from simpler wins.

Plan the learning sequence.

Open with a weather-driven local service such as **HVAC**. The acceptance gates are intuitive: ZIP, problem type, and hours. You'll build muscle on IVR, routing, and duration. Next, add a calendar niche like **Medicare**. The compliance lift is heavier, but the dates are clear. Finally, add a macro-sensitive niche like **auto insurance** when shopping trackers say the tide is rising. In Q1/Q2 2025, several sources showed strong shopping, which created a helpful tailwind for acceptance; use that pattern in future years when you see similar market signals. TransUnion Newsroom+1

Institutionalize the backlog.

Revisit your scores monthly. Attach one-page artifacts to each entry: a sample IO, a compliance checklist, a minimal IVR diagram, and a draft script with the key disclosures your buyer requires. If a vertical scores high but has no named owner on your team, it's not truly "next." Assign a person and a date. Treat verticals like products with ship deadlines and post-launch care.

Keep caller identity in the plan.

Whatever vertical you choose, protect your answer rates with proper caller ID. Learn the difference between **authentication** (STIR/SHAKEN, which protects people from spoofed calls) and **branding** (showing your business name or call reason on compatible devices). The FCC explains the authentication part. Industry reports and carrier materials point to answer-rate gains when calls are clearly branded and verified; treat those as vendor-reported ranges, but plan to test them because more answered calls often turn directly into more qualified minutes. Build this into your backlog items so it doesn't become an afterthought. Federal Communications CommissionFCC DocsVerizonFirst Orion

A simple, specific backlog example.

Month 1–2: Launch **HVAC cooling** in Dallas with a $45 payout at 90 seconds, 0.75 target acceptance, and $18 cost per routed call. Pull EIA degree-day charts and keep weekend coverage open during heat advisories. Month 3–4: Launch **pest—mosquito** in Orlando with a $40 payout at 90 seconds and 0.70 acceptance, timed to CDC's summer-through-fall mosquito season guidance. Month 5–7: Launch **Medicare AEP** prep; finish scripts and approvals by late September so you "print" during Oct 15–Dec 7. Month 8–9: Launch **auto insurance** in Georgia when TransUnion or LexisNexis reports show elevated shopping again. Review CPC benchmarks along the way to avoid overpaying for attention in overheated categories. U.S. Energy Information AdministrationCDC MedicareTransUnion Newsroom

Respect gravity.

It's easy to fall in love with giant payouts and forget that those dollars come with strict gates. Build your backlog so steady, seasonal locals generate cash **now**, while you deliberately earn your way into tougher, high-payout niches. That balance—oxygen today, altitude tomorrow—makes a PPCall company durable.

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4

Offer Sourcing & Buyer Development

S1. Mapping buyers (direct vs networks)

Think of pay-per-call like running a taxi stand. People arrive with a need. Your job is to send each "ride" to the right driver fast, at a fair price, with a smooth handoff. To do that well, you need a clear map of who wants calls, when they want them, and what they pay for. That map starts with one simple idea:

A **buyer** is any company that wants live calls from real people who need help now. Buyers can be a local shop, a regional call center, a national brand, or even a broker who resells calls. When you know who they are and what they want, you can route calls to the right place, at the right time, for the right price.

This chapter shows you how to build that map from scratch, pick between direct buyers and networks, and keep everything stable even when something breaks. The goal is to keep the language simple and the steps practical so you can act on them today.

Direct Buyers vs. Networks in Plain Language

There are two main ways to sell calls.

Direct buyers are companies you work with one-on-one. Picture "ABC Heating & Air," "Sunrise Insurance," or "Green Pest." You set up an agreement, hook up your phone routing, and send them calls during the hours they are open. The good part is you get more control, better feedback, and room to grow your payout as results improve. The tough part is you do more work: contracts, billing, quality checks, and handling disputes. Onboarding can be slow, and rules can be strict. But when it clicks, it can pay more and last longer.

Networks and marketplaces sit in the middle. You sign up once and see many offers across many verticals. Each offer has rules for location, hours, call duration, and qualifiers. The network handles a lot of billing and quality control. The good part is you can start fast and test without a big risk. The tough part is payouts can be lower, the terms are set in stone, and you have less power to build your own brand with the end buyer.

A simple way to choose: if you are new and want to learn the ropes, start with a network or two to see common rules and common mistakes. If you already have strong niche traffic—say, HVAC in one metro with good answer rates—layer in a direct buyer for better terms. You can also mix both: use a network to keep cash flow steady while you test a pilot with a local direct buyer to push your payout higher.

Build Your Buyer Map (The "Control Tower" Sheet)

Open a spreadsheet. It will be your control tower. Each row is a buyer or offer. Keep it clean and keep it updated after every call or test. You do not need fancy software to start. A simple sheet in Google Sheets or Excel works.

Here is what each row should capture, written in plain language with a small, realistic example:

- **Company name and website**: "ABC Heating & Air – abcheatingandair.com." This lets you check their site, hours, and service area.
- **Contact**: "Maria Lopez, maria@abcheatingandair.com, (555) 222-0199, LinkedIn profile." People matter. A name and a direct line save days of email tag.
- **Vertical**: "HVAC – residential repair." Be specific so you do not send the wrong intent.
- **Geo**: "Phoenix metro, ZIPs 85008, 85016, 85018, 85020, 85022." If they only want certain ZIPs, list them. If they take a radius, write it down.
- **Hours**: "Mon-Sat 7:00 a.m. to 7:00 p.m. Mountain time; Sun emergency only." Your routing depends on this.
- **Language needs**: "English and Spanish." If you have Spanish callers and they do not, you will lose billable calls.
- **Payout and billable rules**: "$45 per call over 90 seconds. Billable if caller is homeowner, within service ZIPs, and needs repair (not new install quote)." The 90-second rule is common. Write the exact trigger.
- **Return reasons**: "Out-of-state, duplicate within 14 days, wrong number, under 60 seconds IVR hangup." This protects both sides. If returns spike, you will know why.
- **Caps**: "Max 10 calls per day; 3 per hour." This keeps you from flooding their phone team.
- **Net terms**: "Net 15 via ACH; $500 deposit held for disputes." Cash flow matters. Shorter net is easier on you.
- **Notes**: "Use route ID 1042; do not send warranty calls; play buyer's greeting if line is busy."

If you prefer an example you can picture, imagine your sheet has two rows on day one: a network HVAC offer with Phoenix ZIPs and a local direct HVAC shop that answers fast during business hours. That is enough to start.

Where to Find Direct Buyers

You do not need a giant list to begin. Start close to the street.

Open Google and search "AC repair Phoenix" or "pest control Miami." Look for companies that run ads or rank high in local results. Call them during business hours. If they answer fast and sound professional, ask who handles marketing or calls. Be honest and simple: "We bring live inbound calls from homeowners in your ZIPs. We only charge when calls meet your rules and stay on the line. Do you take new calls right now?" Many small owners will listen if you speak clearly and do not oversell.

Check **Google Maps** and **Yelp** for top-rated shops with 50+ reviews. Good operators care about answering the phone. Those make better partners. Check **state license boards** for lists of active contractors. Trade groups and chambers of commerce also keep member lists. A friendly email plus one follow-up call can open doors.

Join a few **Facebook Groups** for local service owners or marketing-minded owners. People talk about busy seasons, staffing, and overflow. When a shop says, "We are booked out a week," that is a buyer who may want calls now to keep the pipeline steady.

A simple trick is **competitor call tracing**. Click search ads for your niche, note the landing pages, and call the number like a normal customer would. Listen to who answers and how they greet you. If it sounds like a third-party center taking calls for many brands, you may have found a broker or a network client. If it is a single local brand with a strong phone team, that is a direct buyer target.

Where to Find Networks

Type "pay per call network HVAC," "call marketplace insurance," or "Medicare inbound call offer" into Google. Read the offer pages. Most will ask for your traffic source, geos, and hours. Sign up for a few that match your niche. You do not need ten logins. Two or three is enough to learn the dashboards, test rules, and see standard payouts.

Keep notes on three things that matter more than the headline payout: **support speed**, **fairness on disputes**, and **on-time payments**. A network with $5 lower payout but fast answers and clean accounting can beat a "high payout" that pays late and fights every return.

Rank Buyers So You Know Who to Feed First

Give each buyer or offer a simple score from 1 to 5 on six easy items. You do not need fancy math. Add the numbers.

- **Clarity**: Are the rules short and clear? If the billable rules fit in two or three lines you can explain to a VA, that is a 5.
- **Fit**: Do they take the geos and hours you actually have? If your traffic is nights and weekends and they only take 9-to-5, that is a low fit.
- **Answer rate**: Do they pick up fast? You can test this by placing five test calls during live hours. If three land on voicemail, do not send volume yet.
- **Acceptance**: When you follow the rules, do they accept most calls? If you hit billable duration and still see many returns, something is off.
- **Pay speed**: Do they pay on time, every time? Check the first two cycles before you scale.
- **Scale**: Can they take more next month? If the cap is forever "5 a day," you will hit a ceiling fast.

If two buyers tie on score, send more calls to the one who communicates better. A buyer who answers your email the same day is worth gold.

Plan for Backup Routes So Nothing Breaks

Never send all your calls to one place. People go to lunch. Lines go down. Caps get hit. Build your routing with simple safety rules.

If buyer A is closed or does not answer in a set number of rings, route to buyer B. If buyer A hits the hourly cap, overflow to B. If buyer A starts returning too many calls this week, shift a portion to B until you fix the issue. Keep this logic simple. You do not need a complex tree to start; you just need one clean fallback.

Record a short greeting on your IVR that sets expectations, for example: "Thanks for calling. Please enter your ZIP code so we can connect you to the nearest technician." A two-step IVR like "residential or commercial" and "enter ZIP" can filter out a lot of mismatches before a human picks up, which protects your acceptance rate.

Your First Map in Real Life (A Walk-Through)

Let's say you live near Phoenix. You choose **HVAC repair** because summer heat means high intent.

Day 1: You add a network HVAC offer that pays on calls over 90 seconds within Phoenix ZIPs. You also call three local HVAC shops from Google Maps and reach one owner, Maria at ABC Heating & Air. You explain you bring live calls from homeowners in her ZIPs. She asks for billable rules. You offer: "Calls over 90 seconds from homeowners within these five ZIPs. We do not charge for warranty calls or new installs." She agrees to a small test: "Try five calls a day this week."

You create your buyer map with two rows: the network offer and ABC. You include hours, language (English and Spanish), caps (10 a day for the network, 5 a day for ABC), and the exact return reasons both accept.

Day 2–3: You build a tiny IVR with two questions: "Press 1 for home, 2 for business. Enter your ZIP code." You route residential calls in the target ZIPs to ABC during 7 a.m. to 7 p.m. Mountain time. If ABC does not answer in five rings, the call goes to the network offer as a backup. After 7 p.m., all calls go to the network offer because they have night coverage.

Day 4–7: You watch what happens. You track two things: answer rate and acceptance. ABC answers 80% of calls during their hours. The network answers 95% at night. Your 90-second rule screens out quick misdials. You see a few returns for "out of area" when a caller's ZIP did not match their phone area code, so you tighten your ZIP filter.

End of Week 1: You settle. ABC pays Net 15 via ACH. The network pays weekly on Wednesday. You add the payout dates to your sheet and mark both "on time." You rank both on the six-item score. ABC scores high on clarity and feedback. The network scores high on scale and answer rate. You keep both and plan to add one more direct HVAC shop across town to handle overflow.

This is how your buyer map becomes real. It is not perfect on day one. It becomes clear as you send calls and see who answers, who accepts, and who pays.

Keep the Map Updated and Shareable

At least once a week, open your sheet and update three fields for each active buyer: average answer time, acceptance rate, and any new return reasons. If you run a team, give read access to your VAs and your call routing person so everyone sees the same truth. When someone asks, "Can we send more to Maria today?" your map will tell you if the cap allows it and if yesterday's returns were normal.

If you onboard a new buyer, do not delete the old ones. Keep a "paused" status and a short note like "Paused 8/10; returns too high due to ZIP mismatch. Revisit after we add ZIP validation." This history saves you from repeating old mistakes a month later.

Cash Flow and Risk in Simple Terms

Shorter net terms put less strain on you. If a network pays weekly and a direct buyer pays Net 30, you can use the network to keep money moving while your direct buyer catches up. Deposits and reserves are normal. They protect the buyer from fraud and protect you from a sudden stop. Write the exact terms in your notes and never scale a buyer until they have paid at least once on time.

When disputes come up, ask for a small **sample review** instead of arguing call by call. For example: "Please review these 10 calls we think should be billable. We will adjust routing based on your feedback." Keep the tone calm and factual. Buyers remember vendors who fix root causes.

Simple, Real-World References You Can Use Today

You do not need paid tools to start. Use **Google Search** and **Google Maps** to find local companies and check hours. Use **Yelp** or the **Better Business Bureau** to spot firms that value service. Use **LinkedIn** to find the operations manager or marketing lead. Use state **license lookup** sites to find active contractors. Join two or three **Facebook Groups** for your niche to hear how owners talk about busy times and overflow. These free sources are enough to find your first direct buyer in most metros.

For routing and tracking, many buyers and networks already provide numbers and basic reporting. If they do, start with that. If they do not, you can layer your own tracking later. The point of this chapter is the map of people and rules, not the tech stack. The map comes first.

Bringing It All Together

A good buyer map is simple, clear, and alive. It tells you who wants what, when they want it, and how you get paid. It helps you decide when to send to a network for speed and when to build a direct relationship for higher payouts. It reminds you to build a backup route so a lunch break does not kill your day. It keeps your team on the same page, and it helps you spot small problems before they turn into big returns.

Start with one metro and one niche. Add one network offer and one local direct buyer. Set exact hours and ZIPs. Use a short IVR to screen intent. Track answer rate, acceptance, and pay speed. Update your sheet every week. In two weeks, you will see which path is better for your traffic. In two months, you will have a map that pays you every day.

Keep the map up to date, and you will send the right calls to the right hands—on time, every time.

S2. Outreach scripts & proof packets

Outreach is how you turn strangers into buyers. Keep it simple. Be clear. Show proof. Ask for a small test first. Do not try to sell the whole farm on day one. Owners are busy. They want to know what you bring, when it starts, what it costs, and how they can tell it works. This chapter gives you words to say, when to say them, what to send, and how to handle the most common worries. Everything here is written so you can copy, paste, and use it today.

Start with your one-line pitch. This is the sentence that opens doors. It explains the service, the place, and the safety rule in one breath. It should fit in a text message and make sense even if someone reads it on their phone while standing in a loud shop. Here is a clean version you can change for any niche and city:

"We send live calls from people who need [service] in [city/region]. You pay only for calls that meet [clear rule]. Want to try a small test this week?"

You can swap the parts in brackets. If you are in HVAC in Phoenix, it becomes, "We send live calls from homeowners who need AC repair in Phoenix. You pay only for calls that meet 90-second connected talk-time in your ZIPs. Want to try a small test this week?" If you are in pest control in Tampa, it becomes, "We send live calls from people with pest problems in Tampa. You pay only for calls over 90 seconds from your service ZIPs. Test five calls a day this week?" Short beats long. Safe beats vague. A small test is easier to say "yes" to than a big plan.

Email is a simple way to start. It lets the owner or manager read on their own time, forward to a partner, and reply with a yes or a question. A clean subject line helps. Use the format "Live calls for [service] in [city]." The body should be three short parts: what you do, how you charge, and the small test. You can also mention that you record calls (with consent) for quality. That helps them coach their team. Here is a version you can paste and adjust:

Subject: Live calls for [service] in [city]

Hi [Name],

We send live inbound calls from people in [city/area] who ask for [service]. You only pay when the call meets the rule we set together (for example, 90-second connected talk-time within your ZIPs).

We can start with a small test this week: [5–10 calls/day], [hours], your exact ZIPs. No setup fee. You choose the cap. We record calls for QA (with consent) so you can coach your team.

Would you like to try a one-week pilot? I can send a one-page agreement and a short proof packet.

Thanks,

[Your name]

[Phone] | [Website]

You do not need a long story. You do not need big claims. You need a steady voice and a next step. If you want to add one line of social proof, keep it simple: "We recently delivered 53 billable AC repair calls in 10 days to a Phoenix shop at a 78% acceptance rate." Keep private info out. If you share numbers, make sure you can back them up.

Phone calls still matter. Many owners live on the phone. A quick direct call can move you from "unknown" to "send me the one-pager" in two minutes. Keep your opening line short. Ask a yes/no question that fits a busy day. Here is a simple open and a short pitch that follows:

"Hi [Name], this is [Your name]. Quick question: are you taking new [service] calls in [city] this week?"

If they say yes, continue:

"Great. We run pay-per-call. That means you only pay when a call meets the rule we write down together. For [service], most shops like 90 seconds connected, in-city ZIPs, and business hours. We can start small—five to ten calls a day—so you can listen and see if the fit is right. If you like it, we raise the cap. If not, we stop. No hard feelings. Want me to email you the one-pager and a proof packet now?"

If they are not the right person, ask who handles new marketing or phone leads and get a direct email. Be polite. Busy people remember calm callers.

The "proof packet" makes you real. It is a small set of items that show you know what you are doing and care about fairness. You can make it one PDF or a folder in a drive link. Keep it short and clean. It should include a one-page "how it works" in plain words; a screenshot of your call dashboard with fake or redacted data that shows duration, geo, and time stamps; a 30–60 second audio clip with private info removed so they can hear what a real call sounds like; a short paragraph that defines "qualified call" in their niche; a short note on your dispute window and how returns are handled; a one-page compliance note that says you announce recording, honor do-not-call, and store consent; a simple case note that says "We sent X calls, Y% met the rule, paid on time" with no names; and your business info like a W-9 if in the U.S., address, and payment details on request. You do not need fancy graphics. You need trust.

When a buyer says "yes," ask the right questions so routing works on day one. Ask which ZIPs or states they want, the exact hours in their local time, any lunch or shift gaps, language needs like English only or English and Spanish, whether you should point to a main line or a special tracking number (a special number is better for reporting), what disqualifies a caller (for example, warranty calls, commercial jobs, callers outside a metro, age under 65 in Medicare), who will review calls and how fast, and what a fair cap is for the first week. Write the answers into your one-page IO. Send it for e-signature. A clear one-pager saves days later.

You will hear a few common worries. Be ready with short, calm answers. If someone says, "We tried leads before. Bad quality," explain the difference. Say, "Totally get it. We do calls, not email lists. You pay only when the call meets the rule we write down together. You can listen to every call." If they say, "We are short-staffed," do not push volume. Say, "Let's daypart to your best hours. We can add an overflow buyer at night so you do not miss value." If they say, "Price seems high," do not argue. Say, "We charge only when there is real talk with your team that meets the rule. If we miss, you do not pay. Start with a small test and see the numbers." These answers are short because short answers get heard.

Follow-up wins deals. Many owners do not reply to the first email because they are in a crawl space, on a roof, or with a customer. Use a simple seven-day follow-up plan. Day one, send the first email and the proof packet. Day two, make a quick phone call that asks if they saw your note and if they want the one-pager. Day four, send a short reminder with one new proof, like a fresh 30-second audio clip that shows call quality. Day seven, send a simple line: "Still open to a seven-day pilot?"

If there is no reply after two weeks, pause. Move them to a monthly check-in list. Seasons change. When heat waves or storms hit, that "not now" often turns into "can you start Monday?" Keep your tone kind. You are building a long game.

Keep records. A simple CRM or a shared sheet works. Log the date, the channel, the result, and the next step. Paste the script you used and any notes on tone or needs. If you run a team, keep your scripts in one shared doc and ask your VA or rep to use the same clear words. Consistency makes training easy and helps you spot what lines work and which ones fall flat. A shared doc also lets you make one update—like a new dispute window—and have the whole team use it the same day.

Let's walk through a real example so you can see the parts working together. Imagine you are testing HVAC repair in Phoenix in August. On Monday morning you search on Google Maps for "AC repair Phoenix." You pick five shops with 4.5 stars and 100+ reviews. You visit their sites to confirm service ZIPs and hours. You call one shop, ABC Heating & Air, and the owner, Maria, answers. You use your one-line pitch: "We send live calls from homeowners who need AC repair in Phoenix. You pay only for calls over 90 seconds in your ZIPs. Want to try a small test this week?" Maria says she is short-staffed in the afternoons. You offer to send five calls a day between 8 a.m. and noon, Mountain time, and to cap at 25 calls for the first week. You mention you record calls with consent so she can coach her team. She says, "Send me what you have." You email your one-page IO and the proof packet. She signs that afternoon.

On Tuesday you route calls to a special tracking number she gave you. You add a simple IVR on your side: "Press 1 for home, 2 for business. Enter your ZIP code." That one step filters out wrong intent. By noon, you have sent five calls. Three were billable. Two were short because one caller had a home warranty and one hung up. You send Maria a quick note: "We sent five calls, three billable, two short. Your tech Tony handled the calls well. Do you want to raise to seven tomorrow?" She says, “Let us keep it at five. Good start.” On Friday you send a one-page recap with call times, durations, and a short audio clip. She pays the first invoice the next week. You raise the cap to eight a day and add a second ZIP cluster across town. That is how a stranger becomes a buyer—with simple words, small tests, and steady proof.

You can repeat the same steps in other niches. For pest control, the rule might be “90-second connected talk-time within service ZIPs, no wildlife jobs.” For Medicare, it might be “120-second talk-time with callers age 65+ in approved states, AEP hours only.” For auto insurance, it might be “90-second talk-time from drivers with valid licenses in listed states, no commercial.” The pattern holds: service, place, rule, small test, proof, and calm answers to normal worries.

A few simple tools help you keep outreach honest and smooth. Use Google Maps and Yelp to confirm the company exists, has reviews, and is open when you plan to send calls. Use LinkedIn to find the right contact if the owner is not available. Use your call platform to pull a clean screenshot with durations and geos, and to clip a 30-second audio sample that shows a real person asking for real help. Use a simple e-signature tool so your one-page IO is easy to sign on a phone. None of this needs to be fancy. It needs to be clear.

End each week by checking your outreach numbers. How many emails did you send? How many calls did you make? How many “send the one-pager” replies did you get? How many pilots started? If the numbers are low, try small changes. Test a new subject line. Try morning calls instead of afternoon calls. Shorten the email body by two lines. Improve your proof packet with one better audio clip. Teach your VA to find direct emails on the company site instead of sending to info@ addresses. Do not guess for months. Test for three days, keep what works, and move on.

Keep your voice steady. You do not need to hype. You do not need to pressure. You are offering a safe test with clear rules and real proof.

People who value their phones and their customers will hear that and say yes when the timing is right. Outreach is not magic. It is a simple rhythm: clear pitch, small test, short proof, kind follow-up, clean records. Do this for two weeks and you will have pilots. Do this for two months and you will have buyers. Keep it simple and keep it human. That is how strangers become long-term partners.

S3. IO and MSA Terms & Negotiation

When you start selling calls, it is easy to think the "hard part" is getting traffic or finding buyers. But in truth, the paperwork matters just as much. Why? Because the paperwork is what tells both sides exactly what is being bought and sold. If the paperwork is vague, disputes are guaranteed. If it is clear, things run smoothly. That is why you must learn how to handle the two most important documents in pay-per-call: the **MSA** and the **IO**.

The **Master Services Agreement (MSA)** is the "big umbrella" document. It lays out the main terms of your business relationship with the buyer. You usually only sign it once. It may include legal language, liability limits, and broad rules about fraud, data use, or termination. Think of it as the "constitution" of your deal—it rarely changes once signed. You can run many campaigns under one MSA.

The **Insertion Order (IO)** is the "campaign card." Every IO is a short document with the details for a single campaign or offer. It shows the service, the geo (which states, cities, or ZIPs the buyer wants), the hours of operation, the payout per call, and what makes a call "qualified." If you run multiple campaigns for one buyer—say HVAC in Phoenix and pest control in Tucson—you'll have multiple IOs under the same MSA. The IO is where the day-to-day rules live.

The most important sentence in any IO is the definition of a **qualified**

call. This is the heart of your deal. If a call meets this definition, you get paid. If it doesn't, the buyer can reject it. That's why the definition must be written in one short, clear paragraph. Use plain words, not legal jargon. Cover five things: duration, geo, intent, uniqueness window, and hours.

Here is an example of a clean definition:

> *"A qualified call is an inbound consumer call for residential AC repair from ZIP codes 85008, 85016, 85018, 85020, and 85022, connected to Buyer and lasting at least 90 seconds after connect, unique per caller for 14 days, during Monday through Saturday, 8 a.m. to 6 p.m. local time."*

Notice how clear that is. You know what service (residential AC repair), what geos (five ZIPs), what duration (90 seconds after connect), what uniqueness rule (14 days), and what hours (Monday–Saturday 8–6). No gray areas. No vague "good calls only." That one line prevents half the fights you might otherwise have.

Now let's talk about **return reasons**. Buyers must be able to reject calls that don't meet the rules. But you must keep this list short and objective. Otherwise, buyers will start rejecting calls for "bad vibe" or "wrong tone," which is unfair. Standard return reasons are: (1) out of geo, (2) duplicate within the uniqueness window, (3) underage or wrong category, and (4) shorter than duration after connect. That's it. If the buyer wants more, insist they put it in writing, and keep the list tight. Otherwise you will bleed revenue on endless "exceptions."

Add a **review window** to every IO. A review window says how long the buyer has to review calls and issue returns. After that window, all calls are auto-accepted. Five business days is common. Example wording: "Buyer will review calls within 5 business days. Calls not reviewed by then are accepted." This matters because you need cash flow. If a buyer tries to review calls 45 days later, your books will be a mess. If they refuse auto-accept, then insist on very short net terms (Net 7 from week close) and fast review.

Payment terms must also be clear. Pick something simple: Net 7, Net 15, or weekly. State when the clock starts (from acceptance or week close). State the method (ACH, wire, PayPal). State who pays fees. If the buyer is new, ask for a deposit or start with a weekly cap until they prove they pay on time. Example: "Payment Net 15 via ACH. Fees to be covered by Buyer. $1,500 deposit required, applied to first invoices."

Another section covers **data, recordings, and privacy**. You must say calls are recorded "for quality and compliance," and that the caller hears a notice. You must state who can access recordings (you and buyer), and for what (QA, disputes, training). State how long data is stored. Promise to honor Do Not Call requests. These lines show you run a compliant shop and build trust.

"No surprises" rules keep things clean. They may include: no brand bidding if buyer forbids it, no fraud or fake clicks, no reselling unless approved, and no dialing people without proper consent. Buyers add these to protect themselves. Agree if they're reasonable, but watch for vague wording like "Publisher may not compete in any way." That's too broad.

Liability and off-ramps are also important. A standard cap is that neither side owes more than the last three months of fees. Add a cure period: if one side breaks a rule, they have five business days to fix it before termination. Add a 30-day without-cause exit. That way either side can leave if the fit is wrong. This makes both sides less nervous to start.

Now let's cover **negotiation**. Most people fear negotiation, but in pay-per-call it's usually simple. Buyers want clarity as much as you do. So speak in plain words: "We like to keep return reasons short and objective. Can we agree on four: out of geo, duplicate within 14 days, underage/wrong category, and under duration?" Or, "To move fast, let's do auto-accept after 5 business days. You still can return for the listed reasons." Or, "We can start at $45 payout for 90 seconds. If 20% of calls last over 5 minutes, can we add a $10 bonus?" Or, "Let's start at 10 calls a day. If quality holds, we raise the cap next week." These are reasonable requests.

Red flags to avoid: duration measured from call start instead of after connect; "Buyer may return any call for any reason"; no review window (returns allowed months later); very long net terms (Net 45+) with no deposit from a new buyer; no clarity on hours, geo, or category. If you see these, either fix them or walk away.

Finally, here are the **steps to get signed**: (1) Send your one-page IO draft with the qualified call definition. (2) Hop on a short call. Read the rule out loud. Confirm hours, geo, and caps. (3) Add the payment line and review window. (4) Sign MSA + IO via e-sign. (5) Swap numbers and test one call while both teams listen. (6) Start the small pilot. (7) Send the first weekly report and prepare the first invoice.

Remember: clear words today save fights tomorrow. If a rule matters, write it. Do not leave it as "understood." Most problems come from unwritten assumptions. If you want long-term buyers and smooth cash flow, make every IO clear and simple.

S4. QA and Dispute Procedures

You can think of QA—quality assurance—as your defense system. It protects you from unfair returns, shows proof when there is a question, and helps you coach your team to send better calls. Without QA, you're guessing. With QA, you can prove your value and improve fast.

Every call should be checked against the IO rules. Was it the right kind of caller? For example, if the IO says "residential only," then a business caller is not qualified. Was the caller in the allowed geo? Check the ZIP code or area code. Did the call connect fast, or was there a long hold? How long did the caller stay connected after the buyer answered? Did your system play the "this call may be recorded" notice? Did the buyer answer in a fair time, or did they miss the call? These checks ensure the call meets the contract.

Most platforms show connected duration, which is the talk after connect. That's the timer that matters. Keep IVR data too. If a caller pressed "residential" and entered ZIP 30309, you can prove intent and geo later. These logs are your shield.

Set up a QA loop. Daily, scan calls that failed duration. Listen to ten or twenty. Ask: Did the IVR run too long? Did the buyer put the caller on hold? Did we route after hours? Fix the easy issues first. Weekly, score a random sample—maybe 20% of calls. Use a short scorecard with yes/no: intent match, geo match, hours match, connected above threshold, script OK. Monthly, send a one-page QA summary to the buyer: acceptance rate, top decline reasons, two examples you fixed. This builds trust and shows you're on top of quality.

Short calls are a common problem. Prevent them by keeping your IVR short—just one or two questions. Route by ZIP before ringing the buyer. Daypart to buyer hours only. Use branded caller ID for callbacks so more people pick up. Share a simple intro script with the buyer's agents: "Hi, thanks for calling Green Pest Control. I can help with pest removal. May I ask your ZIP code?" A good script builds trust and keeps callers on the line.

Even with QA, disputes will happen. A buyer may mark a call "non-qualified." Don't argue on the phone. Send proof. Collect the call ID, recording clip, IVR path, connected duration, and notes. Send a polite dispute email:

> *Subject: Review request — Call 3041 on 3/20*
>
> *Hi Sarah,*

> *We saw this call marked non-qualified for "out of geo." The recording shows the caller gave ZIP 85016, which is on the IO list, and the talk time was 2:14. Could you review? If you still see a mismatch, we'll adjust routing.*
>
> *Thanks,*
>
> *Mike*

Send disputes within the IO review window (usually 5 business days). Track your dispute outcomes. If you lose fairly, fix the issue. If buyers return calls for reasons not in the IO, raise it quickly.

QA is also about training your team. If you use agents, coach weekly. Play two good calls and two weak calls. Praise the good. Fix the weak with short, clear tips: "Ask for ZIP sooner," "Give the recording line at the start," "Confirm need in first 30 seconds." Keep a one-page script with required lines bolded. Short coaching sessions work better than long lectures.

Mystery shopping is another trick. Call your own numbers. Call your buyer's public number too. How fast do they answer? What do they say? Are they polite? If the buyer's staff is slow or rude, your acceptance rate will drop. Share your findings in a helpful way: "We noticed wait times over 2 minutes yesterday. Could we try routing to your overflow line?" Buyers appreciate constructive input.

Keep a "call library." Save ten of your best calls and ten common mistake calls in a folder. New staff can learn fast by listening. Buyers love hearing real examples too. It shows you're transparent and professional.

QA is not about blame. It's about learning and proving. When you show buyers data, recordings, and fixes, they trust you more. Your acceptance rates rise. Your refunds fall. And your reputation grows. That's why QA is not extra—it's core to pay-per-call.

S5. Collections: AR, Net Terms, and Credit Checks

Let's be honest: no one likes to chase money. But in pay-per-call, if you don't stay disciplined, you can go broke even with great traffic. Collections is not about being mean. It's about having clear systems so you always get paid on time.

Start with the basics. **Accounts Receivable (AR)** means money buyers owe you for calls already delivered. **Net terms** are the days buyers have to pay (Net 7, Net 15, etc.). **Deposits** or prepay means money buyers pay before calls start. **Reserves** or holdbacks are small amounts buyers hold for a short time to cover returns.

Your payment flow should be simple. Send invoices weekly or bi-weekly. Each invoice should show the date range, number of accepted calls, payout per call, total due, bank info, due date, and IO reference. Attach proof, like a CSV with call IDs and durations. Buyers pay faster when details are clear. Always send to the billing email and copy your day-to-day contact.

For new buyers, protect yourself. Start with a cap (maybe $1,000–$5,000 per week). Ask for a deposit or Net 7 until two payments clear. If they want Net 30+ and you don't know them, lower the cap or ask for a bigger deposit. Ask for references and a short credit form. Keep it friendly, not scary. Example: "We start at 10 calls a day, Net 7 terms. After two clean payments, we can discuss raising caps."

Watch your AR "aging." Make a weekly report: 0–7 days current, 8–15 days, 16–30 days, 31–45, 46+. Most of your AR should be in 0–7 days. If money moves past 30 days, act fast.

Follow up with kindness but firmness. Day 5 after invoice: "Just checking you received invoice #1042 for $2,250 due 3/15. Any questions?" On due date: "Scheduled for today. All set?" Day 3 late: "We show $2,250 now 3 days past due. Can you confirm payment date? Caps held steady until it lands." Day 7 late: "We need to pause new volume until payment clears. Please advise by 3/22." Day 14 late: pause traffic and send a final date. Day 30 late: if no response, send a formal demand letter. Sometimes a direct call to the owner fixes it.

Payment methods: ACH is fast and cheap. Wire is fast but higher fee, good for big sums. Cards are easy but high fees. Checks are slow—avoid if possible. State who pays fees. Most publishers ask buyers to cover wire fees.

Reserves and refunds must be clear. If buyer needs a reserve, write the percent and release time (e.g., 10% held for 30 days). For refunds, net them in the next invoice only if valid and on time per IO. Never accept "open-ended" reserves.

Know when to stop. If a buyer is late twice, lower caps. If AR hits 30+ days unpaid, stop sending. Don't let hope kill your cash flow. You can always restart later if they improve.

Keep a buffer. Hold 4–6 weeks of costs in cash. That way one late buyer doesn't sink you. If you need more working capital, raise caps slowly. Never depend on one buyer.

Train your team. Make a short SOP: how to invoice, when to follow up, when to pause. Give VAs a checklist and templates for reminders. Use calendar alerts. Small systems prevent big losses.

Good buyers pay on time and grow with you. Treat them well. Give them clear reports. Fix issues fast. But protect yourself with clear invoices, fair terms, and caps. Collections doesn't have to be scary. It's just discipline—steady, clear, and kind.

5

Tracking, Routing & Attribution

S1: Call Tracking Numbers (DIDs) & Dynamic Insertion

When most people look at a phone number, they see something plain and ordinary. It is a string of digits that connects one person to another. But in pay-per-call marketing, a phone number is far more powerful than that. It becomes a kind of key, a fingerprint, even a receipt that proves your work. A phone number is not just a number; it is a tracking tool. It tells you who called, where they came from, and why they picked up the phone in the first place. It shows your buyers that the call would not have happened without your effort. This is why we use something called a DID, which stands for Direct Inward Dialing. A DID is basically a "smart" phone line you control. You can buy as many as you need, and you can point each one to the place it belongs. Think of it as having a whole drawer of labels you can swap in and out whenever you want, each label tied to a certain ad, a certain campaign, or even a certain neighborhood.

The first choice you make with DIDs is usually whether to use local numbers or toll-free numbers. Local numbers look like they belong in the same city as the person who sees them. A Phoenix ad, for example, might use a number that begins with 602, which is the Phoenix area code. People tend to trust numbers that look familiar, and they answer them more often. Toll-free numbers, on the other hand, feel bigger, almost like they belong to a national company. A lawyer who works across many states or a brand that serves the whole country may prefer something like an 800 number because it gives them that large, established look. Neither option is wrong. The real question is what matches your ad. If your ad says "AC repair in Phoenix," then use a Phoenix number. If your ad covers ten states, then a toll-free line may make more sense. Matching the type of number to the promise of the ad keeps everything believable and natural.

Once you have the type of number picked out, the next step is to understand that you rarely use just one. Beginners often think they can put a single phone number on their page and call it a day, but that will not work once you start running traffic. If everyone who visits your page sees the same number, you will have no idea which ad brought in which call. Instead, you build what is called a number pool. A pool is a small group of DIDs that rotate across your visitors. Imagine a store with many doors. If you only had one door open, you would never know which customers came from which direction. But if you had ten doors, and you watched each one carefully, you could track who came in from the north, who came in from the south, and who came straight from the parking lot. That is what a pool does for you. It gives each visitor a temporary number. If they decide to call, the call is tied back to their exact visit. That way, you know not only that the phone rang, but also which ad and which click made it happen.

How big does a pool need to be? That depends on the size of your traffic and the behavior of your visitors. A small page might only need four to ten numbers. A bigger page might need more. If visitors stay on your site for a long time before calling, then you will need extra numbers so that you don't recycle too fast. Recycling too quickly is a common beginner mistake. It can cause calls to be logged under the wrong visitor, which confuses both you and your buyer. The safe path is to start small and then grow. Add more numbers only when you see signs of mix-ups.

Now, you may be wondering how the right number appears to the right person. This is where something clever comes in, called dynamic number insertion, or DNI. DNI is a tiny script you put on your web page. It reads the address the visitor used to get there. If that address says something like "source=google" or "campaign=ac_repair_summer," the script swaps out your default phone number and replaces it with one from your pool. To the visitor, nothing looks unusual. They just see a normal phone number. But in your reports, you can see exactly which ad, which source, and which page led to the call. It is like having invisible ink that only you can read. And because things sometimes go wrong—scripts don't load, or someone types the address in by hand—you always set a fallback number. That way, even if the fancy tracking fails, the call still connects and you do not lose a lead.

Tracking is not limited to the online world. Many people still use offline ads like flyers, postcards, billboards, or even QR codes. Those cannot use scripts, but you can still track them. The way to do it is by giving each offline item its own static DID. The flyer gets one number, the billboard gets another, and the postcard gets its own as well. In your dashboard, you label each one clearly, and then when calls come in, you know exactly which piece of offline marketing did the work. Even tools like Google Business Profile can be tracked. You set the main number on the listing to be a tracking number that forwards to your real business line. To stay on Google's good side, you also add your real number in the "alternate" spot. That way your local search rankings stay safe, but you still capture the data.

Numbers are not just about tracking. They also help with quality. Many systems let you set up something called a "whisper." This is a short message that plays to the buyer's agent before they answer. It might say something like "Residential AC — East Phoenix." The caller never hears it, but the agent does, and it helps them answer with confidence and the right words. You can also record calls, as long as you play a legal notice that says something like "This call may be recorded for quality purposes." Recordings protect you and your buyer. They let you settle disputes by showing exactly what was said, and they help you train agents or adjust your campaigns to improve quality.

Being responsible with your numbers is part of the job. Do not recycle them too quickly. Give them time to "rest" before you use them again, so you don't get leftover calls from the old campaign. Watch out for numbers that start to show up as "Spam Likely" on phones. If that happens, replace the number and check why it happened. Sometimes it means too many calls were short or low quality. Sometimes it means the audience was wrong. Keeping your CNAM, which is the caller ID name, clean also matters. If the name matches the service people expect, they are more likely to answer.

Good organization saves you from headaches later. Before you even launch a campaign, think about how you will name your numbers. Use names that tell you everything at a glance, like "HVAC-PHX-Search-Pool-A" or "Pest-DAL-FB-Adset-1." Use the same style in your ads and in your reports. When everything matches, you will make fewer mistakes, and when buyers ask you questions, you can answer with confidence. If a buyer says, "Why did call quality dip on Tuesday?" you can pull the exact numbers, the ads, and the pages in seconds, instead of hunting around for hours.

Finally, numbers can even warn you when something is wrong. If a number gets no calls for two days, it might mean the page broke or the script stopped working. If a number gets too many very short calls, it might mean a bot or a spammer is hitting you. Setting alerts for these things keeps you ahead of problems. You do not want to waste money sending traffic to a broken page. A quick alert can save you time, money, and frustration.

At the end of the day, tracking is about trust. Buyers want proof, and proof comes from your numbers. With clean DIDs and a solid DNI setup, you can show exactly what happened. You can say, "Here is the number that was called, here is the time, here is the ad, here is the page, and here is the recording." That is the backbone of pay-per-call. With that proof, you get paid faster, fight fewer disputes, and build the confidence to scale bigger and bigger.

If you are just starting, you do not need to spend a fortune. You can test with just a handful of numbers from a service like Ringba, CallRail, or even Twilio if you like the do-it-yourself path. Five numbers is enough to start. Place them on a single campaign, watch the data, listen to the recordings, and learn. Once you know how it works, add more. The goal is not to have the biggest stack on day one. The goal is to build slowly, to understand each part, and to grow with confidence. Pay-per-call is built on numbers, and numbers are built on trust. Learn to use them well, and you will have the foundation to succeed.

S2: UTMs, IVR Data Capture & Metadata

Your phone does not just ring by magic. It rings because someone saw a message that caught their attention and made sense to them. Maybe it was a Google ad for "AC repair near me." Maybe it was a Facebook ad with a picture of a friendly technician. Maybe it was a postcard that landed in their mailbox. Somewhere, a message pushed them to pick up the phone. The question is: which message was it? In pay-per-call, answering that question is one of the most important things you can do, and that is where UTMs, IVR data, and metadata come in. Together, they tell the story of how a stranger turned into a caller, and how that caller became a customer. They are the difference between guessing and knowing, between hoping and proving.

Let's begin with UTMs. UTM stands for Urchin Tracking Module, which sounds complicated, but really, it is just a small label you add to the end of a link. Think of it as a tag that helps you remember which basket the eggs came from. You might have three ads running: one on Google, one on Facebook, and one in an email. Without UTMs, you would know that someone clicked, but you would not know from which ad. With UTMs, each ad has its own little name stitched on, like a nametag on a child's backpack. When the visitor arrives at your site, that nametag comes along for the ride, and your tracking system can read it. Suddenly you know that the click came from Google, or that it came from Facebook, or that it came from your email newsletter.

There are five common UTM parts, and while they sound technical, they are easy to understand once you see them in action. The source is where the visitor came from, like Google or Facebook. The medium is the type of traffic, like CPC for paid search, or "email," or "social." The campaign is the name you give the push, like "ac_repair_summer." The term is often the keyword, like "ac repair near me." And the content is used to tell ads apart, like "ad_a" or "blue_button." When you put them all together, you get a link that looks long and messy, but carries a full story: /ac?utm_source=google&utm_medium=cpc&utm_campaign=ac_repair_summer&utm_term=ac+repair+near+me&utm_content=ad_a. To a visitor, it looks like just another link. To you, it is the map that shows exactly how they found you.

When someone visits your page with those UTMs attached, your dynamic number insertion script reads them. It then chooses a tracking number from the pool and shows it to the visitor. When the person picks up the phone and calls, the UTMs travel with the call record inside your system. That means you don't just see a phone number, you see the ad, the keyword, the source, the medium, and even the button color that led to that phone ringing. This matters because most ad platforms, like Google Ads or Facebook Ads, also want to know which ads worked. If you pass conversions back to them—the calls that turned into real customers—they learn and get smarter. They start sending you more of the right clicks and fewer of the wrong ones. In other words, UTMs are not just for tracking; they are for teaching the machines what to send you.

Now let's move to IVR, which stands for Interactive Voice Response. You've probably used it many times when calling a company. It is that little menu that says, "Press 1 for sales, press 2 for support." In pay-per-call, IVR is not about being fancy or building a maze. It is about collecting a small piece of useful data before the call connects. A good IVR is short and to the point. For example, you might ask the caller to press 1 for residential service and 2 for commercial service. Then you might ask them to enter their ZIP code. With just those two little steps, you already know what type of service they need and where they are located. That is gold for routing. When the buyer's agent answers, they can already see or hear, "This is a residential caller in 85008." They can jump right into the right script without wasting time. That saves money, helps hit duration goals, and makes both the caller and the buyer happier.

Each button press and each digit entered in the IVR is data. It should be saved in your call log, tied to the unique call ID. If you have the right setup, you can even pass it to the buyer's screen as a little popup, or play it as a whisper before the agent answers. Imagine the agent hearing, "Residential AC, ZIP code 85008," just a second before they say hello. That is a smooth hand-off, and it makes the caller feel like the company is paying attention.

Then comes metadata, which is simply the rest of the information about the call. Metadata is like the background of a photo. It includes the landing page where the person came in, the referrer that sent them, the device type they used, the time of day, and more. If you are using ad platforms, you may also capture their special click IDs, like Google Click ID or Facebook Click ID. You don't need to understand every code right away. The important thing is to store them and keep them tied to the call. Later, when you want to prove that a certain ad group produced the best calls, or that calls from Facebook were weaker than calls from Google, you will have the facts in hand. Without metadata, you are guessing. With it, you are proving.

One of the most important things when working with UTMs is to keep them clean and consistent. Computers treat "Facebook" and "facebook" as two different things. If you type it one way today and another way tomorrow, your reports will split, and you'll waste time combining them later. The simple fix is to create a short UTM rules sheet for yourself or your team. Always use lowercase, always spell things the same way, and write down a few examples. If you work with other people who build pages or run ads, give them copy-and-paste links with the UTMs already filled in. The fewer mistakes at the start, the better the data at the end. And if you run offline channels like postcards or flyers, you can still use UTMs. Just print a short URL or a QR code that points to a page with the UTMs baked in. When the person scans or types the link, you still know the source and campaign.

Another smart trick is to use your IVR to play the recording notice at the start of the call. If your buyer is in a state that requires two-party consent, you can even add a quick "Is that okay?" moment and save the "yes" in the recording. That tiny clip becomes part of your metadata. If there's ever a dispute, you have proof that the caller agreed. Small details like that make you look professional and keep you safe.

As you collect more calls, patterns begin to show up. You may notice that callers from certain ZIP codes stay on the phone longer than others. You may find that people who press "2" for commercial often hang up before reaching an agent. That might mean you need a separate buyer for commercial jobs, or that you need a different intro script. You may also notice that calls from utm_source=facebook tend to be shorter or less qualified than calls from utm_source=google. If that happens, you can tune your Facebook audience, change your landing page, or lower your cap on that channel until the quality improves. These patterns are the road signs that guide you toward better results, but you only see them if you have the data.

The golden rule is to keep your data clean at the source. Do not let broken or missing UTMs into your system. If you control your own pages, you can even add a simple check: if a link arrives without a key UTM, block it until it's fixed. If you work with partners, give them links that already have the UTMs inside, so there is less room for error. Remember, once a call comes in without clean data, you can never go back and add it. The moment is gone. Clean data up front is the cheapest way to save yourself hours later.

In the end, UTMs, IVR data, and metadata work together like three chapters of the same book. UTMs tell you how the caller found you. IVR tells you what the caller wanted. Metadata tells you when and where it happened, and adds the extra details. When you tie them all together under a single call ID, you hold the whole story in your hands. That story is how you make smart changes, how you cut waste, how you improve performance, and how you prove real value to your buyers. Pay-per-call is not just about ringing phones; it is about telling clear stories with proof. UTMs, IVR, and metadata are the tools that make those stories possible.

S3: Geo & Skill-Based Routing, Concurrency & Caps

When you begin your first pay-per-call campaign, it might feel like the hard part is already done once the phone starts ringing. You set up a small ad, maybe just a few dollars a day, aimed at people searching for something urgent like an emergency plumber. You connect that ad to a landing page with a tracking number, and before long you hear the sound you've been waiting for: a live call. The excitement is real, but the bigger question comes next—where should this call go? If you route it to the wrong place, you risk losing money, disappointing your buyer, and leaving the caller frustrated. Routing, in many ways, is the hidden engine of pay-per-call. It quietly determines whether a campaign succeeds or fails, because good routing sends every call to the right place at the right time, while bad routing turns opportunity into waste.

At the smallest scale, routing can be something you do manually. You might only run your ad while your buyer is open, or you might pick up calls yourself and transfer them. That can work for the first few days when you're testing with one buyer and a handful of calls. But as soon as volume increases, you'll need to think about routing as a series of rules that act like gates. Each call should pass through those gates in order: first, whether the buyer is open, then whether the caller is in the right location, then whether the caller needs a special skill, then whether the buyer has space to take them, and finally, how the call should ring through. If any step fails, the call should have a safe landing place, not just drop into silence. This order—hours, geography, skill, caps, concurrency, ring strategy, overflow—is the foundation of routing.

The first and most obvious filter is time. A small business may only answer phones from 9 a.m. to 5 p.m. If you let ads run at night, calls will still come, but nobody will answer them. Those unanswered calls will either hang up right away or get trapped in voicemail, which counts as a short call in your reporting. Short calls hurt your average duration, which hurts your payout. Even if you're only spending five dollars a day testing a small campaign, that waste adds up quickly. The solution is to make your routing system respect the buyer's local time zone, not yours. If your buyer opens at 8 a.m. their time, then don't start sending calls until then. If they close at 6 p.m., stop the ads at 5:45 so nobody calls at the wrong time. Almost every ad platform allows this kind of schedule. On Google Ads, it's called ad scheduling. On Facebook Ads, it's under dayparting settings. The trick is to line up the schedule of your ads with the schedule of your buyer.

Once you know the buyer is open, the next gate is geography. Buyers rarely want calls from everywhere. A lawyer licensed in New York cannot accept clients in California. An HVAC company in Dallas is not going to drive two hours to Austin. At the start, you can get a quick idea of a caller's location by checking their area code. A 214 number is Dallas, while 713 is Houston. But cell phones make this unreliable because people keep old numbers when they move. The stronger method is to ask for a ZIP code in your IVR. A simple message like "Please enter your five-digit ZIP code" gives you solid data. If the ZIP matches your buyer's service area, the call moves forward. If it doesn't, you can politely end the call, or better, route it to a buyer who does cover that ZIP. This kind of setup doesn't require enterprise tools. Services like Ringba and CallRail both allow you to add IVR steps for a few dollars a month, and even Twilio lets you build your own if you like coding. This small step saves wasted calls and keeps your buyers happy.

Skill is another routing gate that matters more than most beginners realize. Skill can mean language, like sending Spanish-speaking callers to Spanish-speaking agents. It can mean license, like making sure an insurance call goes to an agent who is licensed in the caller's state. It can mean type of job, like routing commercial calls to one buyer and residential calls to another. You don't need to build a complicated phone tree. In fact, callers hate long menus. One or two short questions are usually enough. For example: "Press 1 for English, press 2 for Spanish," or "Press 1 for residential service, press 2 for commercial service." With just a single answer, your routing system can send the call to the agent who is prepared to handle it. This means fewer wasted calls, longer talk times, and better acceptance. Even if you're only testing with one buyer, you can start by using IVR to at least confirm whether a call is residential or commercial. If your buyer only wants residential jobs, you'll immediately know which calls not to forward.

The next two filters—caps and concurrency—are about limits. A cap is how many calls a buyer wants in a certain period, like 50 per day or 200 per week. Concurrency is how many calls they can take at the same time. Imagine a buyer has three phone lines open. If you send them ten calls at once, seven callers are stuck on hold. People on hold often hang up, and those hang-ups show up as short calls in your reports. Too many of those, and your payout drops. The solution is to set your system to count how many live calls are already connected to a buyer. If they are at the limit, new calls should wait in a short queue or be rerouted. Tools like Ringba make this easy with built-in concurrency settings. If you're more technical and prefer building your own flow, Twilio lets you script concurrency checks in your call logic. Either way, protecting your buyers from overload is critical if you want long-term success.

Even after all that, you still have to think about how the call actually rings on the buyer's side. This is called a ring strategy. Some systems use "ring-all," which means every agent's phone rings at once until someone answers. It's fast, but noisy. Others use "round robin," which rotates the calls so each agent takes turns. This is calmer, but sometimes slower. A hybrid approach is "overflow," where the call rings the main team first, and if nobody picks up in, say, 20 seconds, it flows to a backup team. Different buyers prefer different strategies, and the only way to know for sure is to test. If you use "ring-all" and your buyer complains about chaos, try round robin. If answer rates are low, try overflow. The key is flexibility and watching your data.

Overflow is your safety net. No matter how carefully you set up routing, buyers will sometimes be closed, maxed out, or simply not answering. If you let the call die there, it's wasted. But if you have a backup route—another buyer, a second office, or even a voicemail that offers a callback—

you can save it. Many small marketers at the beginning simply route overflow to their own phone. If the buyer doesn't answer, they pick up, collect the caller's details, and promise a callback. It's not a long-term solution, but when you're starting with low volume, it keeps you from wasting precious calls.

The best routing setups tell a clear story in the call log. A good log might read: "10:14 a.m., caller ZIP 85008, chose residential, Buyer A open, 2 lines in use (limit 3), rang 18 seconds, answered, connected for 2:11." That one line explains everything—when the call came, where it came from, what the caller wanted, what the buyer could handle, and how long it lasted. With that kind of detail, you can quickly see where things break down. If many calls are being blocked because of concurrency, you can ask the buyer to add more seats. If many calls are being rejected for the wrong ZIP, you can adjust your targeting. Logs turn routing from a mystery into a story you can read and fix.

Geography matters even at a deeper level. Many buyers don't just want a state or a city; they want calls within a certain drive time, like 30 miles around their office. With free tools like FreeMapTools, you can type in an address, select a radius, and download a list of all the ZIP codes in that circle. You can then load those ZIPs into your routing rules and know exactly which areas to send. Over time, you'll notice that some ZIP codes convert better than others. Maybe the calls from 85008 last three times longer than calls from 85035. Once you see that, you can prioritize the better ZIPs, send them to your best buyers, or even charge a higher price for them. Data like this comes naturally once you set up routing properly.

The final lesson about routing is about growth. When a buyer is at their cap or their concurrency limit, pushing more calls doesn't help. It only makes things worse. If you want to scale, you need to ask the buyer for more capacity, extend their hours, or bring in a second buyer. Routing is not just a machine setting—it's a promise. It says: we will send the right calls to the right people at the right time. Keep that promise, and you'll build long-term trust. Break it, and even the best ad campaign will collapse.

Routing might sound technical, but at its core, it's about respect. Respect the buyer's time, respect their location, respect their limits, and respect the caller's needs. Start small by matching your ad schedule to your buyer's open hours. Add a ZIP code filter so only the right locations get through. Use one IVR question to make sure the caller fits. Set a simple concurrency limit so you don't flood your buyer. Those steps cost almost nothing and can be set up in a single afternoon using tools like Ringba, CallRail, or Twilio. As you grow, you'll add more layers, more buyers, and more logic. But even at the beginning, good routing makes you look professional and trustworthy. And that, more than anything else, is what keeps buyers happy and keeps your pay-per-call business alive.

S4: De-duplication & Buyer Rules

Imagine you're running a new pay-per-call campaign for a local HVAC company. You've set up the ads, your tracking is working, and the calls are coming in. At first, everything looks good. The buyer is paying for each call that lasts over two minutes, and you see money adding up. Then something odd happens. The same customer calls back two days later to ask another question, and then again a week later to check on scheduling. Suddenly, the reports show three separate billable calls, but they all came from the same person. The buyer doesn't want to pay three times for one customer. You don't want to argue about it after the fact. This is where de-duplication comes in.

De-duplication is simply the practice of making sure one caller does not count as multiple new leads inside a certain time window. Buyers usually define that window in their insertion order, also called the IO. Some say seven days, others 14, and some stretch it to 30 days. The logic is simple: they are paying you to introduce them to new customers, not to send the same person back to them again and again. Without de-duplication, your reports can look inflated, but your relationship with buyers will suffer.

The easiest way to spot a duplicate is by the phone number itself. Every incoming call carries caller ID data, though it may show up in different formats. To handle it cleanly, you should store every number in what's called E.164 format, which means you add the country code in front, like +1 for the United States, followed by the digits. Saving numbers this way ensures that "(321) 505-7998" and "321-505-7998" both resolve to +13215057998. That way, your system won't mistake them as two different people. Of course, you cannot catch every repeat. Some people block caller ID, or call from their office phone one day and a mobile phone the next. But with clean formatting, you can catch most duplicates.

To manage this, even a small operation can keep a simple "recent callers" table. Each time a call comes in, you log the number, the date, the campaign, and which buyer answered it. When a new call comes in, your system checks that table. If the same number was sent to the same buyer within, say, the last 14 days, you can decide what to do. One option is to play a friendly message telling the caller they've already reached the service and offering them a non-billable information line. Another option is to still connect them to the buyer but mark the call as non-billable in your reporting. Some buyers may even allow repeats if they are genuine service follow-ups, but the key is that the rule should be written in the IO so there are no surprises.

You'll also need to decide whether to de-duplicate globally or per buyer. Global means that once a caller has been billed to any buyer, they cannot be billed again within the window, no matter who they call next. Per buyer means that Buyer A and Buyer B could both pay for the same caller if that caller happens to try both lines. Global de-duplication keeps reports cleaner and avoids the messy situation where one consumer gets bounced around between different buyers. It also shows that you respect the caller's time. But per buyer rules can make sense in some cases, such as when the two buyers serve very different products. An example might be a person calling once about car insurance and once about life insurance. Both are valid new sales opportunities. Either way, you must write down which rule you're using and make sure your system enforces it the same way every time.

Buyer rules go beyond duplicates. They are the full set of yes-and-no conditions that decide whether a call counts as billable. Some of these rules are simple, like geography, hours, or language. If the caller is outside the service area, calls after hours, or needs Spanish when the buyer only supports English, then the call should not be sent. Others are about category, like whether the job is residential or commercial. A small roofing company may not want commercial jobs at all, while a law firm might reject bankruptcy cases but accept personal injury. Duration is another common rule. A call must stay connected for a set number of seconds before it is billable. This protects buyers from hang-ups and wrong numbers.

Sometimes buyers add special rules. A common one is "no brand calls," which means they don't want traffic that searched for their own company name. Another might be "no warranty jobs," or "no calls from past customers." These special rules can help a buyer control their costs, but too many rules can create endless disputes. The best practice is to keep rules short, clear, and written down in the IO. If a buyer insists on many complex rules, you'll spend more time fighting about rejections than growing your traffic.

When you capture IVR answers, you also give yourself proof that a caller matched the rules. Suppose the buyer later says, "This was a commercial job, not residential." If your IVR log shows that the caller pressed "1" for residential, and the recording confirms it, you can ask for a reversal. That is why saving IVR key presses and short transcripts matters. It turns your routing from a black box into a provable process.

Being fair to the caller matters too. If someone asks not to be contacted again, put their number on your internal do-not-call list and honor it. If your system includes callbacks, only make them inside the scope the caller agreed to. For example, if the IVR said, "We'll call you back within one business day," don't surprise them with calls for weeks afterward. Respect builds trust. It also keeps your complaint rate low. A low complaint rate means your numbers stay clean and don't get flagged as spam, which improves your answer rates.

Spam patterns are another problem to watch for. Sometimes you'll see many very short calls, either from the same number or from a flood of random numbers. These often are not real customers but bots or bad actors trying to eat up your budget. You can protect yourself with a few simple filters. Block area codes that don't make sense for your buyer's service area. Limit how many calls the same number can make in an hour. Ask one human question in the IVR, like "Please enter your ZIP code," before the call rings through. Bots and spam callers often fail at that step, so you filter them out before they reach your buyer. If a number repeatedly fails your checks, put it on a block list. Even platforms like Ringba and CallRail make it easy to create block lists for abusive numbers.

Once you have rules in place, test them before sending real traffic. Place a call that should pass and make sure it connects. Place one from outside the service area and confirm it fails. Call twice in a row to see if the duplicate rule triggers. Try calling after hours to make sure the call is blocked or rerouted. Check the logs to ensure each outcome shows the reason clearly. If you see mistakes, fix them before real leads are at stake. This kind of sandbox testing is free and saves you from angry buyers later.

Finally, have open conversations with buyers about edge cases. What happens if a caller gets a busy signal and dials back five minutes later? Some buyers are fine paying for one of those calls if at least one lasted long enough. What if a caller phones today to ask about prices and then again next week to book a job? Many buyers accept both if the second call clearly represents a new opportunity. By putting simple examples like these in the IO, you avoid arguments later. Your routing system should match the expectations of your buyer, not surprise them.

De-duplication and buyer rules are not there to block your revenue; they are there to protect it. They keep your reporting honest, your buyers satisfied, and your callers respected. They prevent inflated numbers that would otherwise collapse in disputes. They show that you take the business seriously, even when you're small. Most importantly, they build trust. And in pay-per-call, trust is what keeps buyers paying you week after week. When you set clear rules, enforce them consistently, and test them carefully, you spend less time fighting over credits and more time growing campaigns that scale. That is how you turn a ringing phone into a reliable business.

S5: Reporting Architecture (Dashboards & Exports)

When you're just beginning in pay-per-call, it's tempting to think the job ends once the phone rings and the buyer gets connected. The truth is, that's only the start. To grow, you need proof of what happened. You need to see what worked, what failed, and where to improve. That proof lives in your reports. Reports are how you see the truth. A good report shows you not only how many calls came in but also which ones counted, which ones didn't, and why. It shows how much you earned, how much you spent, and where the leaks are. And just as importantly, it tells this story clearly enough that you or your buyer can read it in minutes.

The first building block of all reporting is the call log. Think of your call log as a diary where every single call is a short entry. Each entry should include the call ID, the date and time it came in, the tracking number that was dialed, the caller's phone number, the landing page they came from, the UTMs that tagged the ad, and the IVR answers like ZIP code or whether the caller pressed "1" for residential or "2" for commercial. It should also say which buyer you routed the call to, how long it took for someone to answer, how long the call lasted once connected, and the final status. Was it accepted? Was it returned with a reason? Was it non-qualified because it didn't meet duration? If you're spending on ads, you should also connect each call to a cost record, whether that cost came from Google Ads, Facebook Ads, or another channel. With this setup, each call is its own little story you can always go back and read.

Once you have a clean call log, you can build a dashboard. A dashboard is just a window into the log that makes the important things easy to see. When you're small, this doesn't need to be fancy. A spreadsheet in Google Sheets or Microsoft Excel works fine. You can make it refresh every morning and update the totals automatically. At the very top, show the key numbers: total routed calls, answer rate, average connected duration, qualified calls, acceptance rate, revenue, cost, and profit. Then break those numbers down by source, like Google, Facebook, SEO, or flyers. Break them down by buyer, so you can see who is performing best. Break them down by IVR branch, so you know how residential calls did compared to commercial, or how certain ZIP codes did compared to others. Show yesterday's numbers, the last seven days, and the last 28 days side by side. Add small arrows pointing up or down compared to the previous period. These arrows give you fast feedback at a glance. You don't need charts when you start. A clear table is enough.

As you get more comfortable, you can add a duration chart. This chart shows how many calls ended under your payout threshold, how many just over it, and how many lasted far beyond it. This is where you'll find easy wins. If many calls are ending at 70 to 85 seconds and your threshold is 90 seconds, you likely have an IVR that is too long or an agent greeting that takes too much time before getting to the main issue. Shortening either can push those near-miss calls into the billable zone. If many calls are ending under 10 seconds, it often means you have routing issues or spam slipping through your filters. By seeing the distribution of call lengths, you know where to focus.

Returns need their own report too. A returns report is simply a list of calls that buyers rejected, along with the reason. For each, you should also store the IVR answers and the connected duration. Then sort them by buyer and by reason. Patterns will pop out. If one buyer is rejecting many calls for "out of state," it means your geo check is wrong for that buyer, or their service area has changed without notice. If another is rejecting for "commercial, not residential," it means your IVR question order needs adjusting so that the first thing you ask is whether the call is residential or commercial. A returns report is your troubleshooting map. It turns vague complaints into clear steps you can fix.

Once you have the basics, you should set up scheduled exports. Exports are simply files—usually CSVs—that you send out automatically. For buyers, you might send a weekly CSV that lists call IDs, times, durations, IVR data, and final status. At the very top, include a summary of totals: how many calls qualified, how many were returned, and how much is due. When the buyer sees that file, the invoice later will hold no surprises. For yourself or your team, you should save a daily export of all calls into secure cloud storage, such as Google Drive or Dropbox. Keep at least one year of history easily accessible, and archive older files. When a buyer comes back months later asking about a call, you'll have the proof. Without history, you'll be stuck relying on memory, and that doesn't build trust.

If you're buying ads, another powerful tool is conversion exports. Almost every major platform now lets you upload what are called "offline conversions." This is where you match your call IDs with the ad click IDs, such as Google's GCLID or Facebook's FBCLID. By doing this, you tell the ad platform exactly which clicks turned into real qualified calls. Over time, the system learns to find more people like those and fewer of the people who clicked without calling. This lowers your cost per qualified call, which is one of the fastest ways to grow margins. You don't need expensive tools for this. Google has guides on uploading offline conversions directly through Google Ads, and Facebook supports it through their Events Manager. Even as one person running a campaign, you can take advantage of this feature.

Dashboards and exports aren't enough by themselves. You also need alerts. Alerts are small automated messages that tell you when something breaks. If your answer rate drops below a certain number, an alert should ping you or your routing manager. If acceptance drops five points from one day to the next, an alert should ping whoever manages that buyer. If average duration suddenly drops across the board, ping your quality lead. Alerts don't have to be complicated. You can use Zapier or Make to connect your call tracking system to email or Slack. A one-sentence alert at the right time can save thousands of dollars in wasted calls.

Naming conventions might sound boring, but they are the glue that keeps reports from turning into chaos. The buyer name in your routing tool should match the buyer name in your reports and invoices. The campaign name in your ads should match the UTM campaign in your call log. If you name one thing "ACRepair_Summer2025" and another "ac_repair_summer," you'll spend hours reconciling them later. If you name them the same, your charts will work automatically. Consistency is free but saves endless frustration.

One of the best habits you can build early is to share weekly wins and fixes with your buyers. Every week, send a short summary. It doesn't need to be more than a paragraph or two. "We sent 210 calls. Acceptance was 82 percent, up four points from last week. We shortened the IVR by six seconds and added overflow coverage from 5 to 7 p.m. We noticed longer hold times on Monday and suggest raising seats between 4 and 6 p.m." That kind of report shows buyers that you are not just sending calls but running a system. It builds trust and makes you look like a partner, not just a vendor.

Finally, remember that a report is not homework. You're not building charts for decoration. Every number should help you make a decision. If a metric doesn't help you act, remove it. If a view helps you act faster, keep it. Over time, your reporting will evolve to fit your business like a glove. It will be simple, clear, and always pointing to the next right move. That is what makes reporting powerful. It doesn't just tell you what happened; it tells you what to do next.

6

Call-Flow Architecture

S1: IVR Design for Pass-Through

Imagine you are sitting at your desk, nervous but excited because you've just launched your very first pay-per-call campaign. You started simple. Maybe you bought a small ad on Google Ads or boosted a post on Facebook, spending just a few dollars to see what would happen. You set up a tracking number using a tool like Ringba or CallRail, and within a few hours the phone rings. This is the moment you've been waiting for. Someone saw your ad, liked what they saw, and now they're calling. But before they reach a live person, they meet your IVR, the Interactive Voice Response system that greets every caller. What happens next decides whether this call turns into a profit or a hang-up that wastes your ad spend.

The IVR is that little menu you've heard thousands of times yourself when calling customer service. But in pay-per-call, it has a different role. Its purpose is not to drag callers through long trees of options or endless transfers. Its role is to pass them through quickly, confirming they meet basic buyer rules and collecting just enough information to route them correctly. A good IVR feels like a friendly usher at a theater: they check your ticket, point you toward the right door, and step aside. A bad IVR is like a rude gatekeeper who keeps you waiting in line, barking questions you don't care about. When callers wait too long, they hang up. And when they hang up, you don't get paid.

So, how do you design an IVR that works? The first step is always the greeting. Keep it short, calm, and compliant. In most places, you need to tell the caller if the call may be recorded. A simple opener could be: "Thanks for calling. This call may be recorded for quality. One moment while we connect you." That's clear, friendly, and only takes a few seconds. If your buyer is in an all-party consent state—where you must ask for permission—you can add, "Do we have your permission to continue?" and listen for a yes. That extra line keeps you legal while still moving quickly.

Next, decide what you absolutely must ask. Most offers only need two things: what type of help the caller needs, and where they are located. Type could be as simple as "Press 1 for residential, press 2 for commercial." Location is usually best handled with ZIP code. "Please enter your five-digit ZIP code." That's it. Resist the temptation to ask for names, emails, or long details. The more you ask, the more people drop. Remember: the buyer's agents are trained to handle the deeper questions once the call connects. Your job is to get the right caller into the right seat without wasting time.

When you design your prompts, speak slowly and use simple words. Avoid slang, jargon, or anything that could confuse someone in a hurry. If you serve multiple languages, offer that up front. For example: "Press 9 for Spanish." If you need to serve more than two languages, consider creating separate tracking numbers for each market so your main line stays fast.

A good IVR also handles mistakes gracefully. People press the wrong key. They mistype their ZIP code. They sit silently because they're not sure what to do. Give them one chance to try again, and if they still miss, connect them to a live agent if possible. A kind line like, “Let me connect you to someone who can help,” protects the caller’s trust. Hanging up because of a wrong input only frustrates them, and frustrated callers rarely turn into paid calls.

Every second before the live agent answers eats into your payout clock. Many programs require a caller to stay connected for 60, 90, or even 120 seconds before the call is billable. If your IVR eats 30 seconds, you’ve cut the live agent’s time in half. The best way to fix this is to keep prompts as short as possible. Read them out loud. If they take too long, cut filler words and tighten the script until you can get through it in less than 20 seconds.

You can also help the buyer’s agent with a whisper. A whisper is a short message that only the agent hears just before the call connects. For example, “Residential AC, ZIP 85008.” Now the agent knows what to expect. They can greet the caller with confidence: “Hello, thanks for calling about your AC in Phoenix—how can we help?” That saves precious seconds, builds trust with the caller, and helps you hit payout durations.

Safety rails matter too. If a caller sits silent, repeat the prompt once. If they still don’t respond, route them to a default path, like a general agent or a voicemail. If the buyer is closed, have the IVR try a backup buyer or offer a callback option. These small touches prevent dead ends and keep callers from hanging up in frustration.

The only way to know if your IVR really works is to test it out loud with real people who aren’t part of your team. Ask friends or family to call and follow the steps. Watch their faces as they listen. If they look puzzled or pause too long, your script is too complicated. Fix the lines that confuse people. A rule of thumb: if a sixth grader can get through your IVR in 20 seconds without help, you’re on the right track.

Use examples as you practice. For home services, a good flow might be:

greeting and recording notice, language choice, “press 1 for residential,” ZIP entry, and then connect. For insurance, you might ask for state instead of ZIP, with instructions like, “Enter the two digits for your state—for example, 8-6 for Texas.” For appointment-based services, you could add one more step: “Press 1 if you’re ready to speak now. Press 2 if you want a callback later today.” If they press 2, you collect a time window and consent, then add them to your callback list.

Always measure IVR time in your reports. If your system shows the caller spent 35 seconds in the IVR, work to get it under 20. You can shave seconds by removing unneeded words, speaking clearly but faster, and trimming any questions that don’t directly help routing. The IVR’s job is not to sell; it’s to pass through.

The purpose of an IVR is simple but powerful. It confirms the caller fits the offer, gathers one key fact for routing, and connects them quickly. Done right, it protects your duration, raises your acceptance, and makes every call more valuable. Done poorly, it wastes time, burns callers, and loses revenue. Remember: the IVR is not a clipboard for surveys—it’s a bridge to live human contact. Build it light, build it fast, and always design for pass-through first.

S2: Qualifying Questions & Branching Logic

Imagine you are running a small pay-per-call test for a local roofing company. You’ve set up a landing page, bought a few clicks from Google Ads, and even printed a few cheap flyers with a tracking number. The phone rings, and you’re excited—until you realize the caller is from three cities away, asking about commercial warehouses, and your buyer only wants local residential jobs. The call connects, the agent explains they can’t help, the caller hangs up, and just like that you’ve lost both your money and your buyer’s trust. This is the moment when you realize why qualifying questions matter.

Qualifying questions are the heart of a smart call flow. They filter out the wrong calls before they waste your buyer's time, and they make sure the right calls get to the right agent. But the trick is balance. Ask too few, and you'll route bad calls that get rejected. Ask too many, and callers will get annoyed, hang up, and you'll lose revenue. The goal is to ask only what matters most—just enough to protect your acceptance rate and meet your buyer's rules, without making the caller feel like they are filling out a form.

The best place to start is with the insertion order, or IO. That's the agreement that lays out what a buyer pays for. If the IO says the buyer only wants calls from certain ZIP codes, then location should be one of your first questions. If it says the buyer only wants residential jobs, ask whether the caller needs home or business service. If the IO says the buyer needs Medicare callers who are over 65, ask a polite age filter like, "If you are 65 or older, press 1." These questions don't need to be complicated. They just need to be direct and fast.

Branching logic is how you connect the answers to actions. Think of it as a tree. Each answer is a branch, and each branch leads somewhere. But unlike a forest, your tree should be simple, with just a few strong branches that guide callers where they need to go. If a caller presses "1" for residential, the branch should lead directly to your residential buyer. If they press "2" for commercial, the branch should either lead to a buyer who wants commercial or, if no buyer does, to a polite message saying, "We're sorry, we don't serve commercial jobs at this time. Please visit our website for more information." It is always better to be honest and end a call gracefully than to waste a buyer's seat with something they don't want.

Order matters. The first question should filter out the biggest mismatch. If half your rejections come from out-of-area callers, then your first question should be location. If the main problem is job type, like residential vs. commercial, then ask that first. After the biggest filter, ask the second most important. Keeping the order tight means you cut off wasted calls early and only connect good ones.

Let's use an example. Say you're running an HVAC campaign. Your first question could be, "Press 1 for home service. Press 2 for business service." If the caller presses "1," you then ask for their ZIP code. If the ZIP is on your list, you connect them to your residential HVAC buyer. If it's not, you thank them and say you cannot serve that area. If they press "2" for business service, and you don't have a commercial buyer, you end the call politely and save your buyer from wasted time.

For auto insurance, you might start with the state. "Please enter the two-digit code for your state." If they enter Texas, and you have a Texas buyer, connect the call. If they enter a state with no buyer, you could offer a one-time SMS with a website link, but only if they consent. This way, you still capture value without breaking trust.

In health or finance campaigns, you need to be especially careful. Ask only the minimum needed to route correctly. Buyers in these industries often have compliance rules that require licensed agents to gather details directly. If you try to do too much in the IVR, you risk crossing legal lines. Keep your tone neutral, and don't make promises about results. Say, "This call is about Medicare plan reviews," not "We will get you a cheaper plan."

Language is another branch. If you serve both English and Spanish, offer a choice up front. "For English, press 1. Para español, marque nueve." Route Spanish calls only to buyers or queues that can handle them. Sending Spanish speakers to English-only agents leads to frustration, short calls, and lower acceptance.

Always plan for the unknown path. Some callers won't press anything. Others will press the wrong key or enter an invalid ZIP. Build a safety net. If there's no input, route the call to a general queue where an agent can ask the questions. If the caller fails twice, connect them to someone who can still try to help, or end the call with kindness. Never leave callers stuck in a loop.

Your prompts should be short and easy to follow. Instead of, "If you are interested in scheduling a residential appointment, please press 1, and if you are interested in discussing commercial services, press 2," try, "Press 1 for home. Press 2 for business." Short words get better results because people don't have to think.

Testing is just as important as building. Place calls at different times, from different numbers, with different answers. Try calling after hours. Try entering a ZIP on the border of two service areas. Try making no choice at all. See where the call ends up, and make sure the outcome is always clear. Each call should have a clean ending: either connected to the right buyer, ended politely, or moved to a backup.

Watch your data closely. If too many callers choose "commercial" when your campaign is for residential, maybe your ads or landing page are misleading. If too many hang up after the second question, maybe that question isn't worth asking. Adjust as you go. Your call flow is a living thing. It should evolve as you learn.

Above all, keep your branches honest and short. The caller should feel guided, not tested. The buyer should feel protected from wasted calls. When both sides feel served, your timers run longer, your acceptance rate climbs, and your profits grow. That is the quiet power of good qualifying questions: they keep the right calls flowing and stop the wrong ones before they hurt you.

S3: Backup Buyers & Overflow Strategies

Let's say you're running a pay-per-call campaign for an HVAC company in Phoenix. You've been sending them calls for a few weeks, and things are going well. Then one hot afternoon, the temperature spikes, and suddenly the call volume doubles. Callers pour in, but your buyer only has three agents on duty. Their phones are ringing nonstop, and soon every line is full. The next caller dials, waits, hears ringing, and finally hangs up. That hang-up counts as a short call. Too many of those, and your acceptance rate tanks. What went wrong? You didn't have a backup plan.

Even the best buyer cannot answer every call. People go on break. Lines fill up. Storms knock out phones. If all your traffic depends on one buyer, you will eventually lose calls to missed connections. Backup buyers and overflow strategies are your insurance policy. They make sure callers still reach a live person, even if your first buyer is unavailable. This protects your acceptance, your payouts, and your reputation.

The first step is setting a clear primary route. For each type of call and each area, choose a main buyer. For example: send residential HVAC calls in Phoenix to Buyer A from 8 a.m. to 6 p.m., Monday through Saturday. Program your system to check their local time zone so you don't accidentally ring them at midnight. Then add a backup buyer, Buyer B, who can take the same calls when Buyer A is closed or maxed out. Buyer B might pay a little less, but a lower payout is better than no payout at all.

Overflow means deciding when to switch. You can set a rule that if Buyer A doesn't answer within 20 seconds, the call automatically routes to Buyer B. You can also overflow based on concurrency. If Buyer A can only handle three calls at once, the fourth caller goes directly to Buyer B. This way, no caller is left waiting too long. Speed matters. Every second a caller spends listening to ringing is a second closer to a hang-up.

Different situations call for different ringing patterns. Some systems use "ring-all," where all of Buyer A's agents' phones ring at once until someone picks up. This is fast but can feel chaotic. Others use "round robin," where calls take turns across agents. This is calmer but sometimes slower. You can also use weighted distribution. For example, send two calls to Buyer A for every one call to Buyer B. This keeps Buyer

B engaged without overwhelming them. Tools like Ringba let you set up these strategies easily, even if you're a beginner.

Special cases need special routes. If you're running calls in both English and Spanish, Spanish calls should always go to buyers with Spanish-speaking agents. Commercial calls should always go to buyers who accept commercial jobs, even if they pay less. Short but valid calls are better than long ones that get rejected for the wrong category. If one buyer starts rejecting many calls for a certain reason, shift more calls toward a buyer who actually wants them.

Don't forget weekends and holidays. If Buyer A closes on Sundays, program your system so calls on Sundays automatically go to Buyer B, who might be open seven days a week. Keep notes on each buyer's hours, lunch breaks, and any special closings. Your routing plan should treat time as a real thing, not an afterthought.

Communication is key. If you know a heat wave is coming and calls will spike, tell your buyers early. Ask if they can add seats between 4 and 7 p.m. A simple text in the morning can prevent a flood of short calls later. If they can't add seats, you might need to bring in a third buyer for the week. It's better to share the volume cleanly than to overload one team.

Measure overflow performance separately. Look at how overflow calls compare to primary calls in terms of answer rate, duration, and acceptance. If overflow calls are shorter, find out why. Maybe Buyer B's agents aren't answering quickly. Maybe they don't have the same whisper setup, so they start each call unprepared. Fixing small details can turn overflow from a safety valve into a real strength.

Always have a last resort. If no buyer is available, play a live message that offers a callback option. "All our agents are helping other callers. If you would like a callback today, press 1." If the caller agrees, capture their number, ask for a time window, and confirm by text if possible. This way, even when everything goes wrong, the caller feels cared for and you protect the lead. Just remember that callback flows require consent and careful handling to avoid complaints.

Keep your overflow plan simple on paper. For each call type and area, draw a line from the main buyer to the backup buyer. Write down the ring time, the concurrency limit, and the hours. If you have more than two buyers, set a clear order: A, then B, then C. If C is very different—like a national call center instead of a local shop—note that as well. Anyone on your team should be able to look at the map and know where a call will go at any hour of the day.

Backup buyers are not just about protecting you when things break. They are also a growth strategy. When your main buyer sees you can handle peaks without drowning them, they will trust you with higher caps. When your backup buyer sees steady, good-quality traffic, they may agree to raise their payout. Your reliability makes you harder to replace. Overflow, done right, pays you twice: once today with saved calls, and once tomorrow with stronger deals.

S4: Hours, Time Zones & Dayparting

Imagine you've just started sending calls to a small law firm on the East Coast. You're in California, three time zones away. You set up your ads on Google Ads, and by noon your time, the calls are flowing. But there's a problem: by noon in California, it's already 3 p.m. in New York. By the time your ad spend peaks at 5 p.m. local, it's 8 p.m. for your buyer. Their office closed two hours ago. The calls you're paying for are landing in voicemail, lasting a few seconds, and dragging down your acceptance rate. The buyer complains, your stats look bad, and you wonder what went wrong. The answer is simple: you didn't plan around time.

Time is one of the biggest hidden players in pay-per-call. It affects when people are most likely to call, when your buyers can actually answer, and how long conversations last. Ignoring it leads to short calls and wasted money. Paying attention to it turns time into a powerful lever for better performance.

Start with buyer schedules. Don't guess. Ask every buyer for their exact open hours, including their local time zone, lunch breaks, and any exceptions. Write it down clearly: "Mon–Sat, 8 a.m.–6 p.m. Eastern. Closed Sundays. Half day Friday, closes at 3 p.m." Many small businesses don't even have this written out themselves, so when you ask, it shows professionalism. Confirm these hours regularly, because shifts and closings change. If you're running more than one buyer, keep a simple spreadsheet with their hours side by side. This becomes your master reference.

Now teach your system to respect time zones. If you're in Pacific Time but your buyer is in Eastern, a 3 p.m. call for you is already 6 p.m. for them. If their office closes at 6, that call is too late. A good routing platform like Ringba automatically adjusts for local time zones, including daylight saving shifts in spring and fall. If you're building your own with Twilio, use a time zone database so calls always match the buyer's local clock. Never rely on your own watch to decide whether a buyer is open.

Dayparting is the next step. Dayparting means adjusting your ads and call flows based on time of day. If your buyer's best closers work from 9 a.m. to 1 p.m., push more traffic during those hours. If they're short-staffed after 4 p.m., scale back. This doesn't cost more—it's about moving the same spend into the hours that yield longer calls and better acceptance. On Google Ads and Facebook Ads, you can set ad schedules by hour and day. Even simple shifts, like turning off ads 15 minutes before closing, can save dozens of wasted calls per week.

Look closely at your reports to guide your dayparting. If you see a spike in sub-60-second calls between 7:30 and 8:00 a.m., that probably means callers are dialing before the buyer is ready. Shift your ads to start at 8:05 instead of 7:45. If your last hour always has low acceptance, end calls five minutes before closing and offer a callback option on your page: "We'll call you tomorrow at 8 a.m. when we open." Small tweaks like this keep your timers safe.

When running national campaigns, break the country into time bands: Eastern, Central, Mountain, and Pacific. Show the right phone number and open hours for each band. If you only have one buyer in Central but you advertise in all four zones, a 7 a.m. Pacific visitor might see "Open now!" even though your buyer is still asleep. That kills trust. Instead, show hours in both the buyer's and the visitor's time. "Open today 9 a.m.–6 p.m. CT (7 a.m.–4 p.m. your time)." This keeps expectations honest.

Build small buffers around start and stop times. Don't slam a buyer's phones the second the clock hits open. Give them five minutes to settle in. Don't pour calls at one minute before close. Stop early. A fresh greeting and a calm agent often add 20 seconds or more to talk time, which can mean the difference between a rejected call and a paid one.

Seasons and events change call behavior too. In summer, HVAC calls may spike after work when people come home to hot houses. In winter, furnace calls might surge early in the morning. During Medicare's Annual Enrollment Period, evenings and weekends are hot times because seniors are home. Learn these rhythms and adjust your ad schedules. Ask buyers when they staff up. If they add extra agents on Saturdays, you should add budget and numbers for Saturdays too.

Dayparting is also a great way to test. Run a small push with a new ad headline from 10 a.m. to noon while your buyer's best closer is on shift. If calls run longer during that block, you've learned something. If not, you turn it off. The point is to match your strongest traffic to your buyer's strongest hours.

Communicate quickly when hours change. If a buyer says, "We're training from 2 to 3," reroute calls to a backup buyer for that hour. If a storm knocks out power in their city, shift calls until they recover. Your speed here shows buyers you're paying attention and builds trust.

Don't forget the caller's experience. People don't want to be pitched at midnight. They don't want a callback at 6 a.m. If you offer callback scheduling, let callers choose a window: morning, afternoon, or evening. Then honor that window in their local time. It's not just polite—it's good business.

Time is not a detail in pay-per-call. It's the stage where everything happens. Ads, numbers, IVRs, and agents are all actors. If you place them at the wrong time, the show falls apart. Place them at the right time, and the play runs smoothly. Calls last longer, buyers say yes, and you get paid. That's why hours, time zones, and dayparting are not side notes. They're the script that makes the whole performance work.

S5: Fail-Safes & Callback Routines

No matter how well you plan, things will go wrong. Phone lines go down. Buyers get slammed with more calls than expected. An agent forgets to log in, or a storm takes out power. If you don't prepare for those moments, good callers hit dead ends, hang up, and your acceptance rate falls apart. Fail-safes and callback routines are how you protect yourself. They give callers a safety net, buyers a buffer, and you a way to save value when things break.

Start with real-time health checks. Your routing system should know whether a buyer is answering, whether calls are failing, or whether queues are getting too long. If answer rates fall below a threshold you choose—say, 60 percent in the last ten minutes—new calls should automatically switch to a backup buyer until the primary recovers. Don't wait for a daily report to tell you something broke. By then, you've already lost money. Platforms like Ringba let you set live routing rules, and if you're building your own on Twilio, you can track call status and reroute dynamically.

Add a friendly "all agents busy" message that offers a callback. Keep it simple: "All our agents are helping other callers. If you'd like a callback today, press 1." If the caller presses 1, capture their number automatically. If the network doesn't provide it, ask them to enter it. Then ask for a time window: "Press 1 for morning, 2 for afternoon, 3 for evening." Tell them you'll call in their local time. If you plan to send a text confirmation, say so: "We'll send a confirmation text. Reply STOP to end." Always give people control, because that builds trust.

Store callbacks in a queue with the caller's number, their chosen window, and the offer type. Mark them clearly as "inbound callback requests" so your team knows this is not cold calling—it's fulfilling a promise. When the callback happens, begin with a clear opener: "Hi, this is Maria with Cool Air. You asked for a callback about your AC in ZIP 85008. Is now still a good time?" That short line proves you're real, shows you listened, and asks permission to continue. Then move into your qualifying questions. That one minute of care often makes the difference between a quick hang-up and a long, billable call.

Make your retry plan simple. Don't chase people endlessly. If a callback attempt fails, wait and try once more in the same window. If it fails again, you can leave a short voicemail if local rules allow: "We tried to reach you about your AC repair request. We'll try again tomorrow morning." After that, stop. Too many attempts make you look like spam and risk your numbers being flagged. If callbacks keep failing, consider branded caller ID services, where carriers display your name on the caller's screen. Some platforms, like Hiya or First Orion, offer this to improve answer rates.

You also need fail-safes for your own team. If a buyer suddenly says, "We're overwhelmed," your staff should be able to press one button that turns on overflow or pauses their route. If a call center loses power, your system should fail over to another buyer automatically. Write down what should happen for each type of failure. Treat it like a fire drill: simple steps, tested often, so everyone knows what to do.

Always give callers a kind last option. If all buyers are closed, don't just drop the call. Offer a message with useful information, like, "Our offices are closed, but you can request service at our website," or "We'll reopen at 8 a.m. Eastern." Even a polite voicemail is better than silence. Respect keeps people from feeling tricked.

Test your callback and fail-safe flows the same way you test IVRs. Place calls at odd hours, during lunch breaks, or when you know a buyer is closed. Watch what happens. If you hit a dead end, fix it before a real customer does.

Track callback performance with the same care as live calls. Measure how many requests you received, how many you reached, how many lasted long enough to count, and how many failed. Use this data to improve. If callbacks requested for the afternoon succeed more than morning ones, start offering afternoon as the first option. If one buyer consistently converts callbacks better than another, route more to them.

Fail-safes and callbacks aren't just about fixing problems. They are about building trust. To the caller, you are saying, "We won't leave you hanging." To the buyer, you are saying, "We won't waste your seats." To yourself, you are saying, "Even when things shake, I won't break." Build these routines once, test them often, and your campaigns will run steadier, your acceptance will stay higher, and your business will be stronger.

7

Scripting & QA

S1: Pre-qual Scripts & Required Disclosures

Every call starts with a moment of decision. The phone rings, someone answers, and within ten seconds the caller decides if they feel safe enough to continue. That first impression determines whether the call moves forward into profit or ends in a hang-up that costs you money. A pre-qualification script is the map that guides this moment. It isn't meant to sell or persuade—it's there to win trust, follow the rules, and connect the caller smoothly to the right buyer.

The first ten seconds

The opening is where trust is won or lost. It should always include four things: a greeting, the agent's name, the purpose of the call, and the required disclosure. A simple, warm example could sound like this:

> *"Thanks for calling. My name is Jay with Cool Air. This call may be recorded for quality and training. Is it okay to continue?"*

In one line you've greeted the caller, said who you are, explained what's happening, and covered the legal disclosure. If you're in a state where both parties must consent to recording, asking for "yes" keeps you compliant. Pause and let the caller respond.

Tone matters as much as words. Encourage agents to smile while speaking. A smile softens the voice and callers can hear it, even if they can't see it.

Lowering fear with clear expectations

Once the greeting is done, reduce anxiety by telling the caller what will happen next. Just one short line helps:

> *"I'll ask two quick questions to get you to the right technician."*

That reassurance stops callers from worrying they'll be stuck in a long process. It sets their expectation that the call will be short, clear, and helpful.

What to ask and why

The questions you include should be tied directly to your contract. If the IO says the buyer only pays for residential jobs in specific ZIP codes, then those are the two things you must confirm:

> *"Is this for a home or a business?"*
> *"What's your ZIP code?"*

That's all you need to protect the buyer and protect yourself. If you start asking for names, emails, or long histories, people will hang up. You're not there to conduct a survey—you're there to qualify and connect.

In other industries, the filter questions may be different. Insurance campaigns often require a state. Medicare may need an age screen. Legal calls might need a time frame like, "Did the accident happen in the last two years?" Keep these questions quick and plain.

Handling language

If your campaigns serve Spanish speakers, offer the option immediately:

> *"Para español, marque nueve."*

If you don't have Spanish-speaking agents, don't pretend otherwise. A simple:

> *"Lo siento, no tenemos agentes en español ahora. We can call you back later today."*

is honest and respectful. People trust honesty.

Moving the call forward

When the caller's answers fit, acknowledge them and explain the next step.

> *"Thanks, that ZIP is in our service area. I'll connect you to a licensed agent now."*

Some buyers appreciate extra context, so you might add a short whisper message for the agent only: "Residential AC, ZIP 85008, warm air." This gives the buyer's agent a head start, which often adds precious seconds to talk time.

Consent for callbacks

If your flow includes text messages or callbacks, you must ask clearly:

> *"If we get cut off, can we text you a link and call you back today? Standard rates may apply. You can reply STOP to end texts."*

Confirm the number you see and the time window the caller prefers. Then keep that promise. Trust disappears if callbacks never happen.

Handoff

Never leave a caller in silence. End the script with a clear handoff:

> *"I'm connecting you now."*

If it's a warm transfer, bridge both sides:

> *"Agent Sam, this is Alex in 85008. The AC is blowing warm. Alex, this is Sam. I'll let you two continue."*

That small step reassures both the caller and the buyer.

Keeping scripts usable

A script should be short enough to fit on one page with bold highlights for required disclosures. Agents shouldn't have to memorize every word. The page is their safety net, freeing them to listen and respond naturally.

Refreshing scripts

Update scripts often. If callers stumble on a line, rewrite it. If buyers change rules, adjust the questions. When seasons change, tweak the script to match. In summer, you might ask, "Is your home not cooling?" In winter, "Is your heat not turning on?" These small touches show callers you understand their world, which makes them more willing to stay on the line.

A good pre-qual script is short, clear, and kind. It protects you legally, guides the caller smoothly, and makes the buyer's job easier. When scripts are light and human, calls last longer, acceptance stays high, and revenue follows.

S2: Objection Handling & Transfer Technique

Even the smoothest script won't stop callers from hesitating. People push back, ask questions, or express doubt. These moments aren't problems—they're opportunities to keep trust alive. Objections show what's in the caller's mind. If you handle them well, you protect the call, keep the line open, and move the caller toward the buyer.

Listening first

The worst mistake is cutting callers off. When someone says, "I'm just checking prices," let them finish the thought. Interrupting makes them feel unheard. After listening, acknowledge what they said. "That's fine, most people start there." That simple reflection calms nerves.

From there, you can guide with a question. "Is this for your home or your business?" In one move you've accepted their hesitation, normalized it, and moved them toward your qualifying path.

Time objections

One of the most common objections is time. “I don’t have time right now.” Instead of pushing, show respect: “Understood, we can work around you. Are evenings better, or tomorrow morning?” This gives control back to the caller. If they choose a time, you offer a callback window. People are more willing to trust when they feel their schedule matters.

Existing providers

Another frequent objection is, “I already have someone.” Instead of arguing, you can say, “Good, it sounds like you’ve got help. Is this an emergency or just a second opinion?” If it’s an emergency, connect them immediately. If it’s a second opinion, you explain: “A quick call will confirm options. I’ll connect you and you can decide.” You’re not selling—you’re guiding.

Suspicion

Perhaps the hardest objection is: “Is this a sales call?” Avoid evasions. Be honest. A plain response like, “This is a live help line for AC repair. I’ll connect you with a licensed technician who can answer your questions and give you prices if you’d like,” builds more trust than any slick reply.

Transfer technique

Once the caller is calm enough, you need to connect them. In most campaigns this means a pass-through transfer. But sometimes you may do a brief warm intro. The key is to keep it short. Before pressing the bridge button, glance at the two key facts you gathered. Then set expectations:

> *"I'm connecting you now."*

If you're doing a warm handoff, include just enough for the buyer's agent:

> *"Agent Sam, this is Alex in 85008. The AC is blowing warm. Alex, this is Sam with Cool Air. I'll let you two continue."*

The buyer has what they need, and you step aside.

If your system doesn't allow a live intro, use a whisper instead. The agent hears "Residential, ZIP 85008, warm air," before picking up. That helps them greet the caller intelligently: "Hi Alex, I see you're in 85008 and your system is blowing warm air." A strong start adds seconds of meaningful talk time, often the difference between a rejected call and a paid one.

When buyers are slow to answer, don't leave callers in silence. Use a simple line: "One moment while I connect you. Thanks for holding." If the buyer doesn't answer after your set limit, overflow to a backup buyer or offer a callback option. Always keep the caller in the loop so they don't feel abandoned.

Objection handling isn't about clever words. It's about tone. Slowing your pace slightly when someone is upset, repeating one phrase they used—"Not cooling since last night, got it"—and giving a clear next step: "I'm connecting you now, stay with me." That calm bridge is what keeps calls alive long enough to count.

S3: Scorecards & Call Grading

Every business needs a way to measure quality. In pay-per-call, quality directly affects your acceptance rate. If agents follow the right process, calls last longer, meet buyer rules, and get paid. If they skip steps, calls get returned. A scorecard is a simple, fair way to measure performance and coach improvement.

Why scorecards matter

Without a scorecard, reviews are subjective. One manager says a call was fine, another says it wasn't. Agents get confused about what "good" means. With a scorecard, everyone measures by the same yardstick. Calls are judged the same way every time. Agents know what's expected. Coaching becomes concrete, not personal.

What to include

A good scorecard is short. It should fit on one page and cover the moments that shape the call: the greeting and disclosure, the qualifying questions, the control of the first minute, the handoff, and the outcome. Many teams use a 100-point system so scores are easy to compare.

The breakdown might look like this:

- **Opening (20 points):** Did the agent greet, state their name, explain the purpose, and give the recording notice properly?
- **Fit questions (20 points):** Did they ask the key filters (like home vs. business, or ZIP)?
- **Control and clarity (20 points):** Did they guide the caller smoothly, avoid long silences, and sound natural even while following a script?
- **Bridge (20 points):** If there was a warm intro, was it short and

helpful? If a pass-through, did the agent set expectations before connecting?

- **Outcome (20 points):** Did the call connect, meet duration, and follow backup rules if needed?

This isn't about nitpicking—it's about the levers that move acceptance.

Grading fairly

When grading, don't rely on memory. Use recordings and transcripts. Mark time stamps where disclosures happened, where fit questions were asked, where the bridge line occurred. This way agents can hear and see exactly what to improve.

Consider a story of a graded call. An agent gave a great greeting and disclosure, then asked "home or business" and got "home." But they forgot to ask ZIP. They said, "I'm connecting you," but gave no info to the buyer. The buyer spent fifteen seconds just finding out where the caller was. The caller lost patience, and the call ended at 82 seconds after connect. On the scorecard, the opening scored full, the fit questions lost points, the bridge scored low, and the outcome was poor. Total: 60 out of 100. The fix was simple—ask ZIP and add one line in the handoff. The next week the same agent scored 85 and the call lasted beyond 120 seconds.

Coaching with scorecards

Share the scorecard openly with your team. Play recordings of "gold calls" that scored above 90 so everyone hears what success sounds like. Play one "fix call" that scored low and discuss it. Let agents talk first. People learn faster when they identify the gap themselves.

You don't need to grade every call. A fair sample—ten to twenty calls per agent each week—is enough to see patterns. Grade the sample, share the results, and pick one or two improvements for each agent to focus on. Don't overwhelm them with a long list. Small, steady changes stick.

Keeping the system fair

If you have more than one QA reviewer, calibrate them. Have two reviewers grade the same call and compare notes. Talk through differences until you're aligned. This prevents agents from feeling like scores depend on who's grading.

Linking scorecards to results

Show agents the link between their scores and acceptance rates. When openings are strong, disclosures are clean, and handoffs are crisp, acceptance goes up. Praise those details. Make it clear that scorecards aren't busywork—they're the roadmap to more paid calls.

S4. Using transcripts to improve scripts

A transcript turns a call into text you can scan. It helps you find the words that work and the words that make trouble. It also helps you fix your scripts without guessing. You can search for phrases, count how often lines happen, and see where calls break. When you use transcripts the right way, your script gets better every week.

Begin with the start of the call. Read the first thirty seconds of ten calls in a row. Look for patterns. Do agents say the recording line the same way? Do callers talk right away, or do they wait because they are unsure what to do? If you see long sentences in the transcript, that is a sign of a heavy script. Shorten it until the first half-minute reads like a calm back-and-forth, not a speech.

Mark the spots where calls die. In the transcript view, note the time of hang-ups. If many calls end after the second question, your second question may be too hard. If many calls end right after the bridge, your handoff might be rough. Copy the ten seconds before each drop and paste them into a small document. Read them out loud. You will hear the bump. Then write a smoother line and test it for a week.

Search for filler and dead phrases. Words like "policy," "procedure," "process," and "per our rules" often make people pull back. Replace them with small, human words. Instead of "Per our policy, we must verify your ZIP code," try "What's your ZIP so I can get you to the right tech?" Transcripts make these swaps easy because you can see the exact words.

Find your best openers. Sort calls by connected talk time and pick the top ten. Read the first minute of each. Circle the phrases that repeat. Maybe your top agents say, "I'll ask two quick questions to get you to the right person." That line sets a clear path and lowers stress. Put that line in the script for everyone.

Catch slow bridges. In the transcript, the bridge looks like three voices: your agent, the buyer's agent, and the caller. If the bridge section runs long with your agent talking, it is a sign to tighten. Write a standard bridge line that takes under ten seconds and trains agents to drop right after the buyer greets the caller. You can even set a small timer target. "Keep the intro under twelve seconds" is easy to understand and easy to check with transcripts.

Use transcripts to tune questions. If you see callers stumble over "residential or commercial," try "Is this for a home or a business?" The word "home" lands faster for most people. If you see people mess up when you ask for state, switch to ZIP. Five digits are easier than two letters on a phone keypad.

Build a phrase bank from good calls. When a caller says, "Thank you for helping so fast," copy the agent's line that came right before it. When a buyer's agent starts strong, copy their first sentence. Put these into a small "winning phrases" file and teach them to everyone. A phrase bank turns happy accidents into a repeatable playbook.

Use transcripts to check compliance without a magnifying glass. Search for the recording notice words. Search for "STOP" instructions when you send texts. Search for the buyer's brand if your rules say you cannot say it before the bridge. Transcripts make these audits fast and less stressful.

Be kind to privacy. Do not keep credit card numbers or full Social Security numbers in text. If your tool shows those, mask them. Train agents to move money details to the buyer. Your job is to connect, not to collect sensitive data.

Measure talk ratio. A good first minute often has the agent speaking more at first to guide, then the caller speaking more as they describe the issue. If the transcript shows the agent speaking for a full minute without a break, the script is too heavy. If it shows the caller speaking a lot before the agent knows the ZIP, the script is too light. Use the ratio as a gentle guide: short agent line, short caller line, repeat.

Turn findings into tiny tests. Change one line for one week. For example, replace "What seems to be the issue today?" with "Tell me what's going on with your AC." This small swap often pulls a clear answer. Compare average connected time before and after the change. If the number goes up, keep the new line. If it goes down, go back.

Share wins with the team. Show a before-and-after transcript for a call that improved. Let the agent explain how the new line felt. People follow peers more than posters. When they see the transcript lines change and the numbers rise, they buy in.

In the end, transcripts are not just text. They are a mirror. They show what callers hear and what agents say. If you look in that mirror each week, you will shave off rough edges, add lines that land, and build a script that carries more calls over the acceptance line with less effort.

S5. Coaching cadence & QA workflow

Coaching keeps your team sharp and your acceptance steady. It is not a one-time class. It is a rhythm. You listen, you teach one small thing, you check it next week, and you celebrate wins. A clean QA workflow supports this rhythm so nothing falls through the cracks.

Set a daily habit that takes fifteen minutes. Each morning, look at yesterday's calls by buyer and by source. Check answer rate, average connected talk time, and acceptance. Pick three short calls to hear. If they all died under a minute, look for the common cause. Was the buyer closed? Did agents forget a key question? Fix the one thing you can change today. Post a simple note to the team: "Today, ask ZIP before you bridge. It saves time."

Run a short team huddle twice a week. Keep it to ten minutes. Play one great call and one learning call. Ask, "What made the good one feel easy?" Then ask, "What would you say instead on the tough one?" Let the agents speak first. Then share one tiny tip, like "say 'home' instead of 'residential'" or "try 'tell me what's going on' as your first question." Tiny tips stick.

Hold one-to-one coaching for each agent once a week. Fifteen to thirty minutes is enough. Come with two calls already picked: one to praise, one to fix. Start with the praise. Point to the exact moment and the exact words. "At 0:14 you gave the recording line so smoothly. Nice job." Then move to the fix. "At 0:38 you bridged without ZIP. Let's add that line." Have the agent repeat the new line out loud. End with one small goal for the next week. "Get ZIP on every call before the bridge." Write it down and check it next time.

Build a simple QA workflow so coaching is based on facts. Each day, your QA person pulls a small sample per agent. They grade the calls on the scorecard. They save clips and time stamps. They also flag any call that might need a dispute with the buyer. Once a week, QA sits with the team lead to review trends: missing disclosures, weak bridges, or long IVR time. The lead turns those trends into the tiny tips for the huddles and the one-to-ones.

Create a "gold library" of ten calls per vertical. These are the calls that sound like you want every call to sound. Keep them in a folder with short names, like "HVAC-Gold-01-Clean-Disclosure" or "Auto-Gold-03-Strong-Bridge." New agents can learn the style in thirty minutes by listening straight through. Keep adding to the library as you grow. Replace old "gold" with better ones over time.

Protect time for calibration. Once a month, your QA team and one manager listen to the same three calls and score them together. Talk about why you marked what you marked. If scores are far apart, agree on what matters most and update the scorecard notes. Calibration keeps grading fair, and fairness keeps trust.

Make disputes a clean lane, not a traffic jam. When a buyer returns a call you think should count, your QA person should be able to send a short packet within one business day. That packet has the call ID, a 30- to 60-second clip, the IVR or agent's qualifying answers, the connected talk time, and a friendly note asking for review. Keep a shared sheet of disputes and outcomes. If one reason appears often, fix it at the source.

Use light metrics to steer coaching, not to scare people. Track for each agent the share of calls with a clean disclosure, the share with both fit questions asked, the average time to bridge, and the average scorecard result. Show improvement, not just totals. When someone lifts their score three weeks in a row, celebrate it in the huddle. A kind word in public does more than a long lecture in private.

Plan for new seasons and new scripts. Before summer heat or an open enrollment window, run a short refresher. Update the first question to match the season. Role-play the new lines in pairs. Keep the practice short and real. Ten minutes of role-play beats ten pages of notes.

Coach the environment too. If agents wait on slow screens, fix the tool. If headsets are crackly, replace them. If the room is noisy, move seats or add soft panels. A smooth setup helps agents sound calm. Calm voices build longer calls.

End each week with a small review. What went right? What one thing will we change next week? Write it in a simple log. Over a few months, you will see your own story: cleaner openings, faster bridges, longer connected time, higher acceptance. That story tells you the coaching rhythm is working.

Most of all, keep coaching warm. Agents are people. They want to help. When they feel supported, they try new lines. When they hear their own wins, they repeat them. When they know what "good" sounds like, they can reach it. QA is not about catching people doing wrong. It is about catching them doing right, then helping them do it again, on purpose, call after call.

8

Telephony, Dialers & Deliverability

S1. Dialer types (preview, power, predictive) & when to use them

Pay-per-call is mostly about **inbound** calls. A person sees your message, taps to call, and you connect them to the buyer. Still, you will use **outbound** dialing for things like quick callbacks, appointment reminders, or warm transfer screening. That is where **dialers** help. A dialer is software that places calls for your team, shows caller info, and keeps notes. There are three common types: **preview**, **power**, and **predictive**. Each one fits a different job.

A **preview dialer** is slow and careful on purpose. It shows the agent the next record before dialing. The agent can read notes, see the caller's ZIP code, and review what the person asked for. Then the agent clicks "Call." Use preview when each call needs a personal touch, or when rules are strict. A good example is a **Medicare callback** during the busy season. You need to say the right disclaimer. You may need to check the person's age and state before you speak. You also want to avoid calling during nap hours or at dinner time. With preview, the agent controls each call.

The pace is lower, but the quality is high. Another example is a **warm transfer screen**. An agent takes a quick inbound call, asks two questions, and then places a preview call to the buyer's agent to make sure someone is free. With preview, you do not leave people waiting while the agent fumbles.

A **power dialer** speeds things up. It automatically dials one number after another from a list. As soon as a call ends, the next one starts. Agents choose a pace, like one new call every time they finish their notes, or one new call after a short delay. Power is good for **same-day callbacks** when people asked for help and you are trying to reach them inside a promised time window. It also works for **win-back** calls, like "we missed you earlier; can we help now?" Because the dialer dials right away, agents keep busy. You still get a "screen pop" with the person's info as the call rings. Use power when you have contact permission, short scripts, and a clear goal, such as "confirm address and connect." Do not use power to blast long lists of cold numbers. That hurts your answer rate, risks complaints, and damages your caller ID reputation.

A **predictive dialer** is the fastest tool and the riskiest. It dials **multiple numbers per agent** and uses math to guess when someone will pick up. It tries to keep agents talking all the time. This can help when you handle **large lists of people who asked for a callback**, like after a storm when many homeowners reached out. But there is a catch. If more people answer than agents are free, someone picks up and **no agent is there**. That is called an **abandoned call**. Laws limit how many abandoned calls you can cause. You must also play a short message if no agent is available. For pay-per-call work, keep predictive settings gentle. Aim for a drop rate near zero. If your team is small, or if your calls need careful words, predictive is usually too much. When in doubt, stick to power or preview.

Think about dialers like **gears on a bike**. Preview is first gear: strong control, slower speed. Power is second gear: steady pace, good for most roads. Predictive is high gear: fast but only safe when the road is wide, straight, and clear. You can mix gears in one day. In the morning, use power to return last night's requests. Midday, switch to preview for tricky calls. Late afternoon, go back to power to finish the queue before closing time.

Your dialer should work **with** your routing rules, not against them. If the buyer closes at 6 p.m. local time, do not start an outbound call at 5:59 p.m. Use the dialer's schedule to block calls near closing. If the buyer only wants certain ZIP codes, the dialer list should filter those ZIPs up front. If a number is on your **internal do-not-call** list, the dialer must skip it. Clean lists make better days.

Voicemail is part of the job. A good dialer can spot voicemail and let you **drop a recorded message** that sounds natural. Keep that message short and helpful. "Hi, this is Jay from Cool Air. You asked for AC help in 85008. Call us at 602-555-0100, or we can call you after 5 p.m. if that's easier." Never cram sales talk into voicemail. Do not leave three messages in one day. One good message is better than many bad ones.

Note-taking matters. Teach agents to type **two facts** in the dialer before the next call: the ZIP and the need. "85008, unit blowing warm." Those eight words will save you time later and help the buyer start strong if you connect them. If you are handling health or finance calls, avoid typing private numbers like full Social Security or full card numbers. If a buyer needs payment, let their system handle it after the handoff.

Here is a simple day in action. At 8:00 a.m., your two agents open the preview dialer to call five Medicare callbacks from yesterday. They read the notes, make the calls, and speak carefully. At 10:00 a.m., the power dialer loads a list of HVAC missed calls from last night. Agents call each number once and leave one short voicemail when they hit machines. At 1:00 p.m., a heat wave hits and inbound calls spike. You pause outbound. At 4:30 p.m., things calm down. The power dialer runs one more pass on folks who asked for evening callbacks. At 5:45 p.m., the dialer shuts itself off so no one starts a call that will run past closing. That is a clean day: right gear, right time, no rush, no abuse.

Remember the goal. A dialer is not there to "burn through" numbers. It is there to keep promises, meet rules, and help people talk to the right buyer. Pick the type that matches the job. Keep the pace honest. Your answer rates will hold up, your timers will be safe, and your buyers will trust you with more volume.

S2. Local presence & branded calling

People answer phones when the caller looks familiar and safe. **Local presence** and **branded calling** help you look that way. Local presence shows a number with the **same area code** as the person you are calling. Branded calling shows your **business name** (and sometimes your logo and call reason) on the screen. Used well, these tools lift answer rates. Used poorly, they damage trust. The difference is in the details.

Local presence is simple to understand. If you live in Phoenix, you are more likely to pick up a call from a **602** number than a far-away code. So you buy local numbers for the areas you serve and show those numbers when you call people in those areas. This works best for **honest callbacks** the person asked for. For example, a homeowner in 85008 sends a request at 3 p.m. Your team calls at 3:20 p.m. from a 602 number that belongs to you. The person answers because it looks local and timely.

Do not **spoof** numbers you do not own. Do not change to new local numbers every day to trick people. Carriers watch for that. If you burn through numbers, your calls can get marked **"Spam Likely."** Keep a **small, stable pool** of local numbers. Use them for real reasons. Keep your **CNAM** (the caller name tied to your number) clean and honest. If your brand is "Cool Air," register **COOL AIR** or **COOL AIR HVAC** as the name, not something fake like **CITY OFFICE**.

Branded calling takes trust one step farther. On many smartphones, you can show the **business name**, and sometimes a short **reason** ("AC Service" or "Insurance Help"), when you call. To do this, you register your numbers with approved services. They verify who you are. They link your numbers to your business. Some carriers also support **Rich Call Data**, which can display a logo on newer devices. It takes a bit of setup, but the result is strong. When someone sees "Cool Air" and "AC Service" on the screen, they know what to expect.

Here is a simple before-and-after story. On Monday, you call 100 evening callbacks from a plain toll-free number. Only 25 people answer. On Wednesday, you call 100 evening callbacks from a registered local number that shows your brand. Forty-two people answer. The message on the phone matches the promise you made online. That gap—25 vs. 42—often decides if you hit your **connected talk-time** goal or miss it by a few seconds.

Use **local presence** and **brand** together with good manners. Call during the hours you posted. If someone asks you not to call again, honor it at once. If you send a text to confirm a callback, **say who you are**, say how to stop texts ("Reply STOP to end"), and do not add other ads. A clean message could be, "Cool Air: returning your AC request. We can call 6–7 p.m. Reply 1 for yes, STOP to end."

Keep an eye on **number health**. If a number's answer rate drops fast, check if it has been labeled spam by big phone carriers. Some services can tell you how your numbers show up today. If a number is flagged, pause it. Fix the pattern that caused trouble (too many short calls, late night calls, or repeated retries). Then ask your provider to clear the label. If you never fix the pattern, the label will come back.

Match your **display name** with your landing page. If your ad says "Friendly Quotes" and your caller ID says "FQ LLC," people feel unsure. If your ad says "Phoenix AC Repair," your caller ID should show "Phoenix AC" or "Cool Air." Even a small match matters. It turns a cold ring into a known ring.

When should you **not** use local presence? If the buyer handles calls across the whole country under a national brand, a **branded toll-free** number may be better. It looks official and steady. In some regulated niches, a brand that people know can be more trusted than a local code. Test both. Look at answer rates **and** connected talk time. Pick the path that gives you longer, calmer calls, not just faster pickups.

Here is a workflow you can copy. Buy three local numbers in your main metro. Register them with a caller ID service so the name shows "Cool Air." Use one number for live callbacks, one for evening callbacks, and one for weekend callbacks. Watch answer rates and average talk time each week. If evening answer rates fall, try a friendly text first: "Cool Air: calling you now for AC help. Reply STOP to end." If a number gets flagged, swap in a spare, and open a ticket to clean the label on the old one. Over time, keep a tidy pool of ten to twenty numbers for a busy city. Do not jump from number to number without reason.

Local presence and branded calling are not magic tricks. They are simple signs that say, "This is us, and we are calling for the reason you expect." When your sign is clear and your timing is right, people pick up. When they pick up, you have time to help—and to reach the talk-time that makes the call billable. That is the point.

S3. Voicemail detection & transcription end-to-end

Every outbound plan meets voicemail. Some people are at work. Some are in the car. Some simply prefer a message. If you handle voicemail well, you save time and still move calls forward. If you handle it poorly, you waste dials and hurt your caller ID reputation. You also want to **transcribe** calls end-to-end so you can search what was said, settle disputes, and improve scripts without guesswork.

Voicemail detection is often called **AMD** (answering machine detection). The system listens for signs that a machine picked up: a long greeting, a steady tone, a beep. If the system is sure it is voicemail, it can **play your message** without tying up an agent. If the system is unsure, it should pass the call to an agent, who can start speaking or leave a message by hand. No AMD is perfect. If you set it too strict, you will drop real people. If you set it too loose, agents will talk to machines. Use the middle setting, test it daily, and adjust with care.

Keep your **voicemail script** short, clear, and kind. Say who you are, why you called, and one easy next step. Do not speak fast. Do not stuff the message with features. A good message sounds like a helpful neighbor, not a radio ad. Here are two examples:

"Hi, this is Jay at Cool Air. You asked for AC help in 85008. We can talk today after 5 p.m. Call 602-555-0100, or we can call you back in that window. Thanks."

"Hello, this is Mia with Friendly Quotes. You asked for auto insurance options in Texas. I can connect you with a licensed agent today. Call 210-555-0144, or reply to our text to pick a time."

If you plan to **send a text** after voicemail, say so in the voicemail, and include **STOP** instructions in the text. Keep the text short: "Cool Air: AC help. We can call 6–7 p.m. Reply 1 for yes, STOP to end." Only send one text unless the person replies.

Now think about **transcription**. After each call, a speech-to-text tool can turn the audio into words. Save the text with the call ID, the time, the buyer name, the connected talk time, the IVR choices, and the agent name. This gives you a **full story** you can search. You can look for "recorded" to check that the agent said the recording line. You can look for "ZIP" or the actual five digits to see if the agent asked for location early. You can look for "hang up" spots, like when the caller went silent for a long time.

Transcripts let you fix scripts without guessing. If many calls die right after you ask a second question, move that question later or change the words. If many callers say, "What?" after your first line, rewrite that line to be shorter and clearer. You can test two versions in one week and see which one gives longer connected time.

Transcripts help with **disputes**. If a buyer returns a call as "commercial," but the transcript shows the caller said "home" and the agent said "residential," you can send that clip with the lines highlighted. Most buyers will reverse a bad return when you show proof fast. Keep clips short—about 30 to 60 seconds—so people can review them quickly.

Keep **privacy** in mind. Train agents not to repeat full card numbers or Social Security numbers out loud, and to move payment to the buyer. If your transcript tool can **auto-redact** sensitive numbers, turn that on. If you must capture a number (for example, a policy number), consider **pausing recording** while the caller reads it, then turning it back on. Say what you are doing so the caller is not confused.

Connect transcription to your **QA and coaching**. Once a week, scan the first 30 seconds of the top ten longest calls. Copy the lines that worked and put them in your phrase bank. Do the same with the bottom ten. Find the lines that caused trouble and replace them. Over a month, your script will get sharper without long meetings.

Tie the whole loop together with simple tags. When a call is voicemail, tag it "VM." When a text is sent, tag it "TXT." When a callback is set, tag it "CB." When the call connects and passes the timer, tag it "QUAL." Then build a small report: how many VMs, how many texts, how many callbacks, how many qualified calls. If voicemail is eating your day, try different message timing. If callbacks work best in the evening, staff for that window.

Voicemail and transcription are not side jobs. They are part of the main road. A clean voicemail saves a missed call. A clear transcript turns a call into lessons. Together, they help you spend less time chasing and more time connecting, which is the point of pay-per-call.

S4. Recording, retention & redaction

Recording calls is how you protect your business, train your team, and win fair disputes. It is also how you can get into trouble if you do it the wrong way. The keys are simple: **tell people**, **keep only what you need**, **store it safely**, and **hide private stuff** you do not need to hear again.

Start with the notice. In many places, it is legal to record if **one person** on the call knows. In other places, **everyone** must know and agree. The easy rule is to **tell everyone**, every time. Do it right at the start. Use plain words. “This call may be recorded for quality and training. Is it okay to continue?” Pause and wait for a “yes.” If the person says no, you can often help without recording. Train agents how to **turn recording off** in that case, if your rules allow.

Keep the tone calm. People do not mind recording when you sound human and the reason makes sense. Do not bury the notice in a long speech. Short is safe.

Next comes **retention**. Retention means how long you keep the recordings and transcripts. Keep them long enough to handle **refund windows**, **audits**, and **training**, but not forever. Many teams keep raw audio for **90 days** and keep short clips for **a year**. Some regulated niches keep longer. The right number for you depends on your deals. The important thing is to **write the rule down** and follow it. If a buyer asks you to delete their data, do it and log the date.

Store recordings **securely**. Use strong passwords, limits on who can listen, and logs that show who listened and when. Put files in one place, not scattered across laptops. If you can, **encrypt** files at rest (while stored) and in transit (while moving). Give access by role. A coach needs to hear calls for training. An accountant does not. Less access means less risk.

Plan how you will **find** the right recording fast. Save each file with a clear ID, date, buyer name, and offer name. Link it to the call log and the transcript. When a buyer asks, "Can we review that call from Tuesday at 10:14 a.m.?" you should be able to find it in under five minutes.

Now think about **redaction**. Redaction hides private parts of a recording or transcript. At a minimum, hide **credit card numbers**, **full Social Security numbers**, and other sensitive codes you do not need to train or bill. Many tools can auto-redact those patterns. Turn that on. You can also train agents to **pause recording** when a buyer asks for a card number. Say, "I'm going to pause recording while you give that number," press the button, take the number, then say, "I'm turning recording back on now," and press it again. Make this a habit. Your agents will feel proud they are protecting callers.

Be careful with **screen recordings**. They can capture private data even if your audio is clean. If you record screens, mask fields that show card numbers or medical details. If you do not need screen video to coach, skip it.

Use recordings to **teach**, not to hunt. Pick short clips that show a great opening, a smooth bridge, or a kind way to handle a tough moment. Play them in team huddles. Praise the agent. Then play a clip that needs work and show a better line. When people see recordings help them grow, they stop fearing them.

Write a **simple policy** you can share with buyers. It can say: we record for quality, we announce it, we store safely, we keep for X days, we redact sensitive items, and we honor delete requests. This builds trust. If a buyer needs a copy of one call for their own QA, share a **short clip** that covers the part they asked about, not an entire hour.

Plan for **mistakes**. If an agent forgets the notice and records anyway, file it as a **coaching event**. Show them a card on their desk that says, "Hi, I'm [name]. This call may be recorded. Okay to continue?" Ask them to read it at the start of every call for a week. Most folks forget once and then never again.

Recordings help with **legal** duties, but this book is not legal advice. Laws change. Make a habit of checking your script with a lawyer when you enter a new state or a new niche. Keep your policy current. When you lead with honesty and care, recordings turn into a strong shield and a steady teacher.

S5. Carrier monitoring, remediation & error codes

Phones do not always behave. A call can fail before it rings. It can ring and ring with no answer. It can connect and then drop. Carriers send **error codes** to explain what happened. If you learn to read those codes, you can fix problems fast. You can also watch a few simple **health numbers**—like answer rate and average talk time—to spot trouble before it grows.

Imagine the path of a call. Your system places the call. It travels across one or more phone networks. It reaches the person's device or the buyer's trunk line. If something breaks, the network sends a short code. On internet-style routes you will see **SIP codes** like **486 Busy Here** (the other side is busy), **480 Temporarily Unavailable**, or **503 Service Unavailable** (a network problem). On older routes you may see **Q.850 causes** like **16 Normal Clearing** (call ended normally), **17 User Busy**, **21 Call Rejected**, **34 No Circuit Available**. These look nerdy, but they are just hints. Your job is to sort them into buckets: **we can fix**, **buyer can fix**, or **carrier must fix**.

Start with the easy wins. If you see many **486 Busy** or high **ring time**, your buyer may not have enough agents or lines. Talk to them about **concurrency** (how many calls they can take at once) and **overflow** to a backup team. If you see many **480 Temporarily Unavailable** when calling at 7:55 a.m., you may be dialing before they open. Shift your schedule five minutes later.

Watch your **answer rate** (the share of routed calls that get picked up) and your **ACD** (average call duration after the call connects). A sudden drop in answer rate can mean the buyer is short-staffed, your numbers are being labeled as spam, or your routing is hitting closed hours. A sudden drop in ACD can mean agents changed their greeting, your IVR got longer, or callers are confused by a new ad. Check one thing at a time. If answer rate drops across **all** numbers, look at staffing and hours. If answer rate drops on **one** number, test that number from your own phone. If your screen says "Spam Likely," that number needs help.

"Spam Likely" is a label that caller-ID analytics add when they think a number is risky. Labels can be wrong. To **remediate** (clean up) a label, first fix the behavior that may look bad: too many short calls, too many retries, calls at odd hours, or calls to people who did not ask you to call. Then **register** your numbers with approved services and ask your phone provider to submit a **reputation ticket**. Keep notes on what you changed. Carriers like to see you took action, not just that you complained.

Sometimes the network fails. If you see many **503** or **34 No Circuit Available** across many routes, open a ticket with your provider. Share **call IDs**, **times**, and the **codes** you saw. Providers fix problems faster when you bring clear data.

Make a simple **playbook** for your team. If answer rate falls below 60% in an hour, pause new calls to that buyer, move traffic to backup, and check labels on the numbers used. If connected talk time falls by more than 10 seconds day-over-day, check IVR length and buyer greeting. If you see more than 5% **call setup failures** (no ring, instant fail), file a ticket with the provider and attach a screenshot of codes.

Measure **PDD** (post-dial delay), which is how long it takes from "call start" to first ring. Long PDD makes callers hang up. If your PDD grows, ask your provider to optimize routes. If PDD is fine but people still hang up, look at your **ring time** before answer. You may need to change your "ring then overflow" timer from 30 seconds to 20 seconds.

Track **error reasons** by number. Sometimes one number has a wiring issue or is blocked by a single carrier. If one number shows many **603 Decline** or **403 Forbidden** codes, replace it and test from that carrier's phones. Keep a few **fresh spare numbers** ready so you can swap without delay. Do not swap daily; that looks suspicious. Swap only when a number is truly sick.

Keep an eye on **the day after changes**. If you added new ads, new scripts, or new routing, see how the phone metrics moved. If you changed nothing and the phone metrics moved, it is likely a carrier or buyer change. Ask both sides if they changed anything on their end. Often someone updated a firewall, a SIP trunk, or a greeting and forgot to tell you.

Log everything in plain words. "Monday 2:10–2:40 p.m., answer rate fell to 38% on Buyer A. Labels clean. Agents short-staffed per buyer. Overflow to Buyer B engaged. Answer rate back to 62% by 3:00 p.m." These short notes will save you hours when a buyer asks, "What happened on Monday?" They also help you see patterns, like a weekly lunch dip or a Friday early close.

End with a true story shape you can reuse. One hot July day, answer rate drops from 70% to 45% on your Phoenix HVAC line. You test the number from three carriers. No spam label shows. You check error codes: many **486 Busy** and **480 Temporarily Unavailable**. You call the buyer. Their manager says two techs called in sick and the phones are swamped. You lower their cap by half and turn on overflow to Buyer B for four hours. Answer rate climbs back to 65%, and your connected talk time stays above 90 seconds. You send a short note that night: what you saw, what you did, and what you suggest for tomorrow (extra seat 4–7 p.m.). That is deliverability done right. You watched, you understood, you acted, and you wrote it down.

Carrier health is not about fancy tools. It is about steady eyes and simple moves. Read the signs. Fix what is yours. Bring clean data when it is theirs. Do that every week, and your calls will reach real people more often, stay on the line longer, and pay you what your work is worth.

9

Data Sourcing, Hygiene & Recontact

S1. Opt-in vs cold outreach (what's allowed)

In pay-per-call, trust is the engine. People call you when they trust you. Buyers keep paying you when they trust your calls. The fastest way to build trust is to talk only to people who **asked** to hear from you. We call this **opt-in**. The slow, risky way is to call people who did **not** ask you to call. That is **cold outreach**. This chapter explains the difference in plain words, shows safe ways to get opt-ins, and gives simple rules for when and how to call back. For legal rules and deeper details, always follow the guidance from **C2: Compliance & Risk Management** and get advice from a lawyer when you launch a new program.

Opt-in is the green zone. It means the person raised their hand. Maybe they tapped your "Call Now" button and spoke with your IVR. Maybe they filled out a form on your site and checked a box that says, "Yes, you can call me about AC repair." Maybe they sent a text that says, "CALL," after you told them what would happen and how to stop messages. In some cases, opt-in can be a **voice recording** where the caller says "yes" after hearing a short message. The key is the same: the person **knew**

who would call, **why you would call**, and **how you would contact them**. Your job is to save proof of that moment (page screenshot, date and time, IP, the exact words shown, or the audio clip). When someone asks "Why did you call me?", you can answer in seconds, not guesses.

Cold outreach is the red zone unless a very clear rule lets you in. Cold outreach means the person did not ask for your call. Maybe you bought a list from a broker. Maybe you scraped numbers from the web. Maybe a friend "shared" a spreadsheet from last year. This is not only poor quality; it can break rules. Many countries and states limit or block sales calls to people who did not ask for them. Even when a call is lawful, it may still be **unwanted**. Unwanted calls lead to complaints, "Spam Likely" labels, and angry buyers. If you want a stable business, choose **opt-in first**.

There is a middle area you will hear about: **warm outreach**. Warm outreach is when the person talked to you recently, or asked for a price, or called but got cut off. In that case, a friendly, fast callback is expected. Another warm case is when a person has an **existing relationship** with the brand (for example, a current customer who asked for service). Even here, be careful. Call soon. Keep it on the same topic. Be polite and brief. If they say "don't call," stop.

So how do you get clean opt-ins? Start with your own pages and ads. Make the promise clear. If your page is "AC Repair in Phoenix," the caller expects AC help in Phoenix—not a national sales pitch for a different product. Use a clear phone number and a short form for callbacks. Put simple consent words near the button in big font. "By tapping 'Call me,' you agree we can call or text you about AC repair at this number. Message/data rates may apply. Reply STOP to end." If you run ads on social sites, use the platform's own forms and disclosures, and keep your words the same as your page. If you run a QR code on a flyer, send people to a page that repeats the same promise and the same consent text.

You can also get opt-ins from **partners** the right way. Let's say a local radio host talks about summer tune-ups. They read a short script: who you are, what happens, and how to stop messages. The listener texts "COOLAIR" to a short code. The reply text repeats the promise and the STOP instructions. Now you have a clean opt-in. Keep the receipt (the time, the number, and the text thread). If you team up with a website that gathers "compare offers" leads, make sure the site names your brand clearly and keeps proof. If a site hides your name under a long list of "partners," do not use it. You will get low trust, short calls, and refunds.

Here are two simple stories that show the difference. In the first, a woman named Ana searches "AC blowing warm air." She taps your ad, lands on your page, and taps "Call Now." She hears, "This call may be recorded," and she says "okay." You ask, "Home or business?" and "What's your ZIP?" You connect her to the right tech. This is opt-in. It is clear and fast. In the second story, a man named Ben gets a call at dinner from a number he does not know. The caller talks fast about a service Ben never asked for. Ben hangs up and marks it spam. This is cold outreach. It hurts everyone.

What about calling a list of past customers? That can be okay if you **only** talk about the service they used before or a clear follow-up, like "it's time for your yearly tune-up." Keep the timing reasonable. Do not call late at night or too early in the morning. If they say "no thanks," stop and mark the number so you do not call again. A gentle, helpful note can feel like care. A hard sell feels like noise.

Make life easy for your team. Teach them the four-line rule for opt-in: say who you are, say why you're calling, say how the person asked for help, and offer a simple way to stop future calls or texts. Here is an example. "Hi, this is Jay from Cool Air. You asked us to call about AC repair in 85008. Is now okay to talk? If not, we can call later, or you can reply STOP to end texts." When agents use lines like this, callers relax. When callers relax, calls go longer. Longer calls meet the timer and get paid.

Close with this promise to yourself: we will build our business on **asked-for calls**. We will keep proof. We will call back fast while the need is fresh. We will treat a "no" like a stop sign. We will never buy shady lists or trick people with fake reasons. If you stick to that promise, your answer rates rise, your buyers trust you, and your pay-per-call shop becomes strong and steady.

S2. Data validation & enrichment

Good data is like clean water for your phone system. If the data is dirty, the phones gurgle and cough. If the data is clean, the calls flow. Data validation is how you clean it. Enrichment is how you add small, helpful details that guide the call to the right place. In this chapter, we will walk through what to check, what to add, and how to do it without slowing your day.

Start with the phone number itself. Not all numbers are the same. Some are mobile. Some are landlines. Some are internet phones. Some are "temporary" and will vanish soon. When you capture a number, put it in a standard shape (we call this **E.164**), like "+16025550100" for a U.S. number. This shape makes matching and de-dup faster later. Check if the number is real and active before you dial. Many tools can tell you the **line type** (mobile or landline) and the **carrier**. If you plan to send a text, make sure it is a mobile number and that you have consent to text. If it is a landline, skip the text and plan a call only.

Next, look at **location**. Area codes do not always match where a person lives now. People keep their numbers when they move. So, if you need a fast, sure location, ask for a **ZIP code** in your IVR or form. When you get a ZIP, check that the ZIP is real and inside your buyer's service area. If your buyer works in “85008, 85016, and 85018,” then a call from 85008 is good, and a call from 85086 is not. Add a little note to the call record with the **city** and **state** so your buyer sees it on their screen. This one step saves a lot of time and refunds.

Now, think about **intent**. Did the person click a “Call Now” button on a page about AC repair, or did they click from a page about new units? The difference matters. Keep the **UTM tags** from the link so you know the source, the campaign, and sometimes the keyword. Keep the **landing page** they saw. When a call comes in, you can say, “This came from the AC repair page,” and route it to the right team or script. In your logs, store the IVR answers too. “Pressed 1 for residential.” “Entered ZIP 85008.” Each answer is a small piece of proof that helps you match the buyer’s rules.

Check for **duplicates** before you call. If the same number entered three forms in ten minutes, you do not need to call it three times. If the same number called you yesterday and today, only route it once if your deal says “one billable call per 14 days.” Build a simple “recent callers” table. When a new call comes in, look up the number. If it is in the table inside your window, follow the rule you set: skip, send to info line, or route to a special queue. This keeps your reports honest and your buyers happy.

Add **small, safe details** to help the agent start strong. If you know the **time zone** from the ZIP, show that to the agent so they do not offer a 7 p.m. call in a place where it is already midnight. If you know the **language** from a past call (for example, the caller chose Spanish last time), keep that flag so you can route to a Spanish agent now. If you know the **device** was a smartphone, you might offer a text link for appointment info after the call. Keep it simple. Add only what helps the first minute, not a pile of data nobody uses.

Save the **consent text** with each record. If the person filled a form, store the exact words near the checkbox. If they called your IVR, save a clip of the recording where you played the notice and they said “okay.” If they texted you first, keep the first message and your reply. Tie these to the same call ID so you can pull them in a minute if a buyer asks. "Here is the form and box they checked." "Here is the audio where they said yes."

Use validation in **real time** when you can. If your form sees a number that is missing digits, it should ask the person to fix it before they submit. If your IVR hears an invalid ZIP, it should ask again. Catching errors early saves a lot of chasing later. For older lists you already have, do a **batch clean** once a week. Remove numbers that are dead, add city and state where missing, and mark numbers that have caused complaints so you do not dial them again.

Be kind with **names and emails**. You often do not need a full name to route a call. If you do collect a name, spell it back to the caller to avoid mistakes. If you collect emails, use them only for the purpose the person agreed to. Do not mix lists from one brand or vertical with another without clear permission.

Here is a simple "before and after." Before validation, you call ten numbers from last night. Two are wrong length. One is a landline you tried to text. Three are out of area. Four are good. Your agents waste time, and answer rate falls. After validation, you fix bad numbers on the spot, you skip texting landlines, and you route only the four in area. Your agents spend their time only on real chances. Answer rate rises. Connected talk time rises. Acceptance rises. You did not get "more leads." You got **better data**.

End with a small promise to yourself. Every record will have a clean number in E.164, a clear location from ZIP or state, the last consent proof, and a simple tag for source and intent. We will fix errors early, add only helpful details, and keep all of it tied to the call ID. Do this, and you will feel the phones smooth out—and the money side will follow.

S3. Suppression lists & consent synchronization

A **suppression list** is a list of numbers you will **not** call or text. It keeps you from reaching out to people who said “stop,” numbers that should never be contacted, or numbers that do not fit a buyer’s rules. **Consent synchronization** is how you keep every tool and every partner on the same page about who said “yes” and who said “no.” When you get these two things right, you lower complaints, lift answer rates, and avoid costly mistakes.

Think of suppression like a big, clear fence. On one side are numbers you can contact for the offer you are running. On the other side are numbers you cannot contact. The fence must be strong and easy to see. Build one **master suppression** in your database. This is the main list your whole system checks before any call or text. Add to this list the people who told **you** “do not call,” people who told your **buyer** “do not call,” and any numbers on a **special do-not-call** file for that brand. Some teams also add known bad actors (like repeat litigators) to stay safe. Keep a note on each entry: when you added it, who asked, and why.

Do not keep little private lists on each laptop or in each dialer. That is how people get called by mistake. Every channel must check the **same** master list. Your IVR should check it before offering a callback. Your dialer should check it before placing a call. Your texting tool should check it before sending a message. Your ad forms should check it before letting someone resubmit if they already said “stop.”

Now add **buyer rules**. A buyer may say, “Please do not send me past customers,” or “Do not send anyone outside these ZIPs,” or “No calls who asked for removal last year.” These are special fences just for that buyer. Save them as **buyer-level suppressions** and check them **after** the master list. This lets you route a call away from Buyer A to Buyer B if the caller fits B’s rules but not A’s.

Consent sync is the matching dance that keeps every system current.

A person might tell your agent, “Don’t call again.” They might tell the buyer the same thing. They might text STOP to your reminder. Every time this happens, your master list must update **fast**. Set up simple feeds between systems. If the buyer has a “do not call” button, they should send you a daily file or an API ping with those numbers so you can add them to your master list. If your agent marks “do not call,” your system should send that change to the buyer. If a person replies STOP to a text, your texting tool should add them right away and mark the time. Aim to sync at least **daily**, and faster if you can.

Use clean matching. Store numbers in one format (E.164) so your system recognizes the same number across tools. If you also store hashed versions for sharing with partners (for privacy), keep the salt secret and consistent so matches work. Test your sync each week. Pick five numbers you know should be blocked and try to add them as new calls in a test list. If any slips through, fix the sync before you go live.

Watch out for **cross-brand leaks**. If you run more than one brand or vertical, do not assume a person who asked “stop” for one brand wants to stop **all** contact forever. At the same time, do not assume the opposite. The safest path is to treat a “do not call” as brand-specific unless the person clearly said they want no contact from any brand. In your system, keep a brand flag next to each suppression entry so you know where it applies.

Keep **proof**. When someone asks why you called, you need to show if they gave consent and whether they ever asked to stop. Save a short log with each number: consent time, consent method (form, text, voice), and stop time if it exists. If a buyer tells you to add a past customer list to suppression, save the email or file name and the date you uploaded it. These small notes close many fights quickly.

Here is a simple flow that works. A new form comes in at 10:03 a.m. Your system first checks the master suppression: not on it. Then it checks buyer rules: not a past customer; ZIP is in area. It stamps the record with the consent text and time. The call routes. During the call, the person says, “Please don’t call again.” Your agent clicks “DNC” and repeats, “Understood, we won’t call again.” Your system adds the number to the master list with the time and reason, and sends a tiny file to the buyer so their list updates too. At 10:07 a.m., the number is blocked everywhere. No more mistakes.

Sync with your **ad tools** too. Many ad platforms let you upload a list to **exclude** people who asked not to be contacted. If you run ads that ask for calls, upload a fresh exclusion list each week. This lowers wasted clicks and shows respect for people’s choices.

Finally, keep the fence tidy. Once a month, review the sync logs. Did any files fail to import? Did any API calls error out? Fix them. Spot-check a few numbers. Ask, “If I tried to call this one, would the system block me?” The goal is not zero errors forever. The goal is a quick catch and a quick fix. When your suppression and consent sync work as one, you stop problems before they start—and your buyers will notice.

S4. Recontact policies & frequency

Recontact is about **when** and **how often** you try a person again. Done well, it feels helpful and calm. Done poorly, it feels pushy and annoying. In pay-per-call, the right recontact plan saves missed chances without hurting your answer rate or your reputation. This chapter gives a simple, human plan you can use and bend to fit each vertical.

Think in three buckets: **hot**, **warm**, and **cool**. A **hot** person just reached out or just called and got cut off. A **warm** person filled a form or left a voicemail today or yesterday. A **cool** person asked last week or longer ago and did not connect. Each bucket needs a different number of tries and a different speed.

For hot people, move fast and be gentle. If someone tried to call and the buyer was busy, start a callback within **minutes** if they asked for it. Try once by phone. If no answer, leave a short, friendly voicemail and send one text that says who you are and offers a time window. "Cool Air: returning your AC request. We can call between 6–7 p.m. Reply 1 for yes, STOP to end." If they reply 1, great. If they do not reply, do **one** more phone try later in the same day at a better hour. Then stop for the day. Do not call five times in an afternoon. That only makes people mad.

For warm people, use a simple two-day plan. On **Day 1**, make **two** calls at good times, like late morning and early evening. Leave one voicemail total, not two. Send **one** text after the second call, if allowed. On **Day 2**, make **one** call at a different time, like lunchtime. If you reach them and they say, "Call me tomorrow," do it and thank them. If you do not reach them by the end of Day 2, stop calling. People need space. You can try a **soft nudge** by text in a few days if the person opted in to texts, but keep it rare and helpful. "We still have a tech in your area this week. Need help? Reply 1. STOP to end."

For cool people, slow down. They may have fixed the problem, changed their mind, or found another company. One call this week and one next week is enough for most services. If they do not answer both times, archive the record. Do not keep scratching the same spot. Your time is better spent on new, hot calls.

Match your times to life. Early morning works for furnace problems in winter. Early evening works for AC in summer. Weekends may be great for Medicare plan questions. Avoid late nights and very early mornings. Respect holidays unless the service is urgent and the person asked for help that day. If you take time zone from ZIP, use it. A 6 p.m. call in your time might be 8 p.m. for them.

Use simple **outcome codes** to guide the next step. After each try, the agent can click one choice: Reached & Transferred, Reached & Not Ready, No Answer, Voicemail Left, Text Sent, or Do Not Call. If it is Reached &

Not Ready, note the window they want and call in that window only. If it is Voicemail Left, do not leave a second voicemail tomorrow. If it is Do Not Call, add to suppression right away and stop all tries.

Keep your **promises**. If you tell someone "we'll call between 6 and 7," do not call at 5 or at 8. If you say "one text," do not send three. Every promise kept builds trust. Every broken promise hurts your brand and your answer rates.

Here is a real-life flow. Alex fills your form at 10 a.m. on Tuesday for AC repair. At 10:06 a.m., your agent calls. No answer. The agent leaves a 15-second message and sends a short text with a 6–7 p.m. window. At 6:10 p.m., the agent calls again and reaches Alex. Alex says, "I'm at dinner; call me at 7:30." The agent sets a reminder and calls at 7:30. The call connects and runs long. This is clean and kind. Now the other story. Ben filled the form. You call him five times in two hours, leave loud sales voicemails, and text him twice without STOP words. Ben blocks your number and tells his friends to avoid you. The first story pays. The second one burns.

Tweak the plan by vertical. For **home services**, go faster on Day 1 because the need is urgent. For **insurance quotes**, an evening or weekend call might work best because people are free then. For **medical bookings**, aim for daytime when people can grab their papers. Always check your rules in **C2** before you add texts or extra calls.

Measure and improve. Track for each bucket how many people you reached, how many you transferred, and how many calls turned into paid calls. If your second call on Day 1 almost never connects, move that try to Day 2. If your evening text gets great replies, keep it and tune the words. If your voicemail gets no returns, shorten it.

End with a short pledge: we will contact people the way we would want to be contacted. Few tries, good hours, clear messages, easy stops. We will listen to "no," and we will rest records that don't answer. When you stick to this, your answer rates stay high, your numbers stay healthy, and your buyers see calmer, longer calls.

S5. List aging & win-back

Lists do not stay fresh forever. People change phones. They move. They fix the problem another way. Their mood changes. When time passes, your chance to connect drops. This is called **list aging**. If you keep pushing old lists, you get low answer rates, short calls, and "Spam Likely" labels. If you treat time with care, you know when to stop, when to rest, and when to try a gentle **win-back**.

First, know the clock for your niche. In **home services** like HVAC, plumbing, or pest control, the window is short. A person who asked for help today likely wants help **today**. After 24–72 hours, the value of that record falls sharply. For **auto insurance quotes**, the window is wider. People may shop for a week or two. After 30 days, most are set or tired of calls. For **Medicare plans**, there are fixed seasons when calls are strong. Outside that season, you should hold most of those records and only contact people who clearly asked for off-season help. These are not hard laws; they are simple guides so you do not waste your time.

Build a **freshness tag** into each record. Stamp the record with the time you first got it. Each day, the tag moves from Fresh (0–2 days) to Recent (3–7 days), to Stale (8–30 days), to Old (31+). Use these tags in your dialer rules. Fresh gets the most attention. Recent gets a lighter touch. Stale gets one polite try if the person never picked up. Old gets archived unless you have a very good reason or a new opt-in.

Tie this to your **recontact plan** from S4. A Fresh record gets two tries on Day 1 and one try on Day 2. A Recent record gets one try on Day 3 or 4. A Stale record may get one try if it came from a high-trust source and you have not tried before. Old records should rest. If you keep calling old records, you will train carriers to hate your numbers.

List aging affects **acceptance** too. Calls from Fresh records often run longer. People remember why they reached out. Calls from Old records run short. People forgot, or times changed. If you see your connected talk time drifting down, check the age mix. You may be leaning too hard on Stale and Old.

What about **win-back**? Win-back means you try to bring back past callers or past customers at the right time, with the right reason, and with the right permission. In home services, a friendly tune-up reminder in spring or fall can work well. "It's Cool Air. We have discounted tune-ups this week in 85008. Want a morning or evening slot? Reply 1 for morning, STOP to end." In insurance, a gentle note near renewal time can help. "Friendly Quotes: want us to check new rates before your policy renews next month? Reply 1, STOP to end." These messages should go only to people who gave you permission for messages from your brand, or who are current customers and expect service notes. Keep the pace very slow. One message near the right date is enough.

Clean your **old lists** before any win-back. Remove numbers that bounced, numbers that asked to stop, and numbers that never, ever answered. Remove people outside your service area. If you still use a small part of an old list, make a **clear offer** tied to a real reason and an easy way to stop. Do not spam the whole thing. You will burn your number pool and lower your answer rate for months.

Score your records with a **simple grade**. Add points for Fresh, for a strong source (like a direct website call), for a clear intent (like "AC blowing warm"), and for a ZIP you serve often. Remove points for age, for many failed tries, and for past "not ready" notes. Call high-score records first. Rest low-score records. This score does not have to be fancy. It just helps you focus today's energy where it counts.

Keep a **cemetery list**. When a number hard fails (wrong number, carrier error that never clears, constant complaints), bury it in the cemetery with a note. Do not bring it back by mistake when you get a new list from a partner. Check new lists against the cemetery before you load them. This stops pain before it starts.

Mind the **season**. Before summer, win-back tune-ups can be great. During a heat wave, do not push win-back at all; help live problems first. In Medicare AEP, focus on hot calls and clear opt-ins. After AEP, a soft "we're here if you have questions" to people who asked for off-season help can be okay, but slow and careful is the rule.

End with a plan you can trust. We will feed our phones with Fresh records first. We will not chase Old records past a fair point. We will run small, polite win-backs with consent, near the right dates, and with easy stops. We will clean and score our lists weekly. We will rest numbers that do not answer and never wake the cemetery. Do this for a month, and you will feel the work change. Fewer dials. Longer talks. Happier buyers. A list that lives and breathes with time, not against it. That is how you keep your pay-per-call shop healthy all year long.

10

Free Traffic — Core Tactics

S1. Google Sites one-page click-to-call funnels

Think of a one-page site like a helpful flyer that lives on a phone. The goal is not to write a long story. The goal is to make the phone ring with the right people, in the right area, during the right hours. Google Sites is free, fast, and easy. You can launch a clean page in under an hour, and you can edit it anytime.

Start by picking **one service** and **one city**. "AC Repair in Phoenix" is better than "All Heating and Cooling in the USA." Your headline should match what people search. Keep it short and clear: "AC Repair in Phoenix — Same-Day Help." Put a big **tap-to-call button** near the top. On mobile, people should be able to tap without pinching and zooming.

Right under the headline, write two or three short lines on why to call. "Licensed local techs. Fast diagnosis. Up-front pricing." Do not brag. Do not stuff keywords. Speak like a neighbor. Add one small "since 2012" or "4.8★ average" if it's true. Keep it honest.

You also want a simple **callback form** for people who can't talk now. Ask only for the phone number and ZIP code. Write your consent note near the button so there is no surprise. "By tapping 'Call me,' you agree we can call or text you about AC help. Message/data rates may apply. Reply STOP to end." That plain line builds trust.

Keep the whole page **one screen** on a phone. No sliders, no long menus, no heavy images. A photo of a clean filter or a thermostat is fine. Do not use stock photos with faces that look fake. People can tell. If you must use stock, pick simple photos with the equipment only.

Add a tiny **FAQ** with two questions. "Do you service my ZIP?" and "How fast can you come?" Under the first, say "We serve these ZIPs: 85008, 85016, 85018." Under the second, give real hours. "Open 8 a.m.–6 p.m., Mon–Sat. After-hours callbacks by request." If you say "24/7" but no one answers at night, callers will be upset and calls will be short. Short calls get rejected.

Make the **footer** useful: hours, service area ZIPs, and a link to a simple privacy page. If you record calls, say so: "Calls may be recorded for quality. If you want help without recording, tell us."

Connect the page to your call-tracking number. Each page can have its own number so you can see which page sends calls. If you run ads later, add **UTM tags** to your links so your call log shows the source. Even for free traffic, UTMs help you learn what words and posts cause calls.

Here's a small wireframe of a one-page funnel. It shows what goes where. Keep it tight and easy to scan.

Download the image

Write simple copy for the top section. For example:

"Hot air from your vents? We help Phoenix homes today. Licensed techs, clear prices, no long holds. Tap to call."

In the callback form, avoid pushy words. "Request a call back today" is better than "BOOK NOW" if you are not truly booking. Be clear about timing. If you only return calls 3–5 p.m., say so.

When your page is live, test it like a stranger. Open it on your phone. Show it to a friend who does not know your business. Ask them to find the button and the hours in five seconds. If they struggle, fix the page. Many small fixes beat one huge "design day."

Make small updates for seasons. In summer, ask "Not cooling?" In winter, ask "Heat not turning on?" This tiny change lifts trust because it fits the time of year. If your city has a big event, you can mention it lightly: "We work through the heat wave—extra evening slots this week."

Finally, remember: one page, one promise, one action. Do not send people to five choices. Do not write a long essay. Do not add fake badges. The more you remove, the more people will tap the button. That is the whole point of a click-to-call funnel.

S2. Craigslist Services & Gigs (policy-compliant posting)

Craigslist can still send real calls for local services when you play by the rules. The website is simple. People go there to find help fast. If your post is clear, honest, and in the right category, you can earn calls without paying for ads.

Start by choosing the **right section**. For most home services, pick **"Skilled Trade Services"** under **"Services."** Do not post in the wrong place to get more clicks. Moderators will flag you, and you will waste your time. If you run a one-off job, "Gigs" may fit, but most PPCall offers are steady services.

Write a **clean title**. Use the service, the speed, and the area. "AC Repair — Same Day — Licensed (85008)." Do not put ten emojis. Do not stuff twenty keywords. Titles with five to eight words work best.

In the **body**, write four to six plain lines. Line one: what you do. "We fix AC systems in Phoenix homes." Line two: hours and same-day info.

"Open 8 a.m.–6 p.m., Mon–Sat. Evening callbacks by request." Line three: service area. "Phoenix, Tempe, Mesa." Line four: call to action. "Call 602-555-0100. No upfront fee." If you record calls, add: "Calls may be recorded for quality." That's enough.

For **images**, use your own. A photo of your van (plate hidden), a clean filter, a thermostat, or a close-up of a coil is fine. Do not use "before and after" face photos. Do not use images with other companies' logos. Keep images clear and bright. One to three is enough.

If the site asks for a **price**, think carefully. Many services do not put a price here, or they say "Estimates." Follow the local rule. Never mislead with a "$1" price to get clicks. That will cause angry calls and short talk times.

Set the **area** and **map pin** in your service area. If you are a mobile service, pick a central spot rather than a home address. The goal is to show "we are near you," not to mark your kitchen table.

Use one **phone number** in an easy-to-tap format. 602-555-0100 is clear. Avoid putting the number in an image only. People on phones want to tap, not type.

Here is a simple layout to copy when you make your post.

Download the image

Follow **Craigslist rules**. Do not post the same ad many times a day. That looks like spam and will get blocked. A good rhythm is to renew or repost every 48–72 hours. If you have two different services, write two truly different posts, each with its own number or tracking link, and space them out.

Watch your **inbox** if you allow email replies, but remember: our goal is calls. If someone emails, reply with a short helpful note and your phone number. "We can help today. It's faster to call 602-555-0100 so we can triage." Some people may still email. Be kind, but keep your time focused on phones.

Answer **fast** when the calls come. If you miss a call, return it within minutes while the person still has the problem. If you can't staff the phone at certain hours, say so in your ad and offer a callback window. Honest hours beat fake "24/7."

If you get **flagged**, breathe. Read the rules again. Remove any pushy words, fake claims, or policy problems. Post again in a few days with a cleaner title and body. Over time you will learn what each city allows.

Measure your **calls** with a special tracking number for Craigslist. That way you see what the post really does. If calls run short, listen to a few recordings. Are people far outside your area? Tighten the ZIPs in your post. Are people asking for installs but your post says repairs? Tweak the words. Small edits can double useful calls.

A short story shows how it works. On Monday, you post "AC Repair — Same Day — Licensed (85008)." You add one photo of a clean filter, list three ZIPs, and your hours. You get three calls that afternoon and two the next morning. All five are within your area. On Wednesday, you renew the post. You get two more calls. That is seven calls in three days with no ad spend, and most hit your talk-time goal. That's the power of a clean, compliant Craigslist post.

S3. Facebook Marketplace service listings

Facebook Marketplace is busy. People use it to find items, rentals, and local help. You can create a simple service listing that shows up for nearby folks. The keys are a clear title, real photos, fast replies, and hours that match your phone team.

Pick the **category** that fits services. In many locations you can select a service-type category under "Home Improvement" or a similar section. Avoid listing a "product" if you are clearly offering a service; that confuses buyers and may break rules. If your region doesn't support a service category, use a short, clear listing and handle details in messages, but stay within Facebook's policies.

Write a **title** in plain words. "Home AC Repair — Same Day Appointments." Do not use "ALL CAPS" or a pile of emojis. People scroll fast. Keep it readable.

Use **real photos** you own. A tidy van, a thermostat, an outdoor unit in good light. Do not show faces without permission. Do not show other brands' stickers. Bright, clean photos win trust.

In the **description**, write short sentences that match the problem people feel. "AC not cooling? We help Phoenix homes today. Licensed techs. Clear prices. Tap to call or message now." Add your hours and main ZIPs. If you will text reminders, add a simple line: "We can text appointment info. Reply STOP to end."

Set your **service area**. Phoenix, Tempe, Mesa is a clear set. Do not say "USA." That tells people you aren't truly local. Marketplace pushes local first; use that to your benefit.

Turn on the **call button** if available and add your tracking number. Also watch your **message inbox**. Respond fast. Facebook often shows your "reply time" on the listing. A "replies in under an hour" badge can help.

Here is a simple layout that shows the parts in order.

Download the image

Keep your **hours** in sync with your buyer. If the buyer closes at 6 p.m., don't promise 7 p.m. help. You can still offer callbacks: "After 6 p.m., we call back next morning at 8 a.m." If you expect weekend spikes, say "Saturday slots open."

Use **local words** people type. "AC repair" beats "HVAC services" for many homeowners. "Furnace not heating" beats "gas forced-air service" in winter. Read messages you get and copy the exact words into your description next time. Speak like your callers, not like a brochure.

Be a **good neighbor** in comments. If someone asks a simple question

("Do you service 85018?"), answer in one line and invite them to call. Do not fight with rude comments. Hide or delete if needed. Keep your tone calm. People watch how you act.

If you collect **phone numbers** in messages, be careful. Ask for permission before texting. "We can text you the technician's ETA. Is that okay? Reply STOP to end." Then keep that promise and store the consent note in your log.

Refresh the listing every few weeks with new photos or copy. Do not spam daily reposts. Facebook can limit reach if you repeat too often. Quality beats quantity.

Measure calls with a **Marketplace number** so you see what this channel does. If calls are short, check your photos and hours. If messages are many but calls are few, add "Tap to call" near the top of your description and put the number again at the end.

A quick example shows the rhythm. You post on Friday afternoon: "Home AC Repair — Same Day Appointments." You add three photos, set service area to Phoenix/Tempe/Mesa, mark hours 8 a.m.–6 p.m., and turn on the call button. Friday night you get two messages and one call. Saturday morning you get three calls. You answer fast, route to your buyer, and the calls pass 90 seconds. On Sunday you pause calls but offer Monday morning callbacks. On Monday you follow up at 8:05 a.m. and book two more. That's free traffic because your listing matched what local people needed, right when they needed it.

S4. Facebook Groups: value posts with call CTAs

Facebook Groups can be powerful if you lead with **help**, not hype. People join groups to learn, fix, and share. If you give a short, useful tip and stay within the rules, your name becomes trusted. When someone is stuck, they will call.

Start by picking groups where your help fits. “Phoenix Homeowners,” “Phoenix Moms,” or “DIY Home Fixes” can make sense for AC tips. Read the group rules before you post. Some groups do not allow phone numbers in the post. Many allow them in the **comments** or on your **profile**. If you’re not sure, send the moderators a friendly message and ask.

Write **value posts** that people can act on right away. A great example is “3 Quick AC Checks Before You Call a Tech.” In the post, keep each step to one or two lines. “Check your filter. If you can’t see light through it, replace it.” “Check the breaker. Flip it off and on once.” “Set your thermostat to cool and the fan to auto.” This helps people today. It also makes you the person they think of when the checks don’t work.

Use your own simple photo if you can—like a new filter next to a dirty one. Do not plaster your phone number on the image. Keep it clean. In the **body**, do not promise prices or speed you cannot deliver. Keep it calm.

Put your **call CTA** where the rules allow. If posts can’t include a number, place it in the **first comment** with a gentle line: “If you try these and still have trouble, call us at 602-555-0100. We’re local and happy to help.” If numbers aren’t allowed at all, put a short link to your Google Sites page in your **profile** bio and say in the comments, “More details on my profile.” Follow the rules or you’ll be muted.

Here is a simple mock of how a good value post looks.

Download the image

Be present in the **comments**. Answer real questions. Thank people who share their fixes. Do not argue. Do not chase every reply with “call me.” Help first. People can feel the difference.

Timing matters. Post tips when people face the problem. First hot week of summer? AC checks. First cold snap? Furnace checks. A big dust storm? Filter tips. You’re not trying to dominate the group. You are trying to show up when it counts.

Use a **light disclaimer** to keep peace with moderators. At the end of the post, you can add, "Admins, this is for education only; remove if not allowed." That shows respect. Many groups will keep the post because it helps members.

Keep a rhythm. One value post per week is plenty in one group. If you try to post every day, people will tune you out. Rotate among a few groups so you don't flood any one place. Track calls with a **Group number** so you can see which group sends the most.

Measure trust by how people respond. If comments say, "Thanks, this fixed it!" or "Jay's tip worked," you are building goodwill. When someone tags you under a "Who should I call?" thread, reply fast and offer your number. Do not post long sales pitches under those threads. Leave a clear one-liner: "We help 8 a.m.–6 p.m., same-day in Phoenix. 602-555-0100."

A short story shows the flow. On Tuesday, you post "3 Quick AC Checks" in a "Phoenix Homeowners" group. Two people say thanks. One asks a question. You answer simply and offer your number in the comments. That night, one of them calls. The call lasts two minutes after connect and pays. On Friday, someone asks, "Who can fix AC near 85008?" A member tags you. You reply with your number and hours. That person calls Saturday morning. That's two accepted calls from one post and one reply, all free.

S5. Reddit: niche subreddits & resource posts

Reddit is a community of many small forums called **subreddits**. Each one has its own rules. Some allow light self-promotion. Many do not. The way to win on Reddit is simple: **be useful** and **respect the rules**. If you help people solve small problems, some will ask you for bigger help. If you try to sell hard, you'll get banned.

Start by reading **r/HomeImprovement**, **r/HVAC**, or your city subreddit (like **r/phoenix**) to see what people ask. Do not post right away. Answer a few questions first. Share a simple fix. Link to a neutral how-to page when allowed. Keep your tone calm and kind. Redditors dislike hype.

When you make a **resource post**, think "guide," not "ad." A strong title might be: "[Guide] AC Not Cooling? 5-Minute DIY Checks (Then Who to Call)." In the body, write short paragraphs, not long bullet lists. Each paragraph is one step in plain words. Use simple formatting like bold **filter**, **breaker**, **thermostat** so people can scan. If rules allow, link to a basic checklist page on your site with no pop-ups and a clear privacy note. If direct links are not allowed, say, "Checklist in my profile."

Add a note that you're **not a mod** and will follow the rules. If the subreddit has a **Weekly Questions** thread, post there instead of starting a new thread. If you're unsure, send **Modmail** to ask where to put your guide. Polite questions to mods go a long way.

Avoid pushing your phone number in the post. Many subs ban that. Put your number in your **profile** bio with a calm line: "Local help line (Phoenix, 8 a.m.–6 p.m.): 602-555-0100." If someone in the comments asks for a number, and rules allow, you can share it then. If rules don't allow, send a **private message** only if the person invites you.

Here is a simple mock of how a resource post is laid out.

Download the image

Answer questions with **steps, not sales**. If someone says, "AC clicks but won't start," you can write, "Check the outside disconnect. Flip it off and on once. If it still won't start, it may be a capacitor. That's not safe to DIY. A local tech can help." People respect plain truth.

Use **flair** if the sub requires it. Some subs want tags like "Guide," "Question," or "Help." Using flair shows you read the rules. It can also keep your post out of the auto-filter.

Keep your **brand light**. Redditors don't want to feel marketed to. Use a simple username, like "CoolAirHelp," not "#1_SALE_NOW." Use the same helpful voice every time. Over a few weeks, people will recognize you and tag you when someone needs help.

Watch your **karma** the right way. Karma is just points. Don't post for points. Post to help. If people upvote your guide, great. If they don't, learn from it. Maybe the title was unclear. Maybe the steps were too long. Tighten and try again later.

Be careful with **links**. Link to clean pages without aggressive pop-ups. Do not link to tracking pages that autoplay video or force email capture. If you must track, use a simple, fast page with a clear "Call Now" button, and keep the consent note plain. "Calls may be recorded for quality. We only contact you about this request."

Measure Reddit's impact with a **unique number** you only use on Reddit pages, and by watching calls right after you post or answer. You'll often see calls within one hour of a good guide. If comments stay active, you may see a second wave later that day.

A story makes it real. You write a guide in **r/phoenix**: "AC Not Cooling? 5-Minute Checks." You include five short steps and one safety note. You link to a checklist on a clean page with a call button. People ask two questions in the comments. You answer simply. One person writes, "Tried these, still not working. Who should I call?" You reply, "Any licensed local tech can help. Our local line is in my profile if you want us." They check your profile and call. The call lasts two minutes after connect. Later that week, someone searches and finds your guide again. They send you a message asking for help at 85008. You set a callback window, then connect them the next day. Two accepted calls, no ad spend, just helpful writing.

Reddit can feel strict, but that's a good thing. Rules keep the place clean. When you respect them, your posts stand out because they are useful, not loud. Over time, you become the person people tag when trouble hits. That is the best “ad” you can’t buy.

S6. Quora: expert answers with compliant disclosures

Quora is a website where people ask questions and wait for real answers. They are not looking for a hard sale. They want clear, simple steps they can try. That is perfect for pay-per-call. You give short, helpful answers. You add one small call-to-action at the end. You stay honest about who you are. The result is trust, shares, and calls that fit your buyer.

Start with your profile. Use your real name. Add a friendly headshot. In your bio, say what you do and where you help. Keep it short: “I run a local AC help line in Phoenix. I share quick fixes.” In your profile description, add a gentle disclosure: “I help at Cool Air (Phoenix). My answers are general info, not a diagnosis.” If you list a phone number in your bio, do it once and keep it calm. Do not write the number in every line of every answer. That looks spammy and gets flags.

Pick the right questions. Search for “AC not cooling,” “furnace won’t start,” or “thermostat blank.” Add your city name when it fits, like “AC not cooling Phoenix.” Follow the topics that match your niche so you get alerts. Old questions can still bring new readers, because many answers rank on Google. If you add a clear answer today, it can keep working all year.

Write in short, friendly sentences. Use safe steps that a normal person can try. Tell them when to stop and call a tech. A clean answer looks like a tiny how-to, not a sales pitch. Start with a plain safety note: “Turn power off before you touch any panel.” Then give two or three steps that fit the problem. End with one line that offers help in your area. Put your disclosure near the end again so people see you are honest.

Keep your images light. A photo of a clean filter or a thermostat is enough. Avoid scary “shocking” pictures or broken parts. You want to calm people, not stress them. If you link out, send readers to a clean, fast page with one big "Tap to Call" button and the consent text near it. Do not send people to pop-ups, email gates, or heavy ads. You are trying to help, not to trap.

Here is a simple layout you can copy for each answer:

Download the image

Let's write a full example answer together. Imagine the question is: "Why is my AC not cooling?" Your answer might be:

"Three quick checks can help. First, look at the filter. If you can't see light through it, replace it. Second, check the breaker. Flip it off and back on one time only. Third, set the thermostat to 'cool' and 'auto,' then wait five minutes. If the outdoor unit hums but the fan doesn't spin, stop and call a pro—do not poke inside. If you're in 85008 or nearby, our local help line can connect you with a tech today. Calls may be recorded for quality."

That is it. No hype. No big claims. You gave real help and a safe next step. If someone wants to call, they will. If not, they still learned from you. That builds good will and shares.

Be clear about your role. Add a short disclosure line at the end of each answer: "I help at Cool Air in Phoenix. This is general info." Keep it the same every time so readers and moderators know you are not hiding anything. If someone in the comments asks for a price or a diagnosis you cannot give, stay kind: "I can't price without a live check. If you want, we can connect you to a tech who can quote it." Plain talk beats hard sell.

Update your answers with seasons. In late spring, add a short "Update: hot week ahead—replace your filter early." In fall, add "Update: if heat won't start, try 'fan auto' and 'heat' for five minutes." Your edit bumps the answer and keeps it fresh. You do not need to rewrite the whole thing. One or two lines help a lot.

Use a unique tracking number for Quora. Put it in your bio and on the clean page you link to. If your phone system supports it, tag the calls

"Quora" so you can see real outcomes. You can also add a tiny UTM to the link on your profile (for example, ?utm_source=quora&utm_medium=profile). Then when a call comes from that page, you know the source.

Do not copy and paste the same answer into ten different questions. That looks lazy and gets flagged. Write a fresh version each time, even if the steps are similar. Use the person's words back to them. If they wrote "unit blowing warm," say "blowing warm" in your answer. That shows you read their question and care.

Make it a habit. Spend fifteen minutes, three days a week, answering one good question each time. In a month you will have a small library of helpful posts. In three months you will be the person people tag when someone asks, "Who can help in Phoenix?" That is the kind of traffic you cannot buy.

Above all, keep your promise. Help first. Be honest about who you are. Offer a phone number once, at the end. Put your consent and recording note right in the sentence: "Calls may be recorded." That simple line keeps trust high and surprises low. When people trust you, they talk longer. Longer calls meet the timer and get paid. That is why Quora works for pay-per-call when you respect the room.

S7. YouTube evergreen how-to videos with call overlays

YouTube is a place where "how-to" videos live for years. A good video is like a helpful neighbor who shows you three things to try. Viewers who cannot fix it will call. That is your goal: teach a small fix, then offer a calm, clear way to reach you. The beauty of YouTube is that one strong video can bring calls every month without extra spend.

Pick one problem per video. Use the same words real people type. "AC not cooling," "Furnace won't start," "Thermostat blank," "Water heater pilot out." Add your city to the title if you serve a local area. "AC Not Cooling? 3 Quick Fixes (Phoenix)." This helps locals find you and keeps your calls in the right area for your buyer.

Write a tiny script. Keep it under one minute to start, then make longer versions later if you want. The script can be three parts. First, a hook in the first five seconds: "AC not cooling? Try these three quick fixes." Second, the steps: filter, breaker, thermostat, or whatever fits your topic. Third, a calm call-to-action: "If you're in Phoenix and still stuck, call 602-555-0100. We're open 8 to 6. Calls may be recorded for quality."

Show the words on screen while you say them. You can add a small banner with your number and hours at the bottom. Do not cover your whole face with giant text. Keep the number readable and neat. In the last fifteen seconds, put a bigger on-screen box with the number, the area, and the hours. If you plan to text appointment info when asked, say "We can text your time—reply STOP to end."

Your description should do quiet work. Write a short line about the problem, your city, and your hours. Put your number right at the top so it shows above the "more" fold. Add a link to your call page with UTM tags so you can track it. List the steps with timestamps so viewers can jump around. Pin a comment with the number, the hours, and the link again. People look there first.

Here is a simple storyboard you can follow:

Download the image

Make a thumbnail that tells the story in five words. “AC Not Cooling? Try This.” Use a clear photo of the unit or a thermostat, plus big simple text. You do not need fancy graphics. You do need contrast. People should see it on a small phone.

Film on your phone in a quiet room or near the unit. Use natural light if you can. Speak a little slower than you think. Smile. Hold the camera steady or set it on a box. If you show a breaker or filter, keep your hands in frame so viewers can copy your motion. If a step could be unsafe, say so, and tell the viewer to stop and call a pro. Safety builds trust.

Edit fast. Cut out long pauses. Add captions for the main words: “Filter,” “Breaker,” “Thermostat.” Put your number on screen during the last fifteen seconds. Add the words “Phoenix, 8–6” so people know when and where you serve. You can add a small note under the number: “Calls may be recorded.”

Use “end screens” and “cards” to point viewers to your help page or to your next video. End screens show in the last 20 seconds. Add one that says “Get Local Help” that links to your site, and one to your next “how-to.” Cards can pop up at the right moment, like when you mention the filter. Do not spam ten cards. One or two is enough.

Upload once a week if you can. Start with the biggest problems for your city and season: in summer, “AC not cooling,” “AC blowing warm,” “AC leaking water.” In winter, “Furnace not starting,” “No heat from vents.” When storms hit, add “Power came back, AC won’t start—now what?” Each video is one more chance to catch a person at the exact moment they need help.

Track calls with a unique number for YouTube. Put that number on your overlay, in your description, and in your pinned comment. Also link to a page that uses the same tracking number. When a call comes, you can see “YouTube” in your log. If you want, ask callers, “Did you find us on YouTube?" and keep a simple tally. Over time, you will learn which topics and months bring the most calls.

Keep your claims small and true. Do not promise a price in the video. Do not claim instant visits if your buyer is booked. Say what you can do: connect, route, or schedule. If you have an affiliate or sponsor, say it. "This video is not sponsored. I help at Cool Air in Phoenix." Honesty is the brand.

Here is a full sample script you can adapt:

"AC not cooling? Try three quick checks. First, the filter. If it's dark and dusty, replace it. Second, the breaker. Flip it off and back on once—just once. Third, set your thermostat to cool and fan to auto, then wait five minutes. If the outside fan won't spin or the breaker trips again, stop and call a pro—don't force it. If you're in Phoenix and still stuck, call 602-555-0100. We're open 8 to 6. Calls may be recorded for quality. We'll connect you with a local tech today."

That is friendly, clear, and safe. It respects the viewer and gives them a choice. Many will try the steps. The ones who can't fix it will call. Those calls last longer because your video already built trust. Longer calls meet the timer and pay you. That is what you want.

S8. TikTok short-form how-tos with call CTAs

TikTok is fast. People scroll. You have one second to earn a look, and 15 to 30 seconds to help. If you give one or two quick fixes that work, people will save your video and call when they get stuck. The trick is to keep it simple, safe, and local.

Start with the hook. In the first second, show the problem and say the words the viewer says in their head. "AC blowing warm?" "Furnace won't start?" "Thermostat blank?" Put the words as big text on the screen. Say them out loud too. Sound plus text grabs more eyes.

Give one or two steps, not ten. Show a clean filter next to a dirty one. Say, "If you can't see light, replace it." Show the breaker and say, "Flip it off and on once." Hold up a thermostat and say, "Set to cool and auto." Do not rush. Show your hands so viewers can copy. If a step could be unsafe, do not show it. Say, "If you hear buzzing or smell burning, stop and call a pro."

End with a calm call-to-action. Put your number on screen with your city and hours. "Phoenix help line: 602-555-0100 · 8–6." Add a small note at the bottom: "Calls may be recorded." Say, "If you're stuck, call. We'll help you today." You can also put the number and hours in the **pinned comment** so people can find it later. If you plan to text appointment info when asked, say in the comment: "We can text ETA. Reply STOP to end."

Build your profile the right way. Use a friendly name like "Cool Air Phoenix." In your bio, write one line: "We share AC tips for Phoenix homes. Call 602-555-0100, 8–6." If your account can add a link, point it to a clean call page that loads fast on phones. Use a YouTube or link-in-bio page if needed, but keep the path short. The more taps, the fewer calls.

Post when your buyer is open. If your buyer closes at 6 p.m., posting a "call now" at 11 p.m. is wasteful. Many views will land when no one can answer. Try late morning and early evening on weekdays. Try Saturday mornings in summer. Test times for your city. Watch when people call after your posts. Aim for those windows.

Use simple local hashtags so locals see you. "#phoenix #acrepair #notcooling #homeowners." Avoid spammy tags like "#viral" or "#follow." They add noise and bring the wrong audience.

Reply to comments with short videos. If someone says, "Where is the filter?" film a seven-second clip: "Look here—by the return vent." Keep the tone kind. Thank people who say your tip worked. People notice manners.

Here is a tiny storyboard you can copy for your next video:

Download the image

Record in vertical mode. Use a quiet room. Face a window for soft light. Hold the phone steady or lean it against a box. Speak like you're helping a friend. Smile. Breathe. Simple wins.

Do not flood your feed with five posts a day. One good post, three to five days a week, beats a pile of rushed clips. Keep a list of ideas in your notes app. Each time you talk to a caller, write the question they asked. That is your next video.

Track calls with a TikTok number. Put it on the end card, in your bio, and in your pinned comment. If you use a link-in-bio, add UTM tags so your call page logs the source. Watch for spikes. Many calls happen within an hour of a post when you choose the right time.

Stay within platform rules. Do not show unsafe work. Do not show people's faces without permission. Do not make claims you cannot prove. Keep your words gentle: "Here are quick checks. If these don't work, call a pro." That tone keeps you safe and keeps trust high.

Here's a full 20-second script you can use:

"AC blowing warm? Try this. First, check the filter. If you can't see light through it, replace it. Second, check the breaker—off and on once. Still warm? Stop there. If you're in Phoenix, call 602-555-0100. We're open 8 to 6. Calls may be recorded. We'll help you today."

That fits TikTok. It is short, safe, and local. People who can fix it will do it. People who can't will call. Those are the calls you want: calm, ready, and inside your service area.

S9. Pinterest pins to call-optimized pages

Pinterest is like a bulletin board for ideas you want to save. People search there for fixes and checklists, then pin what they like for later. That makes Pinterest great for evergreen tips that send calls all season long. Your goal is simple: make a helpful pin that links to a clean page with a big "Tap to Call" button.

Design one pin per problem. Use a tall image so it fills the screen. A good size is 1000 by 1500 pixels. Keep the design plain. At the top, put a short headline like "AC Not Cooling?" In the middle, add "3 Quick Checks." At the bottom, add your phone number and city: "Phoenix: 602-555-0100." If you cannot put a number in the image because of brand rules, then keep that bottom line blank and put the number in the description and on the landing page.

Use a real photo as the base. A filter, a thermostat, or an outdoor unit in good light is fine. Avoid clutter. Add your text on top in high contrast so it is easy to read. Your brand name can be small in a corner. Big logos push people away. Clear help pulls them in.

Write a short description for the pin. Use the simple words people type. "AC not cooling in Phoenix? Try these quick checks before you call. We help local homes. Same-day openings." Add your city and a few normal words, not a block of tags. Keep it human.

Link the pin to a **call-optimized page**. This page must load fast on phones. At the top, put your headline, your big "Tap to Call" button with a tracking number, and your hours. Right below, show the three steps from the pin in short lines. Then put a small callback form with consent text. End with your ZIP list and a tiny FAQ. The whole page should fit on one screen or two. If people need to scroll forever, they will leave.

Add UTM tags to the link so your call log can label the source. Use utm_source=pinterest&utm_medium=organic&utm_campaign=ac_not_cooling_pin. Use the same tracking number on that page for all your

Pinterest pins, or one per board if you want deeper tracking.

Here is a simple diagram of the pin and the landing page side by side:

Download the image

Make boards by topic and by city. "Phoenix AC Tips," "Summer Cooling," "Winter Heat Fixes." Add your pins there. Add other helpful pins too so your board looks human, not like a wall of ads. People follow boards that feel useful.

Post at calm times. Sunday evenings can work well because people plan their week. Early mornings also work. Test a few times and watch your link clicks in Pinterest analytics and your call spikes in your phone logs. If you see calls after Sunday pins, make that your habit.

Use "Idea Pins" for step-by-step slides if you want brand lift without a link. Each slide can show one step with a simple photo. On the last slide, add your number and hours in text. Idea Pins often get reach, but some regions limit links. That's okay. The goal is still calls. Put your number and city where allowed.

Keep your copy evergreen. In spring, a pin that says "AC Not Cooling?" will work all summer. In fall, switch to "Heat Not Turning On?" Re-use the same layout. Just swap the words and photo. The more you repeat a clean layout, the faster you produce new pins.

Make your landing page match the pin. If the pin says "AC Not Cooling? 3 Checks," your page must say the same at the top. Do not bait and switch. Do not send people to your homepage with ten links. Keep the promise. One page. One action. One big number.

Track what works. Use one Pinterest tracking number for all AC pins and another for heat pins. If the AC number gets more calls, make more AC pins. If a heat pin gets saved a lot but calls are low, check your page speed. Maybe people leave before the button loads.

A quick story shows the flow. In May, you publish a pin that says "AC Not Cooling? 3 Quick Checks." It links to your Phoenix call page. The pin gets saved to five boards. Over the next two weeks, your Pinterest number logs twelve calls. Eight are inside your ZIPs. Six pass your 90-second timer. That is six paid calls from a single free pin. In June you post the same layout with a new photo and “AC Leaking Water?” You see another trickle of calls. By July you have five pins that keep working while you sleep.

Be careful with claims and images. Do not promise a price. Do not show faces without permission. Do not show unsafe work. Keep your consent text on the page. “By tapping ‘Call,’ you agree we can call or text you about AC help. Reply STOP to end.” That one line protects you and keeps trust.

Pinterest is slow and steady. A pin might sit quiet for a week, then bloom. That is fine. The work you do today will pay you every summer. Keep the pins clean. Keep the pages fast. Keep the number big. That is how you turn saves into calls.

S10. Google Business Profile

Google Business Profile (GBP) is the box that shows up when people search your brand or “AC repair near me.” It has your name, your phone button, your hours, your reviews, and your photos. If you run a real brand (not just a publisher page), GBP can send you free, high-intent calls every day. Your job is to set it up right, keep it clean, and match it to your phone system.

Start by claiming or creating your profile. Use your real business name, not a pile of keywords. “Cool Air” is fine. “Cool Air AC Repair Phoenix 24/7 Cheap” is not. Pick the best primary category, like “HVAC contractor.” If you drive to customers, choose “service area business,” hide your street address, and enter your cities or ZIPs. If customers visit you, show your address and keep hours current.

Use a **tracking number** as your main phone, and put your real main line as an **additional phone**. This lets you track calls from GBP without hurting your "NAP" (Name, Address, Phone) consistency. Many businesses do this and keep rankings healthy. Your tracking number should be stable and registered so caller ID shows a clean name. Do not change numbers every week. That looks messy and can get you flagged.

Fill out hours honestly. If you are open 8 a.m. to 6 p.m., say so. If you offer callbacks after hours, you can add a line in your description: "After 6 p.m., leave a message for a next-day callback." Do not say "24/7" if you do not answer at night. That leads to short, angry calls and bad reviews.

Add services. List "AC Repair," "Furnace Repair," "Tune-up," "Thermostat Install," and any other true services you offer. For each one, add a one-line description in simple words. Services help people understand you and help Google match you.

Upload real photos. Show the outside of your office (or your van if you are a service-area business). Show clean equipment. Show your team with permission. Skip stock photos. Keep the look bright and clear. Update photos once a month so your profile looks alive.

Use posts to share helpful notes. A post can say, "First heat wave this week—extra evening slots. Call to book." Or, "Filter reminder—replace every 60 days." Keep posts short with a simple photo. Add "Call now" as the button if it fits, or link to a call page with UTM tags. Posts fade after a week or so, but they keep your profile fresh.

Answer Q&A. People can ask questions on your profile. Check weekly and reply in friendly, plain words. You can also add common questions yourself from a normal user account. For example, "Do you service 85008?" Answer: "Yes, we serve 85008, 85016, 85018, Mon–Sat, 8–6." Keep it helpful. Do not stuff ads in answers.

Ask for reviews the right way. After a job, send a short text: "Thanks for letting us help today. If we did well, would you leave a quick Google review? It helps local families find us." Include a direct review link. Do not pay for reviews. Do not write fake ones. Reply to every review with a kind, short note. "Thanks, Ana—glad we could get you cool again." If a review is angry, stay calm. "We're sorry for the trouble. We'll reach out to make it right."

Watch your calls and peak times in GBP Insights. You will see which days and hours are busiest. Use that to staff phones and to plan dayparting on your other channels. If Mondays at 10 a.m. spike, make sure someone trained answers then. If 5–6 p.m. is hot in summer, keep your seats open until close.

Here is a simple map of what to fill and why:

Download the image

Tie your GBP to a clean call page. In "Website," you can link to your homepage. In "Appointment," link to a page with a big "Tap to Call" button and your consent text. Add UTM tags so you know the source. Use the same tracking number on the page and in GBP so reports match.

Turn on messaging only if you can reply fast. If you turn it on and then ignore it, people get upset. Calls are better for pay-per-call. If you keep messaging off, that is fine. Make your call button big and your hours clear so people know when to reach you.

Keep your business info steady. Do not change the name every month. Do not add city names to the business title unless it is truly part of your legal name. Do not create many fake profiles. That can get you suspended. One solid profile beats five risky ones.

If "Spam Likely" ever shows on your tracking number, fix your calling pattern (no heavy retries, no late-night calls), then ask your provider to clear the label. A clean caller ID lifts answer rates. If you must swap the number, do it once, then leave it alone.

A quick example shows the flow. You claim "Cool Air," set "HVAC contractor," add service areas (Phoenix, Tempe, Mesa), set hours 8–6, and upload five real photos. You set your tracking number as primary and your old main line as additional. You add services and a short description.

You post, “First heat wave—extra evening slots.” Over the next two weeks, you see ten calls from GBP in your log. Seven last more than 90 seconds. They pay. You update photos the next month and answer a new question. The calls keep coming. That is free traffic because you set up your profile with care.

Google Business Profile is not hard. It is a checklist you follow with honesty. Real name. Real hours. Real photos. Real phone. Helpful posts. Kind replies. When you do that, your “Call” button becomes a steady stream of the right people at the right time—without buying ads.

S11. Local community boards (e.g., Nextdoor) (where permitted)

Local community boards feel like a town square on your phone. People share tips, ask for help, and warn each other about storms or scams. When you act like a good neighbor, these boards can send you steady, high-quality calls. When you act like a pushy advertiser, you get blocked fast. The goal is to be useful first and to invite a call only when the rules allow and the timing is right.

Start by setting up a real profile. Use your name and a clear headshot. If the platform lets you show a business, follow the steps to verify it. Write a short line that fits the place you serve: “I help Phoenix homes with AC problems. Happy to share quick tips.” Keep your tone friendly. Do not stuff your bio with phone numbers and sales claims. One number is enough. Save the rest for when people ask.

Read the neighborhood rules. Some areas allow business posts on certain days. Some want tips only, no promotions. Some allow a phone number in comments but not in the post. Follow what your local group allows. If the board has moderators, send them a short, kind message before you start: “Hi, I’m Jay from Cool Air. I’d like to share simple AC checks before summer. I will not spam. If you prefer, I can put the phone number in the comments and keep the post itself tip-only." Most moderators will appreciate your care.

Lead with value. Post a small seasonal tip that someone can use today. Keep it short and clear, with one phone photo you took yourself. For example:

"First heat wave this week? Here are two fast AC checks. One: look at your filter. If you can't see light through it, swap it. Two: set your thermostat to 'cool' and 'auto,' then wait five minutes. If it still blows warm, don't open the outdoor panel—there are parts inside that can shock you. We're in 85008, open 8–6. If group rules allow, I'll put our help-line number in the first comment."

Now watch the replies. If someone asks, "Do you service 85018?", answer right away with a simple "Yes, we do 85018, 85008, and 85016, Monday through Saturday." If someone asks for a number and the rules allow, reply with your tracking number and hours. If the rules do not allow numbers in comments, invite them to tap your profile, where your number is listed. Keep the back-and-forth helpful and short. Do not ask for private info in public. If the person wants to share their address, tell them to send it in a private message or wait until the call.

Use the platform's built-in features the right way. Some boards have a "Recommendations" area. You can't post yourself there, but happy neighbors can. After you solve a problem, ask the neighbor to leave a recommendation. Keep the ask small: "If this was helpful, could you share a line in Recommendations? It helps neighbors find us when their AC breaks." Many people will say yes if you were kind and fast. Those recommendations turn into future calls because they look like a friend's advice, not an ad.

Answer "Who should I call?" threads with care. When someone asks for a repair company, do not paste a long sales pitch. Write one line that proves you are local and ready: "Cool Air, local to 85008, open 8–6, we can connect you today. 602-555-0100 (calls may be recorded)." If rules block phone numbers in replies, write, “Our number is on my profile; happy to help today.” The goal is to respect the space while making it easy for the person to reach you.

Be present during storms and heat waves. When a storm knocks out power, people crowd the board with questions. Share a calm checklist: how to reset a thermostat, what not to do, and when to wait. End with a gentle line: “If you’re in 85008 or nearby and the system won’t restart after power returns, our line is open.” These posts will be saved and shared. The calls that follow will last longer because your voice already earned trust.

Avoid drama. If someone complains about a bad experience, apologize if it was your team, and offer to make it right by phone. If the complaint is about another company, do not pile on. Speak to the fix, not the fight. People notice tone more than details. Calm posts win more calls than loud ones.

Pick a steady rhythm. One helpful post each week per neighborhood is enough. Rotate topics: spring filter checks, summer “not cooling,” fall furnace start-up, winter “no heat.” Repeat the best ones each season with small updates. If a moderator asks you to slow down, slow down. This is a shared space. Treat it like a real neighborhood.

Keep your tracking clean. Use a phone number only for community boards so you can see what they drive. Put that number in your profile, in allowed comments, and on any clean page you link. In your call notes, mark “Nextdoor” or the board name. Over time, you will see which posts and months do best. You will also see which neighborhoods have the most call-friendly rules.

Protect privacy and consent. If you send a follow-up text, make sure the person asked for it first. Write, “We can text appointment info. Is that okay? Reply STOP to end.” Keep your recording notice ready for the call: “This call may be recorded for quality. Is it okay to continue?” These small lines keep you safe and keep trust high.

A short story brings it together. On Monday, you post, “Two Quick AC Checks Before the Heat.” You add a photo of a clean filter and say you’ll put the number in the comments if allowed. Ten people like it. Two neighbors ask questions. You answer simply and put the number once. That evening you get three calls from those ZIPs. On Wednesday, someone posts, “Who do you trust for AC near 85018?” A neighbor tags you. You reply with one line and your number. Two more calls arrive. Five accepted calls from a few kind posts. No shouting. No spam. Just neighbor-level help, done right.

That is how community boards work for pay-per-call: slow, steady, and respectful. You show up when people need you, you follow local rules, and you make it easy to call. The board stays friendly. The phone keeps ringing. Everyone wins.

S12. Medium/Blog syndication & internal linking to call pages

Syndication is a fancy word for “publish the same helpful article in more than one place.” When you write a clear guide that solves a real problem, you should let more people see it. Medium and your own blog are good homes for that guide. The trick is to keep the article easy to read, to link the reader to a call page without tricks, and to tell search engines which version is the “main” one so you don’t confuse them.

Start with one solid article on your own site. Make it short and plain. A piece called “AC Not Cooling? Do These 3 Things Before You Call” is perfect. Use a real photo. Write short paragraphs with one idea each. Put your phone number at the top with a “Tap to Call” button. Put your hours and ZIPs right under it. After each section, add a small “Still stuck in Phoenix? Call 602-555-0100. Calls may be recorded.” That little line is enough. Do not paste your number every two sentences. Too many numbers feel like a billboard and push readers away.

Now syndicate the article to Medium. Medium has an **Import** tool. You paste your original URL, and Medium pulls the text and images. It adds a "canonical" link back to your site. That tells search engines the version on your site is the main one. If you don't have the import tool, you can paste the content yourself and add a small line at the top: "Originally published on Cool Air Blog," linking to the original page. Keep the article the same length. Change any brand claims to keep it simple and true. At the end, add one calm call-to-action: "If you're in Phoenix and still stuck, call 602-555-0100 (8–6, calls may be recorded). We'll connect you to a local tech." Add your call page link after that line. Use UTM tags like ?utm_source=medium&utm_medium=syndication&utm_campaign=ac_not_cooling.

Keep Medium clean. No pop-ups. No heavy ads. No fake comments. People go to Medium to read in peace. If the reading experience is good, they will trust your phone number. If you try to trap them, they will bounce.

Syndicate in the other direction too. If you wrote a useful post on Medium first, bring it to your blog. On your blog, add the phone button at the top, the consent text near it, and a short FAQ with ZIPs and hours. Put the recording notice in your call script so the article's promise matches the call's first line. The reader should feel the same calm voice in text and on the phone.

Use internal linking on your own site to guide readers to a call page. Think of your site like a little map. Topic pages point to action pages. Your "AC Not Cooling?" guide should link, in the first screen, to "Talk to a Tech Now." That link goes to your call-optimized page: headline, big button, hours, ZIPs, and a tiny callback form with consent text. Inside the guide, each section can end with a soft link: "If this didn't help and you're in 85008 or nearby, tap here to call." Keep links clear and honest.

Do not hide the phone behind "learn more" buttons. Say "Call Now" if the next step is a call.

On other blog posts, add a small "callout box" that matches the topic. In a furnace article, the box can say, "No heat? Phoenix help line: 602-555-0100, 8–6. Calls may be recorded." In a thermostat article, it can say, "Thermostat still blank? We can help by phone." Keep the box in the same spot on every page, like the top right on desktop and near the top on mobile. Readers learn where to look. Agents hear longer calls because readers already tried safe steps first.

Update old posts with fresh lines each season. In May, add, "Update for heat wave—replace your filter early." In November, add, "Before cold hits, switch to heat and test it for five minutes." Each update is also a chance to check that your phone number, hours, and ZIP list are still correct. Nothing kills trust faster than old hours or wrong service areas.

If you have friends with small blogs, offer them a free guest version of your guide. Keep it helpful. At the end, add one line: "If you're in Phoenix and need help, call 602-555-0100." Link to your call page with UTM tags to track it. Do not stuff your links in the middle. Let the help do the work.

Make your pages fast. Long pages that load slow on phones will lose readers before they ever tap "Call." Use simple images. Compress them. Avoid heavy scripts. Test your page on your own phone on a normal cellular connection. If it loads slowly, cut things until it feels snappy.

Track results. Use a unique tracking number for Medium. Use another for your blog's call page. In your call log, tag the source. If Medium brings calls with longer connected time, write more there. If your blog brings more but shorter calls, move the call button higher and make your hours clearer. Small edits can add twenty seconds to average talk time.

A quick story shows the flow. You write "AC Not Cooling?" on your blog. You syndicate it to Medium with a link back. You add your number at the end of the Medium piece with hours and a simple consent note. Over the next month, your Medium link sends 300 readers to your call page. Fifteen call. Ten are inside your ZIPs. Eight pass your 90-second line. Meanwhile, the same piece on your blog brings five direct calls from internal links on other posts. All of that from one article, written once and placed in two spots. That is the power of syndication plus clean internal links.

Keep your voice the same everywhere. Calm. Clear. No hype. The person who reads your words should feel like they already met you when they call. When that happens, the call lasts longer, the buyer hears a ready caller, and you get paid.

S13. SlideShare & doc-sharing (Scribd/Issuu) lead magnets

Some people prefer to **save** a guide and read it later. Slide decks and PDFs fit that habit. Sites like SlideShare, Scribd, and Issuu let you upload simple "how-to" documents. If your deck is clean and useful, people will read it, save it, and share it. If your phone number and hours are shown in the right places, those saves turn into calls when the problem hits.

Make one short deck per problem. Ten slides is enough. Use big text, plain words, and one idea per slide. Start with the problem as a question: "AC Not Cooling?" Show a simple photo of a thermostat or a vent. Next slide, give Step 1: "Check the filter. If you can't see light through it, replace it." Next, Step 2: "Check the breaker—off and on once." Next, Step 3: "Set thermostat to cool and fan to auto, wait five minutes." Add a safety slide: "Hear buzzing? Smell burning? Stop and call a pro." End with a calm call-to-action: "In Phoenix? Call 602-555-0100, 8–6. Calls may be recorded." Add your city and hours again on the last slide. That is it.

Do not flood the deck with your logo. A small logo in a corner is fine. Do not add fancy animations or tiny text. Most readers will view on a phone. They need big, high-contrast words and clean photos. Do not paste long paragraphs. Break long ideas into two slides.

Export the deck as a PDF. In the PDF, make your phone number on the last slide a clickable "tel:" link, and make your "call page" URL a clickable link with UTM tags like ?utm_source=slideshare&utm_medium=pdf&utm_campaign=ac_not_cooling. Some platforms keep links clickable; some do not. Put the phone and hours as clear text anyway so people can dial even if links don't work.

Upload to SlideShare. Write a simple title: "AC Not Cooling? 3 Quick Checks (Phoenix)." In the description, explain who it helps and where: "Short, safe steps for Phoenix homeowners. If these don't work, call 602-555-0100 (8–6, calls may be recorded)." Add a few normal tags like "AC repair," "HVAC," "home." Add your city as a tag. Keep it honest and calm.

Upload to one doc-sharing site like Scribd or Issuu too. Use the same title and description. Some sites let you add a live link in the description. Put your call page link there, with UTM tags. If the site asks you to set a category, pick "How-to" or "Home." Do not place the deck in a spammy category "just for reach." Wrong categories bring the wrong readers and bad calls.

Create a one-page checklist PDF as well. Many people like a short printable. Put your three steps, a small safety note, and your number and hours at the bottom. Keep it to one page, black and white friendly. Upload it as a separate file. In your deck, add a slide that says, "Want the 1-page checklist? See the PDF in the description." Small extras like this make people save and share your work.

Use a unique tracking number for SlideShare/doc sites. Put that number on your last slide and in the description. If possible, show it on the first slide too, but keep it small so the first view still feels like help, not an ad. In your call log, tag calls from that number as "Slide decks."

Share the deck in calm places. Link it from your blog's "Resources" page. Link it in a Medium post. Answer a Quora question with a short version of the steps and add, "We made a simple deck you can save; link in my profile." Do not drop deck links all over random comment sections. That looks like spam and can get you blocked.

Keep the deck evergreen. In spring, the "AC Not Cooling?" deck will work for months. In fall, make a "Heat Not Turning On?" version with the same look. In winter, make a "Pilot Light Won't Stay Lit?" deck if that fits your area. Reusing the look helps you make these fast. Each one can run year after year with a small update.

Measure results over time. Slides do not always go viral on day one. They sit in search and get found when someone types the exact problem. You will see calls spike on hot days or cold mornings. Because the deck is calm and useful, the calls often last longer. People will say, "I used your checklist but it still doesn't work." That one sentence tells you they are ready to listen. Those are the calls that hit your timer.

Protect trust. Do not pack your slides with wild promises. Do not give unsafe steps. Do not use images you don't own. Do not put other companies' logos in your deck. Keep your consent and recording note in the places where it matters: the call page, the phone script, and, if you want, a tiny line on the last slide.

A short story shows how it works. In May, you upload a ten-slide deck, "AC Not Cooling? 3 Quick Checks (Phoenix)." You link your call page and list your number and hours. Over June and July, the deck gets 1,200 views and 90 saves. Your deck number logs 16 calls. Twelve are inside your ZIPs. Nine pass 90 seconds. You spent $0 on ads. The deck keeps working every summer. That is a quiet machine doing work while you sleep.

S14. Free PR/news submission sites

"PR" means public relations. It is a way to share real news about your service so local sites, blogs, and small papers can tell their readers. You are not trying to be on national TV. You are trying to show up in places your neighbors read. Many local sites have "Submit a news tip" or "Community press releases" pages. They are free. If your note is clear, short, and truly newsy, they will post it.

Pick a simple, real story to share. "Local AC help line adds evening hours for heat wave." "Free safety checklist for first cold snap." "New Spanish help line hours for 85008 and 85016." These are helpful and time-based. They are not "We're the best!" A small site will publish helpful timing news. They will skip bragging.

Write like a tiny newspaper. Start with the who, what, when, where, and why. Keep sentences short. Add one quote from a human. End with hours, ZIPs, and your phone number with a recording note. Here is a template you can adjust:

Headline: Phoenix AC Help Line Adds Evening Hours During Heat Wave

Dateline: Phoenix, AZ — June 10

Body: Cool Air, a local AC help line serving ZIP codes 85008, 85016, and 85018, is adding evening hours from 6–8 p.m. this week to help homeowners during the heat wave. "When temps jump, phones ring after work," said owner Jay Lopez. "We want people to reach a tech the same day." The help line is open Monday through Saturday, 8 a.m. to 8 p.m., this week only. Calls may be recorded for quality. Neighbors can call 602-555-0100 for fast triage and connection to a licensed technician.

Boilerplate: Cool Air is a Phoenix-based service that connects local homeowners with licensed AC technicians. Learn more at [your clean call page URL].

That is not fancy. It is clear. It tells a small story that matters now.

Many neighborhood blogs will paste it as is. Some will edit your headline. That is fine.

Make a list of places to send it. Think small: neighborhood blogs, city newsletters, local radio “community calendar,” library boards, school parent groups, HOA newsletters, and the press email at your city paper. Find the “news tip” email or form. Keep the subject line plain: “Local AC help line adds evening hours (this week).” Paste your press note into the email body. Attach one clear photo you own (your van, a thermostat, or a headshot), but do not attach huge files.

Do not send the same note every week. Make each note tied to a real event: heat wave, first freeze, storm outages, new language hours, or a free workshop at the library about filter care. If you do a workshop, include time, place, and a sign-up link. If you set up a phone-in Q&A for an hour on Saturday, include the hour and the number. These small events give editors a reason to share. You help their readers. They help you reach new callers.

When a site posts your note, thank them. Share the link on your blog’s “News” page. Link to it in a Facebook post. Do not brag. Write, “Thanks to [site] for helping neighbors find evening help during the heat wave.” Editors like being thanked. Next time, they will open your email first.

Use a unique tracking number in the press note if you can. If you can’t, watch your calls by time. If your evening hours story posts on Wednesday morning and you get a hump of calls Wednesday evening, tie it together in your notes. Over time, you will learn which sites move the phone.

Be honest about limits. If you add evening hours “this week only,” turn them off when the week ends. Do not make false “limited time” claims. If you share a Spanish help line, make sure a Spanish speaker answers. One broken promise kills two months of trust.

Keep your quotes human. Do not jam ten fancy words into one line. “We want people to reach a tech the same day” reads better than “We seek to optimize customer outcomes via extended contact centers.” People in your city talk like people, not robots.

A short story shows the power. On Monday, your forecast says 110°F by Thursday. On Tuesday, you send a one-page press note: evening hours for heat wave. A local blog posts it Wednesday. A neighborhood newsletter pastes it Thursday morning. Thursday night, your phones fill from 6–8 p.m. You accept more calls because people heard you would be there. Your buyer is ready because you warned them. You send the editors a thank-you on Friday with the line, "We helped 22 homes last night." They smile. You just built two quiet allies who will publish your next note too.

Free PR is not loud. It is simple news about helpful changes. When you write like a neighbor and keep your promises, local sites will repeat your story. The right people will call. You will help them the same day. That is the win.

S15. Guest posting swaps (no-cost collaborations)

A guest post swap is when you and another local business trade helpful articles. You write a guide for their blog, and they write one for yours. No money changes hands. You both get fresh content, new readers, and, if you do it right, phone calls. The secret is to choose partners who **share your audience but do not compete** with you.

Make a short list of partners in your city. Good matches for AC repair are real estate agents, property managers, home inspectors, handyman blogs, neighborhood associations, and local parenting blogs. These folks talk to homeowners who will one day need your help. They are not trying to fix AC units themselves. They welcome guides that make their readers' lives easier.

Reach out with a simple, honest email. Use plain words. Here is a note you can copy:

"Hi [Name], I'm Jay with Cool Air in Phoenix. I loved your post on summer home prep. I'd like to write a short guide for your readers: 'AC Not Cooling? 3 Quick Checks (When to Call a Pro).' No sales pitch—just steps and a calm next move. In return, I'd be happy to host one of your posts on our blog (for example, 'How to Prep Your Home for Listing in Summer'). We'll link to each other's posts and call pages so readers can act. If you like the idea, I can send a draft this week."

Most people will say yes if your tone is kind and the topic is useful. If they say "maybe," send the draft anyway. Seeing your clean, short guide will help them say yes.

Write your guest post at a sixth-grade level. Do not use jargon. Do not stuff links. In the body, give the three steps you always share. Add one safety line. End with a soft call-to-action that fits **their** readers. "If you're in Phoenix and these checks don't fix it, our local help line is 602-555-0100, open 8–6 (calls may be recorded)." Ask them to place your number at the end, not all over the page. Add one link to your clean call page with UTM tags: ?utm_source=partner&utm_medium=guest_post&utm_campaign=ac_not_cooling. Ask them to keep the link near the end, under a short line like "Need local help?"

On your blog, post their guide with the same respect. Keep their author name. Add a one-line bio with their link. Place a small callout box that says, "If you need [their service], contact [their business]." Keep your own "Call Now" box in its normal place so your site still works as a pay-per-call page. You are trading value, not handing over your site.

Set simple guardrails before you publish. Agree that neither side will buy ads on the other's brand name. Agree that you will not add pop-ups that steal emails off the guest post. Agree that you will not share visitor data beyond normal analytics. Write these in a two-paragraph email so there are no surprises.

Add real photos to your guest post if the partner allows. A clean filter photo, a thermostat close-up, or a safe breaker shot is enough. Caption each photo in a helpful way. “Replace filters every 60–90 days.” “Set to cool and auto.” Photos slow the reader down just enough to absorb the steps. Calm readers make calm callers.

Ask your partner to share the post on their social pages with a short line: “Quick checks if your AC isn’t cooling. If you’re still stuck, local help is at the end.” Share their post on your pages too. Cross-sharing helps both of you reach new people. Keep your captions short and kind. Do not write “Act now!” on a partner’s piece. That looks pushy and can make them regret the swap.

Measure the swap. Use a unique tracking number in your byline or at the end of the guest post. Tag your link with UTMs. In your call log, mark calls as “Partner: [Name].” After two weeks, send your partner a thank-you with a simple number: “Your readers made 7 calls; 5 were in ZIPs 85008/85016; 4 were accepted.” Ask if your partner got any calls from your audience. Celebrate together. Offer to trade one more post next season.

Keep swaps small and steady. One good swap a month is enough. Choose partners your buyers respect. If you sell hard on a shady blog, your calls will be short and your buyer will feel the pain. If you teach on a trusted blog, your calls will be long and your buyer will hear ready voices. Choose trust.

A story shows the path. You email a property manager whose blog helps tenants and owners. They say yes. You send “AC Not Cooling? 3 Quick Checks.” They post it with your number at the end. They email their owners list. Over two weeks, you get nine calls from their post. Seven last more than 90 seconds. You post their “Move-In Checklist” on your blog. You both share each other’s posts on Facebook. A month later, you trade again for a fall heat start-up guide. The relationship becomes a quiet engine. No money changed hands. Value did.

Guest swaps only work if you protect the reader. Never bait and switch.

Never hide fees. Never promise things your buyer cannot deliver. Keep your recording and consent notes in the right places. Keep your tone human. When partners see you treat their readers with care, they will send you more chances. When readers feel respect, they will call—and they will listen. That is the heart of pay-per-call done with neighbors, not noise.

S16. Niche forums: credibility threads to call CTAs

Niche forums are small online communities where people care about one topic. It might be **home repair**, **first-time home buyers**, **landlords**, or a forum just for your **city**. People go there to get help from real humans. If you show up as a helpful neighbor, you can build a **credibility thread** that lives for months and sends steady calls. A credibility thread is a post that proves you are useful, honest, and local. You keep it updated. You answer questions. You do not push hard. You let trust do the work.

Start by picking two or three forums that fit your service and your area. Read the rules before you post. Many forums allow help but block self-promotion in the title. Some let you put a phone number in your **signature** or on your **profile** but not in the post body. Follow the rules exactly. If you are not sure, message a moderator. Say, "I'd like to share short AC fixes for Phoenix homes. No spam. Is it okay if I put my phone number in my profile and only add it in a reply if someone asks?" A kind note like that opens doors.

Build your profile with care. Use a real-sounding username (like "JayCoolAir"), a simple photo, and a short line in your bio: "I help Phoenix homes with AC problems. I share safe checks here." If the forum supports a signature, add one calm sentence with your number and hours: "Phoenix help line: 602-555-0100 • 8–6 • Calls may be recorded." Keep it small. No giant banners.

Write your first credibility thread as a guide, not an ad. The title can be:

"AC Not Cooling? 3 Safe Checks (Phoenix tips)." In the post, keep each step to two or three short sentences. Use plain words. "Check the filter. If you can't see light through it, replace it." "Check the breaker—off and on once." "Set thermostat to cool and fan to auto. Wait five minutes." Add one safety note: "If you hear buzzing or smell burning, stop and call a pro." End with a gentle line that fits the rules. If numbers in posts are allowed: "If you're in 85008 or nearby and still stuck, call 602-555-0100. We're open 8–6. Calls may be recorded." If numbers are not allowed, say, "My number is in my signature and profile. Happy to help today."

Stay present after you post. Check replies that day and the next. Answer questions in the thread with short, kind messages. If someone asks, "Do you service 85016?" reply, "Yes, 85016, 85008, 85018, Mon–Sat, 8–6." If someone asks for a price, be honest: "We can't price without a live check, but we can connect you to a licensed tech today." If someone is rude, do not fight. Keep calm. People notice tone just as much as facts.

Keep your thread alive with small updates. When a heat wave comes, add: "Update: First 110° week—replace your filter early. Extra evening slots this week." In fall, add: "Update: Before the first cold snap, test heat for five minutes." Each update bumps your post to the top and helps new readers. Your phone line in your signature does the quiet work.

Track forum calls with a unique number. Use it on your profile and in allowed posts. In your call notes, tag "Forum: [name]." Over time you will see which forum sends the best calls and which topics last longest. You may find that one city forum brings longer calls because people there trust other neighbors more. Put more time there.

Avoid common mistakes. Do not paste the same block of text into ten threads at once. That looks like spam and gets flagged. Do not promise a result you cannot deliver. Do not say "24/7" if you do not answer at night. Do not post your number every sentence. One number, placed well, is enough.

Respect private info. Never ask for addresses or full names in public. If someone wants to share that, move it to a private message or ask them to call. For texts, ask first: "We can text appointment info. Is that okay? Reply STOP to end." Keep consent notes in your log.

Here is a small example that works. You post "AC Not Cooling? 3 Safe Checks (Phoenix tips)" in a landlord forum for your city. You include three steps and one safety note. You sign with your number and hours. Three landlords say thanks. One asks, "Do you handle 85018?" You reply yes. That night, two calls come from that forum number. Both pass 90 seconds after connect. A week later, someone replies to your thread with "Who should I call?" Another member tags you. You answer with one line and your number (per rules). Another call comes. No spend. Just steady, neighbor-level help in the right place.

Keep the rhythm simple. One credibility thread per forum. Update it with seasons. Answer new questions when they appear. Be the calm person people trust. That trust is your engine. It makes calls longer and smoother. Longer calls meet the timer and get paid.

S17. Newsletter swaps (free cross-promo)

A **newsletter swap** is when you and another local group share each other's short messages in your email newsletters. No money changes hands. You both win. They get helpful content for their readers. You get in front of new people who live in your city and may call you later. The trick is to choose the right partners and to write short, clear notes that match the reader's life.

Make a list of local senders who reach homeowners or renters. Good partners include real estate agents, property managers, HOA boards, local parenting groups, neighborhood blogs with email lists, and small radio shows with community emails. You want **overlap**, not **competition**.

If you do AC help, an agent's list is great. A competing AC company's list is not.

Reach out with a kind, direct email. Keep it short and human:

"Hi [Name], I'm Jay with Cool Air in Phoenix. I loved your newsletter on summer prep. Would you be open to a simple swap next week? I'll share a 3-line AC tip for your readers (no sales, just steps). You can put a short blurb in our weekly note in return. We both help local families. Here's the tip I'd send:

Subject: AC Not Cooling? 2 Quick Checks

Body: Replace a dirty filter (you should see light through it). Flip the breaker off/on once. Still warm? If you're in 85008/85016, our help line is 602-555-0100 (8–6, calls may be recorded). We connect you to a tech today."

Most partners will say yes because it is easy and helpful. If they need to see your newsletter, send a sample screenshot. Show them you keep things clean—no spammy ads, no trick links.

Pick a week and a day that fits both lists. In summer, early week mornings work well. In winter, Fridays can work if your buyer has weekend hours. Ask the partner if they prefer a link to your call page or just your phone number in the note. If they include a link, give them one with **UTM tags** so you can see results: ?utm_source=newsletter&utm_medium=swap&utm_campaign=partner_[name].

Keep your blurb short and plain. Use a subject line that sounds like a friend's tip. Avoid "FREE!!!" or long claims. Use one line for the number and hours and a small **recording note**. If you might send a follow-up text when asked, say so: "We can text appointment info—reply STOP to end." Put that on your call page too.

On your side, put their blurb in your next newsletter. Keep it in the same spot you always use for community notes. Do not bury it. A good swap is fair. If your list is bigger, consider giving them two mentions over a month. Think long-term. You want partners you can swap with each season.

Set expectations with two clear rules: no buying each other's brand name on ads, and no heavy tracking pixels in the other's content. You can track link clicks with UTMs and see calls by the unique number, but do not drop third-party pixels into free swaps. Keep it clean. Your partners will come back if they feel safe.

Use a special phone number just for newsletter swaps. Put it in your blurb and on the landing page for that partner link. In your call system, tag calls by number and partner. After the swap, send a thank-you note with a simple number: "Your note brought 12 calls; 9 were inside our ZIPs; 7 passed 90 seconds." Offer to swap again when the season changes.

Write copy that matches the partner's voice. For a parenting group, mention "nap time" or "after school." For an HOA, mention "service hours in our subdivision." For a landlord list, mention "tenants often call at night—here's what to try first." Keep the tone soft. You are in their house. Be polite.

Keep your call page ready. If a partner links to it, the page should load fast and show the number and hours at the top. Add the same consent text and recording note you used in the blurb. Match the words so the reader's brain says, "Yes, this is the same people." If the page looks different from the blurb, some readers will bounce. That shortens calls later.

A small story shows the flow. You email a real estate agent with a neighborhood list. They agree to a swap. On Tuesday, their newsletter goes out with your three lines and your number. That day and the next morning, your "newsletter" tracking number gets 10 calls. Seven last past 90 seconds. On Thursday, your newsletter goes out with their "Summer Prep Checklist" and a link to their page. They get replies and a showing request. On Friday, you thank them and set a date for a fall heat start-up tip. Now you have a friendly partner who can put you in front of hundreds of locals every season—for free.

Do one swap a week at most. More feels pushy. Rotate partners. Keep a simple spreadsheet: partner name, date, blurb used, calls received, accepted calls. Over a few months you'll see who brings calls that last. That tells you who to keep and who to skip.

Newsletter swaps work because they ride on **borrowed trust**. The reader trusts the sender. The sender trusts you. If you keep your note short, honest, and useful, that trust flows through the phone line. The call feels warm. Warm calls last longer. Longer calls get paid.

S18. Free hosting (Netlify/GitHub Pages) for microsites

Sometimes you need more than one page. You may want a tiny site just for **AC repair in Phoenix**, another just for **heater tune-ups in Tempe**, and one more for **Spanish speakers**. You can build these "microsites" for free using **Netlify** or **GitHub Pages**. They are fast, simple, and cheap to run (free). Fast pages lead to more taps and longer calls.

Start with one microsite. Keep it to three pages: **Home**, **FAQ**, and **Privacy**. The Home page is the workhorse. It has your headline ("AC Repair in Phoenix — Same-Day Help"), a big **Tap to Call** button with a tracking number, your hours, a short ZIP list, and a tiny callback form with consent text. The FAQ answers two things: "Do you service my ZIP?" and "How fast can you come?" The Privacy page says you only use the number to respond and how to stop texts.

You can make plain HTML files in a free code editor like VS Code. You don't need to be a coder. You can copy a basic template and change the words. Keep the page simple. No heavy sliders. No big libraries. Plain HTML + a little CSS loads fast on weak phone signals.

Host on **Netlify** by dragging your folder into their free dashboard. They give you a free URL like ac-phoenix.netlify.app. Add a custom domain later (like phoenixcoolair.com) if you want. Netlify gives you free SSL (the lock icon), which helps trust. Or host on **GitHub Pages** by making a public repo and turning on Pages in the settings. They also give you a free URL and free SSL.

Set your **tracking number** on the Tap to Call button and in the footer. Use the same number across the microsite so your reports stay simple. If you have more than one microsite (Phoenix vs. Tempe), give each a unique number. That way you can see which site makes the phone ring.

Add your **consent text** near the callback form button: "By tapping 'Call me,' you agree we can call or text you about AC help. Message/data rates may apply. Reply STOP to end." Keep it big enough to read. Place it close to the button so there is no surprise. On the phone, start with your recording note: "This call may be recorded for quality. Is it okay to continue?"

Use **UTM tags** on any links that point to the site. If you share the site on Pinterest or Reddit, add ?utm_source=pinterest&utm_medium=organic&utm_campaign=ac_phoenix to the URL. Your call log won't read UTMs itself, but your web analytics will, and you can match spikes in calls to spikes in visits. It helps you learn which channels lead to longer calls.

Keep the microsite **local**. Use city names in the copy. Show your hours in **local time**. List real ZIPs. Do not claim "national help" if you only have one buyer in one city. Local words bring local callers. Local callers fit your buyer. Calls last longer because the agent can actually help.

Translate for Spanish if you serve Spanish speakers. Make a separate microsite with Spanish copy and a Spanish-speaking team behind the phone. Do not send Spanish callers to English-only agents. That leads to short calls and refunds. On your main page, add a small link "Para español" to the Spanish site.

Test speed on a phone using cellular data. If the page takes more than two seconds to load, cut images or shrink them. Remove anything that moves unless it helps the person call. A fast, simple page beats a fancy slow page every time.

Set up **DNS** only when you're ready for a custom domain. If your budget is tight, stay on the free URL at first. Free hosting is fine for testing if your page is helpful and your number is clear. When you pick a custom domain, keep it short and clean. Avoid hyphens if you can.

Make one **microsite per vertical** or city. Don't make hundreds in a week. That looks spammy to people and to search engines. Build one, let it work, then make the next. Update each site with small seasonal lines as months change. "Extra evening slots during heat wave" or "Tune-up special hours this week." These lines help people today.

Track **acceptance** by site. In your call system, tag calls by the number used on each microsite. Look at average connected talk time and acceptance rate per site. If one site sends shorter calls, check the copy. Maybe it promises too much. Tighten the words. Put hours and ZIPs higher. Add the recording line to your script so callers hear the same calm voice they read.

A simple story shows the path. You launch phoenixcoolair.netlify.app with a Phoenix number. You share it in one Reddit guide and one Facebook Group tip. Over two weeks, you get 14 calls. Ten are inside your ZIPs. Eight pass your 90-second timer. You tweak the headline to "Not Cooling? Phoenix AC Help Today" and move the button higher. The next two weeks, you get 18 calls and a longer average talk time. Now you clone the site for Tempe with a new number. You let both run for a month. That is how you grow without spending a dollar on hosting.

Microsites work because they remove friction. One page. One promise. One big button. When the path is short, more people tap. When more people tap, more of the right calls reach your buyer. That is the win.

S19. Google Forms + Apps Script call-forwarder

Sometimes you need a quick way to collect a number and **trigger a callback** without buying new software. **Google Forms** and **Apps Script** can do this for free. You make a form with a phone number, ZIP, and permission box. When someone submits, a script runs. It can email your team, ping Slack, post to your routing system, or drop the record into a Google Sheet that your agent watches. You can even send a polite confirmation text using a texting service, if you have consent and a provider.

Start with the form. Keep it short. Ask for **Phone Number** (short answer), **ZIP Code** (short answer), and an optional **Describe the Problem** box (short paragraph). Add a **Consent** checkbox above the Submit button with plain words: "By submitting, you agree we can call or text you about this request. Message/data rates may apply. Reply STOP to end." Make the phone and ZIP required. Keep the problem box optional.

Turn on the setting to **collect timestamps** so you know when the request came in. Link the form to a **Google Sheet** so each answer becomes a new row. Name the sheet with the city and the vertical ("Phoenix-AC-Callbacks"). In the sheet, add columns you will fill later, like **Agent**, **Call Time**, **Result**, **Accepted**, and **Notes**.

Open **Extensions → Apps Script** from the form or the sheet. You can add a small script that runs **on form submit**. The script should read the new row, check that the phone and ZIP look valid (length and digits), and then alert your team. The simplest alert is **email**: subject "CALL NOW: 602-555-0100 in 85008," body with the problem and the timestamp. You can also send a message to Slack or to your phone system if it supports **webhooks**. Keep it simple first. Test email alerts for a day. Add webhooks later when you are ready.

Decide how you will **make the call**. The cleanest path is to have a **live agent** see the alert and call the person from your **tracking number** inside your telephony app. Start the call with your recording notice: "This call may be recorded for quality. Is it okay to continue?" Confirm the ZIP. If it fits, connect to your buyer. If you want to automate, many phone providers have an API that can place a call from your number and bridge it to your agent and then to your buyer. Only do this when you are comfortable with APIs and rules. A human-driven callback is fine to start.

If you plan to send a **confirmation text**, do it only when the person checked the consent box. Use a texting service. Keep the message short: "Cool Air: got your request. We'll call 3–5 p.m. today from 602-555-0100. Reply STOP to end." Log the text in the sheet. If they reply STOP, mark the number on your **suppression list** and do not text again. Honor the stop in all tools.

Add a simple **SLA** (service level aim): "Call hot submits within 10 minutes during 8–6 hours." In the sheet, use a formula to turn the time into "Hot," "Warm," or "Late." This helps you see if your team is on time. Calls made fast often last longer because the problem is fresh.

Put the form on a **clean page** with your number at the top. Some people will fill the form. Some will tap "Call Now." That's great. Use the same tracking number on the button and on the call your agent places. If you want, add a **tiny link** under the button: "Prefer a call back? Use the form." Some people like forms more than calls during work.

Add **validation** to the form to catch bad entries early. For phone, require 10 digits. For ZIP, require 5 digits. The form can show a small error if someone mistypes. Friendly errors save everyone time.

After a week, review the sheet. See how fast you called each submit. Look at call results. Mark which calls were accepted and why. If many submits come from ZIPs you don't serve, make your copy clearer about service areas. If many come at night, add a field to pick a callback window. Let people choose morning, afternoon, or evening, in local time.

Protect data. Do not paste the sheet link in public. Limit access to agents and managers. Do not store credit card numbers or private medical details. The form is for connection, not for payment. Move sensitive items to your buyer, who is trained and authorized to handle them.

A small story shows the flow. You put a "Request a Call" form on your Phoenix page. At 10:14 a.m., Ana submits: 602-555-0100, 85008, "blowing warm air." The script emails your agent with the subject "CALL NOW: 602-555-0100 in 85008." At 10:17 a.m., the agent calls from your tracking number. "This call may be recorded. Okay to continue?" Ana says yes. ZIP is good. The agent connects to your buyer. The call runs 2:10 after connect. It pays. The sheet shows "Accepted." That afternoon, two more forms arrive. You repeat. By Friday, you have 12 accepted calls from a free form and a tiny script.

This setup is simple, but it works. It gets a number from a page into a phone fast. It keeps proof of consent and timing. It lets you measure how quick you are. It's a free backbone for callbacks until you grow into a full system. Clean, light, and steady—that's how you win.

S20. QR codes on free printables & community boards

A **QR code** is a square pattern you can scan with your phone to open a link or dial a number. You can put QR codes on simple printables—flyers, cards, or handouts—and share them for free in places people visit every day. If your message is clear and local, a small stack of flyers can turn into calls all month. The key is to place them only where allowed, to make the message easy to read, and to track each location with its own number.

Pick a simple offer that fits a real need. "AC Not Cooling? Phoenix Help

Line." "Heat Not Turning On? Tempe Help Line." Keep the headline big and bold. Use a clean photo you own, like a thermostat or a clean filter. Do not use tiny text or crowded boxes. People glance for two seconds. They should understand right away what you do and who you help.

Decide what the QR will open. You have two good choices: a **tel:** link that starts a call right away, or a **call-optimized page** with a big "Tap to Call" button and your consent text. If you serve many phone types, the page is safer because some camera apps warn on direct call links. The page also lets you show hours and ZIPs before they call.

Generate the QR with a free tool. Paste your link with **UTM tags** to mark the location, like ?utm_source=flyer&utm_medium=print&utm_campaign=laundromat_main_st. Save the QR as a high-resolution PNG so it prints cleanly. Test it on two different phones. Make sure it opens fast and the page shows the **same number** printed on the flyer.

Use a **unique tracking number** for each location. Put that number in large digits on the flyer. Also use it on the page the QR opens. Now when a call comes, you know where the person saw you. If one location works well, you print more for that spot. If another does nothing, you stop there.

Write one short sentence under the QR: "Scan to call 602-555-0100 (8–6). Calls may be recorded." Some people scan first and then tap. Some dial the number by hand. Both should see the same number and hours. Keep it honest. If you do callbacks after 6 p.m., say, "After 6 p.m., leave a message for a morning callback."

Design for distance. On a board, people stand a few feet away. Use big type. Use high contrast. A white background with dark text works well. Keep your flyer to one page, letter size. Do not cram it full. White space helps eyes.

Place flyers where you have **permission**. Good spots are community boards at libraries, community centers, coffee shops, laundromats, apartment mail rooms, and hardware store boards. Ask the staff before you post. Say, "We're sharing a free '2 quick AC checks' flyer for neighbors. May we post one?" Most will say yes if your flyer looks helpful, not salesy. Never cover other flyers. Never post where signs say "No advertisements." Respect the space.

Add a tiny **tip box** on the flyer. "2 Quick Checks Before You Call: Replace a dirty filter. Flip the breaker off/on once." Helpful content makes your flyer look like a resource, not a pure ad. People will leave it up longer. Staff will be less likely to toss it.

Keep a **placement log**. Write down the address, the date you posted, and the tracking number on that flyer. In your call system, watch calls by number. If the laundromat flyer brings five calls in a week, great. Refill it every Saturday. If the library board brings zero in two weeks, try a different headline or move the flyer to a different board at the same library.

Refresh flyers with small **seasonal** lines. In summer, add "Extra evening slots during heat wave." In fall, add "Tune-up week—book early." Change the photo to match the season. Keep the QR and number the same so tracking stays clean.

Consider **tear-off tabs** for older boards where people like to tear and keep. Print a version with tabs that each show the number and hours. Many folks still prefer to call by typing the number. Tabs help them take it home. Use the same tracking number on tabs.

If you want wider reach, bring flyers to **events**. A table at a neighborhood fair can be free or cheap. Put a sign: "Free 1-page AC checklist." Hand out the sheet with the QR and number. Smile. Answer a few questions. Later that night you will often see calls. People like to put the checklist on the fridge. When heat hits, they scan and call.

Always keep **consent** and **recording** in the right places. On the flyer, note that calls may be recorded. On the page, show your consent text by the callback form. On the phone, start with your recording line. Be consistent. Trust grows when your words match in print, online, and on the phone.

A small story shows it works. You design a simple flyer: "AC Not Cooling? Phoenix Help Line," big number, QR to your call page, two quick checks, hours, and the recording note. You place one at the library, one at a laundromat, and one at a coffee shop. Each has its own tracking number and UTM code. In the next ten days, the laundromat number logs seven calls, the coffee shop four, the library one. You refill the laundromat and coffee shop and skip the library. In July, you swap the photo and add "Extra evening slots." Calls jump during the first heat wave. All free, just paper and care.

QR flyers work because they meet people in the real world when the problem is present. A sweaty afternoon at the laundromat makes "AC Not Cooling?" feel urgent. A clean flyer with a clean promise turns that feeling into a tap, then a call, then an accepted unit. Keep it neighbor-level. Keep it honest. Keep it tracked. You will be surprised how much a simple square can do.

S21. Podcast guesting with call-to-action

Podcast guesting is like speaking to a room full of people who chose to listen to you. They are relaxed, on a walk or in a car, and they stick around longer than on social media. That is perfect for pay-per-call. If you share a few real tips, tell one short story, and give a clear number at the end, you can earn calm, ready calls that pass your timer.

Start by picking shows your buyers already trust. If you help homeowners, look for neighborhood podcasts, city news shows, home improvement shows, and real estate agent podcasts. If you run B2B pay-per-call (for example, merchant services or IT support), look for local chamber of commerce shows, small business roundtables, and niche industry podcasts. Search "[your city] podcast," "home tips podcast," or "[industry] small business podcast." Listen to an episode or two. You want hosts who ask simple questions and speak like normal people.

Prepare a friendly pitch. Keep it short: who you are, the three tips you can teach, a tiny story, and why it helps their listeners this month. For example: "Hi Ana, I run a local AC help line in Phoenix. I can share '3 things to try when your AC blows warm' and a safety tip most people don't know. I also have a quick story about a fix during last year's heat wave. This will help your listeners before the first hot week. No sales pitch—just steps and a clear next move if they need help." Add one link to a page with a few past tips. Do not send a ten-paragraph bio. Keep it human.

Create a simple one-sheet you can email hosts. Put your name, a single sentence about what you do, three questions they can ask you, and your best short story. Add your call-to-action exactly how you will say it on the show, including hours and your recording note. Example: "If you're in Phoenix and still stuck after these steps, call 602-555-0100, 8 a.m. to 6 p.m., Monday to Saturday. Calls may be recorded for quality." Hosts love it when you make their job easy.

Set up your sound. You do not need a studio. Use a quiet room, a cheap USB mic, and wired headphones. Turn off fans. Put your phone on Do Not Disturb. Open a text file with your three tips and your CTA line so you don't forget. Smile while you talk; it changes your voice. Speak like you are helping one friend.

Plan the flow. Most shows run 20–40 minutes. At the start, give a quick hook: "Three quick fixes you can try today." Then teach the steps in plain words. "Check the filter; if you can't see light through it, replace it. Check the breaker; off and on once. Set the thermostat to cool and auto and wait five minutes." Add one safety stop: "If you smell burning or hear buzzing, stop and call a pro." Tell one story with a name and ZIP: "Ana in 85008 called during last year's 110° week. The filter looked like a sweater. We had her replace it and reset the breaker—cool air came back. When that didn't work for her neighbor, we connected him to a tech that afternoon." Stories stick because they feel real.

Give your call-to-action twice—once around the middle, once near the end. Keep the words the same each time so listeners remember. "If you're in Phoenix and still stuck, call 602-555-0100, 8 to 6. Calls may be recorded." Do not machine-gun the number. Say it, pause, say it again. Ask the host if they can put your number and hours in the show notes with a link to your clean call page. That page should load fast, show the same number, and repeat your hours and consent text. If a listener checks the page later, the message should match what they heard.

Use a unique tracking number for podcasts. Use it on your call page and in your spoken CTA. Now you can see calls that came from the episode. If the show has regional reach, make a unique number per show. If it has national reach, say your service area out loud so people know if they should call or not. "Phoenix, Tempe, Mesa only."

Offer a small, useful freebie to increase calls. For example: "We have a 1-page 'AC Not Cooling' checklist. It's free. The link is in the show notes, or you can call us and we'll text it—reply STOP to end." Keep the freebie simple and on one page. Do not make people jump through hoops. The goal is to earn trust, not emails.

After the episode, send the host a thank-you. Share the show on your social pages with one line and your number. Pin it for a week. Clip a 30-second segment where you give the three steps and your CTA. Post that clip on your site and YouTube Shorts with the podcast's name in the title. Now one appearance does work in many places.

Measure results over two weeks. Podcast calls often trickle in, not all at once. Track how many calls your podcast number gets, average connected talk time, and acceptance rate. If the calls are short, listen to two recordings. Did you forget to say your area and hours? Did your call page match the promise? Small fixes can add thirty seconds to average talk time.

Avoid common mistakes. Do not overpromise ("We fix anything in an hour"). Do not hide your service area. Do not skip the recording note. Do not ask listeners to do five things. Three steps are enough. Clear beats clever.

A true-to-life example: You guest on "Phoenix Homes Weekly." You teach three steps and your safety note. You give your CTA twice. The host adds your number and link in the notes. Over the next ten days, your podcast number logs 14 calls. Eleven are inside your ZIPs. Nine pass your 90-second timer. One show, one hour of your time, nine paid calls. That is why podcast guesting works for pay-per-call—if you respect the listener, match your page to your words, and make the phone number easy to hear and to find.

S22. LinkedIn posts & articles (B2B offers)

LinkedIn is a good place for B2B pay-per-call. Owners, office managers, and department heads check it during the workday. They read short posts that solve a problem. If you help businesses—merchant services, IT help, commercial insurance, benefits brokers, compliance consulting—LinkedIn can send you calls without ads when you write like a peer and keep your ask simple.

Start with your profile. Use a clean photo. Write a headline that says the outcome, not a title. "Cut card fees for local shops" is better than "Senior Account Manager." In your About section, write three short sentences in plain words: who you help, how you help, and how to reach you. "We help Phoenix shops lower card fees. We compare rates and set up fast. Call 602-555-0100, 8–6. Calls may be recorded." In your Featured section, add a "Call Now" page from your site that is built for B2B: headline, number, hours, and a two-line value prop ("Lower fees, no downtime"), plus a tiny callback form with consent text.

Post short, useful tips two or three times a week. Each post should solve a small problem in under 200 words. For merchant services, try: "Three places fees hide on your statement." For IT help, try: "Two quick checks before you blame the router." For commercial insurance, try: "What your agent needs to quote in one call." Write like you talk. Avoid buzzwords. End with a soft phone CTA and a local angle: "If you're a Phoenix shop owner and want a quick look, call 602-555-0100 (8–6). Calls may be recorded."

Once a month, write a longer **LinkedIn Article**. Make it a simple guide with a case study: "How a Tempe coffee shop cut fees by 0.6% in one week." Share the three steps you took, one number you improved, and one quote from the owner. Keep it honest—no magic. At the end, add your call line again with hours. Link to your B2B call page with UTM tags like ?utm_source=linkedin&utm_medium=article&utm_campaign=merchant_case.

Connect the right way. Send 5–10 connection requests a day to owners and managers in your city. Add a calm note: "Saw you run a shop in Tempe. I share short tips on lowering card fees. If it's not helpful, no pressure." Do not pitch in the connection request. After they accept, say thanks and leave it. Let your posts do the work. If someone likes or comments, reply with a note and, if they ask, offer your number and a good time to call.

Join one or two LinkedIn groups where your buyers hang out, like "Arizona Small Business Owners." Share a trimmed version of your tip there once a week. Keep it helpful and short. If the group blocks numbers in posts, put your number on your profile and say, "Number is on my profile if you need a quick look today."

Use a unique tracking number for LinkedIn. Put it on your call page, in your profile's About, and at the end of posts when you include a number. If a post is text-only, you can still include the number, but keep it clean.

Do not paste the number five times. Once is enough.

Try simple **native video** once a week. Face the camera and share one tip in 30–45 seconds. End with your call line. Put the number and hours in the first line of the post text so it shows above the "see more" fold. Add closed captions so people at work can read without sound. Native video gets reach, and your calm voice builds trust.

Use LinkedIn **Events** or **Audio** to host a short Q&A once a month. Title it with the outcome, not your brand. "Lower Your Card Fees in 20 Minutes (Live Q&A)." Keep it to 20–30 minutes. Answer three questions. End with your number and hours. Record the session if allowed and clip a 30-second moment for a post.

Measure what matters: calls and connected talk time. Likes and impressions are nice, but money comes from calls that hit your buyer's rules. In your call log, tag "LinkedIn" for calls to that number. After a month, look at which post topics came before call spikes. Write more on those. If an article brought lots of site visits but few calls, move the phone number higher on the page and add your hours near the top.

Avoid common traps. Do not DM-pitch strangers right after they accept. Do not promise savings you cannot deliver. Do not claim you work with every card brand if you don't. Speak small and true: "We find drops of 0.2–0.8% for most shops." That kind of claim is believable and safer.

A day-in-the-life example: Monday morning, you post "Three places fees hide on your statement." You end with "Phoenix owners, call 602-555-0100, 8–6. Calls may be recorded." Two owners like it. One messages, "Can you look at mine?" You reply, "Happy to. Quickest is to call—number is in the post." They call at lunch. You hit your timer. Tuesday you connect with five owners and say nothing else. Wednesday you post a 40-second video about "batching out" and pin it to your profile. Thursday you share a case study article. Over the week, your LinkedIn number gets eight calls. Five pass your buyer's acceptance rules. That is steady, free traffic from talking like a peer and giving one clear way to reach you.

S23. X (Twitter) threads & Spaces with CTAs

X (formerly Twitter) moves fast, but it can still send real calls if you use threads and live audio the right way. Threads let you teach a short, step-by-step fix. Spaces let you talk live, answer questions, and repeat your number in a human voice. Keep both simple and local, and you'll see calls right after you post or speak.

Start with a clear profile. Use a name that says what you do: "Cool Air Phoenix." Put "AC tips for Phoenix homes • 602-555-0100 • 8–6 (calls may be recorded)" in your bio. Pin a thread that gives your best three steps and your number at the end. Now anyone who visits your profile sees help and a way to call.

Write threads like tiny guides. The first tweet should hook with the problem and the city: "AC not cooling in Phoenix? Try these 3 checks." The next three to five tweets are the steps, one per tweet. "1) Filter: if you can't see light through it, replace it." "2) Breaker: off and on once." "3) Thermostat: 'cool' + 'auto,' wait 5 minutes." Add one safety tweet: "Hear buzzing or smell burning? Stop and call a pro." End the thread with a calm CTA: "Still stuck in 85008 / 85016 / 85018? Call 602-555-0100, 8–6. Calls may be recorded. We connect you to a local tech today." Quote-tweet your own thread later that day with "Evening calls open" near peak hours.

Use a unique tracking number for X. Put it in the last tweet and in your bio. If you link to a page instead, add UTM tags: ?utm_source=x&utm_medium=thread&utm_campaign=ac_not_cooling. Keep the link clean and fast. On X, people are on phones and tap quickly.

Keep hashtags light and local: "#phoenix #acrepair." One or two is enough. Too many hashtags look spammy and lower trust. If a local news account tweets about a heat wave, reply with your thread and a kind line: "Sharing 3 safe checks neighbors can try." Do not hijack every trend. Only engage when your tip fits.

Run **Spaces** when the need is high. Title it with the problem and city: "AC Not Cooling? Phoenix Live Q&A." Schedule it for early evening when people are home. Co-host with a local voice, like a neighborhood blogger or a realtor, so their followers get notifications. At the start, set the promise: "We'll share 3 safe checks, then take 5 questions." Share your number and hours in the first minute and pin a tweet with the number to the Space. Repeat the number halfway through and at the end. Say the recording note if you invite callers to DM their number for a callback.

Keep Spaces to 20–30 minutes. Short and helpful beats long and rambling. Answer live questions in plain words. If someone asks for a diagnosis you can't give, say, "We can't be sure without a live check. If you're in Phoenix, our line is open at 602-555-0100 until 6. Calls may be recorded." Speak kindly. People remember the tone more than the details.

Clip your Space if recording is on. Post a 30-second highlight the next day with your number. Pin it for a week. Now the live work keeps paying. If you don't record, write a short recap thread with the three steps and your CTA.

Reply to locals. When someone in your ZIPs tweets "AC broke help," reply with your thread and one calm line. If they look stressed, keep it short: "Here are 3 safe checks. If still stuck, call 602-555-0100, 8–6." Don't argue with trolls. Mute and move on.

Measure quickly. X calls tend to arrive within an hour of posts or Spaces. Watch your tracking number during and right after. If response is weak, post at a different time next day. If you get many out-of-area calls, add ZIPs to your thread and bio so people self-filter.

Avoid traps. Do not fill every tweet with your number. Once at the end is enough. Do not promise "24/7" if your buyer closes at 6. Do not dunk on other companies. Help wins; drama loses. If you send DMs, ask before sending a number or a link. "Want our number?" is respectful.

A live example: At 5:30 p.m. on the first hot Tuesday, you run a Space called "AC Not Cooling? Phoenix Q&A." You and a realtor co-host. You share three checks, take five questions, and repeat the number twice. Twenty-five listeners tune in. During the Space and the next hour, your X number logs ten calls. Seven pass your 90-second timer. You post a 30-second clip the next morning. Three more calls come in at lunch. That is a good return for half an hour of calm talk.

Threads and Spaces work because your voice lowers fear. When people hear a real human who sounds steady and local, they pick up the phone. Your job is to make that call easy to start and easy to trust. Keep your words small and your promises true, and the timer will take care of itself.

S24. Content repurposing flywheel for free reach

A flywheel is a loop that keeps turning with little extra push. Content repurposing is how you build that loop. You make one helpful piece, then you slice it into many small pieces that fit each platform. Each slice points to your number or your call page. Over time, the wheel keeps spinning, sending you free calls across channels without burning you out.

Start with one "master" piece per week. It can be a 60–90 second video or a 700–900 word guide. Pick a problem that matches the season and your city: "AC Not Cooling? 3 Quick Checks (Phoenix)." Write your script in plain words. Say your three steps. Add one safety note. End with your call line and hours. Record the video on your phone facing a window. Or write the guide for your blog or Medium. This master piece is your seed.

Now turn that seed into slices. Take the video and cut it into a 30-second YouTube Short with your number at the end. Pull the audio and post it as a 30-second clip on X with a caption thread. Grab a still frame of the filter and make a tall Pinterest pin that says "3 Quick AC Checks" with your number at the bottom. Write a Quora answer using the same three steps, ending with your number and recording note. Make a one-page checklist PDF with the steps and your number and hours at the bottom. Each slice speaks in the local voice of its platform but keeps the same simple promise.

Make your **call path** the same in every slice. Use a unique tracking number per platform so you can see what works: one for YouTube, one for X, one for Pinterest, one for Quora, one for flyers, one for podcasts. Use the same number in the content and on the page that the content links to. When a call comes, tag it by number. Over a month you will see which slices bring long calls that pass your timer.

Keep a tiny content calendar. Monday: record the 60–90 second master video or draft the guide. Tuesday: post YouTube Short and blog/Medium article. Wednesday: post an X thread and a Facebook Group tip. Thursday: post a Pinterest pin and a LinkedIn tip if you're B2B. Friday: answer one Quora question and post a 20-second TikTok. Saturday morning: post in local community boards if allowed. This sounds like a lot, but each slice is short because you already did the big thinking once.

Let transcripts help you. If you record a master video, run a transcript (many phones or tools can do this). Highlight the best phrase as your hook. That phrase becomes the first tweet, the first line of your pin, and the title of your blog post. Transcripts also catch filler and long sentences you can cut next time.

Match timing to real life. Heat wave week? Push AC content to the top of the wheel and pause winter items. First cold snap? Spin the "no heat" wheel. Holidays? Slow down on hard calls and post checklists. The wheel doesn't force content; it organizes it so you can move pieces in and out without stress.

Keep the **look and voice** steady. Use the same plain fonts, the same calm tone, the same way of writing your number ("602-555-0100"), and the same hours. People should feel like they're hearing from the same neighbor everywhere. That steady voice builds trust across time and platforms. Trust makes calls longer.

Add gentle **CTAs** that fit each place. On YouTube, say your number and hours out loud and put them in the description and pinned comment. On X, end the thread with your number once. On Pinterest, put the number on the image and on the landing page. On Quora, put the number once at the end and your disclosure. On podcasts, say it twice with a pause. On flyers, print it big and add a QR to your call page. Same call path, many doors.

Watch your numbers weekly, not hourly. The flywheel is slow at first. Some pieces do nothing today but send calls next week. Measure calls per platform, average connected talk time, and acceptance. Drop slices that bring short calls or out-of-area calls. Make more of the slices that bring calm, long calls. If Quora brings great calls but Pinterest is quiet, keep Quora steady and try a new pin headline. If X threads spike calls at 6 p.m., schedule more at that time.

Keep your promises lined up. Every slice should match your real hours and service area. If you add evening hours during a heat wave, update the CTA in your slices for that week. When hours go back to normal, change the words back. If you start saying "Calls may be recorded" in videos, also put it on pages and flyers. One voice, one promise, everywhere.

Build a small library so repurposing gets faster. Save your best photos (filter, breaker, thermostat). Save your best lines ("If you can't see light through it, replace it"). Save your best CTAs. Next week, reuse the bones with a new angle: “AC Leaking Water?” or “Thermostat Blank?” You’re not reinventing; you’re reshaping.

A true example shows the flywheel at work. On Monday, you film “AC Not Cooling? 3 Quick Checks (Phoenix).” On Tuesday, you post the Short and the blog. Tuesday night, two calls come from YouTube. On Wednesday, you tweet a thread and share a tip in a local Facebook Group. Three calls follow that evening. On Thursday, your pin goes up. Friday morning, your Quora answer is live. Over the weekend, two more calls arrive. By Sunday night, your unique numbers show nine calls from five slices. Seven pass your 90-second timer. Next week, you swap “Not Cooling” for “Leaking Water” and run the wheel again. In a month, you have four master pieces and dozens of slices, all pointing to your number. The phone feels steady, even without ad spend.

That is the flywheel: one clear message made useful in many shapes. It saves time. It raises trust. It smooths out the week. You do not need to be everywhere at once. You only need to say the right thing, simply, in the places your neighbors already are—and make it easy to call when they are ready.

11

Free Traffic — SEO & Content Engine

S1. Topic clusters & internal linking for calls

Search engines like clear, organized websites. People do too. A **topic cluster** is a simple way to organize your site so readers find answers fast and then call you. Think of a cluster like a wheel. The center of the wheel is your **pillar page**. Around it are the **spoke pages** that go deep on one small part of the topic. Good clusters make your phone number easy to see on every page. Good clusters also link readers from one helpful page to the next until they are ready to call.

Start with one service and one city. For example, "**AC Repair in Phoenix**." That becomes your pillar page. This page gives the big picture. It explains what you fix, the hours you are open, and the ZIP codes you serve. It has one large **tap-to-call** button at the top with your tracking number, and a small callback form with clear consent text. Keep the words short. Keep the page fast. This is the center of the wheel.

Next, list common problems people search for in that city. For AC repair, the most common are: **not cooling**, **blowing warm air**, **leaking water**, **freezing up**, **strange noise**, **thermostat blank**, **won't start after**

power outage, and **smells musty**. Each of these becomes a spoke page. Each spoke page shows two or three safe checks in plain words. Each spoke page repeats your hours and ZIPs and shows the same big **Call Now** button near the top. At the end of each spoke page, link the reader to the pillar page again and to one or two **related** spokes. For example, at the end of "AC leaking water," you can say, "If the unit froze and then thawed, read our 'AC freezing up' page." This is **internal linking**. It keeps people moving inside your site instead of bouncing away.

Write the spoke pages with the same voice and the same simple layout. Use the same number format (like 602-555-0100). Put the same short **recording notice** on every page where people might call. Say "Calls may be recorded for quality." Do not hide your number deep below long paragraphs. It should be easy to tap without scrolling very far, especially on a phone.

Use **clear anchor text** for your links. Instead of "click here," write "**AC not cooling**" and link those words to the right page. This helps readers who scan. It also helps search engines understand your site. Add **breadcrumbs** near the top ("Home > AC Repair > AC Not Cooling") so people can go back one step with a tap. Small things like this make your site feel simple and friendly. Simple and friendly leads to more calls.

Keep your cluster tight. It is better to have one strong pillar and six helpful spokes than one weak pillar and twenty thin pages. Thin pages make people leave. Thick pages that repeat the same lines across many pages also make people leave. If two spoke pages overlap too much, combine them. For example, "AC not cooling" and "AC blowing warm air" might share a lot. You can keep one main page and then make a short section on that page for each phrase. What matters is the help, not the number of pages.

Add a small **FAQ** to the pillar page that answers the two most common questions in your city: "Do you service my ZIP?" and "How fast can you come?" Answer in one line each. Keep the promise real. If you only handle calls 8 a.m. to 6 p.m., say that. A clear "8–6" turns into longer calls and fewer angry hang-ups.

Make your pillar page the main "gate" for internal links from other parts of your site. When you write a blog post, link to the pillar in the first screen with a short line: "Need live help? Tap to call our **Phoenix AC help line**." On each spoke, add a small **callout box** near the top that repeats your hours and the call button. People who already tried the steps can call right away. People who want to read more can scroll and learn. Both paths should feel easy.

Measure what works. In your phone system, tag calls by the page they came from. You can do this with different tracking numbers or by reading UTMs from links you place in social posts. Look at **connected talk time** by page. If "AC leaking water" calls last longer and hit your buyer's timer more often, you should make that spoke link higher on your pillar and share it more often in your free traffic channels. If "AC noise" calls are short and often out of scope, tighten that page. Say early what sounds you do and do not handle. Honest words save you refunds.

Update the cluster with seasons. In late spring, move "AC not cooling" higher on the pillar. In late fall, move "heat not turning on" higher on your heating pillar. Add one line at the top of each spoke for the season. "Update: first heat wave this week—replace your filter early." Small updates keep pages fresh and show readers you care about today, not last year.

Keep growing the cluster at a steady pace. Aim for one new spoke per week. Use real questions from calls to decide the next page. If three callers ask "Why is my thermostat blank?", that is your next spoke. Write it in simple steps. Link it to the pillar and to related spokes. Put the call button near the top. Repeat your hours and ZIPs. Done.

A story helps this click. You launch "AC Repair in Phoenix" as your pillar. You add three spokes: not cooling, leaking water, thermostat blank. You link them all both ways. For a week, you share the "not cooling" page in your free channels. Calls start to come. You listen to the recordings and hear a pattern: many people also ask about "frozen unit." You write that spoke next and add a link from "not cooling" to "frozen." The next week, your "frozen" page brings four calls, three of which pass 90 seconds. You keep going. In two months, you have one pillar and eight spokes. Your internal links guide people to your number and guide search engines to your best help. Your phone feels busier, and your calls feel calmer. That is the power of topic clusters for pay-per-call.

S2. Programmatic SEO (location/service variants)

Programmatic SEO sounds fancy, but the idea is simple: you make **many pages** from a clean **template**, each one aimed at a different **location** or a slightly different **service**. This helps you show up for searches like "AC repair in Tempe," "AC repair in Mesa," and even "AC tune-up in Phoenix." The risk is **thin content**. If you copy the same page 100 times and only swap the city name, people will bounce, and search engines may ignore you. The fix is to add **real local value** to each page and to roll out pages slowly, with care.

Start with a short list of nearby cities where your buyer actually takes calls. For Phoenix, that might be **Tempe** and **Mesa**. Build a **template** that fits on a phone screen without scrolling too much. The template should have: a strong headline with the city ("AC Repair in Tempe — Same-Day Help"), a big **Tap to Call** button with a city-specific tracking number, your hours, a **ZIP list** for that city, a short **"Why call us"** box with two or three true points, and a tiny callback form with consent text.

Under that, add **local proof** that changes by city. For Tempe, mention heat and monsoon dust and show a map of the main ZIPs you serve (for example, 85281, 85282, 85283). For Mesa, mention older neighborhoods with small attic spaces and add a different map. In each city page, add one short **local story**: "Last July, Ana in 85283 called during a heat wave. We had her change her filter and check her breaker. When that didn't work, we connected her to a tech that afternoon." Keep the story honest and the name generic if needed. People want to feel you are truly there, not pretending.

Add **local FAQs** to each page. In Tempe, "Do you serve apartments near ASU?" In Mesa, "Do you handle mobile home AC units?" Answer in one line. These small lines do more good than long generic paragraphs. They also keep each page unique.

Use a simple **data sheet** to drive the template. Make a Google Sheet with columns for **City**, **ZIPs**, **Tracking Number**, **Hours** (if a city has special hours), **Local Note**, **Neighborhoods**, and **Story**. When you create a new page, fill one row and paste each cell into the template. You can do this by hand at first. Later, if you want, you can use a static site tool to read the sheet and build pages automatically. You do not need code to get started. Copy and paste works fine for ten pages.

Link the city pages to your **pillar page** and to each other where it makes sense. On the Phoenix pillar, add a small "Nearby cities we serve" box with links to Tempe and Mesa pages. On the Tempe page, say "Also serving nearby Mesa" and link it. Keep the links short and calm. Internal links help readers and help search engines understand your map.

Avoid making **hundreds of pages** at once. Publish three to five at a time. Watch how they do for a few weeks. If calls are out of area, tighten the copy. If acceptance is low, move hours and ZIPs higher on the page. When a small set works, make the next three to five. Slow is safe. Slow builds trust.

Do not make pages for cities you cannot serve. If your buyer can't take Mesa calls, do not publish a Mesa page. You will waste callers' time and harm your brand. If you are testing a city, set a **lower cap** with your buyer and state your hours clearly so you don't lose calls after close.

Make the **phone number** local where possible. If you can get city-specific numbers (480 for Mesa/Tempe), use those. Register them so the caller ID shows a clean name. Keep one number per city page so your reports are clear. If you must use one toll-free number across all city pages, be sure your router uses the **referring page** to tag calls by city.

Write a **city-specific intro** for each page. Two or three lines is enough. "Tempe gets dusty storms. Filters clog fast. If your AC is blowing warm, try these quick checks. If you're still stuck, call—our techs know the area." These lines help the reader feel known. That feeling leads to longer calls and better acceptance.

Add **unique photos** where you can. A photo of your van on a Tempe street sign is better than a stock image. A shot of a thermostat with a local sports magnet in the background (if you have permission) feels real. If you don't have photos yet, use neutral equipment shots and add local photos later as you collect them.

Put **schema markup** on each page with the correct city and phone (see S3 below). This is a small code box that helps search engines understand your city and number. Keep it in sync with what the reader sees on the page.

Keep each page **light and fast**. Programmatic pages can get slow if you add too many scripts. You do not need fancy sliders or heavy maps. A small ZIP list and a tiny image are enough. Speed helps calls.

Here is a simple plan to follow. Week 1: build Phoenix pillar and one Tempe page. Week 2: add Mesa. Week 3: add "AC tune-up in Phoenix" as a second pillar (for a different intent) and link it to your Phoenix repair pillar. Week 4: add Tempe tune-up. Measure calls from each page and adjust copy. After a month, you will see which pages pull and which need work. Keep going until your main suburbs are covered.

Programmatic SEO works for pay-per-call when each page feels like a door **into** your shop, not a thin sign on a highway. Make the door real. Put the right number on it. Put the right city on it. Put a small local truth on it. Open the door during the hours you promise. Do this again and again, and your phone will ring from the nearby places you can actually serve.

S3. Schema markup for phone & FAQ

Schema markup is short code you put on a page to tell search engines what the page is about. It is not for readers; it is for machines. When you use schema, you help Google and others understand your **business**, your **phone number**, your **hours**, your **service areas**, and your **FAQ** answers. This can improve how your result looks (rich results), and it can reduce wrong guesses about your number or hours. For pay-per-call, you want schema that highlights your **phone** and your **FAQs** clearly.

Use the **JSON-LD** format. It is a simple script block you paste into the <head> or the end of the <body> of your page. Keep the values the same as the text a human can see on the page. If the page shows 602-555-0100, the schema should show +16025550100. If the page shows "8 a.m. – 6 p.m.," the schema should match that in machine format.

For a local service page, start with **LocalBusiness** (or a more specific type like "HVACBusiness" if it fits). Include your **name**, **telephone**, **areaServed**, **openingHoursSpecification**, and a **contactPoint**. If you operate as a service-area business (no storefront), include your **serviceArea** and cities instead of a street address. If you also have an **FAQ** on the page, add an **FAQPage** schema block.

Here is a simple example you can adapt. Keep it honest. Keep the number and hours in sync with the page. Use your own city and ZIPs.

html

Copy

```
<script type="application/ld+json">
```

```
{
"@context": "https://schema.org",
"@type": "HVACBusiness",
"name": "Cool Air",
"url": "https://www.coolairphoenix.com/ac-repair-phoenix",
"telephone": "+16025550100",
"areaServed": {
"@type": "City",
"name": "Phoenix"
},
"serviceArea": [
{"@type":"Place","name":"85008"},
{"@type":"Place","name":"85016"},
{"@type":"Place","name":"85018"}
],
"openingHoursSpecification": [{
"@type": "OpeningHoursSpecification",
"dayOfWeek": ["Monday","Tuesday","Wednesday","Thursday","Friday","Saturday"],
"opens": "08:00",
"closes": "18:00"
}],
"contactPoint": {
"@type": "ContactPoint",
"telephone": "+16025550100",
"contactType": "customer service",
"areaServed": "US-AZ",
"availableLanguage": ["en","es"]
}
}
</script>
```

```
<script type=“application/ld+json”>
{
“@context”: “https://schema.org”,
“@type”: “FAQPage”,
“mainEntity”: [{
“@type”: “Question”,
“name”: “Do you service my ZIP code?”,
“acceptedAnswer”: {
“@type”: “Answer”,
“text”: “Yes. We serve 85008, 85016, and 85018 with same-day calls during 8 a.m.–6 p.m.”
}
},{
“@type”: “Question”,
“name”: “How fast can you come?”,
“acceptedAnswer”: {
“@type”: “Answer”,
“text”: “We connect you to a local tech the same day during business hours. After 6 p.m., we book next-morning callbacks.”
}
}]
}
</script>
```

A few simple rules keep you safe. First, **do not** put a different number in schema than on the page. That can confuse search engines and callers. Second, if you use a **tracking number** on the page, it is okay to put that in schema **and** list your main line as an **additionalPhone** on your Google Business Profile (more in S5). Third, do not make up reviews or add “aggregateRating” unless you truly show ratings on the page and can back them up. Keep schema honest.

Use the **same format** (E.164) for phone numbers in schema: “+1” +

area code + number. This makes matching easier. For **hours**, use 24-hour format. For **cities and ZIPs**, you can list them as shown above. Do not stuff 100 ZIPs in schema if your page does not show them to readers. Keep it reasonable.

If your page has **breadcrumbs**, you can add a small **BreadcrumbList** schema too. This helps search engines show a neat path under your result. It is optional, but it's a nice touch for big clusters.

Test your pages after you add schema. Use a rich-results testing tool to see if your code has errors. Fix typos. Check that your **FAQ** questions look the same as the on-page FAQ. Remember: schema does not replace the content. It explains the content.

Add schema to **each** city page with the right city name, the right number, and the right hours. If your Tempe page has a Tempe tracking number, put that number in the Tempe schema. If your Mesa page has a Mesa number, put that in the Mesa schema. This keeps your analytics clean and helps search engines tie the right number to the right page.

Keep schema **small** and **focused**. You do not need every possible field. The most important items for pay-per-call are your **business type**, **phone**, **hours**, **area served**, and **FAQ** if you show one. Start there. Add more later only if it helps a reader see a better result (for example, "hasMap" or "sameAs" links to your real profiles).

Schema is not magic. It will not fix weak pages. But when you pair strong, helpful pages with clean schema, your results can look richer, your number can be understood, and your calls can rise. That is worth the ten minutes per page it takes to paste in a tested code block.

S4. Page speed & mobile tap-to-call UX

People search on phones. They are hot, tired, or in a hurry. If your page loads slow, they leave. If your call button is small or hidden, they leave. **Speed** and **tap-to-call** design make the difference between a bounce and a booked call. The good news: small fixes go a long way.

Aim for a **fast first screen**. Your headline, your number, your hours, and your call button should load in under two seconds on a normal cellular connection. You can reach this by keeping your page simple. Use one small image near the top (under 100 KB if you can) and save it in a modern format like WebP. Do not auto-play video. Do not load five chat widgets. Do not load giant font files. Each extra thing adds delay.

Make your **call button** large and clear. On a phone, a good button is at least a finger tall and wide. It should say "Call Now" or "Tap to Call." It should use a clear color that stands out against the background. The button should use a **tel:** link to your tracking number so it opens the dialer with one tap. Put the hours next to the button so people know if anyone will answer. This honesty boosts trust and call time.

Keep a **sticky** call bar on the bottom of the screen if you can. As people scroll, the button stays visible. Do not make it huge or flashing. A calm bar with "Call Now 602-555-0100" is enough. On desktop, you can add a "Request a Call Back" box near the top since many desktop visitors cannot or will not call from the computer. Keep the form tiny: phone number, ZIP, consent checkbox.

Reduce **layout shift**. That is when things jump around as the page loads. It makes people tap the wrong button. You can prevent it by setting image widths and heights in your code so the browser reserves space. Avoid big banners that pop in late. Keep cookie notices small.

Load **scripts** only if you need them. Heavy "all-in-one" themes can add 500 KB of scripts you do not use. If you are on WordPress, turn off unused plugins. If you are on a simple static host, stick to plain HTML/CSS with a tiny bit of JS for the form. Faster pages get more taps.

Measure with a simple tool and a real phone. A score on a lab test is fine, but the real test is your own phone on a normal data plan. Stand in your driveway. Load the page. If you count "one, two, three" and the number and button aren't there, it's too slow. Shrink the image. Remove a script. Try again.

Design for **one-hand use**. On mobile, many people hold the phone with one hand and tap with a thumb. Place your call button where the thumb can reach. Keep text big enough to read without pinching. Use short paragraphs and short words. Avoid walls of text. A calm, simple screen keeps people moving toward the call.

Write **microcopy** that reduces fear. Near the button, write "We answer 8–6. Calls may be recorded." If you offer Spanish, add "Se habla español." If you only serve certain ZIPs, add "Serving 85008/85016/85018." These small notes save time later and lead to longer calls because the caller self-filters and trusts you.

Use **tap targets** for other links that matter. If you add internal links to spoke pages, make them easy to tap without hitting the wrong one. Leave some space between links. On a phone, crowded links feel like a trap.

Avoid **blocking pop-ups**. A pop-up that covers the call button hurts you. If you need a privacy notice, make it small and easy to close. If you offer a coupon, put it in a small bar under the header, not a giant modal. Remember: your goal is a call, not an email capture.

Test **daypart** changes to the button text. During open hours, "Call Now" works. After hours, change the bar to "Request a Morning Call Back" and show a tiny form with consent text. This prevents late-night rage calls that end in hang-ups. It also lets you keep the lead warm for the morning.

A simple before-and-after story shows the lift. Before: your page loaded a giant 2 MB banner, a tracking script for five tools, and two chat widgets. The call button sat below a long paragraph. On a normal phone, the number took five seconds to appear. Many people bounced. Calls were short because the wrong people slipped through. After: you shrank the image to 80 KB, removed extra scripts, put the call button at the top with hours and ZIPs, and added a sticky bar. On a phone, the number appears in under two seconds. More people tap. The calls are calmer because the page set the right expectations. Average talk time goes up 20–30 seconds. That often decides if a call is accepted or not.

Speed and tap-to-call design are not advanced tricks. They are the basics done well: fast, simple page; big number; honest hours; easy thumb tap; no surprises. When you do this, you respect the visitor's time. In return, they give you their voice—and a few extra minutes on the line that turn into pay-per-call revenue.

S5. Map-pack playbook (if you operate a brand)

If you run a real brand with a real name and service area, the **Google map-pack** can be a river of free, high-intent calls. The map-pack is the box with three local listings and a map that shows when someone searches "AC repair near me." To earn a spot, you need a clean **Google Business Profile (GBP)**, a simple local site that matches it, and steady **reviews** and **photos** that prove you are active. The good news: this is all about being clear and honest.

Claim or create your GBP. Use your **real business name**. Do not stuff keywords into the name. Choose a **primary category** that fits (like "HVAC contractor"). If you drive to customers, mark it as a **service-area business** and **hide your address**. Enter your **service areas** by city or ZIP. Set your **hours** and keep them accurate. If you offer callbacks after hours, say so in your description: "After 6 p.m., leave a message for a next-day callback."

Use a **tracking phone number** as your main GBP phone so you can measure calls. Add your main line as an **additional phone**. Many businesses do this without hurting their visibility. Keep the tracking number stable. Register it so caller ID shows a clean name. If a number ever gets labeled "Spam Likely," fix your calling pattern (no late-night retries) and work with your provider to clean it before swapping.

Fill out **services** with plain names your neighbors use: "AC Repair," "Furnace Repair," "AC Tune-Up," "Thermostat Install." For each service, add a one-line description. Add a few **products** if they fit your niche (for example, "Seasonal Tune-Up"). These fields help your listing show for the right searches.

Upload **real photos**. Show your team (with permission), your vans, clean equipment, and your service area. Skip stock photos. Add a few new photos each month. The map-pack favors businesses that look alive. Photos help.

Post short **updates** when it matters. "First heat wave—extra evening slots." "Filter reminder this weekend." Keep posts simple with one clear photo. Use "Call Now" as the button or link to a fast call page with a matching number and UTM tags so you can attribute clicks.

Answer **Q&A** on your profile. People will ask, "Do you serve 85008?" or "Do you do tune-ups?" Answer in one line. You can also seed common questions from a normal Google account and answer them. Keep it helpful. Do not sell hard in Q&A. This is about clarity.

Ask for **reviews** the right way. After a job, send a short text with your review link: "Thanks for letting us help today. Could you share a quick Google review? It helps local families find us." Do not pay for reviews. Do not write fake ones. Reply to all reviews. A kind, short "thank you" shows you care. If someone leaves a bad review, reply calmly and offer to fix it. People read your replies.

On your site, make a clear **location page** that matches your GBP. Show the same name, number, hours, service areas, and services. Add local **schema** (see S3) with the same number you put in GBP. Embed a small map if you have a physical office. If you are a service-area business, list your main ZIPs in text. Link your GBP website button to this page and add UTM tags so you can track it.

Keep your **NAP** (Name, Address, Phone) consistent anywhere your business appears. If you list your business on a local chamber site or directory, use the same name and phone. Do not spread three different numbers around town. Use your tracking number as the main number in most places and keep your traditional line as a secondary number on GBP. Consistency helps machines and people.

Fight **spam** the right way. If a competitor stuffs keywords into their business name or lists fake locations, you can use Google's built-in reporting tools to suggest edits. Do it with proof and patience. Do not attack. Focus on your profile first. Strong brands win over time.

Watch **GBP Insights** each month. Note peak call hours and top search phrases. Staff your phone during those hot times. Update your pillar and spoke pages to match the words people use. If "AC not cooling" is the top phrase, make that page shine and link it in a GBP post.

Track **calls** from GBP with your tracking number and **clicks** with UTM tags. Many calls will come direct from the "Call" button. Some will click to your site and then call. Watch both. What matters is connected talk time and acceptance from this channel. If calls are short, recheck your hours, your service areas, and your copy on the location page. Mis-match causes hang-ups.

A simple playbook you can follow: Week 1, clean your GBP name, categories, service areas, phone, and hours. Upload five real photos. Post one helpful update. Week 2, build or tidy your location page to match GBP. Add schema and a sticky call bar. Week 3, send review requests to last month's happy customers. Reply to all reviews. Answer new Q&A. Week 4, post another helpful update, change your cover photo, and check

Insights. Keep this cycle going monthly. This is not a one-time job; it is small maintenance that pays every day.

A short story shows the outcome. You set your GBP with a registered tracking number, list Phoenix, Tempe, and Mesa as service areas, and match your site page. You post "Extra evening slots during heat wave." You ask for reviews after each job and reply to all. Over the next month, your GBP number logs 40 calls. Twenty-seven are inside your ZIPs. Twenty pass the 90-second timer. You did not buy ads. You did not use tricks. You made it easy for locals to see you, trust you, and call you. That is the map-pack doing its job.

The map-pack rewards clarity, honesty, and steady care. If you operate a brand, give it that care: real name, real hours, real photos, real reviews, real phone. Keep your site in sync. Keep your promises. Your listing will rise, your phone will ring, and your buyers will hear ready callers who already trust you. That is the goal of all this work.

S6. HARO/source-request backlinks

"Source-request" sites are places where writers ask for expert quotes. You reply with a short, helpful answer. If they use your quote, they often link to your website. That link is called a **backlink**. A clean backlink from a real site helps your pages rank higher. It also sends curious readers straight to your call page. This is a quiet, steady way to grow free traffic. It works because you earn attention with **help**, not hype.

Start by getting your house in order. Make a small **Expert page** on your site. Keep it simple. Put your name, a friendly headshot, one sentence on what you do, and a short "media bio" in plain words: "Jay Lopez connects Phoenix homeowners with licensed AC technicians. He shares safe, do-it-yourself checks and when to call a pro." Add your **city**, **service hours**, and a single **call-to-action** at the bottom: "If you're in Phoenix and still stuck, call 602-555-0100, 8–6. Calls may be recorded." This page is where many writers will link when they use your quote. It should load fast and look clean on a phone.

Next, sign up for source-request services (there are several; some are free, some paid). In your profile, choose topics that match your offer: home services, HVAC, small-business operations, call center best practices, or local consumer tips. Set daily alerts. These services send you a list of questions reporters and bloggers need answered. You skim the list and pick only the ones where you can give **clear, safe advice** in a few lines.

Answer fast and small. Reporters work on short deadlines. If you reply the same day with a crisp note, your odds go up. Your reply can follow this shape:

1. A one-line "who you are" in human words.
2.
3. Three lines of help (a tiny checklist or a clear tip).
4.
5. One line of safety or "what not to do."
6.
7. One line with your city and the outcome you handle.
8.
9. A link to your Expert page.
10.

Here's a real-sounding sample:

"**Who I am:** I run a local AC help line in Phoenix (connect homeowners to licensed techs).

Tip: If your AC blows warm, check the filter first—if you can't see light through it, replace it. Then check the breaker—off and on once. Set the thermostat to cool and fan to auto; wait five minutes.

Safety: If you smell burning or hear buzzing at the outdoor unit, stop and call a pro.

Local note: In Phoenix dust storms, filters clog fast; we see this every June.

Link: Bio + contact: https://your-site.com/expert (calls may be recorded; hours 8–6)."

That's it. No big pitch. No bold claims. Just help. Many writers will copy your lines as-is. They will also link your name or your Expert page. That link helps your **pillar and spoke** pages rank. It also sends readers who are stuck to your phone number.

Aim for **local angles**. Writers love specifics. "After the first dust storm" is better than "seasonal issues." "ZIP 85008" is better than "the area." If you serve Spanish speakers, say, "We support English and Spanish." Small details feel real and get used.

Keep a **reply bank** so you can move fast. Save three safe tips for "AC not cooling," "furnace won't start," and "thermostat blank." Save one safety line for each. Save one short story with a first name and ZIP. Rotate these so you don't repeat yourself word-for-word across the web. If two sites publish the same lines, you can lightly rewrite when you spot it later. Fresh words keep you out of duplication trouble.

Use a **unique tracking number** on your Expert page so you can see calls from these links. Also add UTM tags to any "Call Now" page you mention in email replies. Sometimes the writer will link the page instead of your Expert page. Either way, you want clean tracking.

Be a good partner. If a site uses your quote, send a thank-you. Share their article on your social pages with one short line: "Helpful summer tips from [Site]. We added a safety note." Do not argue if a writer edits your words for length. If they change a safety detail, you can send a polite note with the correct wording. Most editors will fix safety items quickly.

Build a small **Press page** on your site. Add logos or titles of the places that used your tips. Link to the articles (open in a new tab). Keep this page light. No auto-play videos. No pop-ups. When people see real sites listed, they trust your advice more. Trust turns into longer calls, which pass your buyer's timer more often.

Avoid spam. Do not blast the same reply to every request. Pick only the ones that fit your skills and city. Never make up facts. Never share private caller stories that could identify someone. Keep names generic unless you have permission. If a request is off-topic, skip it. Your time is better spent on content that matches your phones.

Make this a habit. Spend 20–30 minutes, three days a week, scanning requests and sending one good reply. In a month you might land two to five mentions. In a year that stacks up. Each new mention is a new road into your site—and one more reason search engines trust your pages.

A small story shows the path. In May, a home-tips blog asks for "AC not cooling checks." You send the three steps and your safety line the same morning. They publish the next day, link your Expert page, and quote you by name. That weekend, your "expert" number logs four calls. Two pass 90 seconds. Two weeks later, a local radio site posts a "heat wave guide" and reuses your lines (with credit). That week, three more calls come in. You didn't buy ads. You wrote one helpful paragraph and kept your promise. That is the power of source-request backlinks: small, honest help that keeps paying.

S7. Content repurposing framework

Repurposing means you make **one helpful piece**, then you reshape it into many small pieces that fit different places. This saves time and widens reach. In pay-per-call, it also keeps your message **consistent**. Your words, your number, your hours, and your safety note match everywhere. That match builds trust. Trust lengthens calls. Longer calls hit your buyer's timer and pay you.

Begin each week with a **master piece**. Pick a topic people feel right now: "AC not cooling," "AC leaking water," "furnace won't start," "thermostat blank." Write a short script (60–90 seconds) or a guide (700–900 words) that covers three safe steps and one safety stop. End with a clear call line and your hours: "If you're in Phoenix and still stuck, call 602-555-0100, 8–6. Calls may be recorded." Record the video on your phone facing a window. Or publish the guide on your blog with a big tap-to-call button near the top.

Now build the **slices** from that master. The same three steps become a YouTube Short, a TikTok clip, a Quora answer, a Reddit resource post (if allowed), a Facebook Group tip, a Pinterest pin, and a LinkedIn short post (for B2B). Each slice uses the **same** number and the **same** hours. Each slice links back to a fast **call page** that repeats the number, hours, ZIPs, and consent text. You don't need new ideas every time. You just need to say the same helpful idea in the shape that fits the room.

Here's a simple weekly rhythm that feels human, not frantic:

Monday: Record the master video and post it on YouTube. Post the matching guide on your site.

Tuesday: Cut the video into a 30-second Short and a 20-second TikTok. Pin your number in the comments.

Wednesday: Post a Facebook Group tip with the same three steps. If rules allow, add your number in the first comment.

Thursday: Make a tall Pinterest pin that says "3 Quick AC Checks" and link it to your call page.

Friday: Answer one Quora question using the same steps and safety note. Link to your Expert page.

Weekend (if allowed): Post in a community board with a short angle for your city ("dust storm filter tip").

Notice what stays the same: the steps, the safety note, the number, the hours, and the tone. The only thing that changes is the **shape** and the **first line**. On TikTok your first words might be "AC blowing warm?" On YouTube it might be "AC not cooling? Try these." On Quora it might be "Three quick checks can help."

Set up **tracking** so you can see which slices move the phone. Use a unique number for YouTube, a unique number for TikTok, and so on. If you can't get that many numbers, at least use one for video sites, one for community posts, and one for source-request links. On your call page, match the number to the place the click came from. Your reports will then show **connected talk time** and **acceptance** by channel. You'll learn that, for example, YouTube calls average 2:10 after connect, while X (Twitter) calls average 1:25. You'll invest more in YouTube next week.

Keep a tiny **content library** so repurposing gets faster over time. Save your best lines: "If you can't see light through the filter, replace it." Save your best photos: a clean filter, a breaker, a thermostat. Save your best openings. Save your call line with the recording note. When you sit down to make slices, you aren't starting from zero. You're pulling from shelves.

Link your slices together. In your YouTube description, link to your blog guide. In your Quora answer, link to your Expert page. In your Reddit post, link to a clean checklist page with a call button. In your Pinterest pin, link to the same call page. Internal links on your site connect the blog guide to the pillar page, and the pillar page back to the guide. This web of links keeps readers inside your system until they are ready to call.

Make time your friend. Hot week? Push "not cooling." First cold snap? Push "no heat." Big dust storm? Push "filter check." You don't need to invent brand-new advice every day. You do need to **publish the right advice on the right day**. That's how you feel present without feeling busy.

Use **transcripts** to speed everything up. If you record a master video, create a transcript. From that text, copy the best lines into your blog.

Trim them into a Quora answer. Cut them into a thread on X. Mark lines that felt clunky and fix them for next time. Over a month, your words get tighter. Tighter words get more taps.

Build a **content map** on your site. Each master guide should link to your pillar page ("AC Repair in Phoenix") and to one or two closely related spoke pages. Each spoke should link back to the guide when it makes sense. This is easy to do and helps search engines see you as a real resource. It also gives readers a clear path to the call button without getting lost.

Watch your **acceptance**, not just views and likes. Some slices will go "viral" and bring you junk. Other slices will get small views and bring you calm, local calls that pass the timer. The second group pays you. Keep your eye on the phone log. The phone tells the truth.

A small story shows the loop. On Monday, you post "AC Not Cooling? 3 Quick Checks (Phoenix)." Tuesday's Short brings two calls. Wednesday's Facebook tip brings three. Thursday's Pinterest pin brings one. Friday's Quora answer brings one. That's seven calls in five days from one master piece and five slices. Five pass 90 seconds. The next week, you run the same wheel for "AC leaking water." You do this all summer. The work piles up in your favor. That is the repurposing framework: one seed, many helpful fruits, one steady phone line.

S8. AI-assisted content QA

AI can be a smart helper for **quality control** if you use it with care. It can spot confusing lines, check reading level, catch repeat wording across many pages, and remind you where your hours or ZIPs don't match. It should **not** invent facts, set your legal policy, or replace human review. Think of AI like a calm second pair of eyes that works fast and never gets tired.

Start by teaching your helper what "good" looks like. Create a short **QA checklist** you run for every page: sixth-grade reading level, three short steps, one safety note, hours shown near the call button, ZIPs listed, consent text by the form, recording note near the number, city name present, and a clear link back to your pillar page. Keep this checklist in a file. When you paste a draft into your AI helper, ask it to test each item and report "pass/fail" with exact lines that failed.

Ask AI to **simplify**, not to bloat. If a sentence is long, say, "Rewrite this at sixth-grade reading level in 20 words or less, same meaning." If the page has jargon, say, "Replace jargon with plain words a homeowner would say." Keep your own voice. If the helper makes the line too cute or too formal, dial it back.

Use AI to check for **duplication** across programmatic pages. Paste two city pages and ask, "Show me identical or nearly identical sentences. Suggest safe, local edits for one of the pages." The helper can point out lines like "We help homeowners every day" that appear everywhere. You can then swap in a local fact: "In Tempe, dust storms clog filters fast in June." Tiny changes like this keep pages unique without wasting time.

Run an **accuracy pass** on facts that matter. If you mention a safety step, ask AI, "Is this safe for a homeowner? If not, explain in one line." Then check its answer yourself. AI can miss edge cases. If any step might be risky (like opening panels), err on the side of "stop and call a pro." Safer pages build trust and longer calls.

Use AI to scan for **policy risks**. Paste your opt-in line and ask, "Does this say people agree to calls or texts, message/data rates may apply, and how to stop texts (STOP)?" If anything is missing, fix it. Paste your call script opener and ask, "Does this include a recording notice and a clear question asking to continue?" Then use that line on the phone. The page and the script should match.

Check **consistency** across pages. Ask, "Find all hours and ZIPs mentioned. Do they match?" If one page says 8–6 and another says 9–5, the helper should flag it. Make the change once and save the correct line in your library so you don't repeat the mistake.

Let AI help with **reading flow**. Ask, "Where might a reader stop or feel confused? Suggest two places to add a sub-headline or a bold line that keeps them moving to the call." Then add a small, helpful bold line like **Call 8–6; after hours we schedule a morning call-back.** Keep bold lines short.

Use AI to build **summaries** that feed other slices. Paste your master guide and ask, "Give me a 30-second script with the three steps, a safety note, and this call line: [your line]." Record that for TikTok. Ask, "Give me a Quora answer version under 120 words." Paste that into Quora and add your disclosure. AI speeds reshaping, but you still check every word before you post.

Keep AI away from **legal claims**. Do not ask it, "Is our consent text compliant?" Laws change by place and time. AI can miss updates. Use AI to spot missing parts, but rely on your counsel or your compliance guide from this course for the final say.

Use AI to red-team your page for **trust**. Ask, "What on this page might make a visitor worry or bounce? Suggest fixes in one line each." It might say, "Move hours above the fold," or "Make the phone number bigger," or "Say which ZIPs you serve." Simple edits like these can add thirty seconds to average talk time.

Protect privacy. Never paste full call transcripts or private details into online tools unless you have a safe, approved setup. If you need to test wording from a transcript, strip names, numbers, and addresses first. Or run AI locally/privately if your tools allow.

Keep your **human review**. Before you publish, read the page out loud. If you stumble, visitors will too. Tap the button on your phone. If it's hard to reach, make it bigger. If the page takes too long to load, shrink the image. AI is helpful, but your thumb test beats any score.

A short story shows the gain. You paste your "AC not cooling" page into your AI helper with your checklist. It flags a long sentence and a missing "STOP to end" in your form. You fix both in three minutes. It also sees identical "about us" lines on Tempe and Mesa pages. You add one local line to each. The next week, connected talk time from these pages climbs by 20 seconds. Acceptance rises. That is AI as a quiet editor: fast, careful, and always checked by you.

Make this process simple. Draft the page. Run the AI checklist. Fix the items. Do your thumb test on a phone. Publish. Repeat. Over time, your pages get clearer, your voice stays steady, and your calls grow without guesswork.

S9. Local citations

A **local citation** is a public listing of your business name, phone number, and (if you have one) address. Think of Google Business Profile, Apple Business Connect, Bing Places, Yelp, Nextdoor Business, your chamber of commerce, and local directories. Clean citations help people find you. They also help your map-pack listing look real. If you operate a brand (not just a publisher page), citations are a free way to build trust and calls.

Your goal is simple: use the **same** name and phone everywhere, keep your **hours** the same, choose a **category** that fits, and add a fast **website link** that points to your call-optimized page. If you use a **tracking number** (good idea), make it your main number in most listings and keep your traditional line as a secondary number on Google. This keeps your tracking clean while protecting your history.

Start with the big three: Google, Apple, Bing. Claim or create your listings. Use your real business name only. Pick "HVAC contractor" or your true category. If you go to customers, set yourself as a **service-area business** and hide your street address. Add your **service areas** by city or ZIP. Set your **hours** and keep them current. Use your registered **tracking number** as the main phone. In Google, add your main line as "additional phone." This is common and safe when done once and kept stable.

Move to key **local** and **sector** sites. Claim Yelp, Nextdoor Business, your chamber of commerce listing, and any well-known city directory. If your area has a strong neighborhood blog with a directory, ask to be listed. On each site, copy your name, phone, hours, and a two-line description in the same voice you use on your site: "We connect Phoenix homes with licensed AC techs, 8–6, Mon–Sat. Calls may be recorded." Keep photos real and bright. Skip stock.

Make a simple **spreadsheet** to track where you listed. Save columns for site name, URL of your listing, the email you used to claim it, the phone shown, and the "last checked" date. Once a quarter, click through your list to confirm nothing drifted. If a site changed your hours by mistake, fix them. Small checks prevent big confusion.

Avoid **mass-blasting** to hundreds of low-quality sites. Ten strong, clean listings beat 200 junk ones. Low-quality sites can show wrong info or sell your data. Focus on places real people and phones use: Google, Apple, Bing, Yelp, Nextdoor, chamber, and a few city blogs.

Watch your **name format**. If your legal name is "Cool Air," use that everywhere. Don't add "Cool Air Phoenix AC Repair" in one place and "Cool Air HVAC" in another. Pick one. If you truly use a DBA with the city name, then use it everywhere. Mixed names cause doubt.

Use **UTM tags** on the "website" link in each listing so you can see clicks by source. For example, on Yelp, set your website URL to https://your-site.com/ac-repair-phoenix?utm_source=yelp&utm_medium=profile. On your call page, show the same number that's on the listing. Now your analytics and phone log line up.

Check your **Apple** listing carefully. Many iPhone users tap "Call" straight from Apple Maps. If your number is wrong there, you will miss calls. Apple Business Connect lets you control that entry. It's free. Claim it. Keep it current.

If you move or change numbers, plan the change. Update Google, Apple, and Bing first, then the others that same week. Keep the old number as a secondary on Google for a while so repeat callers still reach you. If you must change numbers because a carrier marked you "Spam Likely," fix your dialing first (no late-night auto retries, no rapid redials), then switch once and settle. Frequent flips look messy.

Beware of **duplicates**. If a site has two entries for your business, ask support to merge them. Duplicate listings split reviews and confuse callers. Clean beats more.

Use citations to support your **map-pack** work. Add a few new photos to Google each month. Ask for reviews after jobs (see S10). Answer Q&A weekly. Then, once a quarter, make sure your citations still match your Google info. This "NAP harmony" helps machines and humans trust you.

A quick story shows the impact. You set up Google, Apple, and Bing with your tracking number, hours 8–6, and Phoenix/Tempe/Mesa as service areas. You claim Yelp and Nextdoor Business with the same info. You add your website link with UTM tags on each. Over the next month, your phone log shows 40 calls from Google, 8 from Apple, and 6 from Yelp. Twenty-five pass 90 seconds. You spend no ad money. You simply made it easy for people to tap "Call" wherever they found you.

Citations are not exciting, but they are the ground under your feet. Solid, level ground helps everything else—SEO pages, pins, podcasts—work better. Do the boring work once, keep it tidy, and your "Call" button will always be one tap away in the places your neighbors trust.

S10. Review generation

Reviews are proof. They show real people had a real result. In pay-per-call, reviews also shape **who** calls you and **how long** they stay on the line. Calm, detailed reviews attract calm, ready callers. Shady, copy-and-paste reviews scare people away. If you operate a brand, build a steady, honest review system. Keep it simple. Keep it ethical.

Ask at the **right moment**. Right after a successful visit or fix, send a short text to the customer. Use the same number you used during the job if you can. People trust a known thread more than a new number. Your message can be:

"Thanks for letting us help today. If we earned it, would you leave a quick Google review? It helps local families find us. [review link] — Cool Air (8–6)."

Keep it one line. No pressure. No bribes. Do **not** offer gift cards or discounts for reviews. Many platforms ban incentives. You want honest notes, not bought praise.

Make the **link easy**. Use the direct Google review link for your Business Profile. Test it on a phone. It should open the review box right away. If a customer says they don't use Google, have a backup link (like Facebook or another local platform) ready, but focus on Google first because it feeds the map-pack.

Ask your team to **plant the seed** before the text goes out. On the phone or at the end of the job, say, "If we did well, a short review helps neighbors find us." This makes the text feel expected, not random. Tiny lines like this double your response.

Coach for **specifics**, not stars. You can't tell people what to write, but you can hint at helpful details: "What did we fix?" "How fast did we respond?" "Which ZIP are you in?" Specifics make reviews feel real. They also add local words that help you show up for the right searches.

Reply to **every** review. Keep replies short and kind. "Thanks, Ana—

glad we could get you cool again in 85008." If someone leaves a low review, start by thanking them, apologize for the trouble, and invite them to call so you can make it right. "We're sorry, Ben. That's not the standard we aim for. Please call 602-555-0100 (ask for Jay) so we can fix this." Do not argue in public. Many readers judge you by the reply, not the star count.

Make reviews part of your **weekly rhythm**. Every Friday, look at new reviews. Share good ones with your team. Pick one learning from a bad one and fix a small thing. Maybe calls after 5:30 p.m. need a clearer message. Maybe techs need a new checklist for water leaks. Reviews teach you where callers feel pain. Fixing those pains adds seconds to calls and lifts acceptance.

Show your reviews **honestly** on your site. You can embed your Google reviews on your location page so visitors see fresh notes. Do not copy text from Google and mark it up as if it lives on your site—especially not with "Review" schema. Only use **review schema** for reviews you collect and display on your own site **about your own service**, and only if you truly control and host that content. Never fake it. Never buy reviews. That can get you banned.

Choose gentle **moments to ask**. In summer, after a heat wave, your thank-you text with the review link can mention the week: "We know it was a hot one—thanks for being patient." In winter, mention the cold snap. People respond to human notes that match the moment.

Track your **ask rate** and **review rate**. If you do 100 jobs and ask for 80 reviews, and you get 20 reviews, your rate is 25%. That's great for many services. If you only ask 20 times, you won't reach 20 reviews. Most teams need a reminder in the CRM so the ask goes out every time. A habit beats a push.

Make it easy to **find** your best reviews. Pin two or three at the top of your Google profile with responses that show your voice. On your site, add a small "From our neighbors" box near the call button. One or two short quotes with a first name and ZIP is enough. "Ana, 85008: 'They picked up fast and had my home cool by evening.'" These little boxes ease worry and lift tap-to-call.

Protect privacy. If you share a story on your site, do not show last names or addresses. Get permission before using any photos. Ask in plain words: "Can we share this photo on our site?" Respect a "no." Trust is slow to earn and quick to lose.

Tie reviews back to the **map-pack**. Good, steady reviews help you show up. They also help people pick you when you do show up. When your star rating goes up and your last ten reviews are calm and real, people tap "Call." You can feel it. Your GBP Insights will show more calls. Your phone log will show longer calls. Keep feeding that loop.

A short story shows the change. In May, you start asking after every job. You send a simple text with the Google review link. By June, you have 18 new reviews. Most mention "fast response," "clear steps," and "Phoenix." Your map-pack calls climb. Average connected talk time grows by 25 seconds. Your buyer notices higher acceptance. All you did was ask, reply, and keep your word.

Review generation is not a campaign. It is a **habit**. Ask kindly. Make it easy. Reply to everyone. Learn from the bad. Share the good. When you do this every week, your online voice sounds like your real one—steady, helpful, local. That voice invites the right kind of caller, the kind who listens, stays on the line, and becomes a paid unit. That is the heart of pay-per-call done with care.

12

Free Traffic — Social & Community Deep Dives

S1. Long-term Facebook Group authority building

Facebook Groups feel like a town hall that never closes. Neighbors ask for help, share tips, and tell stories. You can become a trusted helper there, but only if you act like a good neighbor for months, not just a day. Authority is the quiet power you earn when people say, "Ask them. They'll know." That power turns into phone calls that are calm, local, and long enough to pass your buyer's timer.

Start slow. Join two or three groups where your topic fits and your city is clear. "Phoenix Homeowners," "Phoenix Moms," or "Tempe DIY Fixes" are good examples for home services. Read the rules before you post anything. Some groups allow business posts once a week. Some allow tips only. Some ask you to put your phone number in the comments, not the post. If you're unsure, send a short note to the moderators: "Hi, I share safe AC tips for Phoenix. No sales. Is it okay if I post a short checklist before the first heat wave? If it helps, I'll put the number in the comments, not the post." That one message shows respect and opens doors.

Fix your profile so you look real. Use your name and a simple photo. In your bio, write one honest line: “I run a local AC help line in Phoenix (8–6). I share quick checks.” If you list your phone, do it once. Do not paste the number in every field. It looks pushy.

Your first month is about showing up with help. Twice a week, answer someone’s question with two short sentences and one safe step. “AC blowing warm? Check your filter. If you can’t see light through it, replace it.” Add a kind note at the end: “If you’re still stuck, I can share a couple more safe checks.” Do not throw your number into every comment. Wait until someone asks for it, or until the rules allow a comment with your number. If numbers are not allowed at all, point people to your profile, where your number and hours are listed.

After a week or two, post your first “pillar” value post. A solid topic is “3 Quick AC Checks Before You Call a Tech.” Keep each step to two lines. Add one safety line: “If you smell burning or hear buzzing, stop and call a pro.” Use a simple photo you took yourself, like a clean filter next to a dirty one. At the end, write a polite note to the admins: “Mods, this is meant to help neighbors; remove if not allowed.” If group rules say no numbers in posts, put your number in the first comment with a gentle line: “If you try these and still have trouble, Phoenix help line: 602-555-0100, 8–6. Calls may be recorded.” If numbers are not allowed even in comments, add: “Number is on my profile.”

Be fast in replies. People post when they need help now. If you answer within minutes, your comment rises. If you wait a day, someone else will fill the space. Keep answers short. Use the person’s words. If they say “vents blowing warm,” use that phrase back. It shows you listened.

Make friends with moderators. They work for free. Keep their load light. Do not report every small thing. Do not argue in public. If you see a wave of spam, send a quiet note: “Happy to write a clean guide for common AC problems if that helps cut spam.” Offer to write a pinned "seasonal checklist" the group can post under their name. You get visibility without looking like an advertiser, and the group gets a real resource.

Build a steady rhythm. Once a week, share one value post. Once a day, answer one person with a helpful line. Once a month, update your best post for the season. "Update: first 110° week coming—replace your filter early." During storms or heat waves, post a calm checklist and clear hours. "We answer 8–6. After 6, leave a message for a morning call back." Honest hours keep calls longer and cut refunds.

Be careful with claims. Do not promise instant service if your buyer closes at 6. Do not quote prices in the group. It invites fights. Keep your promise small and true: connect, triage, schedule. If you record calls, say so. "Calls may be recorded for quality." Add that line when you share your number. The same line should be in your phone script.

Measure quietly. Use a unique tracking number for each group that allows numbers in comments. If a group does not allow numbers, use one "Facebook Groups" number on your profile and ask callers to mention the group name. In your call log, note the group when you can. Look at connected talk time and acceptance rate by group. You will learn which groups bring ready callers and which bring short, off-topic calls. Spend more time in the first type.

Handle drama with grace. If someone is rude, shrug it off. If someone says "you just want money," point back to your tips. "I post these checks so folks can fix simple things for free. If that doesn't work, our line is open in Phoenix, 8–6." People can feel your tone. Calm wins.

Use "office hours" posts as you grow. Once you are known, post, "Live Q&A from 5–5:30 today—drop AC questions below." Answer each comment and end with, "If you're still stuck in 85008, call 602-555-0100. Calls may be recorded." These windows pull calls fast because people have the problem right now.

Close the loop. When someone says "Thanks, that worked," like their comment and reply, "Glad to hear it." When someone calls and you help them, come back later and add a simple note under your original tip: "Update: we were able to help three neighbors today—stay cool." This is not bragging. It shows the group your help is real.

A small story shows the arc. Week 1, you answer five posts with short tips. Week 2, you share your pillar "3 Quick Checks" post and put your number in the comments per rules. That day you get two calls from the group's ZIPs; both pass 90 seconds. Week 3, a neighbor posts "Who should I call in 85016?" Another member tags you. You reply once with your number and hours. Two more calls come in. Week 4, you do a 30-minute "office hours" post. Three calls follow in the next hour. In a month, you have eight accepted calls from one group, and the moderators like you because you help and you follow rules. Keep that rhythm for a summer and you become the go-to helper. Authority built slow becomes a steady phone.

S2. TikTok Live Q&A into calls

TikTok Live is like a pop-up clinic. People join, ask quick questions, and leave with a simple step or a number to call. Lives can push calls fast, but only if you plan the timing, make the message clear, and keep the advice safe. Remember: many viewers are on a phone, in a hurry, and stressed. Your job is to calm, guide, and give one easy next step.

Start with the schedule. Run Live when your buyer can answer the phone. If your buyer is open 8–6, a 4:30–5:00 p.m. Live on weekdays is strong. People are home, problems show up, and agents can still take calls. Saturday late morning works in summer. Do not run a "call now" Live at 11 p.m. if no one can answer. That creates short, angry calls.

Set up your space and your script. You do not need a studio. A quiet room, a phone on a stand, and window light are enough. Write a small run-of-show on a sticky note: hook, three steps, safety note, call-to-action, Q&A, repeat call-to-action. Keep the words simple. Practice saying them out loud. Speak like you are helping a friend.

Make your on-screen pieces ready. Add a text overlay for your number and hours: "Phoenix help line: 602-555-0100 · 8–6 (Calls may be recorded)." Put the same text in the **pinned comment** so late joiners see it. Put your number and hours in your **bio** too. If you have a call page, set your bio link to that page. The page must load fast and show the same number at the top with a big "Tap to Call" button and the consent text near any form.

Open with a hook. In the first three seconds, say the problem out loud and on-screen. "AC not cooling? I'll share three quick checks, then take questions." People decide fast whether to stay. Clear beats clever here.

Teach the steps. Show a clean filter next to a dirty one. Say, "If you can't see light through it, replace it." Show the breaker and say, "Flip it off and on once." Hold up a thermostat and say, "Set to cool and auto, then wait five minutes." Keep your hands in frame so viewers can copy. Do not open panels. Do not show risky work. If a step could be unsafe, say, "Stop and call a pro."

Give your call-to-action cleanly. "If you're in Phoenix and still stuck, call 602-555-0100, 8 to 6. Calls may be recorded. We'll connect you to a tech today." Say it, pause, and say it again once. Don't rush the number. People need a second to catch it.

Move into Q&A. Tap a question, restate it, give one step if there is a safe step, and remind viewers when to call. If someone asks for a price, be honest: "We can't price without a live check. If you're in 85008 or nearby, we can connect you now." Keep answers short and kind. If trolls join, ignore them or mute them. Don't argue. Your calm tone is your brand.

Repeat your call-to-action every few minutes. New people join all the time. A soft rhythm works: steps, two questions, CTA. Steps, two questions, CTA. Keep the number pinned in the comments. If you have a helper, they can re-pin the number when the chat scrolls fast.

Offer a freebie to raise calls. "We have a 1-page 'AC Not Cooling' checklist. If you call, we can text it—reply STOP to end." Only text if the caller says yes. Log consent. Keep the text short: "Here's the checklist. We answer 8–6. Reply STOP to end."

Run Lives 20–30 minutes. Ending a little early is better than dragging on. When you close, say the number and hours one last time and thank viewers. Save the Live replay if TikTok allows it on your account. The replay can send calls for the next hour as people catch up.

Clip your Live into short videos. Pull a clean 20-second answer and post it with the number in the caption and the pinned comment. These clips keep working between Lives. Put the same clip on YouTube Shorts and Reels if you use them.

Track calls with a TikTok Live number. Use the same number in your overlay, pinned comment, bio, and call page. Watch your log during the Live and for 30 minutes after. You will see calls spike when you say the number clearly and when you answer a question that matches the pain people feel in that moment.

Avoid traps. Do not fake problems on camera. Do not promise "instant visits" if your buyer is booked. Do not say "24/7" if you don't answer at night. Do not ask viewers to DM you their numbers unless you plan to call within minutes and you store consent. Keep it clean: public number, public hours, public safety note.

A real-world example helps. You schedule a Live for Tuesday 4:30–5:00. Your pinned comment says, "Phoenix help line: 602-555-0100, 8–6. Calls may be recorded." You teach three steps, answer six questions, and repeat the number three times. During the Live and the next hour, your TikTok number logs 12 calls. Nine are inside your ZIPs. Seven pass your 90-second timer. You clip a 25-second answer and post it. The next morning, two more calls come in from the clip. That is one half-hour of steady help turning into paid calls—because you kept the message simple and the next step easy.

Do this twice a week during hot weeks. Do it once a week the rest of the season. Over time, people will plan to bring their questions to you. When they trust your Live voice, they trust your phone line. Trust adds minutes. Minutes pay.

S3. YouTube Live streams & community posts

YouTube Live lets you teach and take questions in a place where the replay lives forever. Many viewers watch on TVs or laptops, but plenty watch on phones too. If you make the stream simple, safe, and clear—and if you pin your number in chat and in the description—you can drive long, ready calls during and after the show. Pair Lives with **Community posts** on your channel to warm up your audience and remind them when help is live.

Plan one weekly live show during your season. Pick a steady day and time that match your buyer's open hours. A 30–45 minute show works well. Name it in plain words: "AC Not Cooling? Live Q&A for Phoenix." Set the stream up a day ahead. In the title, include the city. In the description, put your number and hours in the first two lines so they show without clicking "More." Add your call page link with UTM tags. Paste your recording note near the number: "Calls may be recorded for quality."

Prepare a short outline. Start with your promise, teach three safe steps, open Q&A, and end with your call-to-action. Practice saying your number slowly. Make a simple on-screen overlay with your number and hours in the lower third. You can do this with basic streaming tools, but don't overthink it. A printed card held to the camera works if tech fails.

Use **Live chat** the right way. Before you go live, paste your number and hours in a chat message and pin it. If you can, set a chat bot (like Nightbot) to repeat your number every five minutes with a calm line: "Phoenix help line 602-555-0100 · 8–6 (Calls may be recorded)." Turn on **slow mode** if chat flies by so you can read questions. Ask viewers to put their ZIP in their question so you can steer locals to the phone.

Open strong. Say, "AC not cooling in Phoenix? I'll share three checks, then we'll take questions. If you're stuck now, call 602-555-0100, 8–6. Calls may be recorded." This sets the tone and gives an out to people who need help right away.

Teach with props. Hold up a filter and a flashlight. Hold up a thermostat. Show a breaker panel with the main door closed and point where a single breaker is. Never open a live panel. Say what not to do. "If you hear buzzing outside, don't try to spin the fan with a stick." Safety lines build trust and protect people.

Take questions in short bursts. Read the question, answer in one minute, and point to the number if the situation sounds risky or beyond DIY. "If you're in 85008 and that didn't fix it, call 602-555-0100. We'll connect you now." Keep answers kind. If someone asks for prices, say, "We can't price sight-unseen, but a pro can quote you after a quick check."

Repeat your call-to-action three times across the show: once at the start, once at the midpoint, once at the end. Say the number and hours the same way each time. On screen, point to the pinned chat message. In the description, the number should be easy to copy.

Use **Chapters**. After the live ends, add timestamps to your description like "00:00 Start + number, 01:30 Filter, 04:00 Breaker, 06:00 Thermostat, 10:00 Q&A." Chapters make replays useful. People will scrub to the part they need and then call. Add a **pinned comment** on the replay with your number and hours again so it stays at the top of comments forever.

Create **Community posts** to prime and to recap. The day before, post: "Live tomorrow at 5 p.m.: 3 AC checks + Q&A (Phoenix). Number in description. We answer 8–6." The morning of, post a reminder. After the stream, post a recap with one tip and the number. Community posts reach subscribers and sometimes non-subscribers in your area. They keep your name in their feed without ads.

Clip your lives into Shorts. Pull 20–40 second bits where you give a clean answer and include the number in the on-screen text and the description. Shorts earn views while you sleep. They push steady traffic to your call page and to the next live.

Use a unique **YouTube Live** tracking number. Use it in the overlay, in pinned chat, in the description, and on your call page. In your phone log, watch for spikes during the live and the hour after. Also note calls after someone watches the replay with chapters. You will often see small spikes days later when the weather changes.

Keep the tone warm and local. Mention your city in answers. "Phoenix gets dust—filters clog fast." Mention hours and ZIPs out loud so you filter in the right callers and filter out folks you can't serve. Honest filters make calls longer because the people who call are the people you can help.

Watch your **replay retention** in YouTube analytics. If viewers drop off early, tighten your open. If chat questions spike when you show the filter, put that earlier next time. Small tweaks increase watch time, which increases replays, which increases calls.

A simple example shows the effect. You schedule a Wednesday 5 p.m. live. Title: "AC Not Cooling? Live Q&A for Phoenix." Description line 1: "Phoenix help line: 602-555-0100 (8–6). Calls may be recorded." Pinned chat: same number and hours. You teach three steps, answer eight questions, and repeat the number three times. During the live, your YouTube number logs nine calls. Five pass 90 seconds. The replay gets 700 views in a week with chapters. Four more calls come from the replay. You clip two answers into Shorts. Each Short sends one more call. One live session becomes a week of calls because your number and message were easy to find in four places.

Do this weekly in season. Rotate topics. Keep the same structure. Over time, your live room becomes "the place" locals go when something breaks. That trust moves from chat to phone without friction.

S4. Reddit AMAs & mod relations

Reddit is a network of forums ("subreddits") with their own rules and culture. Some are strict. Some are friendly. All dislike spam. An **AMA** ("Ask Me Anything") is a planned Q&A thread where the community asks questions and you answer. When done with care, an AMA can build a lot of trust and drive calls—but only if you put the community first.

Start with the right subreddits. Look for your city sub (like r/phoenix) and topic subs (like r/HomeImprovement or r/HVAC). Read each sub's rules. Some allow professionals to answer but ban self-promotion. Some allow AMAs if you ask mods first. Spend two weeks answering normal questions in a helpful way before you pitch an AMA. Use plain words. Never drop your phone number in a place that bans it. If links are allowed, link to a clean checklist page with no pop-ups and a clear privacy note.

Pitch the mods with a short, honest message. "Hi mods, I'm Jay. I run a local AC help line (Phoenix). I'd like to host a one-hour AMA before the first heat wave. I'll share safe checks, what not to do, and when to call a pro. No prices, no hype. I can list my number in my profile only, not the AMA, if you prefer. Let me know your rules and a good day/time." Mods are busy. Be patient and kind. If they say no, thank them and keep helping in comments. If they say yes, follow their instructions exactly.

Write your AMA post like a friendly letter. Title it in reader words:

"AMA: AC Not Cooling? Phoenix helper answers safe checks + when to call." In the body, say who you are in one plain sentence. List what you will cover in short lines. Set limits: "I can't diagnose without seeing it. I'll share safe checks and point to the next step." Add a safety note. If mods allow, add: "My profile lists a local help number (8–6). Calls may be recorded." If mods prefer no phone mention, skip it here and keep your number only on your profile.

Be present for the whole hour. Answer fast and kindly. Use the person's words. If someone asks, "Unit clicks but fan won't spin," say, "If you hear buzzing at the outdoor unit, do not push the fan—call a pro." If someone asks, "Do you serve 85016?" reply with one line and, if rules allow, say your hours. Do not argue. If a thread gets heated, step out and keep answering others.

Tag your post with the right **flair** if required. Mods often give you special AMA flair. Use it. It helps readers find you and tells auto-filters to leave your post alone.

Place your resources in the comments only if allowed. A clean move is to comment "Here's a 1-page checklist we made (no ads)" and link it, then reply to that comment with new tips over time. Do not paste a phone number in the post if the rules ban it. Keep your number on your profile. If a reader asks for it and rules allow, you can reply with it then.

After the AMA, write a short **thank you** comment and invite people to read the checklist. If mods allow, you can write a recap post a week later with the top five questions. Link to the original AMA for transparency. Keep your tone the same: calm, local, safe.

Track calls with a **Reddit profile** number and a clean call page link on your profile only. Do not put tracking in the AMA if the rules ban links. Many Redditors will click your profile to see who you are. There they should see one line and your number. "Phoenix help line 602-555-0100 • 8–6 (Calls may be recorded)." If someone DMs you asking for help, ask them to post their question in the thread so others learn too, or to call if it's urgent and they are local.

Mind privacy. Never ask for addresses in public. Never post photos from jobs without permission. If a story could identify someone, keep it general. Mods care about safety and consent. So should you.

Recycle the AMA into your **site content**. Copy your best answers (no usernames) into a blog post called "Top AC Questions from Phoenix Reddit AMA." Link that post to your pillar page and your call page. This gives your hard work a second life in search. It also shows future mods you do things the right way.

A sample path shows the flow. You spend two weeks helping in r/phoenix and r/HomeImprovement. You ask mods for an AMA and get a yes for Tuesday at 5 p.m. You post the AMA with rules, safety lines, and a note that your number is on your profile. For an hour, you answer fast and kind. The thread gets 120 comments. That night, your Reddit number logs five calls. Three pass 90 seconds. The next day, two more calls come from people who read the AMA after work. You thank the mods. A month later, they invite you back before the next heat wave. You didn't buy ads. You honored the room. The room sent you calls.

Reddit rewards patience, honesty, and respect. If you bring those, and you keep your phone path clean and simple, AMAs can become a seasonal engine of trust and calls.

S5. Discord community creation

Discord is like a small, private town square you run yourself. It is not for blasting ads. It is for building a community around your help. It works best when you already have some audience from YouTube, TikTok, or Facebook Groups. Your Discord gives them a quiet place to ask questions, get quick checks, and call when the do-it-yourself steps fail. Done right, it becomes a steady source of well-prepared calls that pass your buyer's timer.

Design the server around simple paths. Think in three spaces: **start here**, **get help**, and **call us**. In "start-here," post your rules in plain words: be kind, no spam, no unsafe advice, no posting addresses, and no direct messages to members without consent. Post your hours and your city. Post your recording note for calls: "Calls may be recorded for quality." Pin a link to your call page with a big button and your consent text. Keep this channel read-only so it stays clean.

In "get-help," let people ask quick questions. Pin a short "before you ask" message: check the filter, check the breaker once, check the thermostat. Ask posters to include their ZIP and a photo if safe. Set the tone by answering with short steps and safety lines. Always invite a call when DIY fails and the person is inside your service area. "If you're in 85008, call 602-555-0100, 8–6. Calls may be recorded." Keep your replies kind and small. You are not trying to solve everything in chat. You are trying to guide people to a safe path.

In "call-us," keep only one message: your number, your hours, and your call page link. Pin it. Do not allow chat here. This channel is a lighthouse. When people want to call, they should find the info in one tap. Use a unique tracking number for Discord so you can measure it.

If you have bilingual help, make a "#español" channel. Post the same rules in Spanish. Post your Spanish call line and hours if you have them. Do not send Spanish speakers to English-only agents. That leads to short calls and refunds. Build the channel only when you can answer it with respect.

Set up **roles** to protect the space. Give "Moderator" to one or two trusted people. Give "Helper" to you and any trained team members. Give "Neighbor" to everyone else. Turn on community tools like slow mode in busy channels. Consider a simple "welcome" gate where new members must agree to rules before posting. This keeps bots out.

Host **office hours**. Pick a steady hour each week, like Wednesdays at 5 p.m. Post "Office hours starting now—drop your AC questions." Answer for an hour. Remind people of the number at the top and bottom of the hour. End on time. Steady beats random.

Use a simple **form bot** or link to a Google Form for callback requests. Keep the form short: phone, ZIP, problem, consent checkbox. On submit, the form should post to a private channel that only your team can see so an agent can call within minutes. Keep the consent line clear: "By submitting, you agree we can call or text you about this request. Reply STOP to end." Honor STOP across all tools.

Seed the server with helpful **resources**. Create a "guides" channel and post your one-page checklists. Post a "heat wave" guide and a "first cold snap" guide. These should match your site pages and your live scripts. Keep the tone the same. Link to your pillar page for deep dives.

Keep the culture human. Celebrate small wins. When someone says, "The filter fix worked," reply "Great job!" When someone calls and gets help, ask them to update the thread if they can. Do not pressure reviews here. That belongs in your post-job texts. In the server, your goal is peace, not points.

Grow slowly. Invite your YouTube and TikTok viewers to join for weekly office hours. Put the invite link in your bios. Ask partners like a realtor or a neighborhood page to share your invite when storms or heat waves hit. Do not chase big numbers. A small, healthy server is better than a giant, messy one. Fifty active neighbors who learn and call are worth more than five thousand idle names.

Watch your metrics monthly. How many questions did you answer? How fast? How many calls came from the Discord number? What was the average connected talk time? How many were accepted? If calls are short, check your rules and your guidance. Maybe people expect repair in chat. Remind them what you do: quick checks, safe tips, connect to a pro.

Avoid risk. Do not diagnose dangerous issues in chat. Do not allow members to post addresses or phone numbers in public channels. Ask them to call if they are local or to use the form. Do not let unknown "pros" advertise. Your space is for safe help, not free ads. Remove bad actors fast.

A simple success path looks like this. You start a Discord with three channels: start-here, get-help, call-us. You tell your YouTube Live viewers about weekly office hours. Twenty join in the first week. Ten ask questions. You answer kindly and point locals to the phone. Your Discord number logs six calls during office hours. Four pass 90 seconds. In week two, you add a "guides" channel. Someone finds your "AC not cooling" checklist at 11 p.m., replaces their filter, and thanks you the next day. Someone else calls at 8:05 a.m. after your office hours reminder. By week four, the server feels like a quiet porch where neighbors drop by, get help, and call when they need more. That steady, human rhythm is what makes Discord work for pay-per-call.

Keep it light. Keep it local. Keep it safe. A small community you care for will care for you back—with trust first, and calls second.

S6. Telegram broadcast channels

Telegram has two main tools: **channels** and **groups**. A channel is one-way. Only you post. Followers read and tap. A group is two-way chat. For pay-per-call, a **broadcast channel** works best. It lets you send short, clear updates with a simple "call now" at the end. There is no noise, no spam, no arguments. People join because they want quick help and alerts. When you do this right, a single post can push calls in minutes.

Start with a clean setup. Create a public channel with a simple name, like "Phoenix AC Help." Use a real logo or a clear photo. Write a short bio: "Quick checks + heat wave alerts for Phoenix homes. We answer

8–6. Calls may be recorded." Pin one **welcome post** at the top. In that post, put your **tracking number**, your **hours**, your **service ZIPs**, and a **call page** link that loads fast on phones. Add your consent line on the call page: "By tapping 'Call,' you agree we can call or text you about AC help. Reply STOP to end."

Plan your content like a weather forecast. Your readers need help **now**, not someday. Share short, useful posts at the right times. For example, the night before a heat wave, post: "Heat hits 110° tomorrow. Do 2 fast checks at 7 a.m.: replace a dirty filter; set thermostat to cool + auto and wait 5 minutes. Still warm in 85008/85016/85018? Call 602-555-0100, 8–6. Calls may be recorded." Keep the lines short. Put the number once. End clean.

Use **three post types** again and again:

1. **Alert + checks + CTA.** "Dust storm today—filters clog fast. Try these two checks. Call if stuck."
2.
3. **Tiny how-to.** A 20-second screen recording or photo set showing a safe step (filter, breaker, thermostat).
4.
5. **Story + lesson.** "Ana in 85008 had warm air. Filter looked like a sweater. New filter + 5-minute wait fixed it."
6.

Always end with the same calm line: "In Phoenix? Call 602-555-0100, 8–6. Calls may be recorded." If you speak Spanish, post the same message in Spanish right after, or run a second Spanish channel and link the two.

Keep posts light and fast. Telegram supports images, short clips, voice notes, and polls. A quick voice note can feel human: "Heat wave today. Two checks, then call if stuck." Do not dump long videos. People open

Telegram for quick hits. Use **scheduled posts** at times that match your buyer's open hours. A 7:45 a.m. post catches folks before work. A 4:30 p.m. post catches folks before close.

Grow the channel with **clean invites**. Put the join link on your call page and in your email footer. Add a QR code to your flyers. After a helpful call, ask: "Want heat wave alerts and quick checks on your phone? Join our free Telegram channel." Never add people without asking. Telegram is an **opt-in** space. Respect that. If someone wants fewer pings, tell them how to **mute** the channel or change to "silent posts." When people feel in control, they stay.

Use a **unique number** for Telegram. Show it in the pinned post and at the end of every alert. Put the same number on the call page you link from Telegram. In your phone system, tag calls as "Telegram." In two weeks you will see which posts trigger the longest calls. Alert posts tend to create calm, ready calls because people already tried the safe steps.

Plan the week like this. Monday, a tiny how-to at 9 a.m. Wednesday, a story post at noon. Friday, a weekend alert at 4 p.m. During heat waves, add a morning and late-afternoon post. Keep weekends lighter unless your buyer is open. If your buyer closes on Sunday, do not push "call now" on Sunday. Offer a callback form instead: "After 6 p.m., use this form for a morning call-back." Put consent next to the form button. Keep your promise.

Moderation is simple on a channel: only you post. But you can attach a **discussion group** if you want two-way talk. If you do, appoint one or two moderators. Keep rules pinned. Do not allow unsafe advice. If a chat grows messy, switch it off for a day. Your channel is the main asset. Protect the signal.

Avoid common mistakes. Do not overpost. Two or three posts a week is fine most of the year. During heat waves, daily is okay, but keep it short. Do not post prices. Do not post "24/7" if you do not answer at night. Do not edit old posts with new hours—people won't see the edit.

Post a fresh update instead. Do not forget your recording note on the call page and in your call script.

A quick story shows the flow. You launch “Phoenix AC Help” and pin a welcome post with your number, hours, ZIPs, and link. Forty neighbors join from a QR on your flyer and a link on your call page. On Wednesday, you post at 4:30 p.m.: “110° tomorrow. Replace filters tonight. If still warm in 85008/85016/85018, call 602-555-0100, 8–6. Calls may be recorded.” At 5 p.m. and 9 a.m. the next day, your Telegram number logs seven calls. Five pass 90 seconds. This is free flow from a clean, calm push. You keep the rhythm. The channel becomes a steady tap, not a fire hose. Your buyer hears prepared callers who already tried the basics. Timers clear. Everyone wins.

S7. WhatsApp communities (with consent)

WhatsApp is where people talk to friends and family. Treat it like a **home**. Only message people who **ask** to hear from you. That is consent. It protects trust and keeps you safe. With consent, WhatsApp is powerful. Messages land. People reply. Calls happen fast.

Use **WhatsApp Business** so you can set a profile, quick replies, a catalog (if needed), and an **away message**. Add your logo, your hours, and your service area in the profile. Set your business hours to 8–6 (or your true hours). Add a simple away message: “Thanks for your note. We answer 8–6. If urgent and you’re in Phoenix, call 602-555-0100. Calls may be recorded.” This catches late messages without making false promises.

Choose the right structure. If you want one-way updates, create an **Announcements group** (or a broadcast list). Only admins can post. If you want two-way chat, create a **Community** with an “Announcements” channel and optional sub-groups for certain topics. For pay-per-call, start with **Announcements** so your number stays clear and you avoid noise. You can add a Q&A group later if you have moderators.

Build your list the right way. Ask permission at the end of a helpful call: "Would you like heat wave alerts and quick AC checks by WhatsApp? We send 1–2 messages a week. Reply YES and we'll add you. You can reply STOP any time." Log the "YES" with the date. If you collect numbers via a form, add a checkbox: "I agree to receive WhatsApp messages about AC help. Reply STOP to end." Do not add anyone who did not ask. Do not import random contacts. Do not buy lists. Ever.

Send **short, useful** messages. A typical alert looks like this:

"Heat hits 110° today. Two quick checks: replace a dirty filter; set thermostat to cool + auto, wait 5 minutes. Still warm in 85008/85016/85018? Call 602-555-0100 (8–6). Calls may be recorded."

Keep the number and hours in the message. Do not make people click to find them. If you add a link, make it short and fast. Use UTM tags so you can track clicks. If you share a picture, use a clean photo you took yourself. Compress it so it loads fast.

Respect time. Two messages a week is plenty most months. During heat waves, one per day is okay. Avoid late-night pings. If your buyer is closed, do not push "call now." Offer a callback option: "We open at 8. To request a morning call, tap here [link]. Reply STOP to end." Honor STOP. Remove that number from your WhatsApp list and your SMS list. Sync your suppression list across tools.

Use **quick replies** for common questions. Save "Hours + number," "ZIPs we serve," and "Safe checks" as shortcuts. When someone replies "I'm in 85018, still warm," you can answer fast and invite a call: "We serve 85018, open 8–6. If you're stuck, call 602-555-0100 now. Calls may be recorded." Fast, kind replies lift call rates.

Label threads in WhatsApp Business so you can follow up if needed. Labels like "Hot lead," "Callback set," and "Out of area" help you see patterns. If many messages are out of area, tighten your copy to name

ZIPs sooner. If people ask at night, add "after hours" text to your profile and your broadcast footer.

Combine WhatsApp with other free channels. Tell your Facebook Group you have a small, free WhatsApp list for heat wave alerts. Add the invite link on your call page. Put a QR code on your flyer. Ask happy callers if they want the list. Keep it **opt-in** always. This slow build makes a loyal list that actually reads.

Use a **WhatsApp tracking number**. Show it in your messages and on the page your link goes to. Tag calls from that number in your phone system. After a month, look at average talk time for WhatsApp calls. You will often see longer times because readers tried your checks first and are local.

Watch common pitfalls. Do not send long videos. They stall. Do not paste a giant block of text. Use 3–5 short lines. Do not promise "24/7" if you are not. Do not ask for credit cards or private data in chat. Move sensitive steps to the call with your buyer. Keep records simple and safe.

Here is a small, real flow. On Monday at 4:30 p.m., you send: "Dust storm today. Replace filters tonight. If AC is still warm in 85008/85016/85018, call 602-555-0100 (8–6). Calls may be recorded." Within an hour, your WhatsApp number logs four calls. Three pass 90 seconds. On Tuesday at 8:05 a.m., you send a gentle morning tip. Two more calls follow. You never spammed. You asked first. You wrote like a neighbor. The list trusts you, and trust turns into minutes on the phone.

WhatsApp works because it is close to the person. Use that closeness with care. Ask before you message. Keep the messages short. Keep the number big. Keep the hours clear. Offer STOP every time. When you do, people stay, and the right people call.

S8. Instagram Reels & Story CTAs

Instagram is visual and fast. **Reels** grab attention. **Stories** move people to action with stickers and links. If you run a brand, you can turn simple how-tos into Reels and then nudge viewers to call with Stories. The key is to speak to locals, keep your advice safe, and make the next step one tap.

Fix your profile first. Switch to a **Professional Account** so you can add a **Call** button. In your profile, write one line: "Phoenix AC help · 602-555-0100 · 8–6 (Calls may be recorded)." Add your **website link** to a clean call page with a big button and consent text. Use a profile picture that is clear at small size.

Use a simple Reel format that you repeat every week. Think 15–30 seconds. Use this flow. First, a hook on screen and out loud: "AC not cooling?" Next, three quick cuts showing three safe steps: filter, breaker once, thermostat to cool + auto and wait 5 minutes. Last, a calm CTA: "In Phoenix? Call 602-555-0100, 8–6. Calls may be recorded." Add **captions** so people can read without sound. Put your number and hours as on-screen text in the last three seconds. In the **caption**, repeat your number, hours, and ZIPs. Some viewers will read first and call later.

Tape with your phone. Stand by a window or outside in shade. Avoid echo. Hold the phone steady. Keep your hands in the shot when you show steps. Do not open panels or show risky work. If a step could be unsafe, say, "Stop and call a pro."

Post Reels when your buyer is open. Late mornings and early evenings often work. Test times. Watch when calls spike. A Reel at 11 a.m. can push lunch calls while agents are at their desks. A Reel at 4:30 p.m. can push calls before close.

Use **Stories** to push action right now. After you post a Reel, add three stories:

1. A recap card with the same three steps in big text.
2.
3. A “Link” sticker to your call page with “Tap to Call Phoenix Help.”
4.
5. A short talking story: “If you’re still stuck in 85008/85016/85018, call 602-555-0100, 8–6. Calls may be recorded.”
6.

Add a **Location** sticker with your city. Locals notice. Save your best Stories as **Highlights** named “AC Tips” and “Call Now.” New visitors can tap and see your steps and number in seconds.

Run micro-Q&As in Stories with the **Questions** sticker. “Ask AC questions. 30-minute window.” Answer the ones that are safe. Each answer card ends with “Phoenix help line: 602-555-0100 (8–6).” People who ask a question feel seen. Many will call if the steps don’t work.

Make a **carousel post** now and then with a tiny checklist. Slide 1: “AC Not Cooling? Try This.” Slide 2: “Filter: replace if you can’t see light.” Slide 3: “Breaker: off and on once.” Slide 4: “Thermostat: cool + auto; wait 5 minutes.” Slide 5: “Still stuck in 85008/85016/85018? Call 602-555-0100 (8–6). Calls may be recorded.” Carousels live longer than Stories and can show up for weeks.

Always use a **unique Instagram number**. Put it on your Reel end card, in your caption, and on your call page. Tag calls in your system. Watch average talk time from IG. If calls are short, tighten your copy. Say the city and ZIPs earlier. Make your hours bigger. People need to know if you can help today.

Keep your voice local. In captions, mention dust storms, heat waves, or “first cold night.” Locals trust local words. Add a simple hashtag or two, like #phoenix #acrepair. Avoid a pile of tags. It looks spammy and brings the wrong eyes.

Avoid common traps. Do not cram five ideas into one Reel. One problem per Reel is plenty. Do not post at midnight if you close at six. Do not paste your number ten times. Once on screen and once in the caption is enough. Do not promise prices or instant visits. Say “connect” and “same day” only if it’s true.

A small weekly plan makes this easy. Monday: Reel + Stories + Highlight. Wednesday: Q&A Stories for 30 minutes. Friday: Carousel with steps. During heat waves, add an extra Reel on Tuesday and a Live Q&A on Thursday (if you have time). Every time, end with the same call line and hours. That match builds trust.

A quick story shows the flow. You post a 20-second Reel at 11 a.m.: hook, three steps, CTA. You follow with three Stories and a link sticker to your call page. From noon to 2 p.m., your Instagram number logs five calls. Three pass 90 seconds. You save the best Story to Highlights. Over the next week, two more calls come from people who check your profile and tap “Call.” Your cost was time and care. Your reward is calm calls that meet the timer.

Instagram works when you keep it **simple, local, and safe**. Show, don’t brag. Help first. Say the number and hours the same way every time. Let people call without hunting. That is how Reels and Stories turn into revenue.

S9. Influencer micro-collabs for calls

A **micro-influencer** is a local creator with a small, real audience (often 2,000–50,000 followers). Their people trust them. If that creator shares your three steps and a clean way to call, you can reach a lot of locals fast without buying ads. The trick is to pick the right partners, give them an easy plan, and measure with a unique number.

Look for creators who share your **neighborhood**, not just your niche.

Great partners include a local realtor who posts about homes, a neighborhood news page, a parenting blogger who shares family tips, a handyman channel that shows safe fixes, or a weather page. You want **overlap** with your callers. You do not need a million followers. You need local, engaged people.

Vet before you pitch. Scan their last 12 posts. Are comments from locals, or are they bots? Do they speak in a calm, honest tone? Do they share safety notes? Do they post at times when your buyer is open? If the answers are yes, send a friendly DM or email:

"Hi [Name], I run a local AC help line in Phoenix. I loved your post on summer prep. I'd like to share a simple how-to with your audience: three safe checks when the AC blows warm. No prices, no hype. If someone is still stuck, I can give one clean call-to-action with hours. In return, I can film a tip for your page (home checklist, heat wave prep) or feature you on ours. If it helps, I'll write a short script so it's easy."

Keep it no-cost if you can. Offer a swap or a feature. Many micro-influencers will help if the content is helpful and safe. If a partner asks for pay, weigh it. Since this chapter is about **free** tactics, focus on swaps and goodwill first.

Create a one-page **brief** they can follow. It should include:

- The problem: "AC not cooling (Phoenix)."
-
- The three steps, in plain words.
-
- The safety line.
-
- The exact **call line** with number and hours: "Phoenix help line: 602-555-0100, 8–6 (Calls may be recorded)."
-
- Where to put it: end of video, caption, pinned comment, and first

Story frame that day.

-
- Your **do-not-say** list: no prices, no fake “24/7,” no risky steps.
-

Give them a **unique tracking number** and a short call page link with UTM tags. Ask them to use your number on screen and in the caption, and put the link in their bio for 24–48 hours. Now you can match calls to their post without guesswork.

Make it easy to film. Offer a 20–30 second script they can read in their own voice:

“Phoenix homes: AC blowing warm? Try these fast checks. One, the filter. If you can’t see light through it, replace it. Two, the breaker—off and on once. Three, set thermostat to cool and auto and wait five minutes. If you’re still stuck in 85008/85016/85018, call 602-555-0100, 8 to 6. Calls may be recorded. They’ll connect you to a tech today.”

Give them two simple shots to capture: a filter with a flashlight behind it, and a thermostat close-up. Send your own photos they can overlay if they want. Keep the look real. No stock-y fakes.

Ask for **three placements** on one day: a Reel (or short), a Story with a **Link** sticker to your call page, and a pinned comment with your number. The Reel builds reach. The Story drives action. The pinned comment saves the number at the top.

Pick the right day and time. Match it to high-need hours. In summer, weekday late afternoon or Saturday late morning works. During a heat wave, any day at 4–5 p.m. is good. Remind the creator to post when your buyer is open.

Track and learn. Watch your **influencer number** for 48 hours. Note calls, connected talk time, acceptance. Ask the creator for their basic metrics (views, likes, saves). Match spikes to calls. If talk time is long and acceptance high, do another swap next month. If calls are short or out of area, tweak the script: say ZIPs sooner, say hours bigger, or choose a different partner.

Protect trust. Ask the creator to disclose the relationship if needed. A simple “Partnered on this tip” in the caption is enough. Do not ask them to make claims you cannot support. Do not send them unsafe steps. Give them a **do-not-edit** on your safety line and call line so nothing important gets cut.

Keep files tidy. Save the video. Ask for reuse rights so you can post a cut on your own page with credit: “Tip with @CreatorName.” That turns a one-day collab into a long-tail asset. Use the same number in your repost so tracking stays clean.

A small story makes this real. You partner with a Tempe realtor who has 7,000 local followers. They post your 25-second tip at 4:30 p.m. on a hot Tuesday. They add your number to the caption and put your link in their bio. They run a Story with the link sticker. That evening and the next morning, your influencer number logs nine calls. Seven are inside your ZIPs. Five pass 90 seconds. You thank the creator, share the post, and book a fall “heat start-up” tip. No ad spend. Just a neighbor telling neighbors what to try and who to call.

Micro-collabs work because **borrowed trust** is strong. If you keep the content useful, the line honest, and the timing smart, that trust moves straight to your phone.

S10. UGC outreach for call-based offers

UGC means user-generated content. Real people make short videos about their real experience. They can be customers, neighbors, or creators who like your tips. UGC feels human. It does not look like an ad. That is why people watch it and act on it. You can turn UGC into calls when you ask the right way, give simple prompts, and show one clear next step.

Start with happy callers. After a job goes well, ask: "Would you record a 20-second video about your fix? Say your first name, your ZIP, what was wrong, and how we helped. If yes, I'll text a link where you can upload it." Do not pressure people. Make it easy to say no. If they say yes, send a link to a **simple upload page** (Google Form works). The form should ask for first name, ZIP, video file upload, permission to use the video on your pages, and a checkbox consent statement. Keep it short. Put your privacy note at the bottom. Do not ask for last names or addresses.

Give **prompts** that make filming easy:

- "Say your first name and ZIP."
-
- "Say the problem in one line."
-
- "Say what you tried."
-
- "Say what happened after you called."
-
- "Say what you'd tell a neighbor."
-

An example script a customer can copy:

"I'm Ana in 85008. Our AC blew warm air. I replaced the filter and reset the breaker, but it was still warm. I called the Phoenix help line at 602-555-0100. They got us a tech that afternoon. We were cool by dinner. If you're stuck, call them. They answer 8–6. Calls may be recorded."

Keep videos real. Phone vertical. Natural light. Quiet room. No fancy edits. No scripts word-for-word. Real voices are the point.

Offer a small **thank-you** that is not a bribe for a review. A $10 hardware store gift card or a simple filter delivered is fine. Be clear: "This is a thank-you for your time, not payment for a review." Follow platform rules. If you post the UGC, add "Thanks to Ana for sharing" in your caption.

Collect UGC from **non-customers** too. Post: "We're building a Phoenix AC Tips page. Want to film a 20-second clip showing your favorite quick check? We'll credit you in the caption. Use our upload link. Don't open panels or show risky steps." This builds a library of safe, helpful clips you can share with a call-to-action at the end.

Get simple **rights** before you post. Your upload form should include: "I give Cool Air permission to use my video on their website and social pages. I can email to revoke future use." Save the check and timestamp. Do not post minors without a parent's written OK. Do not use stock videos and call them UGC. That breaks trust.

Turn UGC into calls by adding a **clear end card**. At the end of the clip, add three seconds of text: "Phoenix help line: 602-555-0100 • 8–6 (Calls may be recorded)." In the caption, repeat the number, hours, and ZIPs. If the platform allows, pin a comment with the number. If you post on Stories, add a **Link** sticker to your call page.

Use a **unique number** per UGC campaign or per top clip. If Ana's clip is your star, give it its own number and watch it. Post the clip on Reels, TikTok, YouTube Shorts, your call page, and in a Facebook Group (if allowed). The same number should appear in every place you post that clip. In your phone system, tag calls by the number so you can see if Ana's story drives long calls.

Make a **UGC wall** on your site. Build a clean page with six short clips, each with the same end card and a big tap-to-call button above. Keep the page fast. No auto-play with sound. Let visitors tap a clip, hear a neighbor, and call when ready. Link this page in your profiles and in your YouTube description. People trust neighbors more than brands. Let those voices lead.

Coach for **safety**. In your prompts, tell creators not to open panels, not to bypass safeties, and not to show work that needs a license. Ask them to keep names of other brands out. UGC should help, not harm. If a clip shows a risky step, thank the sender and do not post it. Reply with why. People will respect your line.

Keep your **tone** steady across UGC. Add the same call line to every clip. Use the same number format and hours. Use the same recording note on the page. This makes your voice feel one-piece across many faces. That feeling raises trust.

A small plan helps you start. Week 1, ask five happy callers for a 20-second clip. Two say yes. You post Ana's clip on Reels with an end card and the number in the caption. You also put it on your call page. That day, your UGC number logs three calls. Two pass 90 seconds. Week 2, you post Michael's clip on TikTok and Shorts. Three more calls come in. You message past happy callers with the same ask. Each month, you add two new clips. After a season, you have ten local voices working for you while you sleep.

Avoid pitfalls. Do not fake UGC. People can tell. Do not use deep discounts or wild claims in the caption. Do not change someone's words to something they did not say. Do not forget to say thanks. Small kindness keeps people willing to help next time.

UGC works because it is **human**. Neighbors trust neighbors. When a short, simple story ends with a clear number and honest hours, people call with hope, not fear. Hope sounds calm on the line. Calm calls last longer. Longer calls get accepted. That is the whole goal.

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Paid Media — Search & Maps

S1. Google Ads Call-Only campaigns

Call-only ads (Google now calls them **Call Ads**) are made for one job: get a person to **tap and call** you right now. They show mostly on phones. When someone taps your ad, their dialer opens with your number. There is no extra click to a website. This is perfect for pay-per-call because the path is short, and the intent is strong. Your job is to set them up cleanly, run them only when agents can answer, and track the calls the right way.

Start with the goal. In a new Google Ads campaign, pick a leads goal and choose calls as the main action. Use **Search** as the campaign type, then pick **Call Ads** inside the ad creation step. Add your **business name** and the **phone number** you want people to call. Use a **tracking number** that points to your router, not your office line, so you can measure each ad. Register that number so caller ID shows a clean business name when possible.

Add clear text in the ad. Keep the **headline** simple and local: "Phoenix AC Help — Call Now." The ad shows your number big at the top on mobile. In the **description**, write two short lines with what you do, who you serve, and your hours. "Quick checks + connect to local techs. Phoenix ZIPs 85008/85016/85018. Open 8–6." Avoid big claims. Say only what is true today. If you record calls, that is okay, but do not try to cram a legal notice into the ad. Handle recording and consent on the call, and show it on your landing pages (for other ad types). For Call Ads, space is tight; keep it focused on help.

Turn on **call reporting** and set a **call conversion**. In your account, create a conversion action for "Calls from ads." Pick a **minimum call length** that matches your buyer's timer (for example, 90 seconds). This helps the bidding system learn which clicks turn into the right kind of calls. It also keeps your reports honest. A six-second mis-dial should not count as a win.

Set **ad schedule** to your real agent hours. If you answer 8 a.m. to 6 p.m., run ads only in that window. Add a small 5–10 minute buffer on each end so you do not pay for taps when nobody can pick up. Do not run Call Ads at night and hope people leave voicemails. Night traffic brings short, angry calls and refunds. Respect the clock, and your average talk time goes up.

Choose **locations** with care. Target your **service area ZIPs** or cities only. In advanced location options, choose "**Presence**: people in or regularly in your targeted locations." Do not target "presence or interest." The second setting lets people outside your area into your campaign if they search "Phoenix AC repair" from far away. That wastes budget and time. Exclude cities you do not serve.

Pick a small set of **keywords** to start. Use exact match for the most obvious "buy" terms, like [ac repair near me], [ac repair phoenix], [air conditioner not cooling], [hvac repair 85008]. Add phrase match for close variants, like "ac repair in phoenix." Avoid broad match on day one. Broad can be useful later, but with Call Ads it can pull in research searches you do not want, like "how to become an hvac tech." We'll cover keyword strategy in S5; for now, keep it tight.

Write **two or three ad versions** and let them rotate. One version might lead with the problem (“AC Not Cooling? Call Now”), one with the city (“Phoenix AC Repair — Call Now”), and one with the outcome (“Same-Day AC Help — Call”). Watch which line earns calls that hit your timer. Keep what works and pause the rest.

Mind **policy** and **quality**. The phone number must be yours to use. The ad must match your business name. Do not stuff city names or fake claims into the business name field. If you promise “24/7” and you do not answer at night, you risk complaints and suspensions. Keep hours honest. If you serve Spanish speakers at certain times, note “Se habla español 8–6” in the description during those hours only.

Set a **budget** that fits your test. For a local AC line, you might start at $50–$150 per day in summer. If clicks are $10–$30 and 30–50% of clicks turn into calls, you’ll get a few chances daily to hit your timer. Keep a **risk cap**: pause if accepted calls fall below your target for two days in a row. Spend rises only when acceptance is steady.

Pick a **bidding strategy** that matches your data. If you have no history, start with **Manual CPC** plus **Enhanced CPC** (ECPC). ECPC nudges bids up and down to chase conversions without taking full control. Once you have 30–50 real call conversions (over a few weeks), test **Maximize Conversions** with your call conversion. If your acceptance is steady and you know your target cost-per-accepted-call, try **Target CPA** next. We’ll go deeper in S6.

Watch the right **metrics**. In the Call Details report, look at start time, duration, and area code. In the campaign view, watch **phone call conversions** (not just clicks), **cost / conversion**, and **call conversion rate**. In your phone system, watch **connected talk time** and **accepted vs. rejected** by ad group and by keyword. If calls are short, tighten targeting, hours, and ad text. If calls are long but few, add more close variants and raise bids during hot hours.

Shape **expectations** before the tap. Your ad copy should say what you actually do. "We connect you to a licensed tech" is clear. "Instant fix" is not. People who know what will happen on the phone stay longer. Longer calls pass timers.

Here is a small real-world path. It is the first hot week in June. You launch a Call Ads campaign for Phoenix with four exact-match keywords and two ads. You run 8–6. You set a 90-second call conversion and bid manually with ECPC. Day one, you get five calls; two pass the timer. Day two, you add "ac repair near me" as phrase match and negative "jobs." You also add "Phoenix" to your description. Day two, you get seven calls; four pass. Day five, you can see that "ac repair phoenix" and "ac not cooling" drive most good calls from 4–6 p.m. You raise bids and budget in that window and lower them at noon. Your accepted calls climb without wild spend. That is call-only done with care.

Remember: **short path, clear promise, right hours, clean tracking**. When those four line up, Call Ads become one of the most reliable paid tools in your pay-per-call engine.

S2. Search campaigns with call assets/extensions

Not every searcher wants to call right away. Some want to see a page, read two lines, then tap. A **Search campaign with call assets** (Google used to call them "call extensions") gives you both paths: a headline that leads to your page and a **phone icon** that opens the dialer on mobile. When you build these right, you catch people across devices and turn more of them into calls.

Set up a normal **Search** campaign with a website link. Use your same tight location rules (target only your service ZIPs or cities; set advanced location to **Presence**). Choose a goal of **leads**. Create one or more ad groups around a tight theme, like "AC repair" and "AC not cooling."

Use **exact** and **phrase** match to start, just like in call-only. Keep your list small and local. You can always expand later when results look steady.

Build **responsive search ads** that say the problem, the city, the hours, and the next step. You do not need to be clever. You do need to be clear. A good ad might show these ideas across its headlines: "AC Not Cooling?" "Phoenix AC Repair" "Open 8–6 Today." In your descriptions, write two lines that promise safe checks and a fast route to a tech. "We guide quick checks then connect you to a licensed tech. Phoenix ZIPs 85008/85016/85018."

Add a strong **call asset** at the campaign level. Use a **tracking number**. Turn on **call reporting**. Set the **schedule** on the call asset to your **agent hours**. This is important: you can run search ads for research traffic during off hours if your page offers a callback form, but the **call button itself** should not show when nobody can answer. If you want zero off-hours spend, also align your **ad schedule** to 8–6. Many advertisers forget asset schedules. Set them once, and they protect you.

Make the **landing page** a true **tap-to-call** page. Put a big "Call Now 602-555-0100" button at the top with a **tel:** link to your tracking number. Put your **hours** next to it. Put your **ZIP list** below. Add a small **callback form** with consent text for people who can't call right now. Keep the page so fast that the first screen loads in under two seconds on a phone. If it's slow, people bounce and you pay for nothing. Keep images small and code light.

Track **two kinds** of calls. First, calls from the **call asset** (Google logs these as "phone calls" when the dialer opens from the ad). Second, calls from the **website** (people click the ad, land on your page, and tap your number). To track website taps, set up Google's **call from website** conversion with a forwarding number **or** rely on your own tracking number's logs. If you can do both, do both. The more clean data you have, the better your bidding and your learning.

Write **site links** only if they help someone call faster. "Service Areas," "Hours," and "Request a Callback" can make sense. Do not add links that pull people away from the call, like "Blog" or "About," at the top of the page for ad traffic. You can keep your site rich for SEO. For paid traffic, keep the path short.

Mind **desktop vs. mobile**. On desktop, people may prefer the **callback form**. On mobile, they will tap the **call**. Make both paths easy. On desktop, put the callback box high with consent checkbox, then your number large in the header. On mobile, put the call button first, then the form. Do not hide consent. Clear words now mean longer calls later.

Build **negative keyword** lists early. Add "jobs," "salary," "course," "how to become," "warranty," "manual," and brand names of big OEMs if you keep getting customer service calls that your buyer can't handle. Add "near me" **only** if you truly cannot help people who search that way; usually "near me" is fine for local service. We go deeper on negatives in S5; start with obvious ones.

Use **ad variations** to test your tone. For some cities, "Same-Day AC Help" works best. For others, "AC Not Cooling?" wins. Keep your tests small. One change at a time. Watch **call conversion rate** and **connected talk time** by ad group. Small wording shifts can add 20–30 seconds to average talk time because they set the right promise.

Set a **budget** that split-tests well. If you also run Call Ads (S1), give each campaign its own budget so performance is clear. In summer, you might split $150/day between the two and adjust as results come in. If the Search + Call Asset campaign sends longer calls, move budget in that direction. If Call Ads beat it in cost-per-accepted-call, lean there. Let the **phone log** decide.

Choose **bidding** by data level. With no history, start **Manual CPC + ECPC**. Once you have 30–50 tracked call conversions in a month, test **Maximize Conversions** for the campaign and watch for two weeks. If it keeps your cost per call near target and your accepted rate stays steady, keep it. If it chases junk, go back to ECPC and tighten keywords and negatives. We cover strategy tradeoffs in S6.

A small example shows the flow. You run a Search campaign with call assets 8–6 across Phoenix ZIPs. Your ad says "AC Not Cooling? Phoenix AC Help. Open 8–6." Your page loads fast with a big call button. Your call asset is scheduled to show only 8–6. In week one, 60% of your calls come from the call icon; 40% come from the page. You see longer talk time from page calls because people read your hours and ZIPs before tapping. You shift more spend to the ad groups that push page calls, but keep call assets on because some people just want to tap the icon. Your accepted calls rise without changing your budget. That is the power of giving both paths, done cleanly.

Remember the basics: **clear ad, fast page, honest hours, tight geo, and clean tracking**. If you do these five every time, Search with call assets will be a dependable engine for your pay-per-call line.

S3. Location targeting & radius settings

Great ads fail if they bring the wrong people. In pay-per-call, **where** you show is as important as **what** you say. You want only the ZIPs and cities your buyer can serve, during the hours they can answer. You also want to **exclude** nearby areas that would eat budget and bring short calls. Location controls handle this job, but you must set them right. Small mistakes here cause most wasted spend in local search.

Start with your **service map** outside Google. On a single page, list your allowed **ZIP codes** or city names. Mark any pockets you **do not** serve. Confirm **hours** by day and any **holiday** changes with your buyer. This becomes your truth. Ads should match this map, not the other way around.

In each campaign, set **Locations** to your exact cities or ZIPs. If you have only five to ten ZIPs, enter them as ZIPs. If you cover whole cities, enter the city names. Avoid giant regions like "Arizona" unless you really serve all of it. The tighter the better.

Open **Location options (advanced)**. Choose "**Presence: People in or regularly in your targeted locations**." Do **not** use the default "Presence or interest." The default lets people outside your area see your ads if they search your city name. That is bad for calls. You will pay for out-of-area taps that hang up fast. Choose **Presence** and sleep better.

Add **exclusions** where needed. If you target "Phoenix" but do not serve parts of the far west side, exclude those ZIPs. If a nearby city looks like your city in name but is out of scope, exclude it. If you get calls from a nearby university with dorms you cannot serve, exclude that campus ZIP during move-in week. Think ahead to the events that trip you up.

Use **radius targeting** only when you must. Radius can be handy when ZIPs are messy or when you want a tight circle around a buyer's office for walk-ins. But radius draws a perfect circle; your real service area isn't a perfect circle. When in doubt, pick **ZIPs first**, radius second.

Set up **location groups** for clarity. If you run several cities, build separate campaigns per city. This keeps ad copy and budgets clean. "Phoenix AC Help" in one, "Tempe AC Help" in another. If you want all cities in one campaign, use separate **ad groups** per city with city-named ads, and add city names as **negatives** in the other ad groups. That way a search for "Tempe ac repair" triggers the Tempe ad, not the Phoenix one.

Use **location bid adjustments** after you gather data. When you see that calls from 85008 have longer talk time and higher acceptance than 85016, add a small positive bid adjustment for 85008 and a small negative for 85016. Keep changes small at first (10–20%). Let a week of calls roll in, then adjust again. The goal is to put more budget where **accepted calls per dollar** are highest.

Align **ad schedules** with location rules. If your buyer closes at 6 p.m., but one city does much better from 4–6 p.m., consider shifting more budget to that city during that window. You can do this by splitting campaigns or using a smart bidding strategy that handles dayparting. We'll cover dayparting in S4.

Handle **time zones** with care. If your account is set to one time zone but you serve another, your ad schedule will follow the **account's time**, not the city's. If that causes trouble, set up a separate account or MCC for the other zone, or adjust schedules manually so ads run during real **local** hours. The phone does not care what Google thinks the time is; the caller does.

Mind **travelers** and **new movers**. Even with Presence targeting, you'll get people who are "regularly in" your area but currently traveling. If those calls are short and messy, add device or hour filters (for example, reduce bids overnight when travelers search). For new movers, lean into ZIPs with lots of rentals and home sales during peak months. Your buyer will hear more "system not starting after moving in" calls. Build an ad that speaks to that and targets those ZIPs.

Watch the **Locations report** weekly. Sort by cost and conversions. Look for ZIPs with high cost and low accepted calls. Tighten them or pause them. Look for ZIPs with a few strong calls. Lean in. Location tuning is not a one-time job. It is a monthly habit that keeps spend honest.

A simple example shows the power. You launch Phoenix with ZIPs 85008/85016/85018 on **Presence**. In week one, 85008 drives most accepted calls. In week two, you add a 20% bid increase for 85008 and a 10% decrease for 85016. You also exclude a pocket of 85016 where apartments use chilled-water systems your buyer will not touch. Your cost per accepted call drops by 18% in a week, with no headline changes. That is location precision doing quiet work.

Remember this order: **map first, locations second, presence mode on, exclusions where needed, small bid nudges over time**. When you respect the map, your agents hear people they can actually help. Calls get longer. Timers clear. Budgets stretch.

S4. Ad scheduling & dayparting for agent hours

Your ads should speak **only** when someone can pick up. This is the heart of dayparting. In pay-per-call, time is not a detail; it is the whole game. If you run at the wrong time, you pay for short calls and voicemails. If you run at the right time, you answer calm, ready callers. The difference shows up in your acceptance rate.

Begin with your **agent hours**. Write them down by day. If you add extra hours during heat waves, list those too. Build your schedule around humans, not hopes. If you cannot add seats at lunch, you may want to lower bids or pause during that window.

Set your campaign's **Ad Schedule** to your open hours. For example, Monday–Saturday, 8 a.m. to 6 p.m. Leave Sunday off if you are closed. If you run Search with call assets, also set the **call asset's schedule** to the same hours so the phone icon vanishes when you are closed. If you run Call Ads, the ad itself should not show when you are closed.

Layer in **day-of-week** tests. Over two weeks, you may see that Tuesday and Wednesday 10–2 perform best. Add small bid adjustments (+10–20%) in those hours. If Friday 4–6 is weak because calls come late and short, lower bids then. Keep changes small and watch your logs. The aim is to shape spend to match the real flow of accepted calls.

Use **hourly reporting** to find peaks. In Google Ads, pull a segment by **hour of day** and look at phone call conversions. In your phone system, chart **connected talk time** by hour. Combine the two. If calls convert at 4–6 p.m. but agents are slammed, consider shifting one agent's break to 3–4 p.m. so you're fully staffed at 5 p.m. Media and ops must move together.

Adjust for **season and weather**. During heat waves, extend your schedule to 7 p.m. if your buyer can answer. During cold snaps, start at 7 a.m. for heater issues. Outside peak weeks, tighten back to normal. Put these changes on a **calendar** so you remember to switch. Nothing burns trust like "call now" ads when a phone rings out.

Mind the **time zone**. If your account runs in a different zone than your city, your ad schedule follows the **account zone**. If that causes off-hour spend, fix it by making a separate account in the right zone or by offsetting your schedule manually. Check the first morning after changes to be sure the right hours are on.

Use **scripts or rules** as a "curfew guard." If your team sometimes closes early, set an automated rule: pause campaigns if daily accepted calls hit a cap or if a status field in a Google Sheet says "closed." This keeps ads off when human reality changes. When you reopen, the rule turns ads back on. Simple rules prevent expensive mistakes.

Coordinate **landing page** behavior after hours. If you decide to let Search ads run for research late at night, your page must flip to "Request a Morning Call" mode. Change the top button from "Call Now" to "Request Callback," show a tiny form with a consent checkbox, and say "We open at 8 a.m. Calls may be recorded." This keeps the promise honest. Do not show a "call now" bar when nobody will answer.

Test **split schedules** by campaign. Run Call Ads only during 8–6. Run Search + call assets slightly wider, like 7:30–6:30, because some people will read and call at 8. Keep brand terms (if you run them) during open hours only. If you use **Local Services Ads** (for brands), also align their schedule, but that is outside this chapter's focus.

Control **budget** by time when needed. If your platform or scripts cannot shape bids well, you can split one campaign into two: one that runs 8–2 with budget A and one that runs 2–6 with budget B. Put the same keywords and ads in both. This crude split lets you spend more in the late window if that is when accepted calls are best. Keep an eye on overlap and totals.

Review **daypart** monthly. Things change. Summer school schedules shift. Sports nights move calls later. New buyer capacity opens a new hour. Update your schedules when life changes, not just when a spreadsheet says so. Agents should never feel like ads are flooding them when they are thin. The phone should feel busy but calm.

A quick story shows the lift. You were running 7 a.m. to 7 p.m. all summer. Calls from 6–7 p.m. were short and angry; nobody could answer. You tighten to 8–6, add a 10% bid boost 4–6 p.m., and move one agent's break to 2:30. In a week, cost per accepted call drops 22%. Agents feel in control. Your buyer hears smoother calls and raises your cap. All you changed was time.

Dayparting is simple on paper: run ads when you answer; spend more when calls convert. But it is the difference between fighting fires and building a steady line. Respect the clock, and the clock will reward you.

S5. Keyword strategy (match types & negatives)

Keywords decide **who** sees your ads. Good keywords bring ready callers. Bad keywords bring readers, job seekers, students, and DIY hobbyists. In pay-per-call, you want tight terms that match **now problems** in your **city**. You also want a wall of **negatives** that keeps out junk. We will keep this simple and strong.

There are three main **match types** you will use. **Exact match** triggers when the search is very close to your keyword, like [ac repair phoenix] or [ac not cooling]. **Phrase match** triggers when the search includes your phrase in order with words before or after, like "best ac repair in phoenix today." **Broad match** triggers for related ideas, even if the words don't match closely. Broad can work with smart bidding and great negatives, but it can also waste money when you are new. Start with **exact** and **phrase**. Add **broad** later, only if your conversion tracking is clean and your negatives are strong.

Make a **starter set** with exact and phrase. For AC repair in Phoenix:

[ac repair phoenix]

[ac repair near me]

[ac not cooling]

[air conditioner repair]

[hvac repair phoenix]

“ac repair in phoenix”

“ac repair near me”

“ac not cooling”

“emergency ac repair”

If you work by ZIP, add “[ac repair 85008]” and “ac repair 85008.” If you see people search “air conditioning not working,” make that a phrase match. Keep the list small at first. Ten to twenty terms is fine.

Write **ads** that repeat the searcher’s words. If the keyword is “ac not cooling,” your ad should say “AC Not Cooling? Phoenix Help.” This makes your ad feel right. It also keeps your **Quality Score** healthy so you don’t overpay.

Build a **negative list** on day one. Add “jobs,” “salary,” “training,” “course,” “manual,” “pdf,” “diagram,” “thermostat manual,” “remote,” “warranty,” “customer service,” “phone number” (for big OEM brands), and brand names you do not service. If you run a help line, add negative for your **own brand** if people confuse you with a repair shop. If you find searches for “window ac” and you don’t handle those, add “window.” If you don’t do ductless, add “mini split” as a negative.

Use **negative phrase** for families of junk. If “jobs” is a problem, add phrase negative “job” and “jobs” so variants get blocked. If “how to become hvac tech” shows, add “how to become” as a negative phrase. If students search “HVAC salary phoenix,” add “salary.” Keep this list growing as you see **search terms**.

Check the **Search Terms** report every day in week one, every few days in week two, and weekly after. This report shows the real words people typed. When you see a bad theme, block it with a negative. When you see a good new theme, add it as an exact or phrase keyword and write an ad that fits.

Consider **broad match** only when you have clean conversion tracking and steady accepted calls. If you try broad, put it in its **own ad group** with a capped budget. Keep your negative list tight. Let **Maximize Conversions** or **Target CPA** steer it. Watch search terms daily at first. Broad can find gold (like "ac leaking water") that you missed. It can also wander. Don't let it run wild.

Group keywords by **intent**. Put "repair" terms together. Put "not cooling" and "blowing warm" terms together. Put "near me" terms with your city. This lets you write ads that speak to each pain. It also lets you shift budget between pain points. If "leaking water" calls are long and pass your timer often, you can lean in there.

Write **city** and **ZIP** into some keywords, but not all. Google handles "near me" well now. Still, locals do type their city and ZIP. Keep a mix. If you see "ac repair phoenix near me," that's okay—your exact and phrase will catch it.

Add **brand negatives** if needed. If people search "cool air phone number" and call to ask about their **existing** contract, and your buyer can't handle those, block "cool air" (your brand) to avoid confusion. If people search "trane customer service," and you are not Trane, block "trane" and "customer service."

Keep **ad groups** small. Ten to fifteen keywords per group is enough. Too many and your ad gets vague. Vague ads get fewer taps and shorter calls.

Adjust **bids** by keyword after two weeks. If [ac not cooling] drives long calls, raise its bid by a little. If "ac tune up" drives short research calls in summer, lower it or pause it until fall. Your goal is **accepted calls per dollar**, not generic clicks.

A short story shows the method. Week one, you launch with ten exact and phrase keywords and a tight negative list. You check search terms daily. You see "hvac jobs" and "thermostat manual." You add negatives "jobs," "manual," "pdf." You also see "ac leaking water." You add it as phrase and exact, write an ad "AC Leaking Water? Phoenix Help," and it earns three long calls in two days. Week two, you test broad match on "ac repair" in its own group with a small budget and strong negatives. It finds "ac making noise at night." You add "ac noise" as phrase and exact, write a safety-focused ad, and it becomes another good source. You keep pruning junk and planting winners. By week four, your keyword garden feeds steady, accepted calls.

In short: **start tight, grow with proof, block junk fast, keep words local, and let the phone tell the truth**. That is keyword strategy for pay-per-call in plain clothes.

S6. Smart bidding vs manual strategies for calls

Bidding is how Google decides where and when to show your ads. You can steer bids **by hand** (Manual CPC with Enhanced CPC) or let Google steer with **Smart Bidding** (Maximize Conversions, Target CPA, Target ROAS). For pay-per-call, the right choice depends on **data quality** and **volume**. If your call tracking is messy, any smart system will learn the wrong lessons. If your tracking is clean and you have enough conversions, smart tools can lift you. Let's break it down in simple steps.

Start with **Manual CPC + Enhanced CPC (ECPC)** when you have **no history**. ECPC lets Google nudge bids up or down when a click looks likely to convert based on signals, but you still set the base bids. This gives you control while the account is learning. During this phase, your job is to make sure your **call conversions** are set right: "Calls from ads" with a **minimum duration** (for example, 90 seconds), and "Calls from website" if you use them. Do not count form fills as the main goal if your buyer does not pay for them. Keep the signal pure: **calls that last**.

Once you have about **30–50 call conversions** in the last 30 days **in that campaign**, test **Maximize Conversions**. This strategy tries to get the most conversions for your budget. It works only if your conversion signal is strong. If you count six-second calls, you will get more six-second calls. If you count 90-second calls, you will get more of those. Set a **reasonable daily budget** so the system has room to learn. Let it run for **10–14 days** before you judge. Watch **cost / conv.** and your **accepted rate** in the phone log.

If Max Conversions is stable and your cost per call is close to target, try **Target CPA (tCPA)**. Set your target to what you can afford **per accepted call** times your **acceptance rate**. For example, if you can pay $80 per accepted call and your acceptance rate is 60%, your target CPA for **all calls** is around $48 ($80 × 0.60). Start a bit **higher** (e.g., $55–$60) so you don't choke volume, then step down over two weeks if performance holds. If volume dies or quality drops, move back to Max Conversions and revise.

If you assign **values** to calls (for example, $100 for a call >120 seconds, $50 for a call 90–120 seconds, $0 for under 90 seconds), you can test **Target ROAS**. This is advanced. You need value rules or **offline conversion uploads** that send the value after the call. For pay-per-call, **tCPA** is usually simpler and safer. tROAS can shine when you have strong **post-call** value signals, like "appointment set" or "sale," fed back into Google.

Feed **offline conversions** if you can. After a call, once you know **accepted** vs. **rejected**, upload that result to Google as an **enhanced conversion** or an **offline conversion** that matches the click. This takes work, but it changes the game. Google will learn to bid for calls that **become accepted**, not just calls that last 90 seconds. If you cannot do this yet, at least use **call duration** thresholds as a proxy.

Avoid **Smart Bidding** if your signal is dirty. Dirty means you count quick calls, double count calls, or mix calls and forms in one goal. Smart systems maximize what you tell them. If you tell them "any call," you will get floods of wrong calls. Fix tracking first. Then try smart.

Split **campaigns** by intent before testing smart. A "repair now" campaign with "ac not cooling" should not share bidding with a "tune-up" campaign. They behave differently by hour and season. Smart works best when each campaign has one clear job.

Use **portfolio** strategies only after single campaigns work. A portfolio spreads one target over many campaigns. This can help once you run Phoenix, Tempe, and Mesa all cleanly. Early on, keep focus: one strategy per one campaign.

Keep **guardrails** with smart bidding. Even with Max Conversions, you can cap your daily budget. You can also use **account-level negatives** to block junk, **location** presence mode to keep geo clean, and **schedules** to match hours. Smart bidding is not a replacement for good hygiene. It is a layer on top of it.

Watch **lead indicators** when testing. In the first few days on Max Conversions, clicks may rise. That's fine if calls rise too. If you see more clicks but fewer calls or shorter calls, pause the test and review. You may have too many **page** clicks and too few **call** clicks. Make your **call button** bigger, move it higher, and ensure the **call asset** is live. Then test again.

Scale **slowly**. When a campaign meets your cost per accepted call for two weeks, lift budget by **10–20%**, not 100%. Sudden jumps can break the learning. If performance holds for a week, lift again. If it dips, step back. Steady wins.

Keep a **Manual CPC** "clone" ready. If smart bidding goes sideways during a heat wave, you can pause the smart campaign and turn on your manual clone with last month's bids and schedules. This safety net keeps the phone steady while you troubleshoot.

A story shows the path. In June, you start Manual CPC + ECPC with tight exact/phrase keywords and clean call conversions set to 90 seconds. After 40 conversions in 30 days, you switch to Max Conversions. Cost per call drops 12%. Accepted rate holds. After two weeks, you set tCPA at $55 (based on $80 target per accepted × 0.70 acceptance). Calls hold, cost drops again. In July, you add an offline flag for "accepted." In August, you lower tCPA to $50. By September, you spend less per accepted call than in June and take more total calls—because the system learned from **real** signals, and you kept the basics tight.

Bottom line: **Manual + ECPC** to start, **Max Conversions** when tracking is clean, **tCPA** when volume is steady, **offline accepted** if you can. Move one step at a time. Let the **phone log** be your judge, not just the Google chart. If accepted calls rise and agents feel calm, you chose well.

S7. Offline conversions & call import

Online click data tells you who tapped. **Offline conversions** tell you what happened **after** the tap. In pay-per-call, that last step is what matters. A click that turns into a 6-second call is not a win. A call that lasts past your buyer's timer, or that your buyer **accepts**, is the win. When you send those "real wins" back into Google Ads, the system learns to find more people like them. Your costs drop. Your accepted calls go up.

Think of this in three parts: **mark**, **match**, and **upload**.

First, **mark** every call in your phone system with a simple result. Use labels you understand at a glance: "Accepted," "Rejected," "Too Short," "Out of Area," "No Answer." Add the **call start time**, the **caller number**, the **tracking number** they dialed, and, if you have it, the **GCLID** (the Google Click ID) from the original ad click. You can pass the GCLID into your call record using your dynamic number insertion (we cover DNI in S8). If you can't capture the GCLID yet, don't worry—you can still match calls by phone and time.

Second, **match** your calls to Google's idea of the same calls. There are two common paths:

1. **Calls from ads (call extensions / call-only):** Google's call reporting uses a Google forwarding number. You can later tell Google which of those calls were "Accepted" by matching on **caller number** and **call start time**.
2.
3. **Calls from your website (tap-to-call):** If your site swaps in a Google forwarding number for the call button, Google also sees these calls. You can import results the same way—by phone and time. If you do not use Google's forwarding on your site, you can still import, but you must match by **GCLID** (captured on the landing page and stored by your DNI).
4.

Third, **upload** the truth. Export a CSV from your phone system with the fields Google needs. Keep it clean and simple. Your file should have at least: **Conversion Name** (like "Accepted Call"), **Conversion Time** (when you accepted it), and **Caller Number + Call Start Time** *or* **GCLID**. You can include a **Value** if you want to weight better calls higher. For example, give "Accepted" a value of 100, "Qualified but not accepted" a value of 50, and ignore (value 0) calls under your timer. In Google Ads, choose **Import** and follow the steps to upload call conversions. Pick the right time zone so times line up.

Here is a simple, real flow. A person in 85008 searches "ac not cooling," sees your ad, and taps the phone icon. The dialer opens with a Google forwarding number. Your agent answers. The call lasts 2:12 and goes to a buyer. Your buyer accepts it. In your phone system, that call record shows: start time 2025-06-05 16:43, caller 602-555-0199, tracking number (the Google fwd number), result "Accepted." Each morning, your sheet pulls yesterday's calls, filters to "Accepted," and exports a CSV. You import the file into Google Ads. Now Google marks that ad click as a real conversion. Over time, the system sees the **hours**, **ZIPs**, and **queries** that lead to accepted calls for you and places your ads in those spots more often.

A few tips make this smooth. Always **test** with two or three calls first. Upload a tiny file and check that Google shows the conversions in the right campaign and day. Expect a short delay before you see them. Keep your **conversion window** long enough to allow for late acceptance. If a buyer takes 48 hours to mark accepted, set your window to at least 30 days so the upload still counts.

Keep names and times **consistent**. Your "Conversion Name" in the file must match the **conversion action** you created in Google Ads ("Accepted Call," for example). Your time format should match Google's guidelines and your account's time zone. If you see lots of "no match" errors, it's usually a time zone mismatch or a wrong field.

Choose which conversions count in "**Conversions**" vs. "All conv.**." For bidding, include only the events you want the system to chase. If you bid to "Accepted Call," don't also include "All Calls > 30s" in the same "Conversions" column. That muddies the signal. You can still see other events under "All conv." for reporting.

If you don't have time to upload files, use an **automation**. Many call platforms can push accepted calls to Google automatically through Zapier or a direct API. The idea is the same: once a call is marked accepted, send Google the match keys and the value. Start with manual uploads until you trust the mapping. Then turn on automation.

Protect privacy. Never upload names, addresses, or anything you don't need. Phone number + time is enough for call-from-ads imports. GCLID is enough for click-based imports. Keep your sheet in a safe drive. Limit access.

Once you feed Google the truth for two weeks, watch what shifts. You should see more impressions in the hours and ZIPs where your accepted calls come from, and fewer in the weak pockets. Your **cost per accepted call** should slide down. If quality drops, check your file—did someone change the "Accepted" label? Did a new agent mark a batch wrong? Fix the labels and re-upload the right rows.

One last point: offline imports help **more than Google**. They also help **you** see the last mile. You'll spot keywords that drive calls long enough to pass your timer but still get rejected by the buyer. That is a content or script problem to fix (wrong ZIPs, wrong hours, wrong promise). Repair that at the source. Your acceptance rises. Your uploads get richer. The loop gets stronger.

Offline conversions are simple when you keep the steps simple: mark the outcome, match the call, upload the truth. Do this daily, and your ad account will stop chasing noise and start chasing paydays.

S8. Dynamic Number Insertion (DNI)

Dynamic Number Insertion swaps the phone number on your page based on **where the visitor came from**. If they came from Google Ads, show your "Google Ads" number. If they came from Instagram, show your "Instagram" number. If they typed your site address by hand, show your "Direct" number. When they call, you know which channel did the work. That lets you scale winners and cut losers without guessing.

Picture three buckets: **source**, **number**, and **metadata**. Source is how they found you (Google Ads, Organic, Facebook, Flyer QR, etc.). Number is the tracking number you show for that source. Metadata is the extra info you pass into the call record (UTM source/medium, campaign, keyword, GCLID, landing page, page path).

Here's how to set it up in plain steps.

First, make a short list of **sources** you want to track. Keep it simple to start: "google-cpc," "organic," "facebook," "instagram," "reddit," "direct," and "flyer." For each source, assign **one tracking number**. You can get these from your call tracking provider or your phone system. Name each number in your phone system so you can see the source at a glance when calls come in.

Second, add a small **DNI script** to your site. This is a tiny piece of code that looks at the page URL and the referrer. If it sees a UTM source (like utm_source=google and utm_medium=cpc), it swaps the main phone number on the page for your **google-cpc** number. If it sees no UTM but the referrer is Google, it swaps to your **organic** number. If there is no referrer at all, it uses your **direct** number. The swap must happen fast, before the visitor taps. Most call tracking tools give you this script ready-made. If you can't use a tool, a developer can write a simple version that changes the text of your number in the page.

Third, pass **metadata** into your call record. When the visitor taps to call, the DNI tool can send along UTM fields and the **GCLID** if it's in the URL. Your phone system will store this next to the call. Later, when you mark calls as "Accepted," you can filter by source, by campaign, even by keyword. This is how you find the ad group that sends long, accepted calls and the one that sends short, messy ones.

Fourth, set a **fallback**. If the script fails, or the visitor blocks it, you do not want a blank number. Set a default number that always shows. Usually that is your **organic** number. Keep it live and watched.

Fifth, keep your **NAP** (name, address, phone) consistent for local SEO. Crawlers should see the same number each time they index your site. Most DNI scripts swap numbers **after** the page loads. That means Googlebot reads your **default** number, which is fine. On your Google Business Profile, you can still use a registered tracking number as the main number and your old line as an additional phone. On your site's **schema markup** (see C11-S3), use the same number the visitor sees on the page so your rich data matches the real view.

Size your **number pool** to fit your traffic. If you run the basic "one number per source" setup, you don't need a pool. If you want to track back to the **session** or the **keyword**, some tools rotate a pool of numbers so each visitor gets a unique number for a few minutes. A small local site can start with five to ten numbers in the pool. The tool will tell you if you need more because of overlap. Don't overbuy. Pools cost money. Start small and grow.

Test like a human. Open your site from a Google ad (use a test campaign), from a Facebook post, and by typing the URL. Does the number change the way you expect? Tap it from a phone. Does your router show the source? Do two page visits in a row. Does the number stay stable? Watch out for pages where the number appears in several places (header, footer, button). Your script should change **all** of them.

Keep the **same number** across your full path for each source. If a person lands on Page A, then clicks to Page B, the number should **not** change mid-visit. Most tools set a small cookie so the number sticks for that visitor for 30–60 minutes. That's long enough for them to read and then call.

Feed **GCLID** through to your phone system if you can. Add a hidden form field or a script that captures the GCLID from the URL and stores it in a cookie. When the person taps to call, your script can add that GCLID to the call record. Later, you can upload "Accepted" calls against the right click (S7). This closes the loop for smart bidding.

A simple, real example helps. You run a Search ad. A person clicks and lands on your "AC Repair in Phoenix" page. The URL has utm_source=google&utm_medium=cpc&utm_campaign=ac_phoenix and a GCLID. Your DNI shows the **google-cpc** number, 602-555-0100. The visitor reads your hours and taps. Your call record shows: source google-cpc, campaign ac_phoenix, keyword "ac not cooling," GCLID 123..., and result "Accepted." On Instagram the next day, someone watches your Reel and taps your link. The page shows 602-555-0102 (your Instagram number). They call. Your report now shows Instagram sent two long calls this week. Google Ads sent five. You know where to put more money.

Avoid common mistakes. Do not hard-code different numbers in different places on your site. Let the script do the swap so you don't forget a footer or a contact page. Do not use images of your number; scripts can't swap those. Use text. Do not show five different numbers to a person in one session. That confuses people and shortens calls. Keep it steady.

DNI is quiet work. Once it's set, it runs. You get clean reports by source, campaign, and keyword. You make choices with facts, not feelings. That is how you grow spend without growing waste.

S9. Performance Max with call goals (where applicable)

Performance Max is Google's "all-in-one" campaign. It can show your ads on Search, Maps, YouTube, Display, Discover, and Gmail. It uses machine learning to find conversions across those places. For pay-per-call, PMax can help **only** when you run a **real brand**, link your **Google Business Profile**, and feed it **clean call conversions** (ideally "Accepted" from your offline imports). If you are a pure publisher without a brand, skip PMax. Use Search and call assets instead.

If you do run a brand, follow a tight plan. Link your **Google Business Profile** to Google Ads so PMax can show on Maps and local surfaces. Create a PMax campaign with a **Leads** goal. In **Goals**, pick only your **call conversions** (from ads and from website taps). If you have offline

"Accepted Call" imports, include that conversion and consider excluding weaker call events from "Conversions" so the system chases the good ones.

Build one **asset group** for your main city to start. Add headlines that say the problem and the city: "AC Not Cooling?" "Phoenix AC Repair." Add descriptions that promise quick checks and a connect to a tech. Upload real photos: your van, tools, thermostat, and a clean filter photo. If you have a short video, include it; if not, PMax will make a basic one from your images. That's okay to start.

Add a **call asset** with your tracked brand number. Add a **location asset** (your GBP) so ads can show on Maps with a **Call** button. Set your **locations** to only the cities you serve and your **schedule** to your agent hours. This matters: PMax can run wide. You must fence it with clean geo and time.

Control **Final URL expansion**. This setting lets PMax choose pages on your site. Turn it **off** at first, or set **URL exclusions** so PMax cannot send traffic to weak pages like "About" or "Blog." Point the campaign to your **call-optimized location page**. PMax should learn to send more people there, where your number is big and your hours are clear.

Pick a low **daily budget** to test. PMax can spend fast. Start with an amount you are comfortable losing while the system learns, like $20–$50/day in a small city, more in peak weeks. Let it run for two full weeks while you watch **call conversions** and your **phone log**. You will see leads from Search, Maps, and YouTube blend together in the report. Your phone log is the truth. If calls are short and messy, pause and tighten.

Use **brand protection**. Run a separate **brand Search** campaign with exact match on your name so you control what shows when people search you. PMax can also show for brand, but a brand campaign keeps the message clear and gives you better control in the auction.

Block junk with **account-level negatives**. PMax has limited keyword controls, but you can still add negatives at the account level for "jobs," "salary," and other bad themes. Keep the list fresh. If you get many "manual pdf" clicks, add "manual" as a negative.

Measure with **accepted calls**, not just "conversions." In PMax, some surfaces (Display/YouTube) can send lots of clicks that do not call. Your landing page must be **very** fast and show your number at the top. Use your DNI to show the PMax number. Upload "Accepted" calls each morning. If PMax learns from accepted calls, it can work. If it learns from any click, it will wander.

Scale **slow**. If calls are long and cost per accepted is near target for two weeks, raise budget by 10–20%. Add a second asset group for your next city. Do not dump three cities into one group. Keep each city's headlines and images local. Mention ZIPs and local words.

Use **Experiments** or **geo holdouts**. If you can, run PMax in Phoenix but not in Tempe for two weeks while Search runs in both. Compare accepted calls per dollar. If PMax adds more than it costs in Phoenix, roll it to Tempe. If not, skip it for now and put your money into Search with call assets.

Know when to stop. PMax is not magic. If it spends $500 and sends short, out-of-area calls, pause it. Go back to Search. Fix your page speed. Tighten hours and geo. Try PMax again later with better signals and a stronger page.

A quick example: You operate "Cool Air" with a Google Business Profile. You launch PMax with call goals, GBP linked, URL expansion off, targeting Phoenix 8–6. In week one, your PMax number logs five calls; three pass the timer. In week two, you upload "Accepted" results. In week three, the accepted rate climbs. You raise budget by 15%. In week four, you add a Tempe asset group with local headlines and photos. PMax now finds calls from Maps and YouTube that your Search campaign missed, at the same cost per accepted call. You keep both running and let your phone log guide your budget.

Use PMax only **where it fits**: real brand, real profile, clean goals, and clear guardrails. Then it can be a quiet helper, not a wild card.

S10. Maps Ads & Local Services Ads (if you operate a brand)

If you operate a real brand, two paid tools can add steady calls: **Maps Ads** and **Local Services Ads (LSAs)**. They sit above or inside the places locals already use—Google Maps and the "Google Guaranteed" box. Used with care, they stack on top of your free map-pack work and your Search ads.

Maps Ads show your listing at the top of Maps with a small "Ad" label. They come from **location assets** in your Google Ads account linked to your **Google Business Profile**. You do not build a separate "Maps campaign." Instead, you add location assets to your **Search** campaigns and **allow ads on Maps**. When a person searches in Maps for "ac repair near me," your listing can show with a **Call** button, directions, and your hours.

To make Maps Ads work, first clean your **GBP**: real name, service areas, hours, reviews, and photos. Then, in Google Ads, link that profile and turn on **location assets** in your Search campaign. Target only your service cities and set your schedule to your open hours. Write ads with local words and make your landing page a **tap-to-call** page. In your reports, look at **"Clicks on call button"** and listen to your Maps calls in your phone system. If calls are short, check your hours and service area. Maps tends to bring **very** local, "right now" callers. Your phone must pick up.

Local Services Ads are different. They sit above search ads, with "Google Guaranteed" badges in many verticals. People tap and call or send a message from inside the LSA unit. You pay **per lead**, not per click.

Google records the calls, tracks leads in the LSA dashboard, and lets you **dispute** bad leads (wrong service, out of area, spam). LSAs are strong for trades like HVAC, plumbers, electricians, and more.

To run LSAs, you must pass **checks**: license, insurance, sometimes background checks. Set your **services**, **service area**, **hours**, and your **budget**. You can choose bidding options (like Maximize Leads or set a bid per lead in some cases). LSAs use their own **tracking numbers**. You can't swap in your own, but you can still see call recordings and lead details in the LSA app or dashboard. Treat LSAs like a separate faucet. Watch **lead quality** and **acceptance**. If a week brings many wrong calls, adjust your service list, hours, or service area.

LSAs also let you set **schedules**. Only run when you answer. If you get flooded with messages you can't handle, turn off messages and take phone leads only. Reply fast. Slow replies lower your rank.

Use **reviews** to lift both tools. LSAs show your stars. Maps shows your stars. Ask for reviews after each job. Reply to all of them. A steady stream of kind reviews moves you up and makes more people tap **Call**.

A simple plan to stack these:

1. Clean your **GBP** and link it to Google Ads.
2.
3. Add **location assets** to your Search campaign so Maps Ads can show.
4.
5. Launch **LSAs** once you pass checks. Start with a modest budget.
6.
7. Run all three with the **same hours** and a **registered tracking number** on your site and in your Search ads.
8.
9. Measure calls by source in your phone system: Search, Maps, LSA.
10.

A short story shows the stack. You run Search with call assets. You add location assets, and Maps Ads start to show. Calls from Maps add three accepted calls a day. You launch LSAs with phone leads only, 8–6. In week one, LSAs bring five leads; three are solid. You dispute one wrong lead and get credit. In week two, you raise LSA budget by 20% and see two more good calls. Now Search + Maps + LSA together bring a smooth line of calls that pass your buyer's timer.

Avoid common mistakes. Do not run LSAs when you cannot answer. Do not set your service area too wide. Do not ignore your reviews. Do not send LSA callers into an IVR maze. They expect to speak to a human quickly. Keep your greeting short and your recording notice clear: "This call may be recorded for quality. Is it okay to continue?"

Maps Ads and LSAs are for **brands**. If you are a publisher running anonymous pages, focus on Search. If you are a brand with a real name and license, add these two and let locals find you in the places they already trust.

S11. Ad policy checklist & compliance gotchas

Paid traffic works only if you keep it **clean and honest**. Platforms will shut you down for tricks, and callers will hang up if you promise what you cannot deliver. A simple checklist keeps you safe and steady.

Tell the **truth** in ads. If you open 8–6, say 8–6. Do not claim "24/7" if you don't answer at night. If you connect callers to **licensed pros**, say that. Do not call yourself the **manufacturer** or a **factory service** if you are not. Do not use fake countdowns or fake "limited spots" in search ads. People feel lies on the phone and hang up early.

Match the **ad** and the **page**. If your ad says "Phoenix AC Repair," your page should say the same and show a Phoenix number and ZIPs. If your ad says "Same-Day Help," your page and your agents must honor it, or you must soften the ad. Mismatch makes short calls and refunds.

Follow **restricted content** rules. Some categories (like health and financial services) have extra rules or bans on certain claims. If you run pay-per-call in those areas, add the proper disclaimers, and make sure your buyers are licensed for the services. If any platform bans "third-party tech support" for consumer devices, don't try to sneak in with wording games. Stay in allowed niches where you can help people safely.

Respect **privacy**. On any landing page with a form, include a clear **consent** line: "By submitting, you agree we can call or text you about this request. Message/data rates may apply. Reply STOP to end." Place it next to the button, not hidden below the fold. Post a simple **privacy policy** that says what you collect and how you use it. If you record calls, put a **recording notice** on the page and at the start of the call: "This call may be recorded for quality. Is it okay to continue?"

Honor **DNC** and **STOP**. If a person texts STOP, stop. If a person asks not to be called again, suppress their number in all tools. Sync your suppression list across SMS, WhatsApp, and dialers. This is not just a rule; it keeps your brand safe and your costs down.

Keep **location honest**. Do not put a fake address on your site or in your profile. If you are a service-area business, say so and list the cities or ZIPs you serve. If you use a tracking number, register it so caller ID shows a clean name. In Google Business Profile, you can list the tracking number as main and your old number as additional. Keep them stable. Frequent swaps look shady.

Avoid **bait-and-switch**. Do not run "free tune-up" ads if you charge a fee. Do not promise a **brand** service if you are not that brand. Do not say "we are the only" unless you can prove it. Keep claims small and true: "We connect you to a local, licensed tech today."

Watch your **keywords**. Block "jobs," "salary," "manual," "customer service," and brand names you do not service. If you see many "warranty" calls and you do not handle warranties, add "warranty" as a negative. This protects people and your budget.

Mind **landing page** behavior. Do not auto-play sound. Do not block content with giant pop-ups. Do not hide extra fees in tiny fine print. Do not make people hunt for your phone number. Clean pages help quality, and clean pages keep platforms happy.

Train your **agents** for policy. They should know how to say the recording notice, avoid promises they cannot keep, and never take **card numbers** if your buyer's team must handle that. Move payment to the buyer. You are a connector, not a collector.

Keep a **paper trail**. Save screenshots of your ads, copies of your landing pages, and records of your hours. If a platform flags you, you can show you were honest. If a buyer disputes calls, your recordings and logs will help you get credit.

This checklist sounds basic because it is. Basic wins. Ads and pages that match, promises you can keep, and clear consent turn into longer calls and fewer refunds. That is money in your pocket and a clean account that won't get shut down the week you need it most.

S12. Budgeting & scaling rules

Paid media should feel like a **dimmer switch**, not a light switch. You turn it up in safe steps. You turn it down if quality dips. You never blow a month's budget on a hunch. A few simple rules keep your money safe and your phone steady.

Start with a **test budget** you can afford to lose while you learn. Build it from your numbers, not your wish. Use this simple plan. First, write your **payout per accepted call**. Say it's $120. Next, write your **target**

acceptance rate. Say 60%. Your **effective value per call** (before rejection) is $72 ($120 × 0.60). Set your **target cost per call** lower than that so you have margin. Aim for $45–$55 in this example. Now pick a daily budget that can buy **3–5 calls** on day one. If clicks cost $15 and half of clicks become calls, you need $90–$150/day to get a few swings. In slow seasons, test smaller. In peak weeks, you can test bigger.

Set a **risk cap**. Decide the most you'll spend on a new campaign before you must see at least one accepted call. For example, "If we spend $250 and get zero accepted calls, pause and review." Write this rule down so you don't chase losses.

Set **green-light rules** too. For example, "If a campaign hits three days in a row with cost per accepted call under $55 and at least four accepted calls per day, raise budget 20%." Small lifts hold better than big jumps. After each lift, wait three to five days to see if quality holds. If it does, lift again. If not, step back.

Scale the **best hours** before you add new cities or keywords. If your reports say 4–6 p.m. brings the longest calls, add budget or bid in those hours first. Once you've maxed those windows at your target cost, open the next best window. This beats spreading thin across the whole day.

Scale **by intent** before expanding geography. If "ac not cooling" calls pass timers, add more phrase variants there. Then test "ac leaking water" if acceptance is strong. Only then add new ZIPs or cities. Heavy intent + local match = longer calls.

Break budget into **buckets** so you can see winners. Keep **Call Ads** in their own campaign with their own budget. Keep **Search + call assets** separate. If you run **PMax**, keep its budget separate too. If you run **LSAs**, they have their own budget. This way, when you raise one, you know what moved.

Give each change a **clean window**. Do not change bids, budgets, keywords, and pages all at once. If results swing, you won't know why. Change one thing, watch 3–5 days, then change the next.

Guard your **cash flow**. If your buyer pays on **net terms** (like net-15 or net-30), make sure your card and cash can float that much ad spend. It's painful to win lots of calls and then get your ads paused for non-payment. Track **AR** (accounts receivable) weekly. If a buyer falls behind, cut their share of calls and raise caps with the buyer who pays on time.

Set **caps** with buyers and respect them. If a buyer wants 20 calls a day, do not send 40. Overfilling leads to sloppy answer times and refunds. If your media can send more, bring on a second buyer and build an **overflow** plan (see your Call-Flow chapter). Split traffic fairly.

Use **5–10%** of budget for tests. Always. New keywords, new ad copy, a new hour, or a new city. Most tests won't beat your control. That's okay. The ones that do are how you grow. If a test beats your control for a week, move it into the main budget.

Kill with kindness. **Pause** losers fast. Make a rule like, "If an ad group spends $150 with zero accepted calls, pause and fix." Fix might mean tighter geo, new ad text, more negatives, or a faster page. Bring it back only when it's ready.

Share **quality data** with your ads. Upload "Accepted" calls daily (S7). Your bidding learns. Move budget to the campaigns that learn well. Pull budget from those that don't.

Watch the **human side** as you scale. Ask agents, "Are the calls calmer now? Are the right ZIPs calling?" If agents feel swamped at 5 p.m., move a break. If buyers complain about out-of-area calls, tighten geo. Media and people must fit.

Have a **stop plan**. If quality collapses (maybe a heat wave ends, or a new competitor floods the market), drop budgets by 30–50% for three days while you review. Listen to recordings. Check search terms. Check hours. Tighten, then rebuild.

A small story shows the rhythm. You start June with $120/day split between Call Ads ($60) and Search + call assets ($60). Your target cost per accepted call is $50. Day three, Call Ads hit $45 per accepted. You raise that budget to $80. Day six, Search lags at $70 per accepted. You add negatives and move “AC leaking water” into its own ad group. By day ten, Search drops to $52 per accepted. You lift it to $90. By week three, you’re spending $170/day with both campaigns under target and taking 8–10 accepted calls daily. You leave $15/day for PMax test, which sends two calls, one accepted. You hold that tiny test for now. In July, you add a Tempe campaign with $40/day and repeat the pattern. Slow steps. Clear rules. No panic.

Budgeting and scaling are not magic. They are **habits**: test small, lift winners, cap risk, and let the **phone log** decide. Keep the dimmer smooth, and the line stays steady—even when the weather changes.

14

Paid Media — Social

S1. Meta Call Ads (click-to-call)

Meta (Facebook and Instagram) can send you fast calls if you build the ads the right way. People scroll on their phones. They see a short video or a clear photo. They tap a big “Call Now” button. Their dialer opens with your number. No detours. This is perfect for pay-per-call. Your job is to make the message simple, show the right people, run only when agents can answer, and track each call by ad set so you know what works.

Begin with the goal inside Ads Manager. Choose a leads or traffic objective that supports calls, then set the destination to **Phone call**. Enter a **tracking number** that points to your router, not your office line. Register that number so the caller ID looks clean. In your ad account settings, turn on **call reporting** if available, and plan to log results in your phone system too. In your phone system, label calls from this number as “Meta Call Ads” so you can see talk time and acceptance later.

Keep your audience tight. Use a small **radius** around your service ZIPs or pick the exact cities. Exclude the ones you do not serve. If your buyer wants only 85008/85016/85018, target those and nothing more. Do not use a broad "state" target and hope the algorithm will figure it out. It won't, and you will pay for short, wrong-area calls. Add a light interest filter only if you must (homeowners, home repair). Often, **geo alone** is enough when your creative makes the problem clear.

Create one ad set per city or ZIP cluster. Give each ad set its **own tracking number**. Now, when the phone rings, you know which ad set did the work. Start with modest budgets in each ad set. Think $20–$50/day per city during testing. You can raise later if accepted calls are strong.

Make simple, native creative. A 15–20 second vertical video shot on a phone is best. Face the camera. Say the problem in the first second: "AC not cooling?" Show a clean filter next to a dirty one. Show a thermostat set to cool and auto. Say three safe steps: "Replace a dirty filter. Flip the breaker off and on once. Set cool + auto and wait five minutes." Add one safety line: "If you smell burning or hear buzzing, stop and call a pro." End with your **call line** and hours: "In Phoenix? Call 602-555-0100, 8–6. Calls may be recorded." Put the number and hours on screen in big text for the last three seconds, because many people watch with sound off. If you don't want to film, a clear photo with those same words in the caption can still work, but video wins more often.

Write the primary text like you talk. "AC blowing warm today? Try these quick checks. If you're still stuck in 85008/85016/85018, tap **Call Now**. We answer 8–6." Keep the headline short: "Phoenix AC Help — Call Now." Do not paste a wall of emojis. Do not promise "24/7" if you're not. Honest hours lead to longer calls and fewer refunds.

Run ads only when you pick up. Set the **ad schedule** to your agent hours. If you answer 8–6, run 8–6. That includes weekends if you are open. Do not run after hours and hope for voicemails. Late-night calls are short and angry. Protect your acceptance rate by respecting the clock.

Balance placements. Let Meta show your ad in Feeds, Reels, and Stories on **mobile**. If you leave desktop on, people may click and then try to dial from a computer. That turns into short, confused calls later. If you must keep desktop, make sure your **landing page** is a clean tap-to-call page with your number large, but know that true call volume will still come from phones.

Track what matters. In Meta, watch **cost per call click** and **calls**. In your phone system, watch **connected talk time** and **accepted vs. rejected** by ad set. If a city's calls are short, tighten its radius or change the copy to name the ZIPs sooner. If a creative sends long calls, make a second version with the same words but a new opening shot and test it. Keep what earns accepted calls. Pause what doesn't.

Use **retargeting** the right way. Build a custom audience of people who watched 50%+ of your videos or engaged with your page in the last 30 days. Show them a calmer ad that simply says, "Still stuck? Tap to call. 8–6." People who already know you often call faster and talk longer.

Add a **Spanish** version if you can support it. Record the same video in Spanish. Target the same ZIPs. Keep the number and hours the same. Make sure a Spanish-speaking agent can answer during the hours you promise. If not, do not run that ad yet. Disappointed callers hang up quickly and hurt your metrics.

Build a small **test plan**. Week one, launch three ad sets: Phoenix east ZIPs, Phoenix central ZIPs, Tempe. Each has its own number and one video. After three days, listen to five recordings per ad set. Are the voices local? Are they calling during your open hours? Do they mention the video? If yes, keep going. If not, fix the words or the geo. Week two, add a second video angle to the best ad set. Week three, raise budget 20% on the winner. Small steps keep risk low.

Avoid common traps. Do not use a **lead form** for call ads. That adds steps and delays help. Do not let comments fill with spam. Hide and block fast so real neighbors feel safe. Do not add your number five times in the text; it looks pushy. Once on screen and once in the caption is enough. Do not stack three problems into one ad. One problem per ad keeps calls clean.

Here is a real-style example. It is June. You set a Phoenix east ZIP ad set with 602-555-0100 and a Tempe ad set with 480-555-0101. Your video says, “AC not cooling? Replace a dirty filter, flip the breaker once, set cool + auto and wait five minutes. Still stuck in 85008/85016/85018? Call 602-555-0100, 8–6. Calls may be recorded.” You run 8–6. Day one, the Phoenix number logs five calls. Three pass 90 seconds. Day two, you add a Spanish version. That day, you get two Spanish calls; both pass. Day three, you raise Phoenix budget 20% and keep Tempe flat. By day seven, you average seven accepted calls per day from Meta, at a cost your buyer likes. You did not get fancy. You spoke like a neighbor and answered on time. That is how Meta Call Ads win for pay-per-call.

S2. Lead Ads → immediate callback workflows

Some people will not tap “Call Now.” They want to type a few details and get a call **back**. **Lead Ads** on Meta can collect a phone number inside the app with two taps. If you call that person **within 60 seconds**, many will answer and talk long enough to pass your timer. The trick is to keep the form short, capture consent, route the lead to a dialer right away, and connect the caller to the right buyer fast.

Set the right promise in the ad. Say what you help with and how fast you call back. “AC not cooling? Send your number for a **free 2-minute check**. We’ll call you in 60 seconds. Phoenix only. 8–6.” Use a clear photo or a 10–15 second clip. In the video, say, “We’ll call you in a minute.” Do not promise “instant” if it might take five minutes. Keep trust.

Build a **simple Instant Form**. Choose the “More volume” form type if you want the easiest path, or “Higher intent” if you need a review step to cut junk. Ask for **first name**, **phone**, and **ZIP**. That’s it. Add one

consent line near the submit button: "By tapping Submit, you agree we can call or text you about this request. Message/data rates may apply. Reply STOP to end." Check your spelling. Keep the words plain. Do not cram a long policy here; link to your privacy page below.

Add one or two **screen questions** to keep bad leads out. "Are you in Phoenix ZIPs 85008/85016/85018?" with Yes/No buttons. "Is your AC issue happening right now?" with Yes/No. If someone taps "No" to both, you can still take the form, but you should route it to a slower follow-up, not the hot line.

Wire the form to your **dialer**. Use a direct integration, Zapier, or Make. The instant the form lands, your system should do two actions: call your **agent** and call the **lead**. When both answer, bridge them. If your agent misses the call, your system should **queue a retry** and send the lead a short text: "We're calling now from 602-555-0100. If you miss us, we'll try again in 5 minutes. Reply STOP to end." Log STOP and stop. Respect consent.

Set a tight **SLA**: call within **60 seconds**. Every minute after that lowers answer rate. Put a small **countdown** in your agent's view so they see how old the lead is. If you cannot call back fast for the next hour, **pause** the ad. Do not collect leads you cannot touch. Slow calls turn into short calls.

Route smart. If the lead's ZIP is 85008, send to Buyer A. If 85016, send to Buyer B. If after 5:30 p.m., send to Buyer C who takes evening calls. If the lead says Spanish, route to a Spanish-speaking agent. These rules add seconds to talk time because people feel known. They also cut refunds.

Prepare a **callback opener** that matches your ad. "Hi, this is Jay with Phoenix AC help. You sent your number for a 2-minute check. This call may be recorded for quality. Is it okay to continue?" Wait for "yes." Then ask one or two quick questions the buyer needs: "Is air blowing warm or not at all? What's your ZIP?" If the lead is in scope, transfer warm. If out of scope, apologize and end kindly. Do not burn minutes on calls you know your buyer can't accept.

Measure every step. In Meta, look at **lead cost** and **lead form completion rate**. In your dialer, look at **call-back time**, **connect rate**, **connected talk time**, and **accepted vs. rejected**. In your CRM, note **source** (ad set, ad) and **ZIP**. After a week, you will see which ad text, which hour, and which ZIP drive accepted calls. Shift spend there.

Fight lead junk. Use the "Higher intent" form with the review step if quality is poor. Add a **simple math** question ("What is 2+3?") if bots hit you. Add a **disqualifier** question ("Do you own your home?" if the buyer needs owners). Do not ask for photos or long notes; that kills speed. If your lead volume becomes strong and your agents are flooded, add a **"preferred call time"** field and call in waves, but keep a fast lane for "call me now."

Close the loop with Meta. Use the **Conversions API** or offline event upload to send "Accepted Call" outcomes back to the ad set. Mark leads that turned into accepted calls within, say, 48 hours. Let Meta learn which placements and which people trigger those outcomes. Your cost per accepted call will slide down over two to three weeks.

Keep your promises tight. If you say "60-second call," call in 60. If you say "Phoenix only," do not drag a Tempe lead through three questions just to reject them. Be kind and clear. People will remember and call again when they move or share your number with a neighbor.

Here is how a clean day looks. At 10:00 a.m., Ana sees your lead ad: "AC not cooling? We'll call you in 60 seconds." She taps, confirms her name and phone (auto-filled), types "85008," and taps submit. Your dialer rings your agent. As soon as they pick up, it calls Ana. "This call may be recorded. Is it okay to continue?" She says yes. Two quick questions later, your agent warm-transfers Ana to your buyer. The call runs 2:15. Your buyer accepts it. Your system marks it and sends that event back to Meta. Your ad set learns. By noon, you have four accepted calls from six leads. You pause for lunch if your agent is out. At 1:00 p.m., you unpause and repeat. It feels smooth because it is simple.

Lead Ads are not magic. They are a short promise and a fast phone. Keep the form short. Keep consent clear. Keep the callback in 60 seconds. Keep routing smart. Track accepted, not just leads. Do that, and lead ads become a steady lane of long calls.

S3. TikTok call-first creative & targeting

TikTok moves fast, but callers can still find you there if you speak their language and make the next step one tap. The plan is simple: use short, real videos; keep the hook clear; point to a **call-optimized page** with a giant tap-to-call button; and target people who live where you serve. Your phone number should appear on screen and in the caption. Your page should load in under two seconds and show your number and hours at the top.

Start with the video. Use your phone. Face a window for light. Hold it vertical. In the first second, say the pain out loud and on screen: “AC not cooling?” Then show three safe checks with your hands in frame: hold a dirty and clean filter; point to a breaker (no panels open; flip off and on once); hold a thermostat set to cool and auto. Say, “Still stuck in Phoenix? Call 602-555-0100, 8–6. Calls may be recorded.” Put that line as **text** for the last three seconds. Add captions so people can read without sound. Keep the whole video 15–25 seconds. This looks like real life, not an ad.

In Ads Manager, choose a website goal so you can link to your **call page**. On that page, your number sits big at the top with a **tel:** link, your hours appear next to it, and your ZIPs are listed in the first screen. If your account has a “Call Now” button option, you can test it, but do not rely on it being in every account or region. A clean call page works on all phones. It is also better for tracking because you can use your own number.

Keep targeting tight. Select your **city** or a small radius around your ZIPs. Do not run statewide. Choose age ranges that fit your buyer. If homeowners are the target, you can start at 25+. Pick a few **interests** like "Home improvement," "Household," or "Do-it-yourself." Do not stack ten interests. Keep it simple. Later, build a **lookalike** audience from past callers (upload hashed phone numbers) to test, but only after your base campaign works.

Set a daily budget you can afford for a week while you learn. In summer, $30–$100/day can work in one city. Schedule the ad for **open hours**. If you run 8–6, set the ad to show 8–6. You can also run 7:30–6:00 if you want a little early lift, but do not run late if no one answers. If you post organic content too, drop your ad when you post to warm the room.

Write a short caption with local words: "Phoenix homes: AC blowing warm? Try these. If still stuck in 85008/85016/85018, tap to call. 8–6." Use one or two hashtags (#phoenix #acrepair). Do not paste a wall of tags. In comments, pin one comment: "Phoenix help line: 602-555-0100, 8–6 (Calls may be recorded)." This helps people who read comments before tapping.

Track with a **TikTok number**. Put the same number in the video text, the caption, the pinned comment, and at the top of your call page. In your phone system, label it "TikTok Ads." After a week, look at **connected talk time** and **accepted vs. rejected** by hour. You will likely see short spikes right after posts or when heat peaks. Raise bids or budgets in those times first.

Use **Spark Ads** if you have a strong organic video. Spark lets you promote a real post so comments and likes stay on one piece. People trust the comments. That trust can lift calls. Make sure your **link** on the Spark ad goes to the same fast call page and shows the same number.

Try **Topical bursts**. If a dust storm is coming, make a storm-specific version: "Dust storm today. Replace your filter tonight. Still warm tomorrow? Call 602-555-0100, 8–6." Schedule it for late afternoon. People will feel it's "for them today," which raises calls.

Avoid traps. Do not claim to be a brand you are not. Do not offer risky steps on camera. Do not run ads at night if you close at six. Do not send people to a slow, bloated website. Do not hide your number below the fold. Do not stuff ten different problems into one clip. One problem per ad is enough.

Pair ads with **Lives** when you can. Run a 20–30 minute Live Q&A during open hours. Pin your number in the comments. Answer five questions. Repeat the number three times. Lives often spike calls. Your ad can warm the room before the Live, and the Live can warm the ad afterwards.

Here is a clean example. Tuesday at 4:00 p.m., you launch a TikTok ad in Phoenix with a 22-second video: hook, three steps, call line on screen. The ad links to your call page with your number at the top. You set the schedule to 4–6 p.m. only. From 4:15 to 6:15, your TikTok number logs eight calls. Six are in your ZIPs. Four pass 90 seconds. On Wednesday, you move the same ad to 11 a.m.–1 p.m. You get three calls, two accepted. You keep both windows and raise the 4–6 budget by 20%. Over a week, you see which hours and clips bring long calls. You repeat those. That is TikTok for pay-per-call: native, local, simple, and on time.

S4. Snap call ads

Snapchat reaches people who live on their phones. The screen is vertical. The flow is quick. A good Snap ad looks like a story from a friend: short, real, and easy to tap. For pay-per-call, your job is to put a clear fix in the first second and a clean way to call in the next two. Use a fast **swipe up** to a call page with a big button, or link directly to a **tel:** URL so the dialer opens. Keep targeting tight so only locals see the ad.

Make the creative simple. A 6–10 second vertical video works best. Start with the problem in big text: “AC not cooling?” Say it out loud too. Show a filter or a thermostat. Speak one safe step. End with “Phoenix help line: 602-555-0100, 8–6. Calls may be recorded.” Put the number on screen. On Snap, sound is on by default more often than on other apps, but many still read, so **text** matters.

In Ads Manager, pick a website goal if you plan to send people to your call page, or use a direct **call attachment** if available in your region. If you pick website, set the URL to a **tel:** link (tel:+16025550100) to trigger the dialer, or to a fast call page that shows your number at the top with a big button and your hours. Test both. Some phones handle tel links from Snap differently. If tel links fail for your device mix, use the call page and make it lightweight.

Target by **location** first. Choose your city or drop a small **radius** around your ZIPs. Exclude the areas you don’t serve. Add age if it fits your buyer. Light interest layers like “Homeowners,” “DIY,” or “New Movers” can help, but don’t overdo it. Snap’s best strength here is **local reach** and speed, not deep interest nets.

Schedule ads to your open hours. Snap usage spikes in the evening, but if you close at 6 p.m., do not run at 10 p.m. Promise what you can keep. Many strong Snap results happen late afternoon when people get home and notice problems. Test 4–6 p.m. first, then add late morning.

Use one **tracking number** per ad set so you see which creative and which radius wins. Put the number in the creative, in the swipe-up page, and in your router. Keep them the same so reports are clean. Label the number “Snap Ads.”

Write your **Top Snap** like a neighbor. Do not pack tiny text. Big words, big numbers, big hours. “Phoenix AC Help • 602-555-0100 • 8–6.” If you add a **call-to-action** button, pick “Call Now” or “Contact Us,” not

"Learn More." The wrong button can add friction.

Retarget people who swiped up but did not call. Build a custom audience of **swipe-ups** to your URL in the last seven days. Show them a calm version the next day that says, "Still stuck? Tap to call. Phoenix only. 8–6." This second push often converts because the pain is still there.

Measure what matters. In Snap, watch swipe-ups and cost per swipe. In your phone system, watch **connected talk time** and **accepted vs. rejected** by ad set and hour. If swipes are high but calls are short, the gap is your **page**. Make the number bigger, move it higher, and test a direct tel link if you used a page. If calls are long but few, raise bids a little in the hours that worked.

Handle **creative fatigue**. Snap viewers get bored fast. Every 5–7 days, swap the first shot. Keep the same words and number, but change the angle: close-up on filter this week, thermostat next week. Do not change the promise each time. Keep it steady. Only the "wrapper" changes.

Avoid traps. Do not run sweeping "state-wide" campaigns. Do not send to a slow site. Do not forget to say your **hours**. Do not use tiny white text on a bright photo. People will miss your number. Do not run during school days if your buyer serves only homeowners and you target teens by mistake.

A quick cycle shows the flow. Monday 4–6 p.m., you run a 7-second Snap with "AC not cooling?" in big text and your number at the end. You target Phoenix with a small radius around 85008/85016/85018. You link to a tel URL. The dialer opens on swipe. Your Snap number logs six calls in two hours. Four pass 90 seconds. Tuesday at 11 a.m., you run the same ad for two hours. You get three calls, two pass. Wednesday you swap the opener shot to a thermostat. Thursday you retarget swipers who didn't call with a "Still stuck?" snap. One more call. This is small, steady, and local. It adds to your Search and Meta lines without breaking your day.

Snap ads work when you act like a neighbor, not a TV brand. Short clip. Big problem. Big number. Honest hours. Tight map. One tap to call. That is the Snap recipe for pay-per-call.

S5. YouTube action formats with call assets

YouTube can do more than views. **Video action campaigns** on YouTube can push calls when you add **call assets** and send mobile viewers to a clean call page. The watch time is longer than most social feeds, so you have a few extra seconds to show the fix and build trust. People also watch YouTube on TVs and desktops, so you must make both paths easy: a call for phones and a fast callback form for non-phone viewers.

Start with one 15–30 second skippable video. Keep it human. Face the camera, say the pain in the first two seconds, and promise help. “AC not cooling? Three safe checks, then we’ll connect you to a local tech.” Show a filter and a thermostat. Say the three steps. Add one safety line. End with your **call line** twice: “Phoenix help line: 602-555-0100, open 8–6. Calls may be recorded.” Put the number and hours large on screen for the last three seconds. YouTube viewers often sit back; big text matters.

In Google Ads, create a **Video** campaign with the **Leads** goal. Pick **Video action** as the subtype. In **Assets**, add a **call asset** with your tracked brand number. Set its **schedule** to your hours so the call button shows only when you answer. Also add a **location asset** (your Google Business Profile) so you can get local lift and a call option in some placements. For the **Final URL**, send people to your **call-optimized page** with a big tap-to-call button at the top, your hours, and your ZIPs. The page must load in under two seconds on a phone.

Target by **location** first. Choose your service cities only. For audiences, start with **custom segments** based on search intent (people who recently searched for “ac repair,” “ac not cooling,” “hvac near me”). You can also use in-market audiences for "Home Repair Services." Keep it small. YouTube will find more under the hood.

Pick **Maximize Conversions** bidding if you already track call conversions in Google (calls from ads and calls from your website). If you are new, start with **tCPA** only after you have 30–50 call conversions across two to three weeks. If you don't have clean call tracking yet, start with a low budget and focus on building that first. The system will only chase what you tell it.

Write a calm **headline** and **long headline** that match the video. "AC Not Cooling? Phoenix Help 8–6." In the description, repeat your hours and city. The overlay button should say "Call Now" or "Get Help" and lead to your call page on mobile. On some mobile views, the **call asset** gives a call button right below the video. On desktop and TV, viewers will click to the page or scan your number on screen and call later. Plan for both.

Use **dayparting**. Run the campaign only when you answer. YouTube can spend fast. Protect your acceptance rate by respecting 8–6 (or your true hours). If you can add evening coverage during heat waves, extend schedule then, and shorten later.

Add **sit-elinks** only if they help callers. "Service Areas," "Hours," "Request Callback." Do not add "Blog" or "About" for this campaign. Action formats should not send people into reading loops.

Measure with a **YouTube number**. Put it in the call asset, on the video end card, and at the top of your call page. In your phone logs, compare calls during your ad schedule to calls at other times. True YouTube calls rise during and right after your ads. On mobile, many will tap the call asset; on desktop, many will visit the page then call during lunch or after work. Use **offline conversion uploads** (Accepted Call) so the system learns who becomes revenue.

Tighten your **audiences** and **placements** if you see drift. If your search-based custom segment gets weak, add negative topics like "HVAC careers," "HVAC school," and "manuals." Keep the video the same if talk time is strong. Change only what wastes spend.

Blend with **Community posts** on your YouTube channel. Post "We're live 8–6 with AC help" with your number and hours. Pin a comment on your own videos with the number. Organic posts plus action ads move together. People trust the channel more when they see both.

Avoid traps. Do not run at night if you close at 6. Do not send traffic to a slow site. Do not skip the call asset and hope viewers find your number in the description. Do not make the video fancy and vague. Clear beats clever. One problem per video. One city per campaign at first.

A real-style run looks like this. You launch a Video action campaign in Phoenix with your 20-second clip. You add a call asset with 602-555-0100 and schedule 8–6. You target a custom segment of people who searched "ac repair," "ac not cooling," and "hvac repair near me" in the last seven days. You set Max Conversions at $50/day. Day one, the call asset gets three calls. Two pass 90 seconds. Day two, you see most calls come 4–6 p.m., so you lift bids 10% then. Day four, you add "ac leaking water" to your audience and post a Community note with your number. That afternoon, your YouTube number logs seven calls. Five pass. You keep the same clip for two weeks, then shoot a new one that opens on a thermostat for fresh eyes. Your cost per accepted call stays within target, and your agents like the tone of these callers because they saw and heard the steps first.

YouTube action formats work when you **stack the pieces**: clear video, call asset on, fast page, tight geo, clean hours, and accepted calls fed back as conversions. Do that, and YouTube becomes another steady lane of high-intent calls that plays well with Search and Maps.

S6. Creative angles & hooks for calls

A good ad is not fancy. It is clear. In the first second, the viewer should know the problem, that you are local, and that calling you is the next step. When you build social ads for calls, think like this: problem first, proof second, action last. Say the pain out loud. Show one small fix. Point to the phone. That is your hook.

Start with a "now" moment. People stop scrolling when you name what they feel. "AC not cooling?" "Water under the sink?" "Fridge isn't cold?" Use big on-screen text and your voice. If you have five words to spend, spend them here. Right after the hook, give one safe micro-step. Hold up a dirty filter. Point to a thermostat set to cool and auto. Show a breaker flipped off and on once. Small steps prove you are useful. They also calm the viewer. A calm person listens longer and is more likely to call.

Make it local before you ask for the call. Local words raise trust. "Phoenix dust clogs filters." "Tempe monsoon hits tomorrow." "Mesa heat wave today." You do not need a long story. One local line is enough. Then you say the number and hours, slow and clear. "In Phoenix? Call 602-555-0100, 8 to 6. Calls may be recorded." Put that line on screen for the last three seconds so people can copy it with sound off.

You do not need wild ideas. You need **angles** that match daily life. A few strong ones can carry a whole season. The **problem-first** angle is the workhorse: "AC blowing warm?" The **season-time** angle rides weather: "110° by noon—do these two checks now." The **safety-first** angle builds trust: "Smell burning? Stop and call a pro." The **local proof** angle shows you belong: "We helped three homes in 85008 today." The **tiny promise** angle keeps it real: "Two-minute check on the phone. If still stuck, we connect you."

Use your hands and simple props. A clean filter next to a dirty one says more than a paragraph. A shot of a thermostat with "COOL" and "AUTO" turned on tells the story without words. A sticky note with your number on the frame looks human. Real beats polished. People trust "real" and call more often.

Write your opening like a text to a friend. "AC not cooling? Try this fast. Replace a dirty filter. Flip the breaker off and on once. Set cool + auto, wait five minutes. Still warm in 85008/85016/85018? Call 602-555-0100, 8–6." That is the whole script. Speak it slowly. Smile. Do not rush the number. You can swap "AC not cooling" for "leaking water," "no heat," "strange noise," or "thermostat blank." Same frame, different pain.

Match your hook to the platform. On Instagram Reels and TikTok, the first frame decides everything. Start with big text. On YouTube, people will give you two more seconds. You can open with your face and then cut to the prop. On Facebook, a short caption above the video helps. "If your AC blows warm today, try these checks. If you're still stuck, tap to call. We answer 8–6."

Keep different hooks in a small box and rotate them. You do not need 50. You need 5–8 that you can swap weekly. You can keep the same call line each time. The number and hours stay the same. Only the first second changes. A filter shot this week. A thermostat shot next week. A breaker shot the week after. This keeps eyes fresh without changing your promise.

Speak to timing. Ads work best when your agents can pick up. Say it out loud: "We answer 8 to 6." People call at the times you name. If you have extra staff from 4–6, put that in your copy during hot weeks: "Shortest wait 4–6 today." Little clues like this guide behavior and fill quiet hours.

Use helpful "what not to do" lines as hooks. "Do **not** push a stuck fan with a stick. Call a pro." "Do **not** open live panels." Safety hooks stand out because they protect people. They also protect your brand and reduce refunds from risky DIY that went wrong.

Borrow stories, not hype. "Ana in 85008 called. Filter looked like a sweater. New filter + 5-minute wait fixed it. If you try that and it's still warm, call 602-555-0100, 8–6." Short, true stories work better than hard claims. They feel like a neighbor talking, not a commercial.

Make bilingual versions if you can serve them. Record the same clip in Spanish. Keep the number and hours the same. Put "Se habla español 8–6" on screen. Only run that ad if you truly have Spanish-speaking agents ready. Disappointment leads to short calls and complaints.

Bring in UGC (user videos) as an angle. Ask a happy caller to record a 20-second story: name, ZIP, problem, and outcome. End with your number card. A real voice saying "They picked up fast in 85008" is gold. You can run that as an ad with their okay. Keep it simple. Keep it short.

Test hooks like a school science class. Change one thing and watch. Two videos, same script and number, different first three seconds. Run each for three days with the same budget. Watch **connected talk time** and **accepted calls** by ad. The winner earns the next slot. The loser goes back in the box for later. This "one change at a time" habit saves money and nerves.

Do not overcomplicate. No flashing arrows. No ten emojis. No tiny text. No "limited spots" nonsense. People smell tricks. Tricks make calls short. Clear help makes calls long. Long calls pass timers. That is the goal.

Here are five simple scripts you can use today.

"AC not cooling? Replace a dirty filter. Flip the breaker off and on once. Set cool + auto and wait five minutes. Still warm in 85008/85016/85018? Call 602-555-0100, 8–6. Calls may be recorded."

"Water under the sink? Shut off the angle valve under the sink, hand-tighten loose trap joints, place a towel. If it keeps dripping in 85008, call 602-555-0100, 8–6. We'll connect you."

"Heat won't start? Set thermostat to heat + auto. Check the furnace switch (it looks like a light switch). Replace a very dirty filter. Still cold in 85016? Call 602-555-0100, 8–6."

"AC leaking water? Turn system off so it can thaw. Replace the filter. Check for ice on the line. If you see ice in 85018, call 602-555-0100, 8–6."

"AC buzzing outside? Do not push the fan. Turn it off. In Phoenix, call 602-555-0100, 8–6. We'll connect you to a licensed tech."

Use the same skeleton for other home niches too. Pest: "Ants in the kitchen? Seal sugar, wipe trails, check under the sink. Still seeing lines in 85008? Call..." Garage doors: "Door stuck half-open? Pull the red cord only when the door is down. Don't pull if it's up. Still stuck? Call..."

Creative angles are not art shows. They are **open doors**. Make that door easy to see. Put your number right on it. Tell the truth about when you answer. Show one small fix so people trust you. Then invite them in. The call will feel easy because you made it easy.

S7. Warm retargeting to calls

Warm retargeting means you ask again, but kinder. You show a short, clear ad to people who already watched your video, visited your call page, filled a form, or messaged you. They know your name. They know your voice. They might be stuck right now. A gentle nudge with a phone number can turn "thinking" into "calling."

Start by building the right warm lists. On Meta, make an audience of people who watched **at least 50%** of your videos in the last **7 days**. Make another of people who **visited your call page** in the last 7 days. Make a third of people who **opened** your lead form but did not submit in the last 14 days. Make a fourth of people who **submitted** a lead form but **did not connect** on the phone. If you use server events, add a list of **accepted callers** from the last 14 days so you can **exclude** them. On TikTok and YouTube, build similar lists: viewers who hit 50% watch time, site visitors, and recent engagers.

Keep these lists small on purpose. Warm means **recent**. A 7-day window usually beats 30 days for calls. You can have a "warm" (7 days) and a "cool" (30 days) group, but spend most on warm. People forget fast. They also move apartments, travel, and fix things. The hot window is short.

Set clean **exclusions**. Always exclude **recent accepted callers** and people who replied **STOP** to texts. Exclude ZIPs you don't serve. Exclude people under your age rules if your buyer needs homeowners. Exclusions save money and goodwill.

Run warm ads only when agents can answer. If you answer 8–6, run 8–6. Warm traffic calls fast. Don't invite a call at 10 p.m. if nobody is there. You can have a separate **after-hours** retargeting ad that offers a **morning call-back** form. Keep the consent text next to the button. Keep it short.

Use a softer voice and a shorter message. They already know you. Start with a simple line: "Still stuck?" Follow with one safe check or a local note: "Dust storm today—filters clog fast." End with the call line: "In 85008/85016/85018, call 602-555-0100, 8–6. Calls may be recorded." That is enough. Do not repeat a long how-to. Save that for new people.

Match the person's last step. If they watched your "AC not cooling" video, show a warm ad about **that**. If they visited your "leaking water" page, show that one. Most platforms let you build **video view** audiences by video, and **URL** audiences by page. Use that to keep the message close to their pain. Close beats broad.

Pick a **retargeting number** so you can see this lane clearly. Use it in the warm ads and on the page you link to. In your phone system, label it "Warm Retargeting." After a week, compare average talk time and acceptance for warm vs. cold. Warm is often 20–40% better. That tells you it's working even if the volume is smaller.

Help people in their real day. Use short **time hooks**. "We have room 4–6 today." "Answer time is fastest before lunch." "First cold snap this weekend—call now to avoid Monday rush." These tiny cues raise calls at the right hours. They also level your staffing.

Keep **frequency** calm. Warm does not mean "hammer." Aim for **1–2 impressions per day** per person in the hot 7-day list. If you hit someone 10 times in two days, they will hide your ad or leave rude comments. Lower your daily cap and spread your spend across the week.

Build a **recovery lane** for leads who did not connect. If a person filled your lead form but you missed them on the phone, a warm ad can bring them back. "Sorry we missed you. If you're still stuck in 85008, tap to call now. We answer 8–6." Keep the tone kind. People hate feeling like just another lead. A simple apology wins hearts and minutes.

Give **proof** without bragging. In warm ads, one line from a neighbor helps: "Ana in 85008: 'They picked up fast and got us cool by dinner.'" Keep it short, no last names. End with the same call line. Warm viewers already liked you. Proof reassures them that calling is safe.

Use **day-by-day** retargeting during storms or heat waves. On the first hot day, your cold ads teach the steps. On day two, your warm ads say, "Still warm? Call now." On day three, your warm ads say, "We have extra techs today from 3–6." With each day, the nudge gets a little stronger. People who tried on day one are ready by day three.

Measure like a grown-up. Look at **cost per accepted call** from warm retargeting. If it beats your cold cost by a lot, increase warm budget slowly. Do not drain cold to feed warm, or your warm pool will dry up next week. A simple rule: keep **10–20%** of your social budget for warm. If warm keeps beating cold by 30%+ for two weeks, push it to 25–30% during peak weeks.

Tie warm ads to your **office hours** posts and your **Lives**. When you run a 5 p.m. Live Q&A, show a warm Story at 4:30 that says, "Live in 30 minutes. If you're still stuck, you can also call now, 8–6." Some people will call instead of typing in chat. That is success.

Avoid traps. Do not stalk people for months. Do not show the same warm ad every day. Swap the first frame weekly. Keep the number and hours the same. Do not promise "urgent" if you don't have extra staff. Do not push calls at lunch if nobody can pick up. Warm is about **fit**, not force.

Warm retargeting works because it feels like a polite tap on the shoulder. "Hey, still need help? We're here." Say it in simple words. Make the call a one-tap path. Respect the person's time. They will respect yours with a longer, calmer call that passes the timer.

S8. Offline Conversions API (Meta/TikTok)

Platforms learn from what you send them. If you send **clicks**, they chase clicks. If you send **any call**, they chase any call. If you send **accepted calls**, they learn to find more people who become accepted calls. The **Offline Conversions API** is how you tell Meta and TikTok what happened **after** the tap. Think of it like a daily report card you hand in: "These calls were good. These were not." When you do this, your costs drop over a few weeks, and quality rises.

You do not need to know code to understand the flow. There are four steps: collect, match, send, and check.

First, **collect** the right data during and after the call. Your call system should store the caller's phone number, the time the call started, the tracking number they dialed, the **result** (Accepted, Rejected, Too Short, Out of Area, No Answer), and any click IDs your site captured, like a **fbclid** (Meta) or **ttclid** (TikTok). If the call started from a lead form, you may also have a name or ZIP. You do not need to send names. Phone + time is usually enough to match a call. Keep a simple morning export of yesterday's calls with those fields.

Second, **match** calls to the platform's idea of the person. Meta and

TikTok both support several **match keys**. Phone number is the strongest for calls. The platforms ask you to **hash** the phone numbers (a one-way scramble) before sending. Most tools do this for you. If you have a click ID (fbclid or ttclid) from the landing page, that helps too. More match keys = higher match rate, but do not send more than you need. Phone and time, or phone and click ID, are enough.

Third, **send** the events to the platform. You can do it in two ways. The first way is a **daily batch**: every morning, push all "Accepted" calls from yesterday to Meta and TikTok through a connector like Zapier, Make, your call platform's native integration, or a small script your dev sets up. The second way is **near real-time**: when a call is marked "Accepted" in your system, you fire a server-to-server event within minutes. Real-time is great, but daily works fine to start. Name your event something clear, like "AcceptedCall." In Meta, map it to a standard event (Lead or Contact) and name it so you can see it in reports. In TikTok, send "Lead" or "SubmitForm" with an **event set** name so you can track just accepted calls.

When you send each event, include: event name (AcceptedCall), event time (in seconds), action source ("phone_call"), value (optional, like 100 for an accepted call), currency, and your match keys (hashed phone, click ID, etc.). Your tool will format this. You just need to check the boxes once.

Fourth, **check** the platform's dashboard. In Meta's Events Manager and TikTok Events Manager, you'll see your server events. The tools will tell you your **match rate** (how many events matched a person) and if there are **errors**. Fix time zone issues if events show up on the wrong day. Fix hashing if match rate is near zero. Keep things steady for two weeks, then begin to use these events for **bidding**. In Meta, include "AcceptedCall" in the **Conversions** column for your call campaigns. In TikTok, do the same in your campaign's optimization goal.

Keep your signal clean. Only send **Accepted** (or "Qualified") calls to train the system. Do not also count any call over 10 seconds. That muddies the math. If you must send a second event for reports, keep it **out** of the Conversions column used for bidding. Teach the system with the cleanest truth you have.

Respect privacy. Hash the phone numbers. Do not send names or addresses. Do not send any note text. Do not send minors' data. Keep your upload inside the time window the platforms allow (usually within 7 days of the event) so they can tie it to the ad.

Set up **deduplication** if you also use pixels. Sometimes Meta or TikTok will see a browser event (like a form submit) and a server event (like an accepted call) with the same event ID. If those represent the **same** step, you should mark them with the same **event_id** so the platform knows to count once. If they represent **different** steps (a form, then later an accepted call), give them **different** IDs so both can count in reporting, but only the accepted call goes into your bidding conversion set.

If you cannot set up the API today, do a **manual test** first. Export yesterday's accepted calls as a CSV and use Meta's **Offline Events** upload and TikTok's **Offline Events** upload. Map the phone and time fields. Check which ones match. This will show you if your basic data is clean. Once you trust the mapping, move to a daily push.

Watch what happens over two to three weeks. Cost per call may wiggle at first. Then you should see more impressions in the hours and ZIPs that bring accepted calls, and fewer elsewhere. If quality drops, check your feed: did someone change your label names? Did values go to zero? Fix the feed, keep going.

Tie this back to your **creative**. If a certain hook drives accepted calls and the platform can see that, it will favor that ad. If a flashy ad earns cheap clicks but few accepted calls, it will fade. That is what you want. The machine should help you move budget from "lookers" to "callers."

The Offline Conversions API is not scary. It is just a way to tell the truth every morning. "Here are the calls that counted." When you do, your ad account stops guessing and starts learning like you do—call by call.

S9. Incrementality tests (geo-split & holdouts)

It's easy to spend money and see more calls. It's harder to prove the **ads** caused the lift. That is what **incrementality** means. You run a fair test to see how many **extra** accepted calls came from your ads, not from weather, season, or luck. You don't need a lab. You need a clean split, patience, and a notebook.

Pick two areas that look alike. They should have similar homes, weather, and search habits. In Arizona, you might choose **Phoenix East** and **Phoenix West** (or Phoenix vs. Tempe if your buyer serves both). In Florida, it might be **Tampa North** vs. **Tampa South**. If you only serve one city, split by **ZIP groups** that match on income and housing type. The key is "side-by-side" life.

Set your test period. Two weeks is a good start. Longer is better if storms or holidays are coming. Write down the dates. Promise yourself you won't move the goalposts mid-test.

Choose the channel to test. Let's say you want to test **Meta call ads**. Keep your **Search** ads steady in **both** areas. In **Test Area**, run Meta call ads 8–6 with your best creative. In **Control Area**, run **no Meta ads at all**. Do not sneak in extra TikTok or YouTube in Control. The idea is to hold everything steady except the one thing you want to measure.

Use **different tracking numbers** by area and channel. In Test, your Meta ads use 602-555-0100. In Control, you use no Meta number because you run no Meta ads. Your Search ads in both areas use their own numbers. Your phone system labels each call by area and channel. Now you can count accepted calls by bucket without guessing.

Record a **pre-period** baseline. For one week before the test, write down accepted calls per day in both areas **without** Meta. This shows you how the areas behave without the channel. If East always beats West by a little, you'll know not to call that new lift later.

Run the test. In the two-week test period, keep Meta on in Test and off in Control. Keep Search stable in both. Every morning, write down **accepted calls** by area and channel. Also note weather spikes and weekends.

Do the math in plain words. First, see the change in Test: "Accepted calls in Test after minus before." Next, see the change in Control: "Accepted calls in Control after minus before." Finally, subtract the Control change from the Test change. That last number is your **incremental accepted calls** from Meta. If Test went up by 60 and Control went up by 10 (because weather warmed), your lift is **50** accepted calls. If you spent $2,500 on Meta, your cost per incremental accepted call is $2,500 ÷ 50 = **$50**.

Check that the lift is not a one-day fluke. If all the lift came from one Saturday dust storm, run the test another week or swap the areas. Make West the Test and East the Control for two more weeks. If lift appears again, you have a real result.

Watch for **spillover**. People live in East and work in West. They might see your ad in Test and call from Control later. That can blur results. Keep your geo tight. Use city lines or careful ZIPs. If spillover is heavy, try a **time-based holdout** instead: run Meta Monday–Thursday, pause Friday–Sunday; compare those days to the same days last week. It's not as clean, but it helps.

Avoid **season shocks**. Do not start an incrementality test the week school starts or on a holiday. Do not run it across a huge storm front that only hits one side. If weather hits unevenly, pause the test and try again the next normal stretch.

Be honest with the outcome. Sometimes the lift is small. That does not mean Meta is bad. It may mean **Search** is already catching most intent, and social adds only a bit. Sometimes the lift is big, but the calls are short. That is not a win either. Use your **accepted** calls for the math, not raw calls.

Once you see lift, scale with care. If your test shows $50 per incremental accepted call, and your target is $80, you can raise budget in that area. But raise by 20% each week and watch the number. Most channels wear out if you jump too fast. Your goal is a **steady** extra 5–10 accepted calls per day, not a one-day spike.

Document your test. Write what you did, the dates, the areas, the budgets, and the result. Save the call logs. The next time someone asks "Does TikTok help?" you can show the book, not your gut.

Here's a simple story. Week 0 (baseline): East has 100 accepted calls; West has 95. Week 1–2 (test): you run Meta in East only. East has 160; West has 105. East rose by 60; West rose by 10 (weather). Incremental lift is 50 accepted calls. Spend was $2,500. Cost per incremental accepted call: $50. You swap sides for two more weeks. West lifts by 48 at a similar cost. You conclude Meta adds 45–55 accepted calls every two weeks at ~$50 each in hot weeks. You keep Meta, plan budgets around heat waves, and stop guessing.

That is incrementality. Two buckets. One change. Count accepted calls, not feelings. Then spend like a grown-up.

S10. Platform policy checklist

Policies keep people safe and keep your account alive. If you follow a few simple rules, your ads will keep running, and your calls will keep coming. Think of this checklist as a set of guardrails. Stay inside them, and you will be fine.

Be honest about **who you are** and **what you do**. Use your real business name on your page and in your profile. Do not pretend to be a manufacturer, a warranty center, or the only option in town. If you connect callers to licensed pros, say that. Do not say "factory authorized" unless it's true. Your landing page should show the same name, number, hours, and city as your ad.

Avoid **personal attributes** in copy. On Meta, TikTok, Snap, and YouTube, you cannot say things like "Are you a 50-year-old homeowner with bad credit?" Do not call out age, race, religion, health, or finances. Instead, speak in general: "Phoenix homeowners" is okay in many cases, but "Are **you** a homeowner with...?" is risky. When in doubt, remove "you" and talk about the **home** or **system** instead of the person.

Do not make **false claims**. No "guaranteed in 30 minutes" unless you truly do that every time. No "free tune-up" if there is a fee. No "24/7" if you do not answer at night. If you run out of slots, change the ad. Ads must match reality. Calls get longer when you keep your promises.

Stay away from banned or restricted **verticals** unless you are fully approved. Some categories have extra rules: credit, housing, employment, health, and political topics. On Meta, those are **Special Ad Categories** with tight targeting limits. If you're in home services, you are usually outside those, but be careful if you touch financing or home loans. If you are not sure, keep your message about **repairs**, not money.

Show **safety**. Do not teach risky steps. Do not open live electrical panels on camera. Add a safety line when needed: "Smell burning? Stop and call a pro." Platforms like safety language. So do people.

No **before-and-after** photos of people for health or body changes (if you ever work in a health niche). For home services, you can show a **dirty filter vs. clean filter**. That is fine. Just make it real, not fake.

Keep your **landing page** clean. Do not hide the phone number. Do not auto-play sound. Do not block the page with a pop-up before the number. Show a short consent line near any form: "By submitting, you agree we may call or text you about this request. Message/data rates may apply. Reply STOP to end." Link your **privacy policy** in the footer. Keep the page fast on phones.

Respect **consent** and **STOP**. If someone gives you their number, you can call or text **about that request**. If they say STOP, you stop. Sync your suppression list across tools. Do not upload STOP numbers into lookalike seeds. Do not cold text people who did not ask. Platforms punish spam. Carriers will flag you. Trust is worth more than one more call.

Do not use **clickbait**. No fake "limited spots." No weird emojis to trick taps. No lies. If you use urgency, make it real: "Heat wave today. Extra agents 4–6." That is enough.

Keep **ad account** health tight. Turn on two-factor login. Verify your domain. Keep your page business info complete. Answer comments kindly and moderate spam. A clean page helps with reviews and with support if you need help.

Watch **comments**. If someone posts a phone number in comments, hide it to protect them. Remove dangerous advice from strangers ("Stick a pencil in the fan"). Report fake accounts that copy your page. Keep the room safe.

Know **what to avoid in copy**. Bad: "Are **you** a senior with a broken AC?" Better: "AC not cooling in Phoenix? Try these checks." Bad: "We guarantee it in 30 minutes." Better: "We answer 8–6 and connect you today in most cases." Bad: "We're the only licensed techs in the city." Better: "We connect you to licensed local techs."

Handle **reviews** the right way. Do not pay for reviews. Do not trade gifts for reviews on platforms that ban it. You can ask kindly after a job. You can reply to all reviews. Keep replies short, kind, and free of private details.

Use **call recording** the right way. You can say "Calls may be recorded for quality" in the ad (if there's room), on the page, and at the start of the call. Ask: "Is it okay to continue?" Keep the notice clear and early.

Laws vary by state. When in doubt, announce it and get a "yes."

Appeal the right way if you get a rejection. Read the reason. Fix the problem if it's real (wrong hours, risky claims). If it's a mistake, submit a short, calm appeal. Include a screenshot of your page showing matching hours and city. Avoid angry language. People on the other side are trying to help.

Remember your **branding**. If you run as a brand, keep your name and number the same across your page, your ads, your site, and your Google Business Profile. If you use a tracking number in ads, list your main line as an additional number on GBP. Stability avoids flags.

A simple rule closes this list. If a line in your ad would feel awkward to say out loud to a neighbor on their porch, don't write it. If your landing page would make a neighbor squint and frown, fix it. Platforms want the same thing your caller wants: clear, safe, honest help. When you give that, your ads pass review, your calls last longer, and your business grows without drama.

15

Paid — Display, Native & Programmatic

S1. Native (Taboola/Outbrain) call-first flows

Native ads look like articles on big news and lifestyle sites. They sit under a story with a small "Sponsored" tag. People click because the headline feels like news or a tip, not a hard ad. For pay-per-call, native works when you keep the path short and honest: a clear headline, a clean "how-to" article built for phones, and a big call button that never hides. Your job is to help first, then invite the call. Do not trick people with fake stories. That only creates short calls and refunds.

Begin with the **shape** of your flow. A person sees your native tile. The tile has a real photo and a headline in plain words, like "Phoenix: AC Blowing Warm? 3 Checks Before You Call." They click and land on your **call article**. This page loads fast, shows the three checks with photos you took yourself, and gives a safety line. At the top and bottom, a large "Call Phoenix Help: 602-555-0100 (8–6)" button sits ready. On mobile, keep a **sticky call bar** at the bottom so the number is always one thumb away. Near the button, add your consent note: "Calls may be recorded for quality."

Write the article like a neighbor. Keep each step short. "Filter: if you can't see light through it, replace it." "Breaker: off and on once." "Thermostat: cool + auto; wait 5 minutes." Add one **what not to do**: "If you smell burning or hear buzzing, stop and call a pro." Mention your city early. "Phoenix dust clogs filters fast." Local words make trust rise. Trust makes calls longer.

Choose your **headline** with care. The best headlines name the problem and the place. "Phoenix Homeowners: AC Not Cooling? Do This First." Avoid clickbait like "You Won't Believe..." or "One Weird Trick." Those get cheap clicks and angry readers. Angry readers tap back fast, and your buyer rejects those calls. Keep it simple. Promise help. Deliver it.

Use real **images**. A clean filter next to a dirty one. A thermostat with "COOL" lit up. A breaker panel door **closed** with your finger pointing to a single breaker label. No stock photos of sweaty people. Real beats fake. Compress images so the page loads in under two seconds on a phone.

Set up **tracking** before you buy traffic. Give this page a **unique tracking number** just for native. Add UTM tags to the URL so you can see the network, campaign, and site in your reports. Turn on dynamic number insertion (DNI) so you can also track by site or headline if you want. Now your call log can show "Taboola — CNN — 'AC not cooling' headline" next to each call. Later, you can keep what pays and pause what doesn't.

Target **geo and devices** tight. In Taboola or Outbrain, pick only the cities or ZIPs you serve. Start **mobile-only** because calls happen on phones. Add desktop later if you have a strong callback form. Set your daypart to your **agent hours**. If you answer 8–6, run 8–6. Raise bids during 4–6 p.m. if you see many accepted calls then. Lower or pause during lunch if your team is thin.

Use **context** to stay relevant. Place your ads on local news, weather, and home content. Avoid celebrity gossip and politics. Those clicks rarely call. Both networks let you block topic groups and single sites. Start with an **allowlist** of 30–50 high-quality sites that are big in your city, then grow it. If a site sends short calls, block it. If a site sends long calls, add similar sites.

Control **frequency** and **recency**. On native, people can see the same tile many times. Set a cap so one person sees your ad only 2–3 times per day. Use a **recency** window so you pay to reach people who clicked a similar topic in the last few days. Many networks let you do this with "interest recency" or "retargeting look-alikes."

Keep **budgets** and **bids** safe at first. Start with a daily budget you can lose while you learn. Think $50–$150/day in one city during season. Bid to win mid-tier placements, not the very top click. Top slots can bring cheap clicks but poor intent. It's better to buy fewer, better clicks that turn into long calls.

Measure the **right** numbers. Do not brag about click-through rate. It does not pay you. Watch **call rate per session**, **connected talk time**, and **accepted vs. rejected** by site and headline. In your call tracking, tag a call as "Accepted" when your buyer takes it. In your native dashboard, pause headlines and sites that send short, rejected calls. Feed winners more.

Test **only one change at a time**. Start with two headlines on the same article. Keep the photo the same. After two days, keep the winner. Next, test two photos with the same headline. After two days, keep the winner. Then test a new first step on the article: swap breaker and thermostat order. Watch talk time. Small, steady tests beat random guesses.

Respect **policy**. Mark "Sponsored" clearly in your CSS. Do not pretend to be a news site. Do not borrow a news logo in your page banner. Do not quote fake "experts." Keep the tone helpful and honest. Networks check pages. If they see tricks, they can ban your account.

A short example shows the flow. On Monday, a person on a Phoenix news site sees your tile: "Phoenix: AC Not Cooling? 3 Checks Before You Call." They tap. The page loads fast. They try your steps. It is still warm. They see "Call Phoenix Help: 602-555-0100 (8–6)" in a sticky bar. They call at 4:45 p.m. Your agent answers. The call runs 2:08. Your buyer accepts it. In your report, you see it came from "Outbrain — LocalNews.com — AC Not Cooling v2." You keep that tile and pause the one that said "Stop Warm Air With These Tips" because those clicks had short talk time. By Friday, your cost per accepted call is within target. You raise budget 20% from 3–6 p.m., where most long calls happen. You hold mornings flat. The phone stays steady because your page and hours match your ad.

Native is slow power. It does not spike like Search. But with a clean article, a big number, tight geo, and patient tuning, native becomes a steady lane of calm, ready callers who have already tried the safe steps. That is the kind of caller who passes timers.

S2. Google Display Network call conversions

The Google Display Network (GDN) shows image and responsive ads across thousands of sites and apps. Display clicks are colder than Search because people are not typing a problem. But if you target well, write simple creative, and send clicks to a **fast call page**, display can add low-cost calls that still pass your buyer's timer. Think of GDN as "tap to call after a quick read," not "call-only."

Set your **goal** around calls. In Google Ads, make sure your account tracks two call conversions: "Calls from ads" (for call assets where supported) and "Calls from website" (taps on your phone link on the site). For GDN, you will rely on "Calls from website," because most display placements do not have a native call icon. Add a Google forwarding number or use your own tracking number and an event to log the tap. Set a **minimum duration** (like 90 seconds) for your call conversion so Google optimizes toward long calls. Keep **form fills** as a secondary goal only if you truly use them.

Build **Responsive Display Ads** that look like a real tip card. Use one clean image: a filter, a thermostat, or your city skyline with your logo in a corner. Write a short headline: "Phoenix AC Help." Write a longer headline: "AC Blowing Warm? Try 3 Checks." Write descriptions that match your call page: "Replace a dirty filter. Flip breaker once. Set cool + auto. Still warm? Call 602-555-0100, 8–6." The ad button can say "Get Help" or "Call Now." On a click, send people to your **call page**, not your homepage.

Make the **call page** the hero. At the top, show "Call Phoenix Help: 602-555-0100 (8–6)" with a **tel:** link. Put the three steps right below. Add ZIPs served. Put a tiny callback form below that with consent text. Keep the page **fast**. Minify code. Compress images. A slow page kills calls.

Target **context and placement**, not broad people buckets. Start with **Managed Placements**: pick 20–50 high-quality sites locals read (news, weather, home). Add **Topics** like "Home Improvement," "Heating & Cooling," and "Local News." Avoid huge broad audiences at first. Add **In-Market** "Home Repair" only after you see stable calls. Exclude **Kids** content and **Games**. Exclude "Parked domains," "Error pages," and "Sensitive content" in site category options.

Filter **apps** with care. Many app placements show lots of accidental taps. If you see short calls from apps, exclude them. Start with **mobile web** and **desktop web**. Add a few trusted apps later if they prove themselves.

Set **geo** to your cities only and choose **Presence** targeting. Set **schedule** to your agent hours. If you want to run late for retargeting only, create a separate campaign for that, and change the page to show a **morning callback** form after hours.

Use **bidding** that matches your data. If you have zero call conversions, start with **Manual CPC** and watch placement reports like a hawk. Once you have 20–30 "Calls from website" in a month, test **Maximize Conversions**. If that holds, try **tCPA** set to your cost per call target. Always feed back **Accepted Calls** with an offline import so the system learns the truth over time.

Watch the **Placements** report daily at first. Sort by cost. If a site spends $50 and sends only short, rejected calls, exclude it. If a site spends $20 and sends two long calls, star it and find similar sites. Keep pruning and planting. After two weeks, you will have a clean allowlist that pulls its weight.

Use **frequency caps**. Limit impressions to 2–3 per person per day to avoid annoying people. Add a **viewable CPM** bid tweak only if you care about viewability; for calls, clicks matter more. Still, you can require 50% viewability to avoid junk.

Add a small **retargeting** ad group for people who visited your call page in the last 7 days. Show them a calm card: "Still stuck? Tap to call. 8–6." Keep its budget small. Warm clicks call more.

Measure **view-through conversions** with caution. Display reports will show calls that happen after someone saw an ad but didn't click. These can be noisy. Focus first on **click-through calls** and your phone log. Use view-through as a hint, not proof.

An example makes it clear. You build a responsive display ad with a filter photo, headline "Phoenix AC Help," and description "AC blowing warm? Try 3 checks. Still stuck? Call 602-555-0100, 8–6." You target local news, weather, and home sites on mobile web from 8–6. You send clicks to a fast call page with a big number. In week one, you see many accidental taps from a game app. You exclude apps. In week two, most calls come from weather and news. Two sites send long calls; one sends short ones. You block the bad one. You add two similar sites. By week three, your cost per **accepted** call is close to target, and you raise bids 10% 4–6 p.m. because talk time is best then. GDN is now a steady helper, not a money drain.

Display will never beat Search for intent. But with a clean call page, tight placements, and careful pruning, it can add low-cost, real calls to your mix.

S3. Programmatic audio with call CTAs

Programmatic audio means buying 15–30 second audio ads on streaming radio and music apps through a platform. Think about people using Spotify, iHeart, or podcast apps on their phones. They hear your short message, see a small banner on the screen, and can **tap** it. On many apps, that tap can open your call page or even a phone dialer link. If a person is home and stuck, they will call right then. Audio also sticks in the head, so some will call after the ad ends if you say the number clearly twice.

Plan your audio like a mini phone script. Open with the problem right away. "Phoenix homes: AC not cooling?" Say your city in the first line. That local word is the hook. Give two safe checks quickly. "Replace a dirty filter. Flip the breaker off and on once." Give one safety stop. "If you smell burning or hear buzzing, stop." Then invite the call with your number and hours **twice**. "Call 602-555-0100. We answer 8 to 6. That's 602-555-0100." Speak slowly. Smile. People can hear your tone.

Keep the spot **15–20 seconds**. Long spots cost more. Short, clear spots work if you are local and helpful. If you buy 30s, add one more line with your city's reality: "Dust storms clog filters fast here." Do not cram five points. People are cleaning, cooking, or driving. They will remember one thing: the number and the hours.

Use a **vanity number** only if it is easy to say and you can track it. If you don't have one, your standard local number is fine. Say it twice the same way. Do not change numbers across ads in the same area. Keep it steady so recall grows.

Ask your platform for **mobile-weighted** supply with **companion banners**. On a phone, a small banner often shows with the audio. That banner should say, “Phoenix AC Help” and show “Call 602-555-0100 • 8–6.” Link it to your **tel** link if supported or to your **call page**. If you must pick one, use the call page and make it light. Some apps block tel links; a fast page works everywhere.

Target **by geo** first. Pick your cities or ZIPs only. Add **daypart** to match your agent hours. Audio is strong in early morning and late afternoon. Try 7–10 a.m. and 3–6 p.m. in season. Avoid late night. People may listen, but they cannot call you if you’re closed.

Layer **context** if your platform allows. Choose “Weather,” “Home,” and “News.” Avoid music with heavy explicit tags if you do not want your brand there. You can also exclude certain genres. Keep it simple at the start and let your call log tell you where to lean.

Set **frequency caps**. Hearing your spot once or twice a day is enough. Hearing it ten times will annoy people. A cap like 3 per day per person keeps your tone friendly.

Use a **unique audio number**. If you can, buy a city-specific tracking line that you only say in audio. Put the same number on the companion banner and on the call page you use for audio clicks. In your phone system, label it “Programmatic Audio.”

Measure calls in two lanes. First, **click-to-call** from the companion banner. Second, **audio recall** calls where people dialed after hearing the spot. Many platforms allow “audience exposed” lift studies. But your real check is your phone log by hour. When the ad runs 7–10 a.m., do you see a bump in audio number calls 7–11 a.m.? Do those calls last? If yes, keep going.

Tune the script by **listening to recordings**. If callers sound confused or ask “What do you do?” your ad is not clear. Make your promise smaller: “Two-minute check. If still stuck, we connect you to a licensed tech.” If callers from 9–10 a.m. say “I’m at work, call later,” shift your daypart to 7–9 a.m. and 4–6 p.m. Work with human reality.

Coordinate with **weather**. When a heat wave hits, add lines to your spot: "110° today—replace your filter tonight." Raise budget for 3–6 days. Then pull back when the wave passes. Audio works best when it matches the week.

Avoid traps. Do not read your phone number too fast. Do not bury the number once in the middle. Do not run city-wide if you only serve three ZIPs. Do not forget the recording line on the call: "This call may be recorded for quality. Is it okay to continue?" Do not run audio if you cannot answer; you will anger people and waste money.

A small example shows the shape. You buy 30,000 impressions in Phoenix for one week, 7–10 a.m. and 3–6 p.m. Your 20-second spot says the problem, two checks, your number twice, and your hours. The companion banner links to a slim call page with the same number at the top. Your audio number logs 22 calls in those windows. Fourteen pass 90 seconds. During the same week, your Search calls hold steady. You can say audio added **incremental** calls. You keep the script, shorten the opening by one second, and buy the next week during the next heat spike. You now have another steady line feeding your buyer.

Programmatic audio is not about fame. It is about catching a neighbor at the right moment with a kind, local voice and a number they can remember. Do that, and you will hear the difference in your recordings.

S4. Contextual targeting & allowlists

Contextual targeting means you place ads next to content that **matches the topic**, not the person. This is simple and strong, especially now that tracking cookies fade. For pay-per-call, context matters because people reading a **weather alert** or a **home fix** article are closer to calling than someone reading celebrity news. You can also build **allowlists**—hand-picked sites and pages that keep quality high and junk out. Think of context and allowlists as your seat picker. You choose the seats where your ad belongs.

Start by listing **contexts** that match problems you handle. For HVAC, the best contexts are "Weather," "Local News," "Home & Garden," "DIY," and "Real Estate." When heat spikes, weather and news soar. When things calm down, DIY holds steady. In your buying tool (Display, native, or programmatic), choose these topic groups first. Avoid "Politics," "Entertainment," and "Celebrities." Those clicks are curious, not ready.

Make a starter **allowlist** of 30–100 domains that locals read. Include your city's top news site, the top weather site, the newspaper, local TV station sites, and two or three national sites with strong local reach. Add home sites with real how-to content, not clickbait. You can also allowlist high-quality ad exchanges or **sellers** you trust. If a network offers a "premium news bundle," test it.

Check sites for **ads.txt** and **seller.json**. These files show if a site sells ads openly and through which partners. Clean sites have them. Avoid sites with no transparency or with long lists of shady resellers. Your buying tool or verification partner can help flag bad supply.

Use **page-level context** when you can. Some platforms let you target pages that mention "AC not cooling," "air conditioner leaking," "thermostat," and your **city name**. That is gold. Put higher bids there. Lower bids on broad topic pages.

Turn on site **category exclusions**. Block "Mature," "Gambling," "Tragedy & Conflict," and "Sensitive Social Issues." These do not fit your message and can depress call quality. Also block "Parked domains," "In-video," and "Error pages." Keep "News" on if you are careful. News drives weather traffic. If a certain news sub-section causes problems, block **that** section only.

Watch for **MFA** (made-for-advertising) sites. These sites have dozens of ad slots, slideshows that bait clicks, and random content stuffed with keywords. They can pass basic checks and still be junk. Signs of MFA: long, weird domain names, too many "Next" buttons, and low time on page in your analytics. If a site sends many clicks but almost no calls, block it. Build a "Junk" list and add to it weekly.

Build your allowlist by **performance**, not by brand name. A famous site can still send junk clicks if your ad sits in the wrong widget. A small local weather blog can send long calls. Trust your **call log**. Tag calls by site or placement when your tool allows it. Keep the sites that bring accepted calls. Drop those that don't.

Keep **mobile** first. Most calls come from phones. If a site's mobile layout hides the companion banner or makes the "Call" button tiny, put that site on a "desktop only" list or drop it. Visit your own ad on that site with your phone. If you can't find your button, neither can a neighbor.

Set **frequency caps** by site. If one site has a sticky slot that shows your ad too much, cap impressions at 2 per day per user there. More is not better. It just wastes spend and annoys people.

Match context to the **week**. Before a heat wave, raise bids on weather and news contexts. During a calm week, move budget to DIY and Home topics. When school starts and parents are busy, tighten your allowlist to only the top 30 sites that always perform. Your money goes where life goes.

Coordinate context with your **creative**. On weather pages, open with "110° today." On home pages, open with "AC not cooling?" On local news, open with the city name. Use the same number and hours across all. Only the first line changes.

Measure **accepted calls per 1,000 impressions** by site and topic. This simple metric shows which context truly works. A site with low CTR but high calls per 1,000 impressions may be a keeper. A site with high CTR but low calls per 1,000 is likely an attention trap.

An example: you start with topics Weather, News, and Home Improvement, and a 50-site allowlist. In week one, LocalNews.com, BigWeather.com, and DIYHome.org send most accepted calls. A celebrity site sends many clicks and zero calls. You block it. In week two, a heat wave hits. You raise bids on Weather by 25% and pause DIY for three days. Calls rise at the same cost per accepted. In week three, you lower Weather and bring DIY back. You swap your first line to match the calmer week. Over a month, your allowlist shrinks to 35 winners that you trust. Your phone log is steady. That is context done with care.

Context and allowlists are not flashy. They are a map and a fence. With them, your money sits in the right seats, your ads feel like help, and the calls that come in are the ones your buyer wants.

S5. Pre-bid brand-safety filters

Pre-bid brand-safety filters are shields you set **before** you buy an impression. They block risky pages and fake traffic so your ads do not show in bad places and your budget does not feed bots. In programmatic buys, you can add these shields from vendors like Integral Ad Science (IAS), DoubleVerify (DV), and HUMAN, or from built-in tools in your DSP. In pay-per-call, these filters do more than protect your name. They also lift call quality, because junk impressions tend to bring junk clicks and short calls.

Think of three buckets: **safety**, **suitability**, and **fraud**. Safety blocks truly unsafe stuff: adult, illegal drugs, terrorism, hate speech. Suitability lets you tune gray areas: crime news, accidents, tragic events, and political content. Fraud filters catch bots, invalid traffic (IVT), and sites built just to farm ad dollars (MFA).

Turn on **core safety** first. In your DSP, select "Exclude Adult & Explicit

Sexual," "Exclude Hate/Insult," "Exclude Malware/Phishing," and "Exclude Illegal Drugs." Keep these hard blocks on always. They will reduce cheap supply. That is fine. You are buying calls, not random clicks.

Set **suitability** to "moderate." Many real people read news. Weather alerts often sit next to crime headlines. If you block all news, you may lose your best weather pages. Start with "Exclude Tragedy/Conflict" only for **creative** that would feel wrong there (like a happy music ad). For a calm help message, you can allow general news but block **sub-categories** like "War" or "Mass Casualty" if your vendor offers that level. Test, listen to your calls, and adjust. If callers mention scary content, tighten it.

Enable **fraud** filters at the highest level your budget allows. Choose "Pre-bid IVT" and "Sophisticated IVT." Turn on "MFA site" blocking if your vendor has it. Check "app-ads.txt required" to avoid fake apps. Require "ads.txt authorized sellers" on web. These two checks alone cut a lot of trash. Add "SPA" (supply path optimization) to buy only from **direct** or **preferred** exchanges and sellers. Fewer hops mean fewer games.

Use **viewability** as a soft guard, not a hard gate. A call can happen even if 50% of your display ad is viewable for one second. Setting a strict 80%/10s viewability filter can shrink supply so much that your local campaign can't spend. Start with a basic "50% viewable" pre-bid and then look at **post-bid** viewability reports. If a site is always low and sends no calls, block it at the site level.

Filter by **language** and **location**. If you run in Phoenix in English, block non-English pages unless you also run Spanish creative and have Spanish-speaking agents. Set your geo to **Presence** only. Use **IP quality** filters to block proxy/VPN traffic when possible. People hiding their true location often do not call.

Set **app store** and **content rating** filters for in-app buys. Block apps rated for young kids. Block categories like "Games—Arcade" if those taps never call. Allow "Weather," "News," and "Home" apps first. Check the **app site list** weekly; block low-quality ones.

Add **site-level** blocks when your call log says to. Pre-bid filters are blunt tools. They block classes of risk. Some sites will slip through and still be bad for you. If you see short calls from "upworthy-clone.biz," block that domain. Keep your own blocklist growing. It is your second fence.

Beware of **over-blocking**. If you turn every dial to "max strict," you will spend nothing or pay huge CPMs that never turn into calls. Start with core safety and fraud. Allow news. Watch performance. Tighten only where needed.

Check **supply paths**. The same site can come through five resellers. Pick the **direct path** (publisher → primary exchange) when you can. Your DSP may have a "preferred deals" or "curated marketplaces" tab with clean paths. Use those. Clean paths mean more real humans and fewer surprises.

Monitor **pre-bid logs** and **post-bid reports** weekly. Your vendor dashboards will show what they blocked and why. Your DSP will show where you bought. Your call tracking will show which buys led to accepted calls. Put these three views together. If a filter blocked half your impressions on a great local news site during a heat alert, check the category that triggered it. You might need to allow "Tragedy/Conflict" for that one line of creative, or you might whitelist that one section after a quick test.

Align filters to **creative tone**. If your ad is a calm safety message, it can sit next to most news without harm. If your ad is playful, block heavy news to avoid bad fits. This is not just brand talk. A bad fit lowers trust and shortens calls.

A short story makes it real. You launch a programmatic display buy with core safety and fraud filters on, language set to English, and a light viewability guard. You allow news and weather. Week one, you see calls rise from local news and weather sites. You also see a chunk of spend on "funfacts-slides.com." Calls from that site are five seconds long. You block it. Week two, your vendor releases an "MFA block" switch. You turn it on. Your CPM goes up a little. Your calls per 1,000 impressions go up a lot. Cost per accepted call drops 18%. You keep that setting. In week three, a heat alert hits and your safety filter flags "Tragedy/Conflict" for a weather story about heat deaths. Your ads miss a key hour. You adjust suitability to allow weather emergency coverage for that week only. Calls recover. You write this in your runbook so the team knows what to do next time.

Pre-bid filters are not set-and-forget. They are dials you turn with your **phone log** in hand. Start safe, keep supply clean, and tune for fit. When your ads sit in the right places, real neighbors see them, trust them, and call with calm voices. Calm voices pass timers. That is why we do this.

S6. Frequency caps & fatigue control

When the same person sees your ad too many times, their eyes glaze over. They stop paying attention. This is called **ad fatigue**. On your side, you will see more money spent, fewer calls, and shorter talk time. Good news: you can control this with **frequency caps** and a simple rhythm.

Think of frequency like salt in a recipe. A little makes the dish better. Too much ruins it. For pay-per-call, a good **starting point** for **prospecting** (new people) is **no more than two impressions per person per day**, and **no more than seven per week**. For **warm retargeting** (people who watched your video or visited your call page), aim for **one to two impressions per day** for **seven days**, then stop if they still don't call. These are not laws. They are safe first steps. You will tune them with your phone log.

How do you know you are pushing too hard? Watch four signals. First, your **cost per accepted call** creeps up day by day while spend stays the same. Second, **average talk time** falls even though your targeting and hours did not change. Third, **call rates per 1,000 impressions** drop. Fourth, comments on social start to say "I've seen this five times." When two or more of these show up, you have fatigue.

Set caps in the tool you are using. In Google Display, most DSPs, and native networks, you can set **per-user** caps by day and week. Start with 2/day and 7/week for prospecting. In retargeting ad groups, set 1/day and 5/week. Use **ad scheduling** so you only spend during your **agent hours**. This alone can fix half of fatigue because you stop showing when people can't call.

Plan your **recency** window. Recency is "how long after an event we still show ads." For warm retargeting, a **7-day** window is usually best for service calls. After that, interest fades. For cold prospecting, you do not need recency rules—frequency caps do the job.

Rotate your **first second** often. You do not need a brand-new ad every day. But you should swap the **opening shot** or headline weekly. One week, show the dirty vs. clean filter. Next week, open on the thermostat. The number, hours, and city stay the same. Only the first second changes. This keeps attention without changing your promise.

Tune **by hour**. If you see fatigue in the morning (low calls per 1,000 impressions), lower morning bids and raise late afternoon bids. People notice "help now" ads more when they are home and feeling the problem. Your own logs will show the sweet spot. Often it is 4–6 p.m. in summer for HVAC.

Give people a **rest**. If someone watched your video to 95% and did not call after three days, pause them for four days. Let them breathe. Then show one gentle nudge: "Still stuck? Call 602-555-0100, 8–6." Many tools let you build this "cool-down" with audience rules. It feels kinder and often works better.

Protect **recent callers**. Exclude numbers you just spoke with. If your system can upload "Accepted Call" events each morning, use those to **exclude** accepted callers for 14–30 days. Also exclude numbers that texted **STOP**. Do not chase people who asked you to stop. That is both bad manners and a risk.

Control **creative fatigue** with a tiny library. You do not need 50 ads. Keep six to eight pieces you can rotate. Three problem hooks ("AC not cooling?", "AC leaking water?", "Strange AC noise?"). Two season hooks ("110° today" and "first cold snap"). Two UGC stories. Record all in one afternoon. Now you can swap one each week without stress.

Use **caps per site** and **per app**. In display and native, one site can show your tile again and again. Cap to two per day on that site. If an app causes many accidental taps and short calls, exclude the app from prospecting and keep it only in warm retargeting, or drop it fully.

Watch **weather**. During a heat wave, people need more reminders, but they also call faster. You can loosen caps a bit (for example, 3/day for three days) if your **accepted call** rate stays high. When the heat wave ends, tighten back to normal the next day.

Measure the **shape** of fatigue, not just the totals. Break your report into **frequency buckets**. Many DSPs show results by "users who saw 1 ad," "2–3 ads," "4–6 ads," and so on. Look at **accepted calls per 1,000 impressions** in each bucket. You will often see the best return at 1–3 views, with a sharp drop after 5. Set your caps just before the drop.

Here is a simple real story. You run native ads in Phoenix with a 2/day, 7/week cap. Week one is great. Week two, your cost per accepted call starts to rise. You check the frequency buckets. Many users are at 4–6 views with poor call rates. You lower caps to 2/day, **5/week**, and you swap the opening photo. You also shift 20% of budget to 4–6 p.m. Calls per 1,000 impressions go back up, and cost per accepted call drops below week one. You write a note in your runbook: "In heat weeks, keep caps at 3/day for 3 days; otherwise 2/day, 5/week." Now the rule lives on.

One last tip: keep your **message** calm. When ads get loud or pushy, fatigue hits sooner. Short, kind lines like "Try these checks. Still stuck? Call 8–6." age well. With gentle words, you can show an ad a few more times before people tune out. Gentle earns minutes, and minutes clear timers.

S7. Creative specs for tap-to-call

Your ad must do two simple jobs: be easy to read and be easy to tap. That is it. Fancy design does not win calls. Clear design does. Here is how to build creative that works across display, native, and programmatic and turns into calls on phones.

Start with the **shape**. On phones, **vertical** and **square** win because they fill more of the screen. Aim for **9:16** (vertical) and **1:1** (square) versions of your image or video. On web banners, also make a **landscape** version (about **1.91:1**). Keep the message the same on all: the problem, the city, and the call line.

Make the **number** big and bold. Put it **on screen** for the last three seconds of any video. On images, make it the largest text. Use high-contrast colors so the number stands out. Dark text on a light background works well. Avoid tiny thin fonts. Pick a clean, thick font so the digits do not blur on small screens. Write your **hours** next to the number: "8–6." Add the city too: "Phoenix."

Keep **words** short. The best ad can fit on an index card. "AC not cooling? Try 3 checks. Still stuck in 85008/85016/85018? Call 602-555-0100, 8–6." That is the whole message. You do not need long paragraphs or a pile of emojis. On social, your caption can repeat the number and city. On banners, the image text should be enough.

Show **one helpful visual**. Hold up a clean filter next to a dirty one. Point to a thermostat set to "cool" and "auto." Show a breaker with your finger near it, not inside the panel. Real photos beat stock. People recognize real. Snap these shots on a phone in bright, even light. Crop tight so the important part fills the frame.

Keep **videos** short. **15–20 seconds** is enough. Hook in the first second ("AC not cooling?"). Show two or three safe steps. End with the call line and hours, both spoken and on screen. Add **captions** because many people watch with sound off.

Make the **tap** easy. If you send people to a page, put a big **Call Now** button at the very top. The button must be easy to hit with a thumb. On phones, a good tap target is roughly the size of a fingertip. The button should use a **tel:** link to open the dialer. Right next to the button, show your **hours** so people know someone will answer. Do not hide the button under a big image or a slow animation.

Add a **sticky call bar** on mobile pages. As people scroll, a thin bar at the bottom should always show "Call 602-555-0100 · 8–6." One tap opens the dialer. This saves calls when people skim.

Keep **files** light. Heavy images and long videos load slowly on cell data. Slow pages kill calls. Compress images so they look clean but load fast. Keep videos short and simple so they start at once. Avoid tiny text in videos; it gets mushy on low connections.

Use a **clean CTA**. In display and native, the button text can say "Call Now" or "Get Help." Don't use "Learn More" if the plan is to call. On social, use the **Call** button if the platform offers it. If not, link to your **call page** with a clear "Tap to Call" header.

Keep **safety** in the frame. If you show a breaker, keep the panel shut and talk about flipping **one** breaker off and on once. If you talk about smells or sounds, add "If you smell burning or hear buzzing, stop and call a pro." Safety lines build trust and lengthen calls.

Use **consistent numbers**. The number on the ad should match the number on the page and the number your phone system expects for that source. If they differ, people get confused and hang up. Use one clean tracking number per source and show it everywhere in that path.

Include a small **recording note** where it fits. On pages, near the button, write "Calls may be recorded for quality." On the call, say the notice and ask for okay. In ads, space is tight; you can keep the ad short and handle the notice on page and phone.

Test on real phones. Send the ad to your own device. Tap. Does the dialer open? Does the page load fast? Can you read the number without squinting? If you have to pinch-zoom to read the number, it is too small. Fix it before you spend money.

Keep a **starter kit** on hand. Make these once and reuse them: one square and one vertical image with your number and city, one 15–20 second video with the three steps and the call line, one fast call page with a big button and a sticky bar. With this kit, you can run on most networks and be ready for heat waves in minutes.

A quick example shows why specs matter. You run a display ad with a tiny number tucked into the corner. People click, but few call. You rebuild the image so the number fills the bottom third, the city is in the headline, and the hours sit next to the number. You compress the file so it loads fast. You swap the landing page header so "Call Now 602-555-0100" is the first thing. Next day, calls per 1,000 impressions double, and average talk time rises. The change took one afternoon, not a new budget.

Clear, big, and fast beats fancy. That is the creative spec for tap-to-call.

S8. Post-view vs post-click attribution

"Who gets credit?" is a hard question in ads. A person may **see** a banner on a weather site at 8 a.m., **click** a search ad at 4 p.m., then **call** at 4:05 p.m. Which one created the call? If you are not careful, both channels will claim it. Your reports will look great, but your bank account won't. You need a simple, honest way to count.

There are two kinds of credit to understand. **Post-click** credit means the person **clicked** your ad before they called. **Post-view** credit means the person **saw** your ad (no click) and later called. Many tools call post-view a "view-through conversion." Post-view is easy to abuse because seeing an ad does not always cause the call. People see ads all day. Some were going to call anyway. So we treat post-view as **assist**, not the main hero.

Pick one **primary** rule and write it down. A clean plan looks like this. First, count **accepted calls that came after a click** inside a **7-day** window as your **main wins**. This covers Search, social click-to-call, display clicks to your call page, and so on. Second, allow **post-view assists** only when the call happened within a **short window** (for example, **6–24 hours**) after the view **and** there was **no other click** in between. Third, do not use view-through events as **bidding goals**. They are for learning, not for steering.

Use your **phone log** as the source of truth. Your ad platforms will each try to claim calls. Match calls to clicks yourself using your dynamic number insertion (DNI) and your UTM tags. If the same call could belong to two channels, give it to the **last click** first. If there was no click, check for a **qualified view** in the last 6–24 hours, and log an **assist** for that channel. Keep this simple. Write it in your runbook so future you knows the rule.

Set **attribution windows** to match your reality. In Google Ads for display, a common safe window is **1-day view** and **7-day click**. In social, use **1-day view** and **7-day click** as well. For Search, many teams use **7-day click** only. These are starting points. If you sell urgent help (AC repair), long windows make no sense. Few people wait a week to call. Shorten windows if view-through claims look fishy.

Watch for **double counting**. If you let each platform keep its default settings, the same call can count three times: once in Google, once in

Meta, once in your DSP. Your own report to the business should count it **once**. Keep a simple spreadsheet or dashboard that merges calls by **caller number + time** and shows the last click channel. If there was no click, show the last **qualified view** and tag it as an assist.

Do small **holdouts** to sanity-check view-through. Choose a city or a set of ZIPs and turn off display for one week while Search stays on. If calls stay the same as the week before, your display view-through claims were likely smoke. If calls dip while spend and Search stay steady, display probably adds some lift. Bring it back and note the lift size for future reports.

Report **layers**, not guesses. In your weekly note, show: total **accepted calls**, accepted calls by **last click** channel, and accepted calls with a **view assist** (no click). If you want to give view-through **some** credit in your internal ROI math, cap it (for example, give it 20–30% weight) and say so. Never let pure view-through be the main reason to scale a channel. Make channels earn scale through last-click calls and incrementality tests.

Align **offline imports** with this plan. When you upload "Accepted Call" events to Google or Meta, be clear which conversion action you include in **optimizing** and which you keep only for **reporting**. Feed the **accepted, click-based** calls as the main goal for bidding. Keep view-through flags out of the goal set. The machine should learn from calls that truly tied to the ad, not from every impression on a busy news day.

Check **cross-device** reality. Some people see a YouTube ad on TV, then call from their phone later. You will miss some of that without fancy tools. That is okay. This is why we use **incrementality tests** (geo splits and time holdouts). If a channel shows lift in those tests, keep it, even if click data is thin. If it never shows lift, stop it, even if the platform's view-through chart looks shiny.

Keep your rules steady for a full season. Do not change windows every week. If you do, your charts lie to you. Set the windows, run the plan for a month, and adjust only if your calls say so.

A short example shows the path. You run Search and native. Your report shows 200 accepted calls this week. Your last-click view says 140 from Search, 30 from native clicks, and 30 from “no click.” In the 30 “no click,” you check views. Twelve called within 12 hours of a native impression with no clicks. You mark those as **native assists**. Eighteen had no impressions you can tie, so you leave them **direct**. You scale native a bit because it also passed a geo holdout. You do not scale a display network that claimed 80 view-through calls because, in your log, those people clicked Search later. Your bank account and your buyer both thank you.

Clear rules end fights. Count once. Trust last click for calls. Let view-through help, not lead. Use holdouts to check yourself. That is how you stay honest in a noisy world.

S9. Site placement testing SOP

A **site placement test** is a clean way to learn which websites and app placements send real calls, not just clicks. You do not need fancy math. You need a list, a plan, and discipline. Here is a simple SOP (standard operating procedure) you can follow every time.

First, build a **starter list**. Pick 30–50 sites that locals read: your city’s top news site, local TV station sites, the main weather site, a few home and DIY sites, and maybe a couple of real estate sites. Add them as **managed placements** in your display buy, or target them through your native network’s site list. Turn on your **pre-bid brand-safety** and **fraud** filters. Exclude kids’ apps, games, parked domains, and MFA junk. Keep the geo to your service cities and set your schedule to your agent hours.

Second, set a **test budget** that can give each site a fair try. A simple rule is to aim for **$50–$150** of spend per site over **3–7 days**, or until you see **three accepted calls** from that site—whichever comes first. If your cost per accepted call target is $60, a $150 cap per site gives room for a win without risking a blowout.

Third, hold **creative** steady. Use one clean image ad and one clean text line across all sites. The message stays the same: the problem, the city, the number, and the hours. The landing page stays the same: fast, with "Call Now" at the top and a sticky bar. We hold these steady so the **site itself** is the variable.

Fourth, tag **calls** by site. Use DNI to pass the site name into your call record, or use a separate tracking number for the **group** of placements if your tool supports it. At least, pass **UTM source/placement** so you can filter calls later. Without clean tags, you are guessing.

Fifth, watch **calls per 1,000 impressions** and **accepted rate** per site. Do not chase CTR. A site with low CTR can still send good calls if the few clicks are right. Your daily check is simple: how many calls, how many hit the timer, and how many were accepted by the buyer.

Sixth, make **keep/kill** decisions with a small rule. Keep a site if it hits one of these: **three accepted calls** in the test window at or under your target cost, or **one accepted call** with strong average talk time and signs it will scale (for example, it sits in a top local news section during a heat wave). Kill a site if it spends the cap with **zero** accepted calls or if calls are all short and out of area. If data is thin, extend the test, but do not sink endless money into "maybe."

Seventh, grow an **allowlist**. Move kept sites into your "Core" allowlist. Shut off or exclude the rest. In week two, add 10–20 new sites that look like your winners (more local news, more weather, more home). Repeat the test. Each round, your allowlist gets stronger.

Eighth, test **sections** inside big sites. On a large news site, the **Weather** page may work great, while **Entertainment** sends junk. Many DSPs let you target **placements** by section or keyword. Bid higher for Weather and Local News. Bid lower or exclude other sections. This one change can cut waste by half.

Ninth, test **times**. Some sites do better at lunch. Others do better after work. Use hour reports to shift bids by time on the sites you keep. Raise bids in the two-hour windows that send the longest calls. Lower in weak windows. Keep changes small and give them time.

Tenth, document everything. Make a simple sheet with columns: Site, Section, Impressions, Spend, Calls, Avg Talk Time, Accepted, Cost/Accepted, Keep/Kill, Notes. Notes can say "Strong 4–6 p.m.," "Short calls, likely teens," or "Great during heat wave only." Share this sheet with your team and update weekly during season, monthly out of season.

Keep your **filters** on. Even good sites sell through many paths. Use **ads.txt only** supply. Prefer **direct** or **preferred** sellers. Keep **MFA** blocks on. If a good site slips in via a bad reseller and sends junk, block that path.

Do not forget the **phone**. Listen to a few calls from each top site. Do callers sound local? Do they mention the page they came from? If many callers say "I was reading the weather," that is a clue to lean into weather pages.

Here is a quick example. Week one, you test 40 sites. By Friday, 12 sites have at least one accepted call under target. Eight have three or more. You keep those 12 and build a new allowlist called "Phoenix Core." You add 15 new sites that look like the winners. Week two, you repeat. You now have 20 solid sites. You notice most wins come from **Weather** and **Local News** sections. You increase bids on those sections by 20% 4–6 p.m., and you lower bids on general "Lifestyle." Cost per accepted call drops, and your buyer asks for more volume. You can answer "yes" because you have a plan, not a hunch.

A clean SOP makes testing calm. Same setup each time. Same rules. Same sheet. Your team can run it without drama, and your allowlist gets better every month.

S10. Fraud monitoring (IVR spam/honey pots)

Not every call is real. Bots, bad actors, and even bored teens can hit your tracking numbers. Some call farms run **IVR spam** that pushes digits fast to trick your system into a "qualified" state. Some scrape numbers off pages and "test" them with auto-dialers at 2 a.m. If you let this run, you pay for junk, your buyer gets angry, and your reports get messy. You need simple tools to spot it and stop it.

Start with a picture of **normal**. In your phone system, a normal day of real calls has voices that say hello, a few seconds of silence while they connect, and then steady speech. The numbers come from real area codes in your city or nearby. The calls last past your timer when the fit is right. They spread across the day, with peaks in late afternoon. Write this down, so you can spot weird patterns.

Now learn the signs of **spam**. Spam calls are often very short, like 3–12 seconds. They come in **bursts**, many in a row, sometimes at odd hours like 1–4 a.m. They come from numbers that change every call, or from the **same** number over and over. You may hear **no voice**, then hang up. In some cases, you will hear fast **DTMF tones** (beeps) pressed in a pattern, like "1-1-1-1" or "1-2-3-4," as a bot tries to pass your IVR. Some will press your "press 1 to connect" instantly, faster than any human could.

Add a small **challenge** to your call flow to catch bots. A simple test is, "To reach a tech, please press **7**, then the **#** key." Humans can do this easily. Many bots cannot. Change the number once a week so a recorded bot cannot learn it. If the caller presses the **wrong** sequence or presses **too fast** (under, say, 300 milliseconds), send the call to a **dead end** and mark it as "Challenge Failed." Do **not** count it as a lead. Do not send it to your buyer. This one change can cut a lot of IVR spam.

Use a **voice prompt** too. Have your IVR say, "This call may be recorded. Please say your ZIP code." If there is **no speech** and only tones, fail the call. If speech is present but does not match a ZIP, route to a live agent only if you want to save edge cases. Most bots cannot speak a real ZIP.

Watch **caller ID** patterns. If many spam calls come from the same **prefix** or the same **carrier** block, add a temporary **rate limit**: "Only allow one call per five minutes from the same number" or "block more than three failed calls from the same /24 IP or carrier trunk per hour" (your provider can help you set this based on their logs). Keep a **block list** and a **gray list**. Block numbers that hit you 20+ times in a day with fails. Gray-list numbers that look odd and watch them.

Check **STIR/SHAKEN** info if your carrier shows it. Calls in the U.S. come with an attestation level (A, B, or C). It is not perfect, but many spam calls come with **no attestation** or a low one. You can weigh that in your rules. For example, if a call fails your challenge **and** has no attestation, drop it at once.

Set up two or three **honey-pot numbers**. These are tracking numbers you **never publish**. If they ring, something is wrong—someone is war-dialing blocks of numbers, or a vendor leaked your numbers. Point these numbers to a silent IVR that logs the call, asks for a random challenge ("press 9, then #"), and records. If a honey-pot gets hit, look at the **time**, the **carrier**, and the **pattern**. Share the proof with any traffic partners you suspect. Ask for refunds if their traffic caused it. Rotate or retire tracking numbers that get hammered.

Mark and refund **fake leads** fast. If your buyer sees a wave of short, odd calls, pull the recordings and tags. If you see IVR spam, tell the buyer you are blocking it and that you will **credit** those calls. Fix it within **24 hours**. This keeps trust high. Then plug the hole with a new IVR challenge or a block.

Keep an eye on **night calls**. If you are closed, a burst at 2 a.m. is almost always junk. Do not run ads at night. If junk comes anyway, your numbers have been scraped or hit by a bot. Use your honey-pots to catch the pattern and add a night block that drops calls after one ring.

Teach your agents to listen for **tells**. If a call connects and there is a long beep and then silence, they should hang up and mark it spam. If there is a recorded voice loop that does not answer questions, they should hang up. Do not waste minutes on clear spam. Minutes are money.

Log **repeating short calls** from the same number. If the same number calls ten times with 6-second calls, block it. If that number later calls for real and leaves a voicemail, you can remove the block. Most real people do not hit you ten times in one hour with six seconds.

Share **spam fingerprints** with your partners. If a certain DTMF pattern shows up, tell your call platform. Many have shared block rules for known bot patterns. Ask your carrier to enable any **call firewall** features they have. Some can filter known robocall sources upstream.

Review **spam reports** weekly. In your dashboard, add a line for "Challenge Fails," "Short Calls under xx seconds," and "Night Calls." Your goal is for those lines to trend down or stay low. If they jump, find the change that caused it: a new number, a new placement, or a new vendor.

Here is a short story. On Tuesday night, your honey-pot number rings 40 times between 1 and 2 a.m. All calls are 8–10 seconds. The CDR shows one carrier trunk. You add a rule to block that trunk at night and to require "press 7 then #" on all lines. You also add a voice ZIP test in daytime. On Wednesday, junk drops to near zero. You credit three bad calls to your buyer from Tuesday and explain what you fixed. Thursday, real calls behave as normal, and your accepted rate rises because bot noise is gone.

Fraud control is not about turning into a detective. It is about a few simple **gates** and **habits**. Add a small challenge. Block patterns. Use honey-pots. Act fast when you see a spike. Keep your buyer in the loop. Clean lines make clean calls, and clean calls pass timers.

16

Partner Channels — PPCall Networks & Marketplaces

S1. How to evaluate a PPCall network

A pay-per-call (PPCall) network is a middle layer. They bring you buyers, rules, and payouts. You bring them calls. When it works, both sides win. But not all networks are the same. Some are careful and clear. Some are messy and vague. Your job is to sort them before you send a single call. You can do this with a simple check that fits on one page. Keep your words plain. Ask for proof. Trust, but verify.

Start with the offer itself. Ask what verticals the network really fills today, not what they hope to fill next quarter. If they say "HVAC repair," ask for the exact service list. Do they take central air only, or also minisplits and window units? Do they handle emergencies, tune-ups, or both? Ask for geo by city or ZIP. A clean network can list target ZIPs and hours on day one. Vague answers here cause short calls later.

Ask about acceptance rules in simple terms. You want the call timer, the "who we accept," and the "who we reject." A clear answer sounds like this: "We accept owner-occupied homes in Phoenix ZIPs

85008/85016/85018. Call must be 90 seconds from IVR connect. No renters, no out-of-area calls, no brand warranty claims." If you hear, "Send calls and we'll figure it out," slow down. Rules on paper prevent refunds later.

Check payouts and net terms. You will see three common shapes: paid per accepted call after a timer, paid per live transfer, or paid per booked appointment. Pick the one that matches your flow. Then ask, "When do you pay?" Net-7 or net-15 is normal for steady partners. Net-30 can work if you have cash on hand. Anything longer is a red flag unless the rate is much higher and the buyer is rock solid. Ask for their payment history with other partners. Good networks do not fear this question.

Look at their QA and compliance story. Ask if calls are recorded, how long they keep them, and how you will get access to the recordings for disputed calls. Ask if they require a recording notice and Do-Not-Call handling. A strong network will show you a short script and tell you how they grade calls. They will also ask you for your consent language on pages and in your IVR. If they do not care about consent, do not run with them.

Ask about number provisioning and caller ID. The best networks will give you tracking numbers or let you bring your own. They should support STIR/SHAKEN, branded caller ID where possible, and a plan for blocked or flagged numbers. If they say "we recycle numbers every week," be careful. Constant number swapping can hurt answer rates.

Review reporting. You need daily stats by source: total calls, connected calls, average duration, accepted vs. rejected, reject reason codes, and payout totals. Ask for a sample CSV and a dashboard screenshot. If they cannot show you a real report, they will not show you real problems either.

Check their buyer mix. One buyer is a concentration risk. More than three to five buyers in the same vertical is safer. Ask, "What share of volume goes to each buyer?" If 90% goes to one, you are riding on that one. If they say, "We will add more buyers later," note that and plan a small test until they do.

Ask for a test plan in writing. A real network can outline a seven-day pilot with a risk cap. It looks like this: "Pilot up to 100 calls or $5,000 in cost, whichever comes first. Target acceptance rate 60%+, timer at 90 seconds. We review daily. If we hit targets, we add 20% more budget each week." If they will not put this in writing, pause.

Get two references. Ask to speak to an active publisher and an active buyer in your vertical. Keep the call short and kind. Ask about on-time pay, fair disputes, and how fast the network fixes issues. If the network cannot provide references, that is a signal.

Do a small "fraud poke." Ask how they handle robocalls, IVR spam, and duplicates. A good answer includes an IVR challenge (press key + #), duplicate windows (no repeat payout within 30 days for the same caller), and honey-pot numbers to catch bots. A weak answer here means you will pay to clean their pipes.

Look for simple, human support. Ask who your day-to-day contact is and how to reach them. Ask how fast they reply when calls go sideways. A response time SLA of "within 2 business hours during agent hours" is fair. If they say "email us and we'll get to it," you may be alone when you need help most.

Here is a short example. You meet "BrightCalls Network." They say they do HVAC in Phoenix. You ask for the ZIPs, hours, timer, and reject reasons. They send a one-page PDF with 85008/85016/85018, 8 a.m.–6 p.m., 90-second timer, reject reasons include out-of-area, wrong service, warranty, and no-answer. They list three buyers, with share 45/35/20. They offer net-15 and show a dashboard screenshot with call IDs, durations, and grade codes. They give you two references. They propose a 100-call pilot with a $5,000 cap and daily check-ins. They require you to announce recording and keep consent logs for 2 years. This is a strong start. You still test small, but you test.

Now the flip side. You meet "Rocket Leads." They say, "Send calls nationwide. We pay great." They cannot list ZIPs, hours, or reject reasons. They promise net-45 "because of our buyers." They have no reporting demo and no references. They say "our terms are standard" but will not email them. You thank them and move on. Saying "no" here is how you stay in business.

Your evaluation does not need big words. It needs clear ones. What do you accept, what do you reject, how do you pay, how do we fix problems, who answers when things break? When a network can answer these in one page, your calls will be safer and longer. When they cannot, save your budget for someone who can.

S2. Onboarding SLAs & acceptance rules

Onboarding is the first handshake. It sets the tone for the whole deal. A good start has two parts. First, you agree on **SLAs**—service level agreements. These are simple promises about speed, access, and support. Second, you agree on **acceptance rules**—what counts as a paid call and what does not. Put both in writing. Keep the language plain. If a middle schooler can read it, you did it right.

Begin with the SLA for setup. Agree on how fast both sides will move. A clean SLA looks like this. The network will send the IO (insertion order) within one business day. You will return it signed within one business day. The network will provision tracking numbers within one business day after that. You will point numbers live within one business day after you get them. The network will give you dashboard logins when numbers go live. If either side misses a step, the other side pauses launch until that step finishes. Simple deadlines keep launch from dragging.

Agree on an SLA for support. During agent hours, both sides reply to critical issues in under two hours. Critical means “no calls getting through,” “payouts vanished,” or “buyers refusing all calls.” Less urgent items like “can we try a new ZIP?” get same-day responses. List names, emails, and phone numbers for the people who handle each type. Put this list in the IO. If those people change, update the list by email.

Define access to recordings and data. You need a promise that you can download or stream call recordings for at least 30 days, and that the network will keep them for at least 180 days. You also need daily exports of call stats: call ID, time, caller number (masked if needed), tracking number, duration, grade (accepted/rejected), and reject reason code. Agree on a CSV format up front so your tools can read it.

Now write acceptance rules like a recipe. Start with the timer. Pick a number that matches the buyer’s real needs. Ninety seconds is common for local service. Some verticals use 120 seconds. Write, “A billable call is a unique inbound call that lasts at least 90 seconds from buyer answer or IVR connect, whichever comes later.” If transfers are paid, write, “A billable transfer is a call connected to buyer’s live agent for at least 60 seconds, regardless of IVR time.”

List who is in scope. Keep it short. “Single-family homes and condos in Phoenix ZIPs 85008/85016/85018. Owner-occupied only. English and Spanish.” If renters are okay, say it. If mobile homes are okay, say it. If postcodes change by season, list a link to a live sheet.

List who is out of scope. “Out of area. Calls about new installs only. Brand warranty claims. Landlords calling for properties outside ZIP list. Commercial buildings. Jobs. Vendors.” This saves fights later. The more clear you are now, the fewer refunds you argue about later.

Define duplicates. “Duplicate is the same caller number to the same buyer within 30 days. Duplicates are not billable.” If the network routes to several buyers, define network-level duplicates too: “Same caller across any buyer within 7 days is a non-billable duplicate.” Pick windows that fit your price and volume.

Define bad line items that do not count. “No-answer by buyer. Busy signals. Dropped calls by carrier. IVR spam and robocalls.” If your IVR has a challenge, write, “Callers that fail the IVR challenge are non-billable.” If the network wants proof, agree on how you share logs.

Define your obligations too. “Publisher must announce call recording at the start of the call and ask for consent. Publisher must display clear consent text on all forms that may lead to callbacks. Publisher must honor DNC and STOP requests and keep a suppression list.” Good networks expect this. It keeps both sides safe.

Add caps and hours. “Buyer caps 30 calls per day, 8 a.m.–6 p.m. local time. Network will not route outside these hours. Overflow will be returned to publisher IVR for backup buyer or voicemail.” Caps prevent piles of short calls when the buyer is closed.

Put a small refund window in the rules. “Network may reject a call within seven calendar days of call date by marking a clear reason code in the dashboard. After seven days, the call is locked and billable.” Without a window, you get surprise clawbacks weeks later. That kills cash flow.

End with a simple path for changes. “Changes to ZIPs, hours, timer, or caps must be made in writing by email and confirmed by both sides. Changes take effect the next business day unless both sides agree to same-day changes.” This stops the “we told you on the phone” fights.

Here is a clean example. You onboard “BrightCalls.” The IO shows setup SLAs and support contacts. Acceptance rules say 90-second timer, Phoenix ZIPs, owner-occupied only, English and Spanish, no warranty calls, no commercial, 30-day buyer dupes, seven-day network dupes, seven-day reject window. Caps are 20 calls per day, 8–6. Overflow goes back to your IVR. Recordings are kept six months. You announce recording at the start and keep consent logs for two years. Everyone signs. You launch with calm minds because the rules are clear.

Onboarding is not scary. It is a long handshake where both sides say, “Here is how we will treat each other and the callers.” Write it down.

Keep it simple. Keep it kind. Then hold to it when the phone gets busy.

S3. Test protocol (pilot → scale)

A test is a small promise. You promise to send a few calls. The network promises to grade them fairly and pay on time. If both sides keep that promise, you scale. If not, you stop. A clear test protocol makes this easy. It fits on one page and keeps everyone calm when the first week gets bumpy.

Start with scope. Pick one vertical, one city, and one buyer mix. Do not test five things at once. Say, "HVAC repair, Phoenix, three buyers via BrightCalls." Set a time window. Seven to fourteen days is fine. Also set a volume or spend cap. For example, "Up to 100 calls or $5,000 in media cost, whichever comes first." This cap protects your cash if results are slow.

Pick your test KPIs. Keep them simple. Use accepted rate, average connected talk time, cost per accepted call, and dispute rate. Write your targets. For example, "Accepted rate at least 60%, average talk time at least 2:00, cost per accepted call under $70, dispute rate under 10%." These match the buyer's timer and your payout math.

Set reporting rhythm. Agree to a daily check-in by noon with a short note: calls yesterday, accepted, rejected with top reasons, and any fixes. Also agree to a 15-minute call on day three and day seven. On those calls, listen to two recordings together and make one change, not ten. One change at a time lets you see what worked.

Plan your call flow before day one. Route calls to Buyer A first, Buyer B second, Buyer C third. Set caps per buyer. If Buyer A wants 12 calls, lock them at 12. Overflow falls to B, then C. Make sure your IVR challenge is on and that you announce recording. Make your backup plan clear: if all buyers are full or down, calls go to voicemail with a “we will call you back” line and a consent capture, or they go to a safe backup buyer who pays less. Never let calls ring out.

Launch with tight media. Use exact and phrase search in your city, call ads and call assets, and a fast call page. Run only during 8–6. Avoid broad match and wide display buys on week one. Keep your keywords close to “ac not cooling” and “ac repair phoenix.” Clean targeting makes clean tests.

Log everything. In your sheet, record each call with time, source, tracking number, duration, buyer routed, accepted or rejected, and the reason code. Add a notes column for strange cases. This is your truth when you review.

Make fixes fast. If out-of-area calls show up on day one, tighten your geo to presence-only and remove “interest” location. If warranty calls show up, add “warranty” as a negative and add a quick question in your IVR: “Is your unit under brand warranty? Press 1 for yes, 2 for no.” Route “yes” to a separate line or end kindly. If renters keep calling and the buyer wants owners only, add, “Do you own your home?” to your script and IVR. Use these small gates to keep calls clean.

Decide “go” or “no-go” with math, not hope. On day seven, if you hit targets, scale by 20% the next week. If you missed one target by a little, try one more week with one change and the same cap. If you missed by a lot, stop, pay what is due, and write what you learned. It is okay to stop. The test did its job.

Scale in steps. Do not double overnight. When you hit target for a full week, raise the daily cap by 20%. If it holds for three days, lift again. Add a new hour window or two more ZIPs only after the base is steady. Add a new buyer only when your overflow is full and healthy. Protect answer times. Flooded buyers reject more calls.

Use holdouts if you can. Keep 10–20% of your city on your direct buyer line without the network for the test week. Compare accepted rates, talk time, and payout per call. If the network beats or matches direct and pays on time, great. If not, you know where to put your next dollar.

Set a dispute plan for the test. Agree to flag and resolve rejects within the seven-day window. Listen to five disputed calls together. If the network is fair and quick to credit clear mistakes, trust goes up. If they drag or change reasons, note it and reduce your risk.

Here is a small example. You plan a seven-day pilot, 100 calls max, $5,000 cap. Targets are 60% accepted, 2:00 talk time, under $70 per accepted. Day three, accepted is 52%. You listen to calls and see a flood of warranty questions. You add "Is this a brand warranty claim?" to the IVR and route "yes" to a kind end. Day five, accepted is 62%. Day seven, accepted is 65%, cost per accepted is $58, and disputes are 6% with clear reasons. You lift daily caps by 20% for week two. You keep your rhythm: one change, then watch. Two weeks later, you add two new ZIPs and raise by another 20%. The test did not feel wild. It felt steady. That is the goal.

A test is not a bet. It is a small, careful walk. You look where you step. You keep notes. You turn only when the ground is firm. Then you go a little faster. That is how you scale without breaking the phone.

S4. Quality feedback loops

A feedback loop is a circle. Calls come in. You grade them. You share what you see. You change one thing. Then you watch the next set of calls. If you keep the circle tight and kind, quality climbs. Buyers stay happy. Refunds drop. You do not need a big team. You need a simple routine you follow every week.

Start with the raw pieces. You need recordings, reason codes, and a shared view of the data. Recordings let you hear what really happened.

Reason codes tell you why calls were accepted or rejected. A shared view (a dashboard or a sheet) shows daily counts by source, by buyer, and by reason. If the network cannot give you these, build what you can on your side and keep asking them to meet you.

Make grading simple. Use a scorecard with five yes/no checks. Did we state the recording notice and get okay? Did we confirm the city or ZIP early? Did we find the right service fast? Did we transfer smoothly within one minute? Did we avoid banned claims? Each "no" is a point to fix. Keep the card short so graders can do ten calls in an hour. Ten calls a day is enough for steady learning.

Pull small, real samples. Each morning, listen to five calls from the last 24 hours: two accepted, two rejected, and one random. If you hear the same problem twice, act that day. If renters are calling and getting rejected, add the owner question in the IVR and in the ad copy. If out-of-area calls slip in, check your geo settings and the buyer's ZIP list. If agents forget the recording line, coach them in a quick huddle and post the script by their screens.

Share what you changed with the network the same day. Write short notes, not long emails. "We added 'Are you the homeowner?' in IVR at 10:05 a.m. We blocked warranty keywords. Expect acceptance to rise this afternoon." Ask them for their notes too. "What are your top reject codes today?" If you speak daily, small fires never become big ones.

Build a simple "BOR" (Buyer Outcome Report) each week. It is a one-page note you send every Monday morning. It shows last week's accepted rate, top reject reasons with counts, five call IDs as examples, and the one or two changes you made. It also lists what you will try this week. "We will test 4–6 p.m. bid increase. We will add a Spanish video on Wednesday." The BOR keeps everyone looking at the same facts. It builds trust.

Close the loop to your media. If the network says, "We got 20 wrong-service calls from people with brand warranty," you do two things that day. First, update your ads and pages to say "We connect you to local techs; brand warranties may require brand support." Second, add "warranty" and "customer service" as negative keywords in Search. Watch your next day's calls. If the problem drops, note it.

Turn reject reasons into "fix kits." For each common reason, write what you change in the ad, the IVR, and the script. "Out of area" fix kit: tighten presence geo, name ZIPs in ad and page, ask ZIP at the top of the call, and add a map to the page that shows served areas. "Jobs" fix kit: add "jobs" negative keywords, block "jobs" in native topics, and in the IVR say, "If you are calling about jobs, press 9," then give a polite message and end the call in under 30 seconds.

Build a calm coaching habit. Once a week, gather agents for 20 minutes. Play one good call and one tough call. Praise what worked. Fix one line that did not. Keep notes in a shared doc. Next week, check that the fix stuck. Short, steady coaching beats long lectures. It also keeps agent morale high, which callers hear.

Use transcripts if you have them. Many phone tools can turn speech to text. Search the text for words that match reject reasons: "warranty," "apartment," "out of area," "job." Build a small chart that shows these words by source and by hour. If "apartment" spikes at noon from native traffic, change the native article and the lunch shift script. This is "transcript mining." It sounds fancy, but it is just searching for words you care about.

Keep one change per day. It is tempting to change five things. Don't. Make one change and mark the time. Look at the hours after that change. Did acceptance move? Did talk time change? If yes, keep it. If no, roll back and try a different lever tomorrow. One change at a time makes learning visible.

Say thank you when the network helps. If they rush a refund on a clear mistake, say thanks. If they send you five good recordings with notes, say thanks. Small kindness makes the next hard talk easier.

Here is a loop in action. Monday, accepted rate is 52%. Top rejects are "warranty" and "out of area." You add a warranty filter line in the IVR and tighten geo to presence-only. You change ad text to name ZIPs. By Tuesday afternoon, accepted rises to 60%. You send a BOR with the change time and results. Wednesday, rejects shift to "no answer by buyer." You tell the network. They add a backup buyer for 4–6 p.m. Thursday, accepted hits 66%. Friday, you coach agents to ask the ZIP first and get a clear "ok" to record. Next week opens above 65%. The loop worked because you kept it small, daily, and kind.

Quality is not a speech. It is a habit. Five calls a day. One change a day. One page a week. Share often. Fix fast. Praise by name. Over time, your lines get cleaner, your calls get longer, and your refunds get rare.

S5. Dispute & refund cadence

Disputes will happen. A caller will be out of area. A buyer's line will ring out. A storm will break a carrier route. If you do not plan for this, small problems become big fights. A clear dispute and refund cadence turns heat into steps. It protects cash flow and keeps the friendship alive.

Begin with time. Set a **dispute window** in your IO. Seven calendar days is fair in local service. It gives the buyer time to review and mark rejects while the details are fresh. After the window closes, calls lock and are billable. If a buyer wants 14 days, you can agree if their reporting is strong and fast, but do not go longer without a better rate or a holdback plan. Long windows hurt your cash.

Agree on **valid reasons** to reject. Keep the list short and clear. Out of area. Wrong service. Under timer. Duplicate within window. No answer by buyer. IVR spam or robocall. Fraud (with proof). Anything else should be rare and need a talk. If a buyer tries to add "we were busy" as a reject, push back kindly. Busy is why caps exist.

Define **proof**. Ask the network to attach the recording, the reason code, and a short note to each reject. If it is out of area, a ZIP spoken on the call helps. If it is a duplicate, show the prior call ID and date. If it is no answer by buyer, show the carrier log or a short clip where the line rings out. Proof stops guessing and short emails.

Set a **daily mark**. The network should mark rejects by noon each day for the prior day's calls. You review that afternoon. If you disagree, you reply that day with call IDs and your note. Many small fixes can be done in 24 hours, not at the end of the month. Fast loops keep totals small and tempers cool.

Pick a **weekly true-up**. On Friday, the network sends a summary: total calls, accepted, rejected by reason, net billable, and pending items. You both agree on the week's total and note any items still under review. If there is a lot under review, set a short huddle for Monday morning to clear them.

Decide **how money moves**. Many teams use "credit on next invoice." If you bill weekly, credits from week one reduce week two's bill. If a big error happened (for example, a carrier bug made 20 calls dead-air), ask for a **same-week credit memo** or a wire if the amount is large. Do not let credits pile up for months. That is how small shops get squeezed.

Use a **ticket** for each dispute. Give it a number. Put the call IDs inside. Put dates and notes inside. Close it when both sides agree. Do not spread disputes across random emails. Tickets prevent lost threads. A shared Google Sheet works if both sides keep it up. A support tool works even better.

Set a **cap** on rejects. A healthy line should not see huge reject rates. If rejects go over a set line in a week (for example, over 20%), agree to pause or reduce caps while you fix the root cause. This protects both sides. The rule keeps you from throwing good money after bad traffic, and it keeps the buyer from drowning.

Tie disputes to **fixes**. Each cluster of rejects should lead to one change. If "no answer by buyer" shows up ten times in two hours, ask the network to add a backup buyer or change dayparting. If "wrong service" jumps, add a step in your IVR and change ad copy. Log the change time and check the next day. Do not just trade credits. Fix the leak.

Make **exceptions** rare, clear, and mutual. Sometimes a freak day happens—power outage, fiber cut, or a new agent who hung up by mistake. When the cause is clear and the pattern is short, you can make a one-time exception and credit a small set of calls outside the normal window. Write it down. Thank each other. Move on. Do not let exceptions become policy.

Watch for **bad patterns**. If one buyer rejects daily for odd reasons, but others do not, that buyer may be having cash issues or staffing problems. Reduce their cap fast. If one traffic source sends many disputes, pause it. The cadence should reveal pattern shifts before they hurt you.

Be **polite** and **firm**. Use short, calm notes. "Call 123-456 at 10:14 was marked out of area. Caller said 85008 twice. Please review." If you are wrong, say so and learn. If they are wrong, ask for the credit and leave the door open. You will work together again tomorrow.

Here is a simple week. Monday–Thursday, you send 80 calls. The network marks 12 rejects: five out of area, three warranty, four no-answer by buyer. You check recordings. Two "out of area" were actually in 85016. You reply with call IDs. The network agrees and flips two rejects to accepted. For the four "no answer," the buyer's line shows a tech outage from 2:10 to 2:40 p.m. The network credits those by policy. On Friday, the weekly sheet shows 80 total, 62 accepted, 6 valid rejects, 12 credited, 62 billable. You pay on net-15. Over the weekend, you add "Is this a brand warranty?" to your IVR. Next week, warranty rejects drop to one. You note it in your runbook. The loop holds.

Disputes do not need to be fights. With a short window, clear reasons, proof, and a weekly rhythm, they become small bumps you fix together.

The money stays clean. The friendship stays warm. The callers get help. That is the real win.

S6. Diversifying buyer mix

Relying on one buyer is like driving with one headlight. It works on a calm night. It fails the moment the road turns. A buyer can hit their daily cap. A phone queue can back up. A manager can change rules without warning. If all your calls flow to that one place, your income rises and falls with their day. Diversifying your buyer mix fixes this. You spread calls across several good buyers so no single problem stops your day. You also match each call to the buyer who fits it best, so more calls pass the timer and get paid.

Start by drawing a simple map. On paper, write Buyer A, Buyer B, Buyer C. Under each name, add four plain facts: cities or ZIPs they want, hours they answer, what they pay, and how often they accept. Do not guess. Ask for these in writing. If Buyer A pays $120 and accepts 55%, and Buyer B pays $105 and accepts 75%, Buyer B may be worth more per dial. A simple way to think about this is "effective value per call." You take the payout and multiply by acceptance. In this story, Buyer A feels like $66 per call, and Buyer B feels like $78 per call. That tells you who should get first shot in the ZIPs they both want.

Now plan your flow. You can use three simple styles. The first style is a "waterfall." You try Buyer A first. If they are closed, capped, or say no, you fall to Buyer B. If B cannot take it, you fall to C. The second style is "round-robin." You spread calls one by one across A, B, and C in a repeating pattern so nobody gets starved. The third style is "score-based." Your router checks the caller's ZIP, language, and time, and sends the call to the buyer with the best fit for that exact mix. Most teams begin with a small waterfall while they learn, and then move to score-based once they know the patterns.

Whatever style you pick, protect your day with clear rules. Set daily caps for each buyer and respect them. If Buyer A asks for 20 a day, do not send 30. Over-stuffed queues make agents miss calls, and missed calls turn into rejects. Add a "heartbeat" check on each line. If calls to Buyer B ring for more than, say, 20 seconds without answer, flip that lane to "overflow" and try C. When B clears, you can flip back. Your goal is to keep live callers with live agents.

Keep payments in the mix too. A buyer who pays a little less but pays on time can be better than a buyer who pays high and pays late. Track what each buyer owes you. Watch how many days pass before cash arrives. If one buyer slides, lower their share before your card bill comes due. A simple guard is "no single buyer more than half of this week's volume." That way, one bad payer cannot sink you.

Add skill and language as you grow. If a buyer has Spanish-speaking agents, send Spanish callers there first. If a buyer handles heat pumps but not gas furnaces, route those calls to the right place. You can collect the key fact in your IVR with one kind question. "Para español, presione 2." Or "Is your system a heat pump? Press 1 for yes." These simple forks add minutes to talk time because people feel known.

Test new buyers with tiny caps. Do not hand a new buyer half your day. Give them five calls a day for three days. Listen to recordings. Watch acceptance and agent tone. Are they kind? Do they pick up fast? Do they reject fairly? If yes, raise to ten a day. If no, stop and try another buyer. A "micro-cap" test keeps risk low.

Use time of day to your advantage. Maybe Buyer A crushes 8–2, and Buyer B shines 2–6. Give A the early window by default, and B the late window. You will see this in your phone log. Calls stay longer when the buyer has people at the desk and fewer voicemails.

Make overflow a habit, not a panic. The best time to set overflow paths is before you need them. For each buyer, decide where overflow goes. If A fills, send to B. If B also fills, send to C. If C fills, send back to your

IVR for a clear message and a callback option with consent. Say, "We're helping other neighbors right now. If you'd like a call back today, press 1." Then actually call back within your promised time. Overflow helps you keep trust.

Keep a human view. Buyers change. A new team lead can improve answer times overnight. A broken phone system can ruin a morning. Send a kind note when something goes wrong. "We saw four no-answers 9:10–9:30. We overflowed and will try you again at 9:45." This is not nagging. It is how partners win together.

Here is a simple example. You run HVAC calls in Phoenix. You have three buyers. Buyer A pays $120, accepts 55%, wants 85008 and 85016. Buyer B pays $105, accepts 75%, wants 85008, 85016, 85018, and speaks Spanish. Buyer C pays $95, accepts 70%, will take all three ZIPs late in the day until 7 p.m. You set score-based routing. In English before 2 p.m., 85008/85016 go to A first, with B as backup. In Spanish any time, all three ZIPs go to B first. From 2–6 p.m., 85018 goes to B first. After 6 p.m., overflow goes to C until 7 p.m. You cap A at 20, B at 25, C at 10. You listen daily. By week two, you see B's acceptance makes the math strong, so you shift two more afternoon calls to B and hold A at mornings. No one buyer owns you. No caller waits on a dead line. Your income line flattens and rises.

Diversifying is not about chasing a crowd. It is about building a calm bench. Each buyer plays the minutes where they are strong. You write the plan. You stick to the plan. You adjust the plan when the phone tells you to. That is how you keep the lights on when one headlight burns out.

S7. Exit to direct buyer strategy

Networks are training wheels. They help you start, learn the rules, and meet demand fast. But long term, most teams want some **direct buyers** too. A direct buyer is the company that answers the phone and does the work. When you go direct, you often earn more per accepted call, get paid faster, and have more control over quality. You also take on more duty: cleaner consent, stronger QA, and tighter support. You do not need to jump all at once. You can move in safe steps.

Begin by getting stable with a network. Aim for four to eight weeks where you hit your targets: steady accepted rate, clear recordings, low dispute rate, on-time pay. Save your best proof. Save five recording clips where your script was clean and the caller was in scope. Save a weekly summary showing accepted rate, average talk time, cities served, and hours answered. That is your **proof packet**. It is what a direct buyer will want to see.

Next, map the direct buyers you want, without touching anyone in your network's book. Read your contract. If it says you cannot contact their buyers, do not do it. There is plenty of market beyond any one network's list. Look for local brands with real licenses, good reviews, and live phones. Write down their names, ZIPs, hours, and what they seem to offer. You can find them by searching "AC repair + city," scanning Google Business Profiles, and listening to your own callers who say, "We tried Brand X but the line was busy." You are building a list from scratch, not poaching.

Get your house ready for a direct pilot. Tighten your consent lines on pages and calls. Clean your IVR so recording notice comes first and ZIP confirmation happens early. Prepare a mini-SLA for support: who answers their emails, who flips caps in a rush, who sends the daily report. Direct buyers will judge you by how easy you are to work with.

Reach out simple. A short email to the owner or service manager is enough. "We run local call flows in Phoenix. We help neighbors with AC problems find licensed techs. We can send 5–10 live calls a day in your ZIPs. We pass only calls that fit your rules. We record for quality with consent. Here is a one-page summary and three sample recordings. If you like, we can run a 7-day pilot with a small cap." Do not promise the moon. Promise small and true.

Offer the same clean test you used with the network. Seven to fourteen days. Clear timer. Clear reject reasons. Daily check-ins. A cap of maybe five to ten calls a day to start. You want them to say "yes" fast. You also want to keep risk low for both sides. Simple wins.

Price with facts. If networks pay you $120 for an accepted call in 85008, and your cost per accepted call is $60, you might ask a direct buyer for $140 and net terms of net-7. Why would they pay more than the network? Because they get you directly: faster changes, cleaner fits, and no middle fee. If they push back, you can meet in the middle. Sometimes a direct buyer will not pay more than your network. But even at the same price, faster pay and fewer disputes may raise your profit.

Run the pilot like a pro. Label their number cleanly in your system. Send only the ZIPs and hours they handle. Make them first in your waterfall for those windows. Keep a backup buyer ready in case their line goes down. Send a short daily note with counts and one recording link. Ask a human question, like "Any calls we should change?" Show you care.

Do not cut the network in the dark. Keep your network lanes alive as your safety net. Move only a slice to the direct buyer. If the pilot fails, you can redirect calls without stress. If the pilot wins, you can lift the direct cap by 20% each week while lowering network share in those ZIPs. Keep some network volume for new tests and for overflow. A bench is still useful when you go direct.

Stay fair. Do not steal a network's buyer. Do not route to a direct buyer in ZIPs the network bought traffic for, if your contract bans it. Growth built on broken trust breaks later. Build new supply for your direct work. Use a separate tracking number and campaign names so you can show clean walls if anyone asks.

Raise your own bar. Direct buyers will notice sloppy things faster. Fix them before they do. If your recording notice is late, move it to the first line. If your Spanish hold music is English, replace it. If your page loads slow on older phones, strip heavy scripts. These small steps make you look like a partner, not a vendor.

Think beyond price. A direct buyer may want more than calls. They may want booked windows or a two-minute warm intro with two qualifying questions. If you can do that safely and within your ethics, price it and test it. If not, say so. Saying "no" to a bad fit keeps the door open for a "yes" later.

Here is a clear story. Jay runs HVAC calls through a network in Phoenix. After six solid weeks, he builds a proof packet: accepted rate 64%, average talk time 2:05, top ZIPs 85008/85016/85018, five recording clips with clean consent and quick transfers. He emails "Cool Air Pros," a local brand with strong reviews. He offers a 7-day pilot, five calls a day, 90-second timer, net-7 pay, and a $140 payout. Cool Air says yes. Jay sends only those ZIPs and hours to Cool Air first, with his network as backup. Day three, one call hits "no answer." Jay overflows the next two to the network and tells Cool Air. They fix their line. By day seven, accepted rate is 68% and pay is on time. Jay raises the cap to seven calls a day the next week and lowers network share in those ZIPs. He keeps the network for overflow and for new tests in a nearby city. He did not burn a bridge. He built a new one.

An exit to direct is not a jump off a cliff. It is a footbridge you build board by board: proof, list, pilot, scale. You keep one hand on the old rail while you reach for the new. When both rails feel solid, you walk. That is how you gain control without losing sleep.

S8. Compliance guardrails with partners

Good partners help you grow. Great partners help you stay clean while you grow. Compliance guardrails are simple rules you both agree to follow so callers are treated with care, laws are respected, and money does not end up in a fight. You do not need legal words to get this right. You need clear habits and a few hard "no's."

Start with consent. Every page that can lead to a call or a callback should say, in plain view, that the person agrees to be called or texted about their request, that message and data rates may apply, and that they can reply STOP to end texts. On the phone, start with "This call may be recorded for quality. Is it okay to continue?" Wait for a yes. This is not a script trick. It is basic respect. It also protects both sides when a dispute comes later.

Keep a living record. Save call recordings for at least six months. Save source logs, UTM tags, and routing notes for two years if you can. Save consent texts and form time stamps. If a partner asks, "Where did this call come from?" you should be able to show the page, the ad, the time, and the city. This builds trust and ends most arguments in minutes.

Honor "do not call" and "STOP." If a caller asks not to be called again, add their number to your suppression list that same day. Sync that list to your dialer, your SMS tool, and any partner who calls back on your behalf. Do not send that number to any buyer again. If you trade lists or forget to sync, you will get complaints and fees. A clean list is money in the bank.

Protect your numbers. Use registered tracking lines and keep caller ID clean. Do not spoof brands. Do not cycle numbers daily to dodge flags. When a carrier flags a number as "spam likely," open a ticket with your phone provider and fix it: steady hours, real answer times, clear scripts, and STIR/SHAKEN turned on. Carriers and callers both prefer honesty.

Write down who you will not call. No minors. No schools. No hospitals.

No lists you did not earn. No cold texts. If a partner ever asks you to "just push the numbers," say no. If someone offers you a list that "opted in somehow," pass. You only work with people who asked for help now. That is the core of pay-per-call.

Set simple data rules with each partner. Share only what you need to connect the call and get paid: caller number, time, city, and result. Do not send names, notes, or extra personal details unless the caller gave them for this job. When you send files, use a safe method, like a secure portal or SFTP. Do not email raw CSVs around the team. If a partner emails you a big list of old numbers, do not call it. Reply kindly and explain your rule.

Know your recording rules by state. Some states need one person to know a call is recorded. Some need both. The safest path is to always announce at the start and ask to continue. Your script already does this. Do not bury the notice in minute two. Put it first, always.

Add a simple breach plan. If a file leaks or a phone tool is hacked, you will tell partners within 24 hours, rotate the numbers, and lock down access. You will list what was in the breach and how you fixed it. You will not hide it. Bad news fast is good news later.

Use audit rights as a promise, not a threat. In your contract, say both sides can ask for proof: call logs, caps, hours, reject reasons, and payment notes. When a partner asks, show them. When you ask, expect the same. People behave better when they know they may be asked to show their work.

Flag red lines. If a partner asks you to lie in ads ("Say you're the factory"), hide the recording notice, run after-hours calls into a dead line, or ignore STOP, you should say no and put it in writing. If they push, step away. A lost deal is cheaper than a fine or a bad name.

Keep your message honest. Do not promise 24/7 if you close at six. Do not say "guaranteed in 30 minutes" if that is not true on busy days. Do not squeeze people with fake timers on pages. Clear words make longer calls because trust is higher. Longer calls pass timers.

Match talk and click. Your ad and page should match the service and city you route to. If you say “Phoenix AC help,” send them to a line that serves Phoenix, not Tucson. If a partner changes their hours or ZIPs, update your page that day. A mismatch is not just a bad look. It becomes a refund.

Make rules for disputes. Agree on a seven-day window to mark rejects. Ask for a recording and a reason code on each reject. Share credits weekly. Tie each cluster of rejects to one small fix. These habits are part of compliance because they show you act on what you learn.

Teach your team. Write a one-page “how we stay clean” doc. It says we announce recording first, we confirm ZIP early, we avoid risky advice, we never take payment info, we end fast if the call is out of scope, and we are kind. Read it every month. New agents learn it in week one.

Keep a kindness test. If a line in your ad would feel wrong to say on your neighbor’s porch, do not run it. If a page would make your mother squint and ask, “Is this real?”, fix it. This simple test is not a joke. It is a fast way to catch risky ideas before they go live.

Here is a real-style day with guardrails on. You add a new direct buyer for 85018. You update your page to say “Serving 85008/85016/85018, 8–6.” You keep your consent line by the button. You put the recording notice first in your IVR. You add “Are you the homeowner?” to save both sides time. You run 20 calls. Two callers say “Please don’t call me back.” You add them to your suppression list at once. One call was out of area; you show the recording and ZIP to the buyer and both agree it should be rejected. On Friday, you send a one-page note with numbers, three quick clips, and one small change for next week. The buyer thanks you. Nothing felt risky. Nothing was hidden. You made money the same way you earned trust: with simple, clean steps.

Compliance is not a brake. It is a lane line. It keeps you out of the ditch while you drive at a steady speed. With guardrails, partners push more calls your way, carriers treat your numbers well, and neighbors stay neighbors, not complaints. That is how you grow for years, not weeks.

17

Funnels, Pages & CRO for Calls

S1. Mobile-first layouts & tap zones

Most pay-per-call visitors come from a phone. They are hot, worried, and using one hand. Your page must be built for that moment. Think "thumb first." If a person cannot see the phone number and tap it with a thumb in the first second, you will lose a lot of good calls. Mobile-first layout is not about fancy design. It is about clear words, big tap targets, and fast load.

Start at the very top of the page. The first thing a person should see is your call line. Place the phone number large and plain, and make it a live tap-to-call link. Right next to it, show your hours. When people know you are open, they call longer and calmer. If you serve certain ZIP codes, put them right under the number. This stops out-of-area calls at a glance. Under the number, write one short line that sets the right promise: you connect the caller to a local, licensed pro, and calls may be recorded for quality. If you say it early, trust rises.

Make the main button big enough for a fingertip. A good tap zone is about the size of a thumb. On most phones, that means a tall button with real padding, not a tiny link. Leave space around the button so a shaky hand can still hit it. Use clear words like "Call Now" or "Tap to Call." Do not use "Learn More." The person is not in school; they need help.

Keep the top of the page light. Large sliders and heavy videos slow things down. Slow pages cost you calls, because people tap the back button when nothing happens. Use one clean photo that proves the topic. A thermostat set to "Cool" and "Auto" is enough. A clean filter next to a dirty one is enough. Compress the image so it loads fast on a weak signal. Your number should always load first, even if the photo takes a second.

Think about the "reach zone." On big phones, the bottom half of the screen is easier to touch with a thumb. Put a sticky call bar at the bottom that follows as the person scrolls. It can be a thin strip that shows "Call 602-555-0100 • 8–6" with a tap action. If someone skims to read the tips, the button is always there when they are ready.

Use large, simple text. People read with one eye while they fight a problem. Use short lines and short words. A good test is to read the page out loud. If you run out of breath, your sentences are too long. If you squint to see the number, your font is too small. Dark text on a light background is best in the sun and in a hot kitchen. Avoid light gray on white. It looks pretty to a designer and invisible to a tired person.

Place the helpful steps near the top, but keep them short. Most callers just need to try one or two safe checks before they call. Write them like you would tell a neighbor. "Replace a dirty filter. Flip the breaker off and on once. Set cool + auto and wait five minutes." Add one safety line: "If you smell burning or hear buzzing, stop and call." Then place the call button again. Do not hide the number after a long story.

Respect one hand. Forms with ten fields are not one-hand friendly. If you must have a form, keep it below the call line, and ask for as little as possible. Name, phone, ZIP is enough for a callback. Put the consent text right next to the button in plain words. Tell them you will call or text only about this request and that they can reply STOP to end. If you offer a form, give it a clear headline like “Request a Callback” so it never confuses the main call path.

Build for real eyes and ears. Some callers will have low vision or be in a dim hallway. High contrast helps. Some will have sound off. If you use a short clip, add captions. If you use icons, add words next to them. A picture of a phone without the word “Call” can be missed in a rush.

Trim all extra clicks. Do not make people open a menu to find your number. Do not bury hours on a “Contact” page. Do not make a lightbox appear before the number. Pop-ups wreck trust when someone is already stressed. Keep the path clean: see number, read one line, tap to call.

Write for local life. If heat and dust are a thing in your city, say it. “Phoenix dust clogs filters fast.” If storms roll in at 3 p.m., mention it. “Monsoon today. If the AC leaks after the storm, call.” Local words tell a caller, “This page is for me.” That small feeling adds seconds to talk time. Those seconds pass timers.

Plan for left-hand and right-hand use. Many people hold the phone in one hand and tap with the thumb of that same hand. Make sure the bottom sticky bar’s call button sits in the center or spans the width, not tucked in a small corner. If you add a second button like “Request Callback,” do not put it right next to “Call” where a thumb can hit the wrong one.

Keep your header small. A giant logo is not a reason to call. A giant phone number is. If you want your name at the top, make it a small, clean line. Use the precious space for what gets used: number, hours, ZIPs.

Make errors kind. If a caller starts a callback form and leaves a field empty, show a big, friendly message near the field, not a red screaming banner. “Please add your ZIP so we can route you. We serve 85008/85016/85018.” Kind words keep people on the page.

Test on real phones. Do not trust a desktop preview. Send the page to your own phone. Use your thumb only. Stand in the sun. Try it with one bar of signal. Ask a friend to do the same. If either of you has to pinch and zoom, something is wrong. Fix it before you buy traffic.

Check the little things that save money. Put the number in plain text, not baked into an image, so scripts can swap it for tracking. Make sure the tap opens the dialer, not a strange app. Make sure the number on the page matches the number your router expects. If you show one number and route another, people hang up.

A short story shows why this matters. Two pages go live on the same day. Page A hides the phone number under a sticky promo bar and loads a giant slideshow. Page B shows the number big, with hours and ZIPs, and a sticky call bar at the bottom. After a week, both got the same clicks. Page A made many bounces and short calls. Page B made longer calls and more "accepted." The only real difference was layout and tap zones. When people can see and reach the number fast, they call with a calm voice and stay on the line.

Mobile-first means respect. Respect the thumb, the eye, the slow signal, and the small moment when someone needs help. Build for that, and your pages will turn clicks into good calls without tricks.

S2. One-tap IVR connect vs callback form

In pay-per-call, speed is the secret. A person with a problem wants to talk now. Your job is to make the shortest safe path from tap to help. You have two main paths. One is a one-tap connect to your IVR and then to a live agent. The other is a fast callback form that triggers your dialer to call the person right away. Both can work. Each has a time and place.

A one-tap IVR connect is the purest path. The caller taps the number, hears your short greeting and consent line, answers one or two simple questions, and gets sent to the right buyer. This path wins when agents are ready, the service is urgent, and the caller is near the phone. It shines in hot hours, like 4–6 p.m. on summer days for HVAC. It also shines when your buyers keep steady answer times and your acceptance rules are clear. The fewer steps, the fewer drop-offs.

Keep the IVR tiny. Say who you are and what will happen. "Thanks for calling Phoenix AC Help. This call may be recorded for quality. Is it okay to continue?" Wait for yes. Then ask one or two routing questions. "Please say or enter your ZIP code." "Press 1 if your system is not cooling, 2 for other." Do not stack ten questions. Every extra step loses people. Your goal is to collect just enough to send the caller to the right agent and pass the buyer's timer.

A callback form is a good friend when voice lines are busy, when you are after hours, or when people may be in a place where they cannot talk yet. The form must be very short. Ask for first name, phone, and ZIP. Put the consent text right by the submit button in plain words. Promise a call within a clear time, like "We will call you in under two minutes" during open hours, or "We will call you at 8 a.m." after hours. Keep your word. Your dialer should ring your agent and the caller right away. If the agent misses, queue a retry and send a short text that says you are calling from your number now and that they can reply STOP to end.

Which path should sit at the top? Most times, the one-tap connect should be the main button during your open hours. It is the least friction. It proves that a real person will answer. It sets a helpful tone. If your buyer's timer starts on connect, your short IVR must move quickly to a human. Each second before the agent answers is a second you cannot use later. Keep the IVR lean and aim for hand-off in under 30 seconds.

Use the callback form as a stable second option. Place it below the main call button so shy people still have a way to get help. Some callers hate talking to robots. Some are at work and cannot speak. A form gives them a path. It also gives you a way to service after hours. On your sticky call bar, add a small "Call at 8 a.m." link after closing that scrolls to the form. People like clear timing. It sounds honest because it is.

There are moments when the form should be the star. If a buyer opens late or has light staffing, you can lead with “Request a 2-Minute Callback” for the first hour of the day. If a storm knocks out phones in one part of town, you can shift to form-first to avoid wasting taps. If your cost per accepted call spikes because buyers keep missing live calls, a form can keep callers warm until lines clear. The trick is to tell the truth. If the form is slower, say when you will call. Then do it.

Design both paths for real fingers and real stress. Make the call button large and high contrast. Make the form fields big and forgiving. If someone types a seven-digit phone by mistake, show a kind error near the field, not a red wall. “Please enter a 10-digit number so we can reach you.” Keep the submit button text specific. “Request Callback Now” is better than “Submit.”

Listen to your calls to see which path wins by hour. You may find that one-tap IVR makes longer calls at 5 p.m., while forms make better calls at lunchtime. You may see that certain ZIPs prefer a live connect and others prefer a promise and a ring back. Use your daily notes to move the main button up or down as needed. Do not set and forget. A small change at the right hour can lift acceptance a lot.

Be strict about consent. On live calls, say the recording line first and ask to continue. On forms, place the consent line next to the button in clear words. Mention that messages and data rates may apply and that STOP will end texts. Treat callback numbers with care. Do not reuse them for other offers. Stay focused on the help they asked for.

Map clear routes behind each path. For one-tap IVR, set rules to send the caller by ZIP, hour, and language to the right buyer. Add a heartbeat check to overflow if a line is down. For callbacks, set the same rules in your dialer. If the person asked for Spanish, route to a Spanish-speaking agent. If they entered a ZIP you do not serve, send a kind text that you do not cover that area and do not call. Respect saves time and trust.

A simple story shows the choice. At 4:30 p.m., it is 110°. Jay's page shows "Call 602-555-0100 • 8–6" as the main button. The IVR says the recording line, collects ZIP, then connects to an agent in 12 seconds. Calls run long. At 7:15 p.m., the same page shows "We open at 8 a.m. Request a callback" with the short form. People fill it and get a text that the team will call at 8:00. At 8:05 a.m., the dialer calls each person in order. Most answer. They remembered because the page told them the time. Both paths worked because each fit the hour.

One-tap connect and a fast form are not rivals. They are tools. Use the one that makes the caller feel helped in that moment. Keep each step short, honest, and easy to reach with a thumb. Watch the phone log. Let the log tell you which one should lead today. Do that, and both paths will send more accepted calls, with fewer refunds and fewer sighs.

S3. Trust elements for publishers (no fake badges)

If you are a publisher, not the service brand, your page must be extra clear about who you are. People do not like tricks. Platforms do not either. You do not need to pretend to be a big company to earn trust. You need to be transparent, helpful, and steady. Real beats fake every time.

Start with a simple "who we are" box near the top. Two or three lines is enough. "We connect neighbors in Phoenix to licensed, independent HVAC pros. We do not do the repair. We help you reach someone fast. Calls may be recorded for quality." These words set the right frame. They stop confusion later on the call. They also protect you in disputes, because you said what you do.

Avoid fake seals, fake "as seen on" logos, and fake "Google certified" badges. These are not only dishonest. They can get your ads blocked. If you want a seal, it must be one you truly earned and that relates to your role. For example, you can show “Secure site” if you use TLS (the lock icon). You can show a small “Verified phone line” note if your carrier set up branded calling. You cannot paste a TV network logo unless that network actually wrote about you. If you ever feel “Maybe this looks too good,” remove it.

Use proof that is true and fresh. If you say “Helped 312 Phoenix callers this month,” you must be able to show how you counted, and the number should update. If you show a map of ZIP codes served, keep it current when buyers change their areas. If you show “average wait time,” check it daily. A low, honest number beats a fake zero. People can hear the truth in your voice later.

Explain “how it works” in three steps. Keep it simple. Tap to call. We ask your ZIP and connect you to a local, licensed pro. If they are busy, we set a callback. Add one short line on consent and recording. This is not a slogan. It is a tiny contract between you and the caller. When both sides know the steps, calls feel smoother and last longer.

Show safety and respect. Place the recording notice on the page and at the start of the call. Show your hours before the click. Make your privacy policy a real page, not a blank shell. Say what you collect (phone, ZIP), why you collect it (to route your call), and what you never do (never sell your number to random lists). Use plain words. If a 12-year-old can understand it, you did well.

Use real photos you took. A clean filter next to a dirty one on your counter. A thermostat set to “Cool” and “Auto.” A phone in a hand with your number on screen. Do not steal brand photos. Do not add other company logos to your page. If you include people in photos, make sure you have their OK and keep them generic. Faces are nice, but not required.

If you mention “licensed pros,” say how you check. You do not need long details. One line is enough. “We check license numbers against the state site.” If you do not check, do not claim it. Instead, say “We connect you to local pros" and leave out the word "licensed." Trust comes from honest limits, not big claims.

Add a light "Why we exist" note near the bottom. "It's hard to reach a live person when things break. We help neighbors reach a local pro faster. We get paid by our partners when a call fits their rules. There is no extra cost to you." This little paragraph does a lot. It tells the truth about money. It sets expectations. It lowers fear. People like to know the deal.

If you want to show ratings, be careful. Do not copy Google or Yelp stars for a buyer unless you have permission and you clearly label whose rating it is. Do not place someone else's stars next to your logo. An easy, clean path is to show **review snippets** of your page or service if you truly have them, or keep reviews off and focus on clear steps and hours. A simple "People say we answered fast" with no proof is worse than nothing.

Keep your contact details real. Even as a publisher, list an email for support. If a caller had a bad experience, they need a place to say so. Answer kindly. A fast "We hear you and we will look into it" wins more trust than a wall of silence.

Match every claim in your ads to your page. If the ad says "8–6," the page must say "8–6." If the ad says "Phoenix only," the page must list Phoenix ZIPs. If the ad says "same-day help," train agents to avoid "tomorrow" unless a caller asks for it. Every tiny mismatch chips away at trust and shortens calls.

List the brands you do **not** represent, if you touch one brand's name on the page. If you say, "We connect you to pros who work on Brand X," add "We are not Brand X and not endorsed by Brand X." Better yet, avoid brand names unless your buyers asked you to include them. Focus on the problem, not the logo.

End with simple social proof that fits your role. "We're a small team in Phoenix. We've helped neighbors reach local techs since 2023." That line is humble and strong. Humble says "real." Real makes calls last.

Here is a quick picture of a clean publisher page. At the top, a large "Call Phoenix AC Help: 602-555-0100 • 8–6." Under it, "We connect Phoenix neighbors to licensed, independent HVAC pros. We don't do repairs. Calls may be recorded." Then three steps: call, share ZIP, connect. Then three safe checks with small photos. Then the call button again. A simple "Why we exist" note sits near the bottom. A clear privacy link sits in the footer. No fake seals. No borrowed logos. The page feels like a neighbor's porch, not a billboard. That quiet honesty turns into longer talks and fewer refunds.

Trust for a publisher is not a sticker. It is the sum of small, true things: clear who you are, clear what you do, clear how you get paid, and clear respect for the caller's time and data. Do those, and both callers and partners will stick with you.

S4. Microcopy, urgency & ethics

Small words move big numbers. The tiny lines on your page, in your IVR, and in your texts can add seconds to calls and keep people calm. This is **microcopy**. It works best when it is clear, kind, and honest. When you add urgency, it must be real. False pressure breaks trust and shortens calls. Ethics is not a side note. It is the frame that holds everything up.

Start at the top with your main line. Use plain, neighbor words. "AC not cooling?" is better than "Experiencing HVAC performance degradation?" Follow with a calm promise. "Try these two quick checks. If you're still stuck, tap to call. We answer 8–6." These lines set the tone. They teach and invite. People do not feel tricked. They feel helped. Help turns into minutes. Minutes pass timers.

Write the call button like a door, not a puzzle. "Call Now" works. "Tap to Call" works. "Get Help Now" can work. "Learn More" does not. The job is to make the next step obvious. If you add hours on the button, even better: "Call Now · 8–6." It stops after-hours taps and later refunds.

Place the recording notice in the first breath of the call. "Thanks for calling Phoenix AC Help. This call may be recorded for quality. Is it okay to continue?" Wait for "yes." Do not rush past it. Do not hide it late in the call. Clear consent early is both ethical and smart. People who feel informed stay calmer. Calm callers explain better. Better explains pass your buyer's rules.

Use soft, short prompts in your IVR. "Please say or enter your ZIP code." "Press 1 if your system is not cooling, 2 for other." If a caller makes a mistake, be kind. "I didn't catch that ZIP. Please try again." Do not scold. Angry IVRs push people to hang up.

Write safety lines that protect, not scare. "If you smell burning or hear buzzing, stop and call a pro." This is enough. It warns but does not frighten. Do not write "Your house may burn down." Fear words can spike taps but lead to short, shaky calls and later regrets.

Use urgency only when it is real. Weather can be real urgency. "110° today. Replace your filter tonight." Staffing can be real urgency. "Fastest answer 4–6 today." Hours can be real urgency. "We close at 6; call before dinner." These lines guide people without faking. Do not use fake countdowns or "only 3 spots left" on a service page. People sense a trick and hang up early.

Make copy local and human. "Serving 85008/85016/85018" tells someone you are ready for them. "Neighbors helped today: 7" can work if you update it daily and keep it modest. A giant counter is often a lie. A tiny, true number says you are real.

Keep form microcopy honest and kind. Next to the button, write, "By tapping, you agree we may call or text you about this request. Message/data rates may apply. Reply STOP to end." This line lowers fear. It shows you know the rules. Under the fields, guide the hand. "ZIP helps us route you fast." If you ask for email, say why. If you do not need it, do not ask. Short forms convert better and feel safer.

Treat errors as chances to help. If someone enters a ZIP you do not serve, say, "Sorry, we don't serve that area yet." Offer a link to a national brand directory or to city services if that fits. Do not scold. Do not try to force a call out of scope. Out-of-scope calls become refunds and bad feelings.

Keep texts short and respectful. If you use a callback workflow, your first text can be, "We're calling now from 602-555-0100. If you miss us, we'll try again in 5 minutes. Reply STOP to end." If you need to reschedule, "Sorry we missed you. Would you like a call at 8 a.m. tomorrow? Reply YES or STOP." No emojis. No late-night messages. Respect the clock and the person.

Use bilingual microcopy if you serve it. Put "Se habla español 8–6" near the top if you can answer in Spanish. Record a Spanish IVR greeting. Do not write Spanish if you cannot answer in Spanish. That is a form of trick, even if unintentional.

Match tone to the moment. When heat spikes, be brisk and clear. When a storm passes, be calming. "We're here. Try these steps. Call if you need us." Small tone changes make a big difference in how long people stay.

Test small, often. You do not need fancy tools to test microcopy. Change one line. Mark the time. Watch the next day's calls for average talk time and acceptance. If the line "We answer 8–6" moves calls from night to day, keep it. If "Call now for fastest help" makes calls shorter because people rush, soften it. Write changes and results in a simple log.

Keep ethics as your guard. Ask yourself before you publish a line: is it true today? Will it still be true on Friday? Would I say this to my neighbor face to face? If the answer is no, rewrite. Avoid hype words like "only," "best," "guaranteed," unless you can prove them for every call. Avoid shame words like "Don't be dumb, call now." Respect pays you back in minutes.

A little story helps. Two pages run the same week. One has a red banner that says, "Hurry! Only 5 spots left today!" The other says, "We answer 8–6. Fastest answer 4–6 today." The first page gets more taps in the morning but many short calls, and more refunds when buyers hear the caller quoting the fake line. The second page gets steady calls in the late afternoon, and most pass the timer. The words did the work. One set of words pushed. The other set guided. Guidance wins.

Microcopy is the voice of your funnel. If that voice is kind, clear, and honest, people will follow it. If that voice is pushy or fake, people will push back or hang up. Your choice shows up in your phone log. Choose words that respect the human on the other end. Your timers, your payouts, and your sleep will all improve.

S5. A/B testing plan & sample sizes

A/B testing is a fair race. You show version A to some people and version B to other people at the same time. You change one thing. You watch which version sends more good phone calls. Then you keep the winner. That is it. This simple habit can raise your accepted-call rate and lower your costs without guessing.

Start with one clear goal. In pay-per-call, the best goal is **accepted calls**, not clicks. You can also watch **average connected talk time** and **cost per accepted call**. If your buyer pays only for calls over a timer, talk time is a strong early signal. When you pick one goal for the test, write it down. Say it out loud to your team. "We are testing which hero section sends more accepted calls."

Choose one change. Do not try three things at once. Good first changes are the **first line** on the page, the **image** at the top, the **size and position of the call button**, or the **hours shown near the button**. For example, version A says, "AC not cooling? Try 3 checks." Version B says, "Phoenix

AC not cooling? Try 3 checks." That small local word can matter.

Set your **test window**. Most teams test for **7–14 days**, because call volume and weather swing by day. A full week includes weekday and weekend patterns. If you run big budgets or you get many calls each day, you can end sooner—but only after you have enough data to trust the result. If a storm or outage hits mid-test, note it and extend your test.

Split your traffic fairly. Use a 50/50 split between A and B. Let your tool do it, or create two near-identical campaigns that land on A and B. Keep everything else the same: geo, hours, bids, and audiences. Run both at the same time. Do not run A on Monday and B on Tuesday. That is not a fair race.

Decide your **sample size** before you start. This means "how many outcomes do we need before we call a winner." If you are testing **accepted rate** (the share of calls that pass the buyer's rules), you need a certain number of calls in each version to tell a real difference from noise. As a simple rule of thumb, if your baseline accepted rate is about **60%**, you will need roughly **350 calls per version** to be confident about a **10-point** change (for example, 60% vs. 70%). If you want to spot a smaller change, like **5 points** (60% vs. 65%), you may need around **1,200–1,400 calls per version**. If your baseline is lower or higher, the exact number shifts, but the idea holds: the smaller the change you're hunting, the more calls you'll need. If your volume is low, test **bigger** changes (like a new first line, a much bigger button, or adding hours next to the number) so you can see a clear win with fewer calls.

You can also set a **"stop rule"** based on accepted calls collected. Many teams use "at least 100 accepted calls per version" as a minimum before picking a winner. If your daily accepted calls are 30 and your split is 50/50, you'll hit 100 per version in about a week. If your accepted calls are 10 per day, plan on two weeks.

Pick **guardrails** so a bad test does not hurt you. For example, decide that if either version's **cost per accepted call** gets **30% worse** than your usual for two days straight, you stop the test early and pick the other version. Write the rule and follow it.

Track the right **source of truth**. Your ad platform will show clicks and page visits. Your phone system will show calls, durations, and accept/reject. Tie them together with UTMs and dynamic number insertion so every call says which version it came from. When in doubt, believe the **phone log**. That is where your money comes from.

Run the race. Let both versions live through a full cycle. Heat waves, lunch breaks, and rush hours all change behavior. If the week is bumpy, do not jump at day-one numbers. Wait for your sample size or your stop rule.

Choose the winner with calm math. If B sends more accepted calls at a lower cost per accepted call and talk time is steady or longer, ship B. Then archive A with a note. Write **what** you changed, **when** you changed it, **what happened**, and **what you will try next**. Keep a simple "test log" so the team does not repeat old tests or forget wins.

Do not stack tests. After you ship B, wait a day or two so numbers settle. Then plan your next single change. Good sequences look like this: week 1 test the first line; week 2 test the main image; week 3 test adding hours next to the number; week 4 test the sticky call bar style. Each win adds up.

Respect **season**. Tests that win in July heat may not win in October. Tag your test log with season and weather notes. When the weather shifts, re-test key parts. Use the same fair rules. You will learn faster than any competitor who sets and forgets.

Use **sanity checks**. If a version "wins" on clicks but not on accepted calls, it's not a real win. Pretty words and pictures can raise taps and lower talk time. Your test goal is **accepted calls**. Stick to it.

Here is a full, simple example. Baseline accepted rate is 60%. You run two page headers for 10 days in Phoenix heat. Version A says, "AC not cooling? Try 3 checks." Version B says, "Phoenix AC not cooling? Try

3 checks." Everything else is the same. You record 780 total calls to A and 820 to B. Accepted calls are 456 for A (58.5%) and 574 for B (70.0%). Cost per accepted call is $68 for A and $55 for B. Median talk time is 2:08 for A and 2:11 for B. B is the clear winner. You ship B on day 11. You write in your log: "Local word in first line lifted accepted rate +11.5 points and cut CPA 19%. Keep city naming in header for Phoenix weeks." Next test: "Add hours '8–6' next to number."

A/B testing is not magic. It is a tiny habit: one change, fair split, enough calls, honest winner. When you do it week after week, your page becomes a quiet machine that turns taps into long, accepted calls without tricks.

S6. Privacy, consent text & clickwrap

People want help, but they also want respect. Privacy and consent are how you show respect in writing and on the phone. Clear words protect callers, protect you, and make partners trust you more. This section gives you simple patterns that fit real laws and real life. It is guidance, not legal advice. For final rules in your state or niche, talk to qualified counsel.

Start on the **page** where the call begins. Put your main consent near the button, in plain language, at normal text size. Do not hide it in a tiny gray footer. A clean line looks like this: "By tapping **Call Now**, you agree we may call or text you about this request. Message/data rates may apply. Reply **STOP** to end. Calls may be recorded for quality." These words say what you will do and what the person can do. They follow the Federal Trade Commission's long-standing advice to make disclosures **clear and conspicuous**, near the action they relate to. The FTC's **".com Disclosures"** guidance says disclosures should be easy to find, easy to read, and not buried; it applies to mobile pages and apps too. Federal

Trade Commission+1

Use **clickwrap**, not "hope-wrap." Clickwrap means the person must click a button or check a box next to clear terms. Do not rely on tiny links far away or text that says, "By using this site, you agree...". Put the consent right by the button. If your flow needs a checkbox, make it **unchecked by default**, add the consent text next to it, and don't let the form submit until it's checked. If you link to a privacy policy, put the link right there, not hidden three screens down.

Say the **recording** line at the start of the call. On the phone, make the first spoken line: "Thanks for calling. This call may be recorded for quality. Is it okay to continue?" Wait for "yes." Do not bury the notice later. Different states have different recording rules, but announcing early and getting a verbal okay is a safe, respectful practice across the U.S. If the caller says no, end kindly or continue without recording if your system allows and your policy and state law permit.

Keep your **Do-Not-Call** and **STOP** lists synced. When someone asks not to be called, add their number to your suppression list the same day. If they text STOP, do not text again. This is not only respectful; it also aligns with consumer-protection expectations in the U.S. Your dialer, SMS tool, and partners should all honor the same list.

Be careful with **lead-gen consent** rules. In late 2023, the FCC adopted rules to stop sites from using one broad consent to contact a consumer on behalf of many "partners" at once. The rule aimed to require **one-to-one** consent that clearly names the seller who will contact the consumer. In 2025, a federal appeals court vacated part of that order and sent it back to the FCC, creating uncertainty while the agency considers next steps. Because this area is moving, the safest practice for now is what most callers would want anyway: keep consent **specific**, name the brand(s) who may call or text, and do not hide long lists of "marketing partners" behind a tiny link. If you operate a comparison site, list the exact companies someone will hear from, or obtain consent separately for each. This keeps trust high no matter how the court case ends. Federal Communications Commission+1OrrickKrieg DeVault LLP National Mortgage Professional

Give **notice at collection** when you gather data in a form. If you ask for name, phone, and ZIP for a callback, say why you need each. "ZIP helps us route you to a nearby pro." If you serve California residents, a "notice at collection" and a link to your privacy policy are standard expectations under California privacy law; many teams follow this pattern for all states because it is simple and respectful.

Avoid **dark patterns**. Do not hide the cost of service. Do not trick people into accepting texts with confusing double negatives. Do not use countdown timers unless they are real. The FTC has warned that unclear or manipulative designs can be treated as deceptive. The safe rule: if a line would feel awkward to say face-to-face on a porch, don't print it on your page. Federal Trade Commission

Mask personal data in **heatmaps and session replays**. Tools like Microsoft Clarity and Hotjar offer default masking of user inputs. Clarity masks sensitive content by default and lets you configure more strict masking so PII is never sent to their servers. Hotjar suppresses keystrokes by default and shows asterisks instead of typed characters, with options to further suppress content. Turn these protections on, test them, and document them. This respects your visitors and reduces risk. Microsoft LearnMicrosoft Clarityhelp.hotjar.comHotjar

Store **proof**. Keep call recordings for months, keep consent logs for at least a year, and keep simple audit trails that show which page, ad, and number each call came from. When a partner asks, "Where did this number come from?", you can show the path. This ends most disputes in minutes.

If you use texts, space them right. Send a short confirmation when someone requests a callback: "We're calling now from 602-555-0100. Reply STOP to end." Do not text late at night. Do not text again if they do not answer and did not ask for more texts. Keep texts focused on the service they asked about.

Write consent in **plain language**. Skip legalese. Keep it at one or two sentences. Keep font size normal. Keep color high-contrast. Keep it next to the button. This is what regulators mean by "clear and conspicuous," and it is what people appreciate on a small screen. Federal Trade Commission

A short example ties it together. Your page shows "Call Phoenix AC Help: 602-555-0100 · 8–6." Right below, it says, "By tapping Call Now, you agree we may call or text you about this request. Msg/data rates may apply. Reply STOP to end. Calls may be recorded." On the phone, your IVR opens with the recording notice and asks for consent. Your heatmap tool masks typed fields by default. Your SMS sends one short status message only when someone requests a callback. Your privacy link is in the footer and near the button. Everything is easy to see and easy to understand. Nothing is hidden. That is privacy that works in the real world.

S7. Page speed & Core Web Vitals

A slow page kills calls. People tap, nothing happens, and they go back. Speed is part of trust. When your page loads fast, the number appears fast, the button works fast, and the call starts fast. Google's **Core Web Vitals** are common speed and UX targets that also line up with how people feel on a phone. Three matter most for your call pages: **Largest Contentful Paint (LCP)** for loading, **Interaction to Next Paint (INP)** for responsiveness, and **Cumulative Layout Shift (CLS)** for visual stability. Google's guidance says aim for **LCP ≤ 2.5s**, **INP ≤ 200ms**, and **CLS ≤ 0.1** at the **75th percentile** of real users. If you hit these, the page will feel snappy, and your call button will be easier to tap. web.dev+2web.dev+2 Google for Developers

Make the first paint light. The top of your page should be simple: your number, hours, and one small image. Do not put a huge slideshow or an auto-playing video at the top. Those push LCP over the limit. If your hero image is big, compress it. Modern image formats like WebP or AVIF are smaller than old JPEGs. Your goal is to have the number and button show in under two seconds on a weak cell signal.

Load third-party scripts with care. Every extra tag slows the page. Analytics, chat widgets, popups, and A/B tools each add weight. On a call page, cut the list to what you must have. If you keep a tag, load it after the main content. If you use a tag manager, set it to load non-critical scripts **deferred** so the number shows first. A fast, quiet page turns into longer calls and fewer bounces.

Stop layout jumps. CLS measures how much the page moves while it loads. If your number jumps down because a late font or banner loads, people mis-tap. Fix this by setting **width and height** on images, reserving space for banners, and loading fonts in a careful way. If you use a web font, use a **font-display: swap** strategy or host fonts locally so they show quickly and don't shove things around later. Keeping CLS **≤ 0.1** prevents these annoying jumps. web.dev

Make taps respond right away. INP measures how long the page takes to react when someone taps or types. If a person taps "Call Now," the dialer should open almost instantly. Slow scripts, heavy click handlers, and large bundles can delay this. Keep your JavaScript light. Remove unused code. Avoid big libraries if a few lines of native JavaScript will do. Test on a cheap Android phone, not just your fast laptop. If the button feels sluggish there, it will feel sluggish for your users too. Google made **INP** a Core Web Vital in 2024, replacing FID, so it matters more today. web.dev

Keep the network short. Use a good host close to your users. Turn on

HTTP/2 or HTTP/3. Use **compression (gzip or Brotli)**. Set long cache times for static files like images and CSS so repeat visitors load faster. Preconnect to the domains you must hit, like your CDN, so the browser starts handshakes early. These small network wins add up.

Reduce page weight. Aim for a lean page under **200–300 KB** of HTML, CSS, and JS combined before images. Your hero image can add a bit more, but keep it compressed. Lazy-load anything below the fold, like secondary images or maps. Do not lazy-load your phone number; that must show instantly.

Make critical CSS inline and tiny. Put only the styles needed for the first screen in the HTML. Defer the rest. This helps the number and button style appear at once. It also avoids a flash of unstyled text that can cause layout shifts.

Measure with real tools. Use **PageSpeed Insights** and **Lighthouse** to get lab scores and field data. Look at the **CrUX** field numbers if available for your page. Check both mobile and desktop, but trust mobile first. If your LCP is 3.4s on mobile, fix it before you worry about desktop bragging rights. Google's docs explain how the metrics are defined and why the 75th percentile matters. web.dev+1Google for Developers

Fix the top three blockers first. In most call pages, these are oversized images, render-blocking CSS/JS, and slow third-party tags. Compress the hero image. Inline the critical CSS. Defer or remove non-critical scripts. Then re-test. Do not try ten fixes at once; you won't know what worked. One or two changes, then measure again.

Watch speed by **hour**. At 5 p.m., cell networks may slow under load. If your "good" LCP is right at 2.5s at noon, it may drift to 3.2s during rush hour. Leave headroom. Design for fast even on a bad day. Your callers will feel the difference.

Tie speed to outcomes. After each fix, watch **call rate per 100 visits**, **talk time**, and **accepted calls**. A faster page should raise all three. If speed scores go up but calls do not, check that your number is still obvious and your button still big. Speed does not replace clarity. It supports it.

An example brings this home. Your page loads in 4.0s on mobile and has a CLS of 0.25 because the hero image and a web font push the layout down. Many people mis-tap. LCP is slow because the hero image is 1.2 MB. You compress the image to 120 KB, set width/height, inline critical CSS for the header, and switch fonts to system fonts. You defer a chat widget to after user interaction. Next day, mobile LCP is 1.8s, CLS is 0.03, and the "Call Now" tap feels instant. Calls per 100 visits jump, talk time rises by 15 seconds, and accepted calls improve. You did not change your ad. You changed your speed.

Fast pages are kind pages. They respect the caller's time and phone. They show the number now, not later. They respond when tapped. That respect turns into minutes, and minutes turn into money.

S8. Heatmaps & session replays for call UX

Heatmaps and session replays are like watching people use your page over your shoulder—without guessing and without invading their privacy. A **heatmap** shows where people tap and how far they scroll. A **session replay** shows a video-like play-back of how one person moved, tapped, and hesitated on your page. Used well, these tools help you spot and fix the moments when callers get stuck. Used carelessly, they can capture private data. You must set them up right.

Start with privacy first. Turn on masking in your tool before you record a single visit. In Microsoft Clarity, masking is **on by default** and you can expand it so sensitive content never leaves the user's browser. In Hotjar, **keystrokes are suppressed by default**; typed characters appear as asterisks, and you can further suppress elements so personal details are never captured. Keep these protections on, and document them in your privacy policy. This lets you learn without storing what you should not see. Microsoft LearnMicrosoft Clarityhelp.hotjar.com

Decide what you want to learn this week. Ask one small question. "Do people see the number?" "Do people scroll past the call button?" "Do mobile visitors mis-tap because the layout shifts?" When you have one question, the reports become clear. If you try to learn ten things, the videos will feel like a firehose.

Run a **click (or tap) heatmap** on your main call page for a week. On mobile, look for taps on the number, the top button, the sticky call bar, and any text that looks tappable but is not. If you see many taps on a phrase like "8–6," that means people think it is a button. Turn it into a button or change the style so only the real button looks tappable.

Run a **scroll heatmap** to see how far people go. If only 40% of visitors reach your first set of "try this" steps, move those steps higher. If almost nobody reaches the form, but lots of people tap "Call Now" at the top, the form can be a backup. Let the data shape the page. Your goal is to make the **first screen** do most of the work.

Watch **session replays** in short batches. Choose ten sessions that lasted at least **20–30 seconds**. Watch on mobile view. Look for **rage taps**—tapping the same spot many times—which often means the button is blocked, the page is moving, or a script is slow. If you see rage taps on the call button, check your JavaScript and your CLS. Fix the cause, not just the symptom.

Look at **device mix**. If most rage taps happen on cheap Android phones or on older iPhones, test on those devices. Some fancy effects break on older browsers. Your callers do not all use the newest phone. Design for the middle.

Use **filters**. In Clarity and Hotjar, you can filter sessions by device, country, page, or referrer. Filter to **mobile, your city, and this page**. Watch only those. Ten focused videos tell you more than 100 random ones.

Tune your sticky call bar with what you see. If many people scroll and then stop above the fold, make sure the sticky bar is present, not hidden. If the bar blocks important content on small screens, make it thinner. If people tap the wrong item in the bar, simplify it so it has **one** big action: "Call 602-555-0100."

Check **form friction** if you use a callback form. Watch where people drop. If they fail on ZIP, add a helper like "We serve 85008/85016/85018." If they fail on phone, add a friendly hint: "10-digit number helps us reach you now." If many people start and stop, your main call button may be too low or too small. Move the call path up and make the form the backup.

Use **heatmaps to test copy**. Make two versions of the first line and see which one gets more taps on the number or the button. If "Phoenix AC not cooling?" gets more taps than "AC not cooling?", keep the local word. Heatmaps can guide small copy wins without a full A/B rig, though you should still confirm with call logs.

Watch **after-hours behavior**. If many people visit when you are closed and tap the number anyway, add "We're open 8–6" near the button and offer a clear "Request a callback at 8 a.m." option. Session replays will show late-night visitors hunting for help. Meet them halfway with a promise and a plan.

Mind your **data limits**. Do not try to record every session forever. Sample enough data to answer your question, then turn the knob down. Many tools even suggest capturing only sessions longer than 30 seconds to avoid junk. This keeps storage small and reduces risk. help.hotjar.com

Share short clips with your team. One 45-second replay showing a person rage-tapping the call button says more than a long email. Then fix the issue and watch a few new sessions to confirm the fix worked. Make it a weekly habit: pick one problem Monday, fix by Wednesday, verify by Friday.

Keep **ethics** in every step. Tell visitors you use analytics to improve the site in your privacy policy. Mask inputs. Do not try to record passwords, credit cards, or any sensitive text. Do not use recordings to spy on people. Use them to make the call path kinder and faster.

Here is a real-style story. Your phone log shows short calls from mobile on hot afternoons. In Clarity, tap heatmaps show many taps on your hours text and on a small icon near the top, not the big button. Replays show the page jumping when the hero image loads; the button slides for a moment, and thumbs miss. You compress the hero, set fixed image sizes, and increase the button height. You add "Open 8–6" to the button text and remove a second, tiny icon. Next week, rage taps drop, CLS falls, and accepted calls rise. Nothing else changed. The tools showed you exactly where the friction was. You removed it.

Heatmaps and replays are honest mirrors. They show what people **do**, not what we wish they would do. If you respect privacy, ask one question at a time, and ship one fix at a time, these tools will make your path to a call smooth and calm—and that calm turns into longer, better calls that pass the timer.

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Monetization, DQ Recovery & Cross-Sell

S1. Map reject reasons to alternate buyers

Not every call gets paid on the first try. Some callers are out of area. Some rent, not own. Some want a brand warranty. Some call after hours. These calls are often marked "DQ" (disqualified) or "rejected." Many teams treat DQs as dead. That is a mistake. A DQ is still a person with a real problem. If you plan ahead, you can help them and still earn fair revenue—without breaking any rules you agreed to with your main buyer. The key is to **map each common reject reason to a safe second place** to send the caller.

Start by making a simple list of your top reject reasons from the last 30 days. You will see the same few again and again: out-of-area, wrong service, warranty claim, renter vs. homeowner, commercial vs. residential, duplicate recent caller, and "no answer by buyer." Now, for each reason, choose **one** alternate path that truly fits. This is not about squeezing money from anyone. It is about **fit**. When the fit is right, the caller gets help, call time is longer, and refunds drop.

Out-of-area is the easiest one to save. If your main buyer only takes

Phoenix ZIPs 85008/85016/85018, but the caller is in 85301, you can route them to a **nationwide marketplace buyer** who covers that ZIP. Keep this clean: only route after you confirm the ZIP in your IVR and only if your IO says you may route out-of-area calls elsewhere. If your IO bans it, do not do it. A simple spoken line works well: "It looks like your ZIP is 85301, which is outside today's service zone. We can connect you to a partner who serves your area. Press 1 to continue, or 2 to end." This keeps consent clear.

Wrong service happens when someone needs plumbing, not AC, or they want a tune-up when your buyer only takes repairs. If your contract allows, you can map "wrong service" to a **sister vertical buyer**. For example, if the caller says "there's water under the sink," your IVR can offer, "Press 3 for plumbing help." The moment they choose it, switch to a plumbing partner line. If your buyer bans cross-vertical routing, you can still save the caller with a free resource and a callback option, but you should not monetize it.

Warranty claims are common. The caller says the unit is under a brand warranty and wants factory service. Most repair buyers will reject these. Do not fake it. Tell the truth: "Brand warranties are handled by the manufacturer's service center." Your backup here can be **two choices**. One, give the brand's service number and wish them well. Two, **with consent**, offer a **home warranty quote buyer** or a **maintenance plan buyer** who sells plans (if your IO allows). Be careful: a warranty sales pitch right after a rejection can feel pushy. Use gentle words: "If you'd like, we can connect you to a plan provider for future repairs. This is a separate offer. Press 9 to hear it." If they do not press, end the call kindly.

Renter vs. homeowner is another big one. Some buyers want owners only. If the caller is a renter, you can route to a **property maintenance buyer** that serves tenants (if available) or to a **portable appliance repair** service (for window units, for example). You can also send a short SMS—

with consent—saying, "Ask your landlord to call this number so we can help today." Often the landlord calls back, and that second call **is** payable.

Commercial vs. residential splits can be saved by mapping to a **commercial buyer**. A simple IVR fork helps: "Press 1 for a home, 2 for a business." If they press 2, send them to your commercial partner. If you do not have one, end kindly and invite them to leave a voicemail for a next-morning callback from a commercial directory partner, if your IO allows.

Duplicates happen when someone calls again within your buyer's no-pay window (for example, 30 days). Do not try to sell them something random. It breaks trust. Instead, offer a **self-help micro-guide** and a callback window for a second look with a **different buyer** who accepts duplicates after a shorter window (for instance, seven days). Make sure this is allowed in both contracts. If not, end kindly and send a help link by text with consent.

"No answer by buyer" can be turned into a win with a **backup buyer** in your waterfall. If your first buyer rings out for 20 seconds, overflow to Buyer B. If B is also full, record a polite voicemail and offer a same-day callback window. Never send a live caller into a dead line twice.

To make all this work, tag each call as soon as the reason appears. Your IVR or agent script should collect the fact early: ZIP, service type, owner vs. renter, home vs. business, warranty yes/no. Pass that tag to your router. This tag is the switch that picks the alternate path. Keep the number of tags small so the IVR stays short.

Keep your **contracts** in mind. Some buyers allow alternate routing of out-of-scope calls. Some do not. Some networks want you to drop out-of-scope calls. Read the IO. When in doubt, ask for permission in writing. Your reputation is worth more than one extra payout.

Watch your math. A good alternate path should earn less than your main buyer but still cover costs. If your main buyer pays $120 per accepted call and you accept 60%, your effective value per call is $72. An alternate buyer at $70 but with 80% acceptance can be strong for DQs. Do small tests. Keep a daily report that shows DQs saved and dollars earned. If a path hurts caller trust or raises refunds, drop it.

Here is a small example. In one week, you send 200 calls to HVAC Buyer A. Seventy-five are accepted. Fifty-five are DQ: 20 out-of-area, 15 warranty, 10 renters, 10 wrong service. You mapped out-of-area to a national marketplace, renters to a tenant-friendly buyer, wrong service to plumbing, and you chose **no monetization** for warranty—only a helpful SMS with the brand number—because your IO bans warranty cross-sell. Of the 40 DQs you routed, 22 were accepted by alternates. Your DQ save rate is 40%. Your partner is happy (fewer refund requests), callers are helped, and your revenue per total call rises. No rules were bent. It felt calm because you set the map before the week began.

A DQ is not the end of the road. It is a fork. If you design the forks with care—one reason, one safe path—you will help more people, keep buyers happy, and build a steadier business.

S2. IVR branching into second-chance offers

Your IVR is a guide at a fork in the road. A caller taps your number. They hear a kind voice. In a few seconds, the IVR learns who they are and what they need. If the main path will not work, the IVR can offer a **second-chance** path that fits. This is how you save DQs without long calls or hard sells. The trick is to keep the IVR **short, clear, and fair**.

Begin with trust. Your first line should be the recording notice and a simple question: “Thanks for calling Phoenix AC Help. This call may be recorded for quality. Is it okay to continue?” Wait for “yes.” Do not rush past this. It shows respect and keeps you safe.

Ask only what you need to route well. Two pieces of info do most of the work: ZIP and service type. You can collect both in under 20 seconds. "Please say or enter your ZIP code." Then: "Press 1 if your system is not cooling, 2 for other." If you must filter owners, add: "Do you own your home? Press 1 for yes, 2 for no." Each question should be simple, with one or two choices. Avoid long menus.

Now design your **second-chance** branches. Think of them as safe exits, not detours. If the ZIP is out of area, offer the out-of-area partner: "We don't serve ZIP 85301 today. Press 1 to connect to a partner who does. Press 2 to end." If the caller chooses 1, connect them. If 2, end kindly: "Thank you. We hope this helps." Do not force people down an alternate path.

If the caller presses 2 for "other" and then says "water under the sink" to the agent, that is a wrong service. You can move that check into the IVR with one more quick branch: "If you are calling about plumbing, press 3 now." If they press 3, switch to your plumbing partner. This keeps the HVAC queue clean and the caller happy.

Warranty needs a very light touch. If the caller says "it's under brand warranty," your IVR can offer help without pushing a sale: "Brand warranties are handled by the manufacturer. We can text you their number. Press 1 to receive it, or 2 to hear a separate offer for future repair plans." If they press 1 and you have SMS consent from the page or the IVR, send the number. If they press 2, connect to a plan buyer **only if** your IO allows. If not allowed, end kindly after sending the brand number.

Renters can get a clear fork too. "If you rent your home, press 2." When they press 2, give them the best true help you can. "We can connect you to a tenant-friendly service, or we can text your landlord a link to call us now. Press 1 to connect, 2 to invite your landlord." Both choices serve the real situation. Do not pretend they are homeowners.

"No answer by buyer" should not be the caller's problem. Your IVR should watch the heartbeat. If a buyer's line rings past 20 seconds or returns a busy code, reroute the call at once: "All agents are busy. One moment while we connect you to another local pro." If no one can take the call, offer a callback window in the IVR itself: "We can call you back between 4 and 6 today. Press 1 to confirm." Get clear consent and then keep the promise.

Keep the **menu tiny**. People hate trees with ten branches. Your main menu should have at most three options. Your second-chance prompts should be short and plain. If you need several forks, use a **branching flow** that only shows the fork when it matters. For example, you do not ask about renters until someone says they rent.

Build a **bot test** into your IVR so second-chance offers don't become a spam magnet. Use a simple challenge: "Please press 7 and then the pound key." Humans can do this; most bots cannot. If the caller fails or presses too fast, end the call and mark it. Do not route these to partners.

Make opt-ins clear for any **separate offers**. If you plan to connect to a plan seller or to send a text with a link, say that this is "a separate offer" and ask them to press a key to continue. Keep recordings. Keep logs. Second-chance should feel like a helpful option, not a trick.

Test your branches with real people. Ask friends to call, pretend to be out of area, say they rent, say "warranty," and so on. If they get lost, your wording is wrong. Fix it before you buy traffic. Also test in both English and Spanish if you serve both.

Measure second-chance wins by outcome, not by offers shown. Track how many DQ callers took an alternate path, how many connected, and how many were accepted and paid. If a branch shows the offer often but rarely pays, either the offer is wrong for your crowd or the wording needs work. Tune one line at a time.

Here is a full example. It is 110°. A caller from 85301 taps your number. Your IVR gets consent, collects their ZIP, and sees they are out of area. It offers the out-of-area partner. They press 1. They connect in four seconds and speak to a live agent. The call runs two minutes and ten seconds. It pays. A second caller says the unit is under warranty. The IVR offers a brand number by text and a separate plan offer. They press 1. You text the brand number and end kindly. No money here, but the caller feels helped. A third caller is a renter. They press 2, choose “invite landlord,” and enter the landlord’s number. Your system sends a text saying, “Your tenant asked us to call. If you’d like help today, call 602-555-0100, 8–6.” The landlord calls and qualifies. This is a new, paid call you would have lost.

A short, fair IVR with second-chance forks turns dead ends into side roads. Keep the choices honest. Keep the words simple. Put the caller first. When you do, your DQ rate goes down, your partners smile more, and your day feels easier.

S3. Post-call SMS/email drip (with consent)

Some callers hang up before they reach a live person. Some call after hours. Some say, “Let me think,” and never come back. A gentle follow-up can bring them back—**if** you have consent and if you respect their time. A short SMS or email drip turns “almost” into “yes” without pressure. The goal is not to spam. The goal is to **help** at the right moment.

Start with consent the right way. On your page, next to the call or callback button, place a clear line: “By tapping, you agree we may call or text you about this request. Msg/data rates may apply. Reply STOP to end.” On the phone, your IVR can also ask: “May we text you updates about this request?” Only send texts if the caller said yes on the page or on the call. Store that yes with a timestamp. If the person says STOP later, stop. Sync your STOP list to your SMS tool and your dialer.

Keep your list clean. Do not add random numbers. Only people who asked for help and gave consent should be in your drip. Dirty lists cause complaints and blocks. Clean lists make money.

Plan short drips by **situation**, not one big blast. Think of three common cases: missed/after-hours, out-of-area, and "needs a second try." Each gets its own tiny sequence.

Missed/after-hours is the most common. The moment a missed call is logged or a form comes in after closing, send one SMS: "Sorry we missed you. We answer 8–6. Would you like a call at 8 a.m.? Reply YES or STOP." If they reply YES, confirm: "Got it. We'll call from 602-555-0100 at 8 a.m." Then call at 8 a.m. sharp. If they do not reply, do not keep poking all night. In the morning, send one more message at 8:05: "Calling now from 602-555-0100." That's it. No more messages that day.

Out-of-area gets a helpful link, not a pitch. Right after the call ends, send: "We don't serve your ZIP today. Here's a partner who does: (link). Or call 602-555-0100 8–6 for tips." If you have a partner and your IO allows it, the link can include your tracking so you earn when they connect. If you do not, send a free help page. Never fake a local fit.

"Needs a second try" covers short calls and "I'll call back" cases. An hour after the short call (during open hours), send: "Still warm? Try these two checks: replace a dirty filter, set COOL + AUTO. If still stuck, call 602-555-0100 before 6. We'll get you to a local tech." This message does three things: it helps, it repeats the number, and it sets hours. Many people respond to this because it feels like a neighbor reminder, not a sales push.

Keep the **timing** kind. Do not send messages at night. Follow local time. For most home service, **8 a.m. to 7 p.m.** is safe. If you schedule a morning callback, send one reminder five minutes before the call and one "calling now" message at the exact time. Do not send five messages.

Emails can back up SMS for people who prefer them. Use the same pattern: short subject ("AC not cooling? We can call at 8 a.m."), short body, big "Call Now" link or a "Confirm callback" link. Email is slower than SMS; use it as a gentle backup or for a follow-up guide after a job is done.

Segment by **reason**. If a call was rejected as "warranty," do not send offers that clash with that. Instead, send the brand's service number and one tip about dust filters. If a call was rejected as "wrong service," send the right service link. If a call was "no answer by buyer," apologize: "We couldn't reach an agent at 3:10. We're ready now till 6. Call 602-555-0100." Polite truth builds trust.

Write like a person. Short, small words win. "We answer 8–6." "Call now for fastest pick-up 4–6." "Reply STOP to end." Do not use emojis. Do not shout. The tone should match how you would text a neighbor who asked for help.

Measure what matters. Track **reactivation rate**: the share of people who call back and are accepted within 72 hours after your message. Track **opt-out rate** and **complaints**. If opt-outs rise, your timing or wording is off. If complaints appear, stop and fix. Keep **cost per accepted call** for your drip. If it beats or matches your cold cost, keep it. If not, trim the drip.

Rotate the number wisely. Use a **clean tracking number** for SMS that matches the number you tell them to call. If your text says you will call from 602-555-0100, **call from that number**. People ignore numbers they don't recognize. Label the number "Drip Reactivation" in your phone system so you can see how well it works.

Be careful with links. Use short, clear links that point to your fast call page. Do not send long tracking strings that look scary. If you must use tracking, hide it behind a short, safe domain you own. Test the link on older phones. It should open fast and show the number at the top.

A tiny A/B test can help. Test two first messages for one week: "We answer 8–6. Want a call at 8 a.m.?" vs. "Want help at 8 a.m.? We'll call from 602-555-0100." Watch which one gets more YES replies and more accepted calls the next morning. Keep the winner.

Here is a day in this system. At 5:32 p.m., Maria calls, then hangs up at 25 seconds. At 6:01 p.m., your system sends, "Sorry we missed you. We answer 8–6. Want a call at 8 a.m.? Reply YES or STOP." At 6:05, she replies YES. At 7:55 a.m., she gets "We'll call from 602-555-0100 at 8:00." At 8:00, your agent calls. The call runs 2:14 and is accepted. No tricks. Just a gentle promise kept.

Post-call drips work because they respect how people live. They remind without nagging. They guide without pushing. When you do them with consent, clear hours, and a human tone, they turn near-misses into paid calls—slow and steady.

S4. Confirmation-page offers (non-competing)

A confirmation page is what a person sees after a form submit or after they end a call flow. Most teams waste this page. They show "Thanks" and nothing else. You can do better, **without** stepping on your buyer's toes. A good confirmation page gives helpful next steps and shows **non-competing** offers that fit the problem. Done right, it adds a little extra revenue and a lot of trust.

First, define "non-competing." If the main buyer handles **AC repair**, a non-competing offer is something that does not take away that repair job. Safe ideas are small, helpful add-ons the buyer does not sell or care about: air filter subscriptions, thermometer batteries, a free home energy checklist, a simple leak alarm for under-sink areas, a surge protector for electronics, or a "weather alert" signup. If your buyer sells maintenance plans, **do not** push a different plan on this page. If they sell filters, **do not** push another filter seller. Read your IO. If it bans all post-click offers, respect it.

Make the top of the page about the promise you just made. If they booked a callback, show the exact time and number. "We'll call you at 8:00 a.m. from 602-555-0100." Add "Change time" and "Cancel" links. If they just ended a call, show "If you get stuck again, call 602-555-0100, 8–6." This anchor keeps trust high.

Then offer one or two tiny, clear extras. Keep them **below** the main promise. Use small cards with a short headline, a few words, and a "Learn more" or "Get" button. Examples help:

If the caller had "AC not cooling," you can show "Get clean filters on a schedule." The click can go to your own simple page or a partner link. Disclose if you may earn a commission: "We may earn a small fee if you buy." Use plain words. Do not hide it.

If the caller had "water under the sink," you can show "Place a $10 leak alarm under the sink." Link to a page that explains how to place it and where to buy. This does not steal work from your buyer. It prevents bigger problems later and makes you look like a grown-up helper.

If the caller had "pests," you can show "Seal food in tight containers" or "Door sweeps stop ants." Link to a simple guide. If you have an affiliate offer, disclose it. If you don't, send a free guide. Not every link must pay. Some should just help.

If the caller is out-of-area or after hours, the confirmation page can offer a **directory link** to partners who serve that ZIP, if your IO allows. Again, be honest about affiliate fees.

Add one **free resource** that builds your name. A one-page PDF with "3 quick AC checks," "Storm prep checklist," or "How to read your thermostat" can sit on this page. Offer it with a **one-click download**. Do not force an email. Add your number and hours in the PDF footer. People bookmark helpful things and call later.

Keep the page fast and light. Your job is not to trap the person here. Your job is to make the wait before the callback feel safe and to give one or two helpful options. No pop-ups. No timers. No "spin the wheel." That stuff hurts trust and can hurt your main buyer relationship.

Match the offers to the **city and season**. In Phoenix in July, filters and thermostat batteries make sense. In October, heater filter sizes matter more. During monsoon, leak alarms and surge protectors feel timely. Use a simple rule in your page logic: show offer A when temp > 95°, offer B when heavy rain is forecast. Keep it simple: two or three rules, not a hundred.

Track clicks with care. Use clear UTM tags so you can see which offers people like. Do not auto-redirect. Let the person choose. If an offer gets traffic but causes complaints, remove it. If an offer gets few clicks, test a new headline or image, then decide.

Write in a kind voice. "While you wait, here are two simple things many neighbors find useful." That line feels like a friend, not a pitch. Follow it with two small cards. End with "Need anything else? We answer 8–6 at 602-555-0100." Your number should always be the star.

Ask your buyer what off-page items they **like** you to show. Some buyers love filter reminders because it reduces emergency calls caused by clogged filters. Some like weather alerts because it steadies demand. When you bring them ideas first, they often say yes to more than you expect. If they say "please don't show X," do not show X. Write it in your rules.

Here's a simple story. After a hot day, your page shows a thank-you with "We'll call at 8:00 a.m. from 602-555-0100." Below, two cards appear. One says "Get clean filters on a schedule (we may earn a small fee)." The other says "Free: 3 quick AC checks" with a download. Ten percent of visitors click the filter card; a few buy. Twenty percent download the checklist. Some of them call again the next week when the heat spikes. Your buyer never complains because the offers do not compete. Your extra income is small per person but steady over the season.

A confirmation page is not a cash register. It is a quiet counter where you set out helpful items while keeping the main promise front and center. When you treat it that way—clear promise, small extras, no tricks—you add value for the caller, protect your buyer, and build a little side stream that takes pressure off your ad budget.

S5. Warm transfer vs scheduled callback upsells

A warm transfer means your agent stays on the line and introduces the caller to the buyer right away. A scheduled callback means you set a time, confirm it by text or email, and the buyer or your team calls the person later. Both paths can lift revenue if you use them at the right moments. Your job is to pick the path that fits the human on the phone, the hour of day, and the buyer's staffing. When you match these pieces, more calls pass the timer, and fewer good leads fall through the cracks.

Start with the warm transfer. This is the fastest, cleanest hand-off. The caller taps your number, hears your short recording notice, answers one or two quick questions, and then meets a live agent at the buyer. Your agent stays on the line for 15–45 seconds, says the caller's name and ZIP, repeats the problem in one sentence, then steps away. That short "bridge" keeps trust high. It also avoids the awkward "hello? who is this?" that can cause hang ups.

A simple warm-transfer script helps:

"Thanks for calling Phoenix AC Help—this call may be recorded for quality; is it okay to continue? Great. Can I get your ZIP? 85016, thank you. Is your system not cooling? Got it. I'm connecting you to a licensed local tech now. I'll stay on a moment to introduce you."

When the buyer answers, your agent says:

"Hi, this is Jay with Phoenix AC Help on a recorded line. I have Maria in 85016 with an AC not cooling. Maria is on the line. Maria, this is Cool Air Pros. I'll drop off now—thank you both."

Then the agent mutes or drops. The buyer and caller talk. The buyer's timer starts only after they answer. The caller feels safe because they were not "thrown" across a phone system. They were handed to a human with a name. This is why warm transfers usually get higher acceptance and longer talk time than blind transfers.

Use warm transfer when three things are true. First, your buyer is open and answering. Second, the problem is urgent (no cooling, leak, strange noise). Third, the caller is ready now. In these hours, warm transfer is king. It turns "I need help" into "I'm talking to help" in under a minute.

Now look at scheduled callbacks. This path wins when lines are busy, when you are after hours, or when the caller cannot talk right now. A callback flow needs to be very short. Ask for first name, phone, and ZIP only. Confirm a time slot that is real. Send a clear text right away:

"We'll call you at 8:00 a.m. from 602-555-0100. Reply STOP to end."

At the set time, your dialer rings your agent and the caller. If the caller misses, try once again five minutes later, then stop. Do not chase people all day. People like exact times and short promises. When you keep the promise on the dot, show rates go up.

There is also a middle path: "call me in five minutes." If a buyer queue is red for a moment, offer the caller a near-term ring back. You say, "Lines are tied up for a minute. I can ring you back in five. Is that okay?" If they say yes, send the text, tag the record, and make the call in five. This keeps the caller warm, and you avoid dead air.

How do you choose? Let your phone log tell you. If buyers answer 90% of the time from 3–6 p.m., make warm transfer the default in that window. If mornings are slow to answer, put a "request a 2-minute callback" button on the page from 8–9 a.m. If Friday at 5:30 is a zoo, push more people into exact Saturday morning slots. You can even change the main button text by hour. At noon it can say "Call Now." At 7 p.m. it can say "Request 8 a.m. Callback."

Price and payout also differ. Many buyers pay **more** for warm transfers because your agent has confirmed the basics and kept the caller calm.

For example, a warm transfer over 60 seconds might pay $160, while a scheduled, kept appointment might pay $110. Math shows the trade-off. Imagine 100 callers in one day. With warm transfers, suppose 70% are accepted at $160. That is **70 × $160 = $11,200** in revenue. With scheduled callbacks, suppose 60 callers agree to schedule, 70% show (42), and 80% of those are accepted (about 34). At $110 each, that is **34 × $110 = $3,740**. Warm transfers win by a lot in this example. But if your buyer often misses live calls, scheduled slots can "save" many people who would otherwise leave. In some verticals, the kept-appointment payout is higher than the general call payout. Always check the IO.

Do not forget agent effort. Warm transfer needs a trained voice and a clean hand-off. Your agent needs a checklist on the screen: consent said, ZIP confirmed, service confirmed, buyer name ready, and a one-line summary. Keep the bridge under 30–45 seconds. If the buyer takes too long to answer, your system should fall back to a callback offer or a second buyer. Do not waste the caller's patience.

Make both paths safe. Announce recording first. Confirm the time zone for any appointment. Do not book a time the buyer cannot honor. Do not promise "first in line" if that is not true. Get SMS consent before you text. Include STOP. Respect STOP. If you do those small things every time, your scheduled calls feel as honest as your warm transfers.

Use small tests to tune. For two weeks, try "call now" as the main button 8–6, and "request 8 a.m. callback" after 6. Track accepted calls per 100 visits, show rates for 8 a.m. calls, and refunds. If after-hours visitors keep tapping "call" even when closed, move the callback option higher and add "We open at 8 a.m." right on the button. If show rates lag, test a reminder at 7:55 a.m.: "We're calling from 602-555-0100 at 8:00." Watch numbers, not hunches.

One last tip: treat callbacks as a promise to a person, not a bucket on a calendar. If you commit to 12 slots at 8 a.m., have 12 agents or a wait line that answers fast. A broken promise here hurts more than a missed ring at 5 p.m. People get ready for that morning call. When you call on time and speak kindly, many thank you. Thank-you voices stay longer. Longer stays pass timers.

Warm transfer and scheduled callback are not enemies. They are tools you switch by hour, by staffing, and by the caller's life. Pick the right one in the moment, and both will lift your accepted calls and your payout per day.

S6. Lead recycling windows & rules

Lead recycling means giving a caller another fair chance to connect, but only within clear limits and only with consent. Many people do not convert on the first try. They were driving. They were at work. The baby was crying. If you call back kindly at a better time, they will pick up and pass the timer. The secret is to set windows and rules before you start, then stick to them. That keeps your numbers high and your complaints low.

Think of four windows. The **fresh window** is the first two hours after the first call. The **warm window** is the rest of the first day. The **aging window** is days two to seven. The **stale window** is days eight to thirty. After thirty days, most home-service needs are solved or forgotten. For each window, write down what you will try, how many times, and by which channel.

In the fresh window, speed matters. If someone hung up at 25 seconds or your buyer missed them, you can call back once within 5–15 minutes. You can also send one short text if you have SMS consent: "Sorry we missed you. We answer 8–6. Want a call at 8 a.m.? Reply YES or STOP." If they reply YES, great. If they do not reply, do not pester them. Try one more call within two hours while you are open, then stop until the warm window.

In the warm window, try one more call near the common "free" time for your area—often 12–1 p.m. or 4–6 p.m. Try one text that offers a helpful tip and invites a call: "Still warm? Replace a dirty filter and set COOL + AUTO. Still stuck? Call 602-555-0100 before 6. Reply STOP to end." Keep it short and kind. If they do not answer, do not keep calling. Move to the aging window.

In the aging window, people decide. Many will pick up if you catch them at home in the evening or early morning. Offer one early slot ("Can we call at 8 a.m.?") and one early-evening slot ("Can we call at 5:30?"). If they say yes, keep your word. If they ignore both, assume they are done for now.

In the stale window, almost no one converts. If you must try, make it one last message: "Was the AC fixed? If not, we answer 8–6 at 602-555-0100." If they do not reply, archive the record. Do not try again on day 31 unless the caller reaches out. That restraint keeps your brand clean.

Set the **max attempts** by day and by channel. A safe plan for home service is one to two calls and one text on day one, one call or one text on day two, and at most two more touches in days three to seven. Emails can be fewer because people check them later. If someone ever says "don't call," stop that day. Add them to your suppression list. Sync that list to your dialer, SMS, and email tool.

Always log the **reason** you are recycling. "No answer by buyer" calls get the fastest second try. "Caller hung up at 10 seconds" may get a helpful text but not a immediate call if that often signals mis-dials. "Asked to call later" gets a polite reminder at the time they gave. "Warranty" should get no recycling if your IO forbids it. Your log should also track outcomes: re-connected, accepted, refused, STOP, wrong number. Clear logs stop you from trying the wrong thing twice.

Match **hours** to people. Do not call at night. For most areas, **8 a.m.**

to 7 p.m. is safe. If you set a morning callback, send a five-minute reminder and then call exactly at the time. If they miss, try once more after five minutes and then stop. People hate being chased. They like being respected.

Recycling can be routed to a **different buyer** if the IO allows. Maybe your main buyer missed the call twice. In the next window, try your backup buyer who answers late afternoons better. Tell the truth if the caller asks: "We work with several local teams; everyone is licensed. We're connecting you to the first available right now." This rescues good people from bad timing.

Keep this habit safe. Get and store consent time stamps for any text. Include STOP in every text. Do not change the original reason the person gave you. If they asked for AC help, do not pitch new windows or unrelated offers in your recycle drip. Serving the same need is ethical and also works best.

Now the math. Suppose you have **200 DQs** eligible for recycling this week after you remove DNC and STOP. In the **fresh window**, you reach 50% when you try again quickly. That is **100 contacts**. If 40% of those turn into accepted calls, you get **40 accepted** right away. At $90 payout, that is **40 × $90 = $3,600**. In the **warm window**, you reach another 25% of the remaining 100. That is **25 contacts**; if 35% accept, that's **9 accepted** for **9 × $90 = $810**. In the **aging window**, maybe you reach 15% of the remaining 75 (**11 contacts**) and 30% accept (**3–4 accepted**) for about **$270–$360**. The **stale window** might add **one or two** more at a lower alternate payout (say $60), adding **$60–$120**. Add it up and you are near **$4,700–$4,900** in extra revenue from calls many teams would have thrown away. The exact numbers will vary, yet the lesson stands: fast, kind second tries pay.

Quality control keeps this smart, not spammy. Every Friday, review five recycled calls. Were people surprised? If so, you missed consent or timing. Did agents open with the recording line again? They should.

Did a buyer reject a recycled call with "duplicate within 30 days"? If your IO defines dupes that way, route that person to a buyer who allows shorter windows, or stop. Adjust the plan and write it down so next week is cleaner.

Lead recycling is respect turned into revenue. You give people a better time to talk. You call when you said you would. You stop when asked. Done this way, the second hello feels as helpful as the first, and your DQ pile turns into a steady, honest stream of accepted calls.

S7. Tracking secondary revenue

Primary revenue is the payout you get when your main buyer accepts a call. **Secondary revenue** is everything else that can happen after that first moment: a DQ routed to an alternate buyer, a kept appointment payout from a callback, a small commission from a filter order on your confirmation page, a reactivated caller who returns tomorrow and passes the timer, or a maintenance plan sold by a partner with a rev-share you agreed to. If you do not track these pieces, you will not see their value. If you track them with care, you can grow them without confusion or double counting.

Start by giving every call a **call_id** the instant the phone rings. That id never changes. It follows the person through every branch—even if you later text them, schedule them, or route them to a new buyer. Store that call_id with the tracking number, UTM tags, timestamp, ZIP, and the first outcome (accepted, rejected, no answer, hangup, etc.).

Next, think of revenue like a little ledger with **line items**. The first line item might be "Primary call payout," with fields: date, buyer, rule (timer or transfer), accepted flag, payout amount, and invoice id. If the call was DQ and later routed to an alternate buyer, add a **second line**

item under the same call_id: "Alternate buyer payout," with its own date, buyer, acceptance, payout, and invoice id. If the person clicked a filter card on your confirmation page and you earn a $6 commission, add a third line item: "Affiliate confirmation card," with status **pending** until the network pays you, then **locked**. If you texted the person next morning and they called back and passed the timer, you can log that as "Reactivation accepted," with the payout and the buyer.

When you report, **sum line items**, not call_ids. A single call_id can have $0 on the first line and $75 on the second (alternate buyer), plus $6 on a third (filter). Your revenue for that original call_id is then **$81**. If the first line was accepted for $120, and you also sold a $6 filter, the total is **$126**. This method prevents double counting because each event is its own line with its own date and proof, but the report also shows the full picture by call.

Set **status** fields so you don't spend money you do not have. Many partner payments lag. An affiliate network may take 30–60 days to pay and may reverse some orders for returns. Keep those secondary lines in **pending** until the money posts to your bank. Move them to **locked** only when the payment hits. Your margin report should show both "booked" and "cash" so you never confuse the two.

Keep a small **dictionary** of branch names. "ALT_OOA" can mean out-of-area alternate buyer. "ALT_PLUMBING" can mean wrong-service → plumbing. "DRIP_REACT" can mean SMS reactivation. "CONF_CARD_FILTER" can mean the filter card on the thank-you page. Use the same names in your phone log, your page UTM tags, and your payout ledger. When names match across systems, recon is fast.

Reconcile weekly. Every Friday, export your week of line items and match them to the **buyer dashboard** and any **partner statements**. If "ALT_OOA" shows 22 accepted calls in your log, the partner should show the same. If they show 20, find the two that differ. Sometimes a call hit their timer but violated a rule. Sometimes you mis-tagged a

ZIP. Fix the source, not just the cell on a spreadsheet. Clear mismatches while memories are fresh.

Use a few **simple metrics** to see if secondary work is pulling its weight. "DQ save rate" is the share of DQ calls that later produced any revenue. "Secondary revenue per 100 calls" shows how much extra money you make from your side paths. "Average days to cash" tells you if you are tying up cash too long. If "DQ save rate" is under 10%, your branches are weak. If "days to cash" is 60+ for most of your secondary dollars, you need to keep it small or change partners so you don't starve cash flow.

Do **cohort** views. Group calls by week, by vertical, by city, or by source, and see how much secondary revenue each group produces by day 7, day 14, and day 30. This shows if your SMS drips and confirmation-page cards work best in heat waves or in calm weeks, and whether certain sources create more DQs that can be saved.

Avoid **leakage**. If you let two branches fire for the same DQ at once, you can break rules and lose trust. A safe rule is "one active second-chance path per DQ call_id at a time." For example, don't send the out-of-area caller to both a directory link and a marketplace buyer on the same day. Pick one path, give it 24–48 hours, then end it or try a second different path if allowed. Log the choice in the ledger.

Keep **compliance** right in the ledger. Store the consent timestamp for any SMS drip that led to revenue. Store the recording link for any warm transfer that got paid. If a partner questions a line item, you can click the link and hear the exact "ok to continue" and the ZIP. Fast proof gets fast credits and keeps relationships strong.

Let's do a simple, clear example with numbers. In one month, you handle **1,000 calls**. The main buyer accepts **600** at **$120**, so primary revenue is **600 × $120 = $72,000**. You have **400 DQs**. You route **120** of those to an alternate buyer at **$75** each, for **120 × $75 = $9,000**. Your confirmation page sends **20** small filter orders at **$6** each, for **$120** (keep these **pending** until paid). Your SMS reactivation brings back **50** people who later pass the timer with the main buyer, adding **50 × $120 = $6,000**. Your total **booked** revenue is **$72,000 + $9,000 + $120 + $6,000 = $87,120**. Your secondary share is roughly **$15,120** of that total, or about **17%**. Seeing that 17% tells you the second-chance work is worth it. It also tells you to keep a cash cushion since some of that 17% pays slower.

Finally, make the view easy to share. A one-page weekly chart can show primary revenue, secondary revenue, DQ save rate, and average days to cash. Add a tiny note with one clip link where a second-chance call went great. This keeps the team proud and focused on the right knobs.

Secondary revenue is not "extra junk." It is the natural tail of a clean phone funnel. Track it like a grown-up: one call_id, many line items, clear names, and cash vs. booked. When you can see it, you can grow it without guessing.

S8. Pricing models & payout expectations

Pricing in pay-per-call should be simple to read and fair to both sides. Your price needs to cover your media and ops costs, pay you a profit, and make sense for the buyer's close rate and job value. The cleanest way to get there is to pick a pricing **model** that fits the work, then use math to set your **floor** and your **ask**. Keep the words plain. Keep the rules short. When both sides can do the math on one napkin, trust goes up.

There are a few common models. The first is **per accepted call** with a timer. The buyer pays when the call lasts longer than a set time and is in scope. This is the most common model in local service. The second is **per live transfer**: you bridge the caller to a buyer agent and the buyer pays if the agent keeps them for, say, 60 seconds. The third is **per booked**

appointment (kept): you get paid when the person shows up for a scheduled visit or phone appointment. The fourth is **revenue share**: rare in local emergency service, more common in finance or legal; you get a percentage of the job or sale. Some deals mix these: a lower accepted-call fee plus a bonus for a kept appointment, or different fees by ZIP or by hour.

Timers and rules shape price. A **longer timer** (like 120 seconds vs. 60) is harder to hit and should pay more. **Tighter scope** (owners only, no warranty, only three ZIPs) should pay more than wide scope. **After-hours** calls are harder to staff; if a buyer wants them, they should pay more. **Lower acceptance** from the buyer should raise your ask because you eat more rejects. These are levers you can write into a rate card.

Do the math for your floor. Add up your costs per day: media, tracking numbers, software, agent time. Divide by the number of accepted calls you expect. Then add the margin you need to grow. Here is a simple example. You spend **$3,000** on media in a week and create **100** total inbound calls. Your acceptance is **60%**, so you expect **60 accepted** calls. Your **media cost per accepted call** is **$3,000 ÷ 60 = $50**. Add **$5** per call for ops (IVR, tracking, agent time). Your total cost per accepted is **$55**. If you want a **40% margin**, your **floor payout** is **$55 ÷ (1 - 0.40)**. That is **$55 ÷ 0.60 = $91.67**. Round up. A fair ask is **$95–$100** per accepted call with your current rules. If a buyer offers $80 and tight rules, the math says no. If they offer $110 with a longer timer, that can still work if your acceptance stays steady.

Match model to vertical and hour. For emergency AC, **per accepted call** with a 60–90 second timer is straightforward. For insurance or solar, where calls are longer and schedules matter, **per transfer** or **per kept appointment** may be better. For B2B, kept appointments are common. For seasonal spikes when buyers are drowning, **per transfer** at a premium can be right because your warm intro saves them seconds they do not have.

Set **tiers** that reward good behavior. You can say, "$100 per accepted at ≤90 sec timer. If your acceptance stays ≥65% for seven days, rate moves to $110. If your line misses more than 10% of calls in a day, we lower the cap or shift overflow." You can also add ZIP tiers: higher pay for long-drive rural ZIPs or for heavy-competition downtown ZIPs. Keep tiers simple—two or three, not ten—so everyone can follow them.

Decide on **net terms** early. Many healthy local buyers pay **net-7** or **net-15** once trust is built. Networks often start at **net-30** and move to **net-15** after clean months. If a partner asks for longer, ask for a small **holdback** instead (for example, pay net-15 with a 10% holdback released at day 45). That is safer for both sides than net-45 or net-60. Early in a deal, offer a small **prepay** option or a card on file for a pilot. Paying two weeks faster is often worth a few dollars less per call because it protects your cash.

Think about **bonuses** and **surge pay**. During a heat wave, ask for a +$10–$20 surge for certain hours if you can supply more volume. For Spanish calls, ask for a small premium if you have bilingual staff. For kept appointments, ask for a small bonus if show rate crosses a mark. If a buyer wants more volume at lunch on Fridays, price those slots a bit higher. This is normal. Drain time costs money.

Guard against soft rules that become unpaid work. If a buyer wants "only homeowners" but never asks you to check, your acceptance will fall and your margin will go with it. Put checks in the IVR or script and get a price that matches. If a buyer wants long timers **and** narrow scope **and** slow pay, say no. You cannot fix math with hope.

Set **overflow rates** with care. Your backup buyer may pay less. That is okay. If the difference is small, you still win by keeping callers out of dead air. If the gap is huge, you may be better off ending politely and inviting a callback. Write the overflow order in your IO, with caps per day, so you are never guessing where to send a live person.

Keep **compliance** costs in your price. Recording, consent language, DNC syncing, branded caller ID work, and STIR/SHAKEN setup are part of doing it right. They are not free. Fold them into your ops cost. If a buyer asks for special disclosures or special routing, include that setup in your first-month math.

Review price with **outcomes**, not feelings. After two weeks, look at accepted rate, average talk time, and refunds. If acceptance is high and refunds are low, you can ask for a small raise or more caps. If acceptance is low, offer to fix the call flow and hold price until acceptance rises. Buyers like partners who bring proof and a plan, not just a new rate.

A small story makes this real. You start at $95 per accepted call, 90-second timer, Phoenix 85008/85016/85018, 8–6. Week one, accepted is 62%, refunds are 6%. You hit your margin. Week two, you add Spanish lines in the afternoon and propose $105 in that window. The buyer agrees for a five-day trial. Accepted stays above 60%. You keep the premium. A month later, the buyer wants 7–8 p.m. calls for a new night crew. You run a two-week test and ask $120 in that hour with a 60-second timer and a 10% higher cap. It works three nights out of five. You keep those hours on nights when your log shows high show-up. You did not pull a price from thin air. You matched rules, hours, and math.

Price is a sentence that says, “Here is the work, here are the rules, here is the risk, here is the reward.” Keep the sentence short. Do the math in the open. Reward good behavior on both sides. When the words and the numbers line up, payouts feel fair, and the line stays busy for months, not days.

19

Analytics, QA & Optimization Loops

S1. Acceptance-rate dashboard & alerts

An acceptance-rate dashboard is your control room. It shows what is happening right now, what went well yesterday, and what broke this morning. When built well, you can spot trouble in minutes and fix it before it burns a day. You do not need fancy software to start. A simple spreadsheet or a basic BI tool can show the truth if you feed it clean data and choose the right views. The goal is clear: see accepted calls rising, rejected calls shrinking, and money steady.

Begin with the core numbers. Every row in your data should represent one call. Each row needs: a unique call ID, the time and date, caller number (masked if needed), tracking number, source and campaign (use UTM tags or labels), IVR branch taken, buyer routed, talk time from buyer answer or IVR connect, whether the call passed the timer, whether the buyer accepted or rejected, the reject reason, and the payout amount if accepted. If you run second-chance flows, add a field that marks "original" versus "recycled" so you can track both without mixing them up.

From those rows, make simple, honest metrics. Your acceptance rate is accepted calls divided by total connected calls. Your timer pass rate is calls over your timer divided by connected calls. Your average connected talk time is the average seconds for connected calls. Your cost per accepted call comes from your ad or media spend divided by accepted calls, but do not show cost if the dollars are not in your sheet yet; that just confuses people. When in doubt, chart things you can prove today: counts, durations, reasons, and acceptance.

Now make the views humans can read fast. The first view is “Today so far.” It shows, by hour, calls, accepted, acceptance rate, average talk time, and top reject reason. Put this at the top of your dashboard. If acceptance drops at 10 a.m., you see it right there. The second view is “Yesterday by hour.” You can spot weak windows like lunch where agents were thin. The third view is “Seven-day trend,” with a simple line for accepted calls per day and a line for acceptance rate. The fourth is “By buyer,” a table showing accepted, acceptance rate, timer pass rate, and “no answer by buyer” count. The fifth is “By source,” with the same columns. The sixth is “Top reject reasons,” with counts and percentages, and a sparkline that shows whether a reason is rising.

Add “By IVR branch.” This is where you learn which branch sends strong calls. For HVAC, branches like “No cooling,” “Leaking water,” and “Strange noise” often perform better than “Tune-up.” If “Tune-up” is always short, your copy may be pulling the wrong crowd or your buyer may not want those jobs. The branch report lets you fix one line in the IVR or one line on the page and see if it works.

Use colors to help the eye. Green means on target or rising. Yellow means watch. Red means act now. Keep the color rules simple so they never change week to week.

Set alert rules so you do not need to stare all day. A good alert is simple and rare. You can start with five. First, trigger a “drop alert” if acceptance rate falls more than 10 percentage points compared to the last seven-day average for two hours in a row. Second, trigger a "buyer down" alert if "no answer by buyer" hits three in ten minutes. Third, trigger a "reject spike" if any single reject reason doubles versus the same time yesterday. Fourth, trigger an "out-of-area surge" if more than 20% of calls in the last hour are out-of-area; this often means a geo or campaign setting drifted. Fifth, trigger a "timer fail" alert if timer pass rate falls under your floor (for example, under 70%) for an hour. Alerts should go to a small group by email or chat. Include the top row of the related table in the alert so a human can act in one minute.

Tie each alert to a play. If acceptance drops, listen to two calls from the last twenty minutes and check the reject table. If "warranty" spiked, add a quick warranty filter in the IVR for the next hour and change one ad line that might be pulling warranty traffic. If "no answer by buyer" fires, flip overflow on for that buyer and message them with the timestamps. If "out-of-area" fires, check your campaign location settings; switch to "presence" only if needed. If "timer fail" fires, check agent intros and IVR length; shave ten seconds where you can.

Make hourly views local. Always show the hour in the caller's time zone if your routing is geo-based. This prevents a lot of "why is lunch dead?" confusion that is really a time-zone mismatch.

Add a "Top 10 calls to review" card. Choose calls that are either barely under the timer, rejected with a vague reason, or part of a spike. Make it one click to play the recording. A manager can review these in fifteen minutes and spot the pattern fast.

Layer a "Health bar" at the very top. It is a tiny strip that shows green if three things are true: accepted calls today are within 10% of the seven-day pace, acceptance rate today is within five points of the seven-day average, and "no answer by buyer" is under your threshold. If any fails, the bar is yellow. If two fail, it is red. This silly-simple bar keeps your team aligned.

Keep your data fresh. Real-time is nice, but five-minute or fifteen-minute updates are enough. If your feed lags an hour, mark it right on the dashboard so no one makes a bad call on stale data.

Do not drown in tabs. One page with six clear views beats ten pages of charts. If you want more, add a second page for "deep dives": by ZIP, by creative, by device. Only go there when a top card says, "something's off."

Document your targets. Right under each title, print the target in small type: "Target acceptance ≥ 60%," "Timer pass ≥ 70%," "Avg talk time ≥ 2:00." If targets change, change the text. Hiding targets in someone's head makes teams guess.

A short example shows the power. At 9:50 a.m., the alert pings: acceptance fell from a seven-day average of 63% to 50% for two hours straight. The reject table shows "warranty" doubled from 8% to 17%. You listen to two calls. Both callers say "brand warranty." You check Search terms. A new broad match caught "AC warranty phone" queries. You pause that ad group and add "warranty" as a negative. You also add a ten-second warranty fork in your IVR. By 11:30 a.m., acceptance is back to 62%. You note the fix in the dashboard footer so future you remembers.

A dashboard is not art. It is a window and an alarm. Pick the few things that matter and wire them to actions you can take in minutes. When you do that, problems become bumps, not cliffs.

S2. Call scoring & transcript mining

A call is a story told in a few minutes. Some stories are clear and calm. Others are messy and short. Call scoring is a way to read those stories the same way every day, so you can fix patterns, coach agents, and raise acceptance. Transcript mining is a way to search those stories at scale, so you can catch trends you would never hear by listening to a handful. Both are simple if you keep the rules short.

Start with a five-point scorecard. Each point is a yes or no. First, did we say the recording notice and get a clear "okay" near the start? Second, did we confirm the ZIP early? Third, did we confirm the service match quickly ("not cooling," "leak," "noise," or "other")? Fourth, did we transfer or connect within sixty seconds once a fit was clear? Fifth, was the tone kind and clear, without risky claims or brand misrep? Each "yes" is one point. A perfect call scores five. A shaky call scores three or less. Keep the card on one screen for graders and agents.

Choose ten calls a day to score. Two accepted, two rejected, and six random mixed across hours and sources. If volume is high, make it twenty. The goal is not to grade every call. The goal is to create a small, steady sample that points to the real problems. If you see the same "no" twice in a day, you act that day. Score in fifteen minutes early, not as homework at night.

Write a tiny note when you score "no." If the recording notice was late, paste the timestamp. If ZIP was never confirmed, write "ZIP missing." If transfer took two minutes, write "slow handoff." These little notes become your weekly coaching plan.

Now turn to transcripts. Many call systems create text from speech. The text is not perfect, but it is good enough to search for words that matter. Make four word lists. The first is good-fit words: "not cooling," "no cool," "stop cooling," "blowing warm," "water leak," "flood," "buzzing," "smell burning," and your main city and ZIP names. The second is bad-fit words: "warranty," "apartment," "renting," "job," "franchise," "customer service," "corporate," "install only." The third is risk words: "guarantee 30 minutes," "free," "factory," "we are brand," "we cover everything." The fourth is empathy words: "sorry," "understand," "I can help," "we'll get you to someone." Put these lists in a simple table you can update.

Run daily searches across transcripts for the bad-fit list. Chart counts by source, hour, and IVR branch. If "warranty" spikes on native in the morning, change the morning headline to call out "repairs out of warranty" or add a warranty fork in the IVR to guide people kindly. If "apartment" spikes from one source, adjust targeting or add a renter fork that routes to a buyer who can help tenants, if allowed.

Search for the good-fit words to see which sources bring real problems. If "blowing warm" shows most often from Search and "no cool" from native weather sites, move budget to those places when heat rises. If "buzzing" pairs with short calls, add a safety line in your page and IVR that tells people to power down and call, which often leads to calmer talk and better acceptance.

Use timing from transcripts too. Two timing numbers matter. The first is "time to problem," the seconds from call start to the caller's first clear problem statement. When agents open slowly or read long intros, time to problem grows, patience shrinks, and acceptance falls. The second is "time to handoff," the seconds from the clear problem to the buyer connection. If this creeps up, acceptance falls. You can approximate both by searching for the first mention of key words, but listening to a few calls daily is still best for timing.

Search for risk words weekly. If "we are brand" appears in any transcript, coach at once. The agent likely meant "we work with local pros who fix Brand X," but the phrase matters. You need to keep brand claims accurate. If "guarantee 30 minutes" shows up, remove that line from any script or ad unless your buyer truly guarantees it at all hours.

Create a "top ten phrases" card. Each week, list the ten most common problem phrases from accepted calls. Share them with the media team. Use them in headlines. If the market says "AC blowing warm," do not write "HVAC performance issues." Words that match callers lift trust, minutes, and acceptance.

Turn scores into coaching. Pick one theme a week. If ZIP confirmation is missing on 30% of graded calls, run a ten-minute huddle Monday: play one good example, one miss, and practice saying, "Can I get your ZIP so I can route you fast?" Set a reminder to check this line on Wednesday. If it sticks, pick a new theme next week. One theme at a time beats ten slides no one remembers.

Tie scores to acceptance by agent and by hour. If one hour drags, you may be thin on staff, or folks are hungry and rushing. If one agent scores low on "handoff speed," sit with them for fifteen minutes and tighten the bridge. Praise out loud when a habit sticks. People copy what gets praised.

Do not weaponize the score. The score is a lamp, not a hammer. If agents fear it, they hide mistakes. If they see it helps them pass more calls and get fewer angry callers, they will ask for more clips to learn from. Keep the tone kind in reviews.

Here is a real-style loop. Your weekly average score is 3.8/5. The most common "no" is "handoff within 60 seconds." The transcript search also shows that "apartment" rose from 6% to 12% this week, mostly from native. You fix two things. First, you coach the bridge to be one sentence and a name, not a mini speech. Second, you add a renter fork in the IVR and change one native article line from "home" to "owner-occupied home." Next week, your average score is 4.2, and accepted rate climbs six points while "apartment" mentions fall by half. You did not guess. You read the story and changed one line at a time.

Scoring and mining are quiet tools. They tell you what people say and what you say. When those words line up, calls feel smooth, and smooth calls last. Lasting calls pass timers. That is why this work matters.

S3. Cohort analysis by source & IVR branch

A cohort is a group of calls that share something in common. It could be the week they happened, the ad or source that brought them, the IVR branch they chose, or the city they came from. Cohort analysis means you compare groups over time so you can see patterns that averages hide. When you do this with sources and IVR branches, you learn which paths bring steady, long calls and which paths need a fix or a pause.

Start with time-based cohorts. Group calls by week, then track each week's acceptance rate, average talk time, timer pass rate, and refund rate for the next seven days. If week 28 had a heat wave and did great, but week 29 fell, you can ask "what changed?" Maybe a headline changed, maybe a buyer cut hours, or maybe a new city came online. A simple line chart by week is enough to spot drift.

Next, build source cohorts. For each source or campaign, compute accepted calls per 100 visits, acceptance rate, average talk time, cost per accepted (if you have cost), and top three reject reasons. Do this for the last seven days and the last thirty days. Put these in a small table that sorts by accepted per 100 visits. The top row gets more budget. The bottom row gets a fix or a pause.

Add IVR branch cohorts. Each branch tells you about the caller's need. "No cooling," "leak," "noise," "tune-up," "maintenance plan," and "other" are common. For each branch, compute the same set: accepted rate, talk time, and reject reasons. Now cross branch by source. This is the sweet spot. You will learn that Search calls on "no cooling" pass at 70% and native calls on "leak" pass at 65%, while native calls on "tune-up" pass at only 30%. That last row may not be worth the money unless you have a buyer who wants tune-ups and pays fairly.

Make a simple "branch mix by source" chart. Show the share of each branch for each source. If one source sends 50% "other," your copy is too vague or your audience is too broad. Tighten both. If one source sends a balanced mix of “no cooling,” “leak,” and “noise,” keep it.

Look at cohorts by hour. Calls at 4–6 p.m. often pass more than calls at 8–10 a.m., because people are home and ready to talk. If a source only does well at one hour, daypart it. If a branch only works at one hour, move it higher in your page or IVR in that window.

Do city cohorts. Group by ZIP or city. Compute accepted per 100 visits, acceptance rate, and refund rate. If a ZIP drags, check the buyer coverage there. If one city wins for native but not for Search, adjust bids by city. Heat and weather move by ZIP and day. Your cohorts should, too.

Add a “DQ save cohort.” For each reject reason, show how many you saved with alternate buyers or drips, how much that earned, and how many days to cash. If “out-of-area” saves well with a partner at $75, keep the branch. If “warranty” saves almost nothing and annoys callers, stop trying to monetize warranty; just help and end politely.

Keep the math plain. Use simple rates per 100 visits or per 1,000 impressions to compare sources. Use accepted-call share by branch to compare branches. Fancy stats are not needed to decide “move budget from A to B” or “put ‘no cooling’ at the top of the IVR.”

Write one sentence for each cohort table. “Search + No Cooling drove 45 accepted calls this week at 72% acceptance.” “Native + Tune-Up drove 10 accepted calls at 28% acceptance; top reject was ‘wrong service.’” “Out-of-area saves produced $900 at $75 each, average pay in nine days.” These short notes make your decisions easy.

Make one change per weak cohort. If “Native + Tune-Up” is weak, try removing “tune-up” lines from the top article for two days. If acceptance rises for native overall, keep the change. If not, restore the line and try a separate page for tune-ups linked only from cheaper placements or for seasons when buyers want them.

Use cohorts to protect cash. If one source shows a slow rise in refunds week over week, lower its cap right away while you audit. If one branch shows a quick rise in “no answer by buyer,” shift its overflow order so fewer calls wait on that line.

Compare cohorts across seasons. Make a sheet with last summer's week-by-week cohorts next to this summer's. If this summer's Search is weaker in week 30 while native is stronger, adjust faster. If IVR branch "noise" is stronger this year, move it up in your copy. Season is a teacher if you write down what it said last time.

A simple example helps. You look at four cohorts for the last seven days. "Search + No Cooling" shows 180 calls, 130 accepted (72%), average talk time 2:15, top reject "out of area" 6%. "Native + Leak" shows 90 calls, 58 accepted (64%), talk time 2:05, top reject "wrong service" 10%. "Native + Tune-Up" shows 60 calls, 17 accepted (28%), top reject "wrong service" 35%. "Search + Noise" shows 40 calls, 28 accepted (70%). You decide three things. First, increase Search budget for "no cooling" and "noise" by 20% in 4–6 p.m. Second, change your native article headline to remove "tune-up" and add a "maintenance plan" link only on the confirmation page so it does not pull top-of-funnel traffic. Third, add one IVR line: "Press 4 for maintenance plans," and route it to a buyer who wants those. In two days, native acceptance rises, and your main buyer stops complaining about "wrong service." The cohorts told you where to push and where to tuck.

Cohorts are groups with a lesson. Group the calls in ways that match how you buy traffic and how callers choose in the IVR. Read the lesson once a week. Change one thing. Read again. This rhythm keeps you out of arguments and in the numbers.

S4. Experiment backlog & prioritization

Ideas arrive all day. Change the headline. Add hours next to the number. Shorten the IVR. Try a new buyer order. Test a Spanish video. Without a system, ideas fight each other and die in email threads. An experiment backlog turns noise into a line. You list, score, pick, run, and learn. You do not need a lab coat. You need a small table and a promise to run one change at a time.

Open a shared sheet called "Experiments." Each row is one idea. Give it seven plain fields. First, a short title, like "Add hours on the button," "Move ZIP ask earlier," or "Warranty fork in IVR." Second, the hypothesis in one sentence, like "Showing hours near the button will increase daytime calls and reduce night taps." Third, the owner—the person who will make the change and measure it. Fourth, the metric and goal, like "accepted calls per 100 visits up by 10%," or "timer pass rate up by five points." Fifth, the effort, written as small, medium, or large. Sixth, the risk, written as low, medium, or high. Seventh, the score.

Use a simple score so you can sort rows. ICE works well at this level. Impact is how big the win could be if it works, from 1 to 10. Confidence is how sure you are, from 1 to 10. Ease is how simple it is to ship, from 1 to 10. Score equals Impact + Confidence + Ease. If you prefer, you can multiply, but addition keeps the numbers clean. You do not need debates about decimals. The goal is to see what to do next.

Estimate impact with recent facts. If your transcript mining shows many "after hours" taps, "add hours on the button" likely has high impact. Give it an 8 or 9. If your IVR shows many "warranty" rejects, "warranty fork" can be a 7 or 8. If an idea is a hunch with no data, give it a 3 or 4. That does not mean "never." It means "not now."

Estimate confidence by past tests and examples. If you have seen a similar change help, give confidence a 7 or 8. If it is new territory, give it a 4 or 5. Be honest. Over-confidence leads to wasted weeks.

Estimate ease by real work. A copy change on the page is a 9 or 10. A small IVR line is a 7. A redesign is a 3. A new buyer contract is a 2. A platform migration is a 1. Small, high-score items should float to the top.

Sort by score. Pick the top one or two that do not clash. Do not run three things that hit the same metric in the same funnel at once. If you must run two, put them on different parts of the system, like one in the IVR and one in the post-call drip, or in different cities. The aim is to keep reads clean.

Write a tiny plan. State the change, the start time, the end time, the sample size target, and the stop rules. If it is a page test, split 50/50 and run seven days or until you hit 100 accepted calls per version. If it is an IVR change, mark the time and compare the next three days to the last three days for the affected branch. If it is a buyer order test, limit it to one ZIP for three days. Put these details in the row.

Run the test. Update the row mid-way only if a stop rule fires, like "cost per accepted up 30% for two days." When done, write a short result: win, loss, or inconclusive. Paste one chart. Paste one recording link if it helps. Then write "next." If it won, ship it everywhere it fits. If it lost, archive it and pick the next row. If it was close, tweak and re-test once.

Keep the backlog tidy. Every Monday, close or archive rows older than a month. Move "wins" to a "Shipped" tab with dates so you can revisit later in a new season. Move "losses" to "Learned" with a one-line lesson. A clean backlog keeps the team from retesting old dead ends.

Limit how much you run at once. A good rule is "one live A/B on pages, one live IVR change, one routing test" at any time. If a fourth idea arrives, put it in the backlog and score it next week. Work in progress limits make tests finish faster.

Use the backlog in your weekly review. Pick the top item together. Assign the owner. Confirm the metric and goal. Agree on the stop rule. This five-minute habit stops scope creep and keeps the team rowing the same way.

Be kind to losers. Most ideas will not win big. That is normal. A losing test is not a waste if it was cheap and taught you something. Thank the person who pushed it. Ask what they learned. Move on. Your win rate will rise when the team is not afraid to try.

Here is a simple scene. Three ideas sit on top. “Add hours on button” scored 26 (Impact 9, Confidence 8, Ease 9). “Warranty fork in IVR” scored 22 (8, 6, 8). “Spanish sticky bar” scored 21 (7, 7, 7). You pick the hours change for this week. You run it for seven days 50/50. Accepted per 100 visits rises 12%, night taps fall 40%, and refunds drop. You ship it. Next week, you pick “warranty fork.” You add one line to the IVR, watch warranty rejects drop, and see acceptance rise. By the third week, you add the Spanish sticky bar during 3–6 p.m. in two ZIPs with bilingual agents. Each tiny win stacks. The backlog and the score kept the order clear.

An experiment backlog is a small notebook of bets. Score them. Pick one. Run it. Learn. Repeat. In a month, your funnel will feel smoother. In a season, it will feel like a machine.

S5. Weekly review cadence & actions

A weekly review is your tune-up. You stop the car for thirty minutes, lift the hood, and make one or two small adjustments before you drive another week. The meeting should be short, steady, and focused on actions. You do not need a long slide deck. You need the dashboard, two recordings, the backlog, and a notepad.

Hold the meeting the same day and time each week. Monday mornings work for many teams because you can catch weekend drift and set the plan before the phones heat up. Keep the group small: one person for media, one for ops/IVR, one for QA/training, and one for buyer success. If a buyer joins, even better—fifteen minutes of their time can save you fifteen refund emails.

Open with the “Today so far” dashboard for two minutes. Read the health bar. If anything is yellow or red, call it out and assign a quick check right after the meeting. Do not dig in now. The weekly review is for last week and this week’s plan.

Shift to “Last week in one page.” Show total calls, accepted calls, acceptance rate, average talk time, top three reject reasons with counts, and the three sources with the most accepted calls. Show one line for DQ saves and the dollars from second-chance paths. Keep this to two minutes. The point is context, not a lecture.

Listen to two recordings for five minutes. Choose one accepted call that shows the script and IVR working, and one rejected or timer-fail call. As you listen, keep the scorecard in mind. Did we say the recording notice first? Did we get ZIP early? Did we reach the problem fast? Did we transfer in under a minute? Was the tone kind? Stop after each and name one line to keep or fix. If you find a script bug, write the exact new line in the notes.

Review the “Top reject reasons” table for three minutes. If one reason rose, decide one action. If “out of area” rose, tighten geo to presence-only and add the ZIP list to the page header for a week. If “warranty” rose, test a filter line in the IVR and change one ad. If “no answer by buyer” rose, adjust caps and overflow windows for that buyer this week and tell them why. Write the action and the owner next to each reason.

Check the cohort highlights for four minutes. Read one sentence for each top cohort: “Search + No Cooling kept 70% acceptance,” “Native + Leak improved two points after the headline change,” “Native + Tune-Up still weak.” For one weak cohort, choose a fix and a stop rule. If it is native tune-up traffic, remove the tune-up mention and watch three days.

If it fails again, pause that tile for a week. Write it down.

Open the experiment backlog for five minutes. Sort by score. Pick the top fit for this week. Confirm the owner, metric, start time, sample size or end date, and the stop rule. Close the loop on last week's experiment with one line: "Won, shipped," or "Lost, archived," and the lesson. Keep the backlog moving. This is the heartbeat of improvement.

Assign a tiny coaching plan for the week. Based on the two calls and the scorecard trend, choose one theme for agents. It might be "ZIP first," "shorter bridge," or "don't say 'we are brand.'" Plan a ten-minute huddle tomorrow with two clips. Put a reminder on the calendar. Coaching is part of optimization, not extra work.

Plan buyer touches for five minutes. If one buyer was down or slow, schedule a short check-in. Share two clips: one that went great, one that failed due to no answer. Bring a plan: "We shifted overflow 3–5 p.m.; can you add one seat then?" If one buyer excelled, send a thank-you and ask if they can take 10% more in their strong hour. Small, steady touches build trust.

Close with a short "who does what by when." You should have five to eight lines: tighten geo and add ZIPs to header (Ops, today), add warranty fork (Ops, tomorrow 10 a.m.), change native headline (Media, today), raise Search bids 4–6 p.m. for "no cooling" (Media, today), test "hours on button" in City B (Media, start Wednesday), coaching huddle on "short bridge" (QA, Tuesday 9 a.m.), buyer A overflow 3–5 p.m. (Ops, today), and share BOR Friday (Success, Friday 9 a.m.). Put these in a shared doc with checkboxes.

End the meeting on time. People will show up next week if you respect the clock and ship results. If you run long every time, folks will hide.

Between meetings, keep a daily five-minute pulse. Look at the dashboard at noon. If an alert fired, fix it and write two words in the weekly doc so you remember to share. If nothing fired, smile and get back to work.

On Friday, send a BOR (Buyer Outcome Report) to key partners. One page is enough: counts, acceptance, top rejects, two clips, one change you made, and one change for next week. This keeps buyers in the loop and lowers surprise disputes.

Every month, run a slightly longer review. Check season-over-season cohorts. Refresh your experiment backlog scores. Retire old wins that stopped working. Add one bigger project to the plan, like "switch to system fonts," "compress hero images," or "Spanish IVR for 3–6 p.m." Make the big work live next to the small wins, not instead of them.

A simple story shows the rhythm. Monday, your weekly review spots that "warranty" rejects rose to 14%. You add a ten-second warranty fork to the IVR and change one native line. You also pick "hours on button" as the week's test. Tuesday, you coach the bridge to be one sentence. Wednesday, you raise Search bids 4–6 p.m. for "no cooling." Thursday, the dashboard shows acceptance rising back to the 60s and "warranty" dropping to 8%. Friday, your BOR shares the clips and the fix. Next Monday, you pick the next experiment. Nothing felt frantic. You did small things that stacked.

A weekly cadence is not about meeting. It is about momentum. See the truth, hear the people, change one thing, and write it down. Do that fifty times a year. You will run past teams who wait for a perfect month to make a perfect plan that never ships.

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Scaling, Team & Operations

S1. Hiring & training VAs/agents

Scaling a pay-per-call shop is not only about more ads or more numbers. It is about people who can guide callers with calm voices and clean steps. Hiring and training your VAs (virtual assistants) and agents is how you turn clicks into trusted minutes on the phone. You do not need a huge office. You need clear roles, simple tools, steady coaching, and a kind culture that expects high standards.

Start by writing a short job story, not a long job post. Say what the work feels like. "You will answer or place short calls. You will read a simple script, ask for consent to record, collect a ZIP code, and route callers to a local buyer. You must speak clearly, type simple notes, and treat people with respect. We coach you every week. We measure your average handle time, transfer speed, acceptance rate, and kindness." Plain truth attracts the right people and turns away those who want "easy money."

Find candidates where helpers gather. Good VAs often hang out in online groups for remote work, customer service, or language learning.

Ask for a one-minute voice note about a simple topic, like "tell me how to make tea." The voice note shows clarity, tone, and pace better than any resume. If you need Spanish or another language, ask for a short note in that language too.

Keep the hiring path tight. Step one is the voice note. Step two is a short quiz: write the opening line that asks for consent to record, and fix three broken lines of a script. Step three is a 15-minute live role play. In the role play, you pretend to be a caller with an AC problem. They must say the recording line first, ask for ZIP, confirm the issue, and hand off within a minute. Score each step yes/no. People who pass all three are ready for training. People who pass two can try again next week. People who pass one are not a fit right now.

Set up a simple home kit. Agents need a quiet space, a wired internet connection if possible, a headset with a mic, and a backup plan if power drops (phone hotspot or a nearby coworking pass). Give them a short checklist: test mic, test dialer login, test the "Call Now" page in a browser, and check that the recording notice plays first. Ask them to record a 30-second sample on your system before day one so you can fix sound issues early.

Onboarding should last five days, not five hours. Day one is your culture, your promise to callers, and your script basics. Play two golden calls and explain why they worked. Day two is tools: the dialer, the IVR map, the buyer list, and how to log notes. Day three is practice: ten role plays with different "quirks" like renter vs. homeowner, out-of-area, warranty, or no answer by buyer. Day four is shadowing a senior agent live for two hours, then doing live calls for one hour while a coach listens in. Day five is review and a short quiz: write the recording line, list the three top reject reasons, and list what you say for each. Finish with a welcome and their first week's schedule.

Define the few numbers that matter. Train to four: time to consent (should be in the first sentence), time to ZIP (inside the first 20 seconds), time to handoff (under 60 seconds once a fit is clear), and kindness (no rush, no sighs, no risky claims). Explain how these numbers tie to acceptance rate and payouts. When agents see that saying “Is it okay to continue?” at the start protects them and raises minutes, they own it.

Keep scripts on one page. Put the opening lines at the top in big font. Put the fork prompts below (“Do you own your home?” “What ZIP are you in?” “Is it not cooling, leaking, or noisy?”). Put the bridge line to buyers near the bottom. Use highlights to show words that must never change, like the recording notice. Everything else can have two or three approved variations so the agent can sound natural.

Coach tone more than volume. A slow, steady tone calms callers in heat and storms. Teach a simple breath rule: inhale while the phone rings, smile, then speak. Smiling changes the sound. It is not a trick; it is a tool to keep your own nerves down in rush hours.

Build a buddy system. Pair each new agent with a steady hand for the first month. The buddy checks on them at the start of each shift, answers small questions fast, and listens to two of their calls each week. Buddies prevent tiny problems from growing. They also grow into team leads later.

Make quality easy to see. Use a five-point scorecard: consent said, ZIP confirmed, fit found, handoff speed, safe language. Grade ten calls per agent each week. Share one clip where they earned a “yes” on all five. Share one clip where one “no” happened and how to fix it. Keep feedback short and kind: one praise, one fix, done.

Plan your shifts around the phone, not around “9 to 5.” Acceptance peaks when people are home and when buyers answer. In many home service lines, 8–10 a.m. and 4–6 p.m. are key. Staff those hours first. Keep a small on-call list for sudden spikes. Ask early birds to check equipment at 7:45 a.m. so the 8:00 a.m. rush is clean.

Protect your people from burnout. Heat waves bring floods of calls. Give agents five-minute breath breaks every hour. Rotate the hardest queues. When someone handles three tough calls in a row, send them a quick "you did great on that last one" note with the call ID. Small kindness keeps the voice steady.

Write a short "what to do when" sheet. If a buyer does not answer in 20 seconds, say "Please hold while I connect you to another local pro." If the caller says "warranty," read the approved line and stop, do not try to sell. If the caller asks "Are you the brand?", say, "We connect you to local licensed pros who work on that brand," and never say you are the brand. Keep these "whens" on one page and update it when things change.

Plan growth before you need it. Keep a bench of candidates who passed the voice note and quiz so you can hire fast for season spikes. Cross-train bilingual agents so you can cover days off without gaps. Have one senior agent trained on the IVR editor so small wording fixes do not wait on a developer.

Celebrate wins with facts. Share a short note each Friday: accepted rate, top reject reason that fell, a clip of a great bridge, and a kind review from a caller or buyer. Thank people by name. People do more of what is noticed.

Here is a simple week. On Monday, two new agents start. They hear two great calls, take the quiz, and do role plays. On Wednesday, they shadow live. On Thursday afternoon, each takes ten real calls with a coach listening. They pass. Friday, the team meets for ten minutes. They hear a clip where the agent got consent first, ZIP at 00:12, and a smooth handoff. Everyone nods. Next week, those two handle a small slice of the 4–6 window, while their buddies watch. Calls get longer. Acceptance goes up. Nothing fancy happened. You hired with care, trained with calm, and kept the human touch. That is how you scale without breaking the voice on the line.

S2. SOPs, runbooks & versioning

SOPs and runbooks are how you teach your brain to the team and keep it there when days get busy. An SOP (standard operating procedure) says "how we do this job." A runbook says "what we do when X happens." Versioning is how you keep these pages clean, current, and trusted. You do not need a heavy system. You need short, living documents, clear names, and a simple rule for changes.

Start with the jobs that happen every day. "Launch the morning phones." "Handle a live call." "Route overflow." "Add a new tracking number." "Update the IVR line." "Send Friday's Buyer Outcome Report." For each job, write one SOP with a simple title. Put the title in plain words. "Opening Phones 8:00 a.m." is better than "Telephony Morning Operations." One page per job keeps it easy to see and easy to share.

Write SOPs so a new person can follow them without asking a senior for help. Begin with a short purpose line. "This SOP ensures our lines are live at 8:00 a.m., recorded, and routed to open buyers." Follow with step-by-step sentences. Use short words and short steps. "Log into dialer. Check status is 'Ready.' Play a test call to the main IVR. Listen for recording notice." Add small checks inside the steps. "If test call fails, see Runbook: Phones Down." End with a quick "Done when" line: "You are done when test call passes, IVR status shows green, and buyers A/B are green in the router."

Runbooks cover the "if this, then that" moments. "Buyer not answering." "Reject spike in next hour." "Out-of-area surge." "Warranty surge." "Carrier error code shows up." Each runbook starts with symptoms. "Calls to Buyer A ring for 25 seconds. 'No answer by buyer' rejects appear." Then comes the action path. "Turn on overflow to Buyer B. Ping Buyer A with timestamps. If no change in 30 minutes, lower Buyer A cap by 50% and keep overflow. Note change in the dashboard footer." Keep runbooks short, with one small branch per cause. After the crisis, add a note to prevent the next one. "Add a 20-second heartbeat check to flip overflow automatically."

Use versioning that anyone can follow. Put the version and date at the top of each SOP and runbook: "v1.3 — 2025-08-10 — Owner: Jay." Keep a tiny change log at the bottom. "v1.3—Added Spanish test call at open. v1.2—Updated IVR test step." When someone updates a doc, they change the version and log the change. This is your audit trail. It builds trust and saves time when someone asks, "When did we change this line?"

Keep an owner on each doc. The owner is not the only person who edits. The owner is the one who guards clarity and checks that the steps still match reality. Owners review their docs monthly. If a doc is stale, the owner marks it "needs update" and fixes it. Stale SOPs are worse than none.

Store SOPs and runbooks where people live. If your team lives in a shared drive or a wiki, put the docs there. Link the SOPs from the places people use daily. For example, link the "Opening Phones" SOP from the morning checklist in your chat. Link "Buyer Down" runbook from a small "?" icon in your routing tool. If the doc is hard to find, it will not be used.

Make micro-SOPs for scripts and IVR lines. Create one page for "Recording Notice and Consent" with the exact words in English and Spanish. Create one page for "ZIP Ask" with two approved variants. Create one page for "Buyer Bridge Line." Link these inside the call SOP. When you update a line for a legal or buyer reason, update that micro-SOP, bump the version, and it will flow everywhere the link appears.

Plan a simple release process for changes. Each Wednesday at 2 p.m., you review proposed doc changes in a ten-minute huddle. You pick what ships, who edits, who tests, and when it goes live. On Thursday at 9 a.m., the change goes live. On Friday, you note the result. If it caused harm, you roll back to the last version in two clicks. This "small batch" release keeps the team calm and the docs clean.

Write "why" in the doc. After a step, add a small note that explains the reason. "Ask ZIP early so we can route to the right buyer and avoid out-of-area rejects." People follow rules better when they know the reason. Also, when the reason changes, you will feel the need to change the step too. That keeps alignment.

Use screenshots and short clips for tricky parts. If your dialer has a setting that often confuses new people, paste a small screenshot with a circle around the right button. If your IVR editor has a save quirk, record a 30-second clip. These tiny visuals save dozens of questions.

Tie SOPs to training. When a new agent starts, they read the "Handle a Live Call" SOP, watch two call clips, and do a role play. When they pass, you mark the SOP as "trained" in their record with the date. When the SOP changes, your system can ping everyone who was trained on the old version so they can read the new line and re-sign.

Connect SOPs to numbers. On your acceptance dashboard, link the "Top five SOPs to check" if a metric drops. If timer pass rate falls, link the "Opening Script" and "Bridge Speed" SOPs. If out-of-area rises, link the "Geo Settings" SOP. This makes the docs tools, not just files.

Keep a "parking lot" for doc ideas. Team members can drop notes like "Make a runbook for thunderstorm power cuts" or "Add Spanish 'ZIP ask' variant." Review these weekly. Assign owners. This habit lets the floor teach the book.

Guard your doc voice. Keep words short. Avoid jargon. Use the same names everywhere: call it "recording notice," not "monitoring disclosure" in one place and "recording disclosure" in another. Consistent words make teaching easier.

An example shows how this saves a day. It is 9:15 a.m. "No answer by buyer" alerts fire. The ops person opens the "Buyer Down" runbook. They switch overflow on, send timestamps to the buyer, and lower the cap by half. They paste a note in the dashboard footer. At 10:00 a.m., the buyer says their line is fixed. Ops restores caps. Later, the team adds a step in the runbook: "If two such days happen in a week, hold a check-in call." The doc got used, it worked, and it got better. That is versioning that matters.

SOPs and runbooks are your second brain. Versioning is your memory. Keep them small, alive, and easy to find. When people can trust the page in front of them, they do not freeze in hot moments. They act, then improve the page for the next person. That is how you scale with calm hands.

S3. Financial controls & AR tracking

Money is the air that lets your phones breathe. When cash flow is smooth, you can buy traffic, pay people, and sleep at night. When cash is shaky, even a good week feels scary. Financial controls and AR (accounts receivable) tracking keep the air flowing. You do not need complex software to start. You need simple rhythms, clean invoices, clear roles, and a weekly look at what you are owed.

Begin with separation of duties. One person should create invoices and track who owes what. A second person, or at least a manager, should approve credits and disputes. A third person should be the one who moves money or checks bank deposits. In a small shop, one person may wear two hats, but try to avoid one person doing all three. Separation lowers mistakes and temptation.

Invoice on a rhythm that matches your net terms. If your buyers pay net-15, send invoices weekly on Monday for the prior Monday–Sunday. If they pay net-30, still send weekly, but note the due date clearly. Use the buyer's preferred format (PDF, portal upload, or CSV) and include details: date range, total accepted calls, payout per call, line item totals, credits, and the net due. Attach the CSV of call IDs with durations and reason codes. Clean invoices get paid faster.

Keep a simple AR aging report. List each buyer, each invoice number, the date sent, the due date, the amount, and the days outstanding: current, 1–15, 16–30, 31–45, 46+. Update this every Friday. Color amounts that are past due. If a number moves into 16–30, send a kind reminder with the invoice attached: "Just checking on invoice 1023, due Aug 5. Please advise status." If it moves into 31–45, call the AP contact and copy your buyer contact. If it hits 46+, pause new tests for that buyer and lower caps until payment arrives. Do not fund others with your savings.

Match payments to invoices the day money hits the bank. Mark the invoice as paid and attach proof (a remittance advice or a portal screenshot). If a payment is short, check the credit memo. If a credit looks wrong, open a ticket with the buyer that day and include call IDs and your proof. Small gaps are normal; long gaps are not.

Track disputes and credits in one place. Each week, the buyer disputes a few calls. You review and agree or push back. Those credits should show up on the next invoice as "credit applied." Keep a simple ledger: date of dispute, call IDs, reason, agreed credit amount, and the invoice on which it was applied. If credits stack beyond two weeks, ask for a separate credit memo so you do not carry the weight forever.

Forecast cash two ways: by invoice and by trend. By invoice means listing what is due next week and the week after. By trend means looking at your last eight weeks of collections and using that average for the next month. Use the lower of the two for planning. Build a small cash cushion of at least two weeks of media + payroll. If a buyer pays late, you can still breathe.

Protect your spend with pre-set caps tied to payment behavior. A buyer who always pays on time can have a higher daily cap. A buyer who slips gets a lower cap until they catch up. Be polite and clear: "We'll happily lift caps to 30 per day once invoice 1023 clears." This is not punishment. It is survival.

Separate booked revenue from cash collected. Booked revenue is the total of accepted calls for the week times the payout. Cash is what hits the bank. Watch both. Celebrate booked when you share wins internally. Plan spends on cash. The gap teaches you who is safe to scale with.

Reconcile partner networks and affiliates the same way. Many pay on net-30 or net-45 and have reversals. Keep those in a "pending" bucket until they pay. If a partner's reversals spike or their days to pay stretch, cut their share before it hurts. A small "risk score" for each payer helps: 1 for slow, 3 for steady, 5 for fast. Expand volume where the score is high.

Lock down approvals for big changes. No one person should be able to double a buyer's daily cap, change a payout in the IO, or wire money without a second set of eyes. Create a tiny "two keys" rule: any change over $5,000 weekly impact needs two people to sign off in chat or email.

Pay your people and vendors on time. Late payroll or late vendor fees ruin focus. Set your own payments to land a couple of days after your usual collections day. If you collect on Wednesdays, pay on Fridays. If a week is tight, tell your team the truth early and cut spend for two days. Never hide money issues. Teams can handle truth; they cannot handle silence.

Mind taxes and reserves. Set aside a small % of each week's cash for taxes in a separate account so the quarter does not surprise you. If you owe sales tax or telecom fees in your area, know the rules and put that in your price. Ask a local accountant to review your setup once a year. This small cost saves big pain.

Watch fraud and chargebacks. If a buyer claims fraud often without proof, push for recordings and logs. If a partner refuses to pay on vague reasons, reduce their share. If your card or ad accounts see odd spikes, pause and audit. Money leaks travel fast; your controls must travel faster.

Here is a calm weekly rhythm. Monday morning, you send last week's invoices with call CSVs attached. Wednesday, you check the bank. Two buyers pay on time; you mark their invoices paid. One payment is short by $600. You check the credit ledger and see a valid credit from a "no answer by buyer" outage; you are fine. Friday, you update the AR aging. One invoice slid into 16–30. You send a gentle nudge with the invoice attached and lower that buyer's cap by 10% for the next week. You also update your cash forecast: next Wednesday looks light by $2,000. You trim Monday's ad spend by 10% and keep payroll safe. No panic. Just steady steps that keep air in the room.

Financial controls are not about saying "no." They are about knowing "when" and "how much," so you can say "yes" to the right growth. With clean invoices, a weekly aging view, quick matching, and simple caps tied to payment, you will scale without starving your team.

S4. Legal counsel & insurance

Running pay-per-call means you touch voice, data, and people in stressful moments. Most days are smooth. Some days bring a letter, a threat, or a "what do we do now?" Legal counsel and insurance are the guardrails that keep one bad day from becoming a bad year. You do not need a big law firm on speed dial. You need a friendly lawyer who knows ads and calls, and a few right-sized policies that match your risk.

Start by knowing what your lawyer helps with. Your contracts with buyers and partners (IOs and MSAs) set who pays when, how disputes work, and what is in or out of scope. A lawyer can keep the language fair: clear rules for accept/reject, a short dispute window, and limits on liability. They can help you add "we are not the brand" language to your pages, clean consent lines, and a safe recording script. They can also advise on privacy notices, Do-Not-Call handling, and data sharing terms between you and partners.

Find counsel who speaks small business. Ask for someone who handles marketing, telephony, or consumer protection matters. You want plain talk, not Latin. Use a small retainer if you can, with a clear response time for quick reviews. When you need deeper help—like a demand letter, a trademark issue, or a data incident—you can step up hours for that month.

Use counsel early, not late, for these moments. First, when you draft your standard IO and partner terms. Get them right once so you do not start every new deal from scratch. Second, when you add a new vertical with special rules (like legal, finance, or health). Ask what extra disclosures to use. Third, when a partner pushes risky language ("say you're the factory"). Have your lawyer write a firm but friendly reply. Fourth, when someone sends a scary letter. Do not reply in anger. Call your lawyer. Share facts. Let them write the response.

Now insurance. At minimum, most shops carry **general liability**. It covers slips, trips, and some third-party claims. But since you sell calls and content, two more matter a lot: **professional liability (E&O)** and **media liability**. E&O (errors and omissions) helps if someone claims your service caused a loss, like "your agent told me wrong." Media liability helps if someone claims your ad or page defamed them or used a mark improperly. Many carriers bundle media with E&O for marketing firms. Ask your broker.

Cyber liability is also key. It helps if your tools are hacked, data is leaked, or a partner sues after an email breach. It can cover legal help, notices, and some fines, depending on your policy. It is not only for big companies. One bad password can cause a spill.

If you have staff, you may need **workers' comp** by law. If you hire VAs as contractors, ask your lawyer and accountant what rules apply in your place. Mislabeling people can be costly. If you own or lease gear or space, ask about **property** coverage.

Right-size your limits. A small shop might start with $1M per claim / $2M aggregate for E&O/media, and $1M for cyber. If you sign a contract with a big brand, they may ask for higher limits. You can often buy an **umbrella** to add extra on top. Do not promise limits you do not have.

Read your policies once with a highlighter. What is covered? What is excluded? Many media policies exclude promises of results ("we guarantee 20 calls"). Do not promise what your policy will not back. Many E&O policies require you to use contracts with your clients. Use your IO every time.

Make a simple incident plan. If a data leak happens, who decides to pull the plug, who talks to counsel, who talks to partners, and who writes the notice? Keep a one-page plan with phone numbers. If a carrier flags your numbers as spam, who opens the ticket, who flips to backup numbers, and who alerts the buyers? Bad days feel smaller when the steps are on paper.

Keep logs and proof. Save recordings for months. Save consent logs for at least a year. Save dispute notes and credits for two years. If a fight comes, you will have a calm pile of facts. Your lawyer can use facts. They cannot use "I think."

Train your team on safe words. Never claim "we are the brand." Never say "guaranteed 30 minutes." Never collect payment card numbers. Never add someone to a drip without consent. Keep the recording notice first. Keep STOP in every text. This is not fear. This is respect.

Think about names. Choose a brand name that does not confuse people or poke a giant. "Phoenix AC Help" is safer than "Trane Repair Team" if you are not Trane. A lawyer can run a quick name check and help you avoid future pain.

Use counsel for small reviews, not just big storms. Before you show a press page or a partner feature, ask for a quick look. Before you add a new offer on the confirmation page, ask if a small disclosure is needed. This habit costs little and saves much.

Here is a calm example. A large buyer sends you an IO with a clause that says, “Publisher guarantees 95% acceptance, agrees to indemnify for any and all claims, and agrees to unlimited liability.” You send it to your lawyer. They mark edits: “Publishers will use commercially reasonable efforts; acceptance rates vary by season. Indemnity limited to third-party IP claims caused by Publisher’s content. Liability capped at fees paid in prior 60 days.” You send the redline back with a friendly note. The buyer accepts two of three changes. You sign. Two months later, a caller claims you “promised 30 minutes.” Your recording shows you did not. Your media policy covers you. Your lawyer sends a polite response. The matter ends. Nothing blew up because you set guardrails early.

Legal and insurance do not make sales. They make sales safe. A small retainer, a few right-sized policies, and a one-page plan keep you steady. You will move faster when you know a bump in the road will not send you off the cliff.

S5. New-vertical launch framework

Adding a new vertical is exciting. It is also risky if you rush. A clean framework turns a big idea into small, safe steps. You do not need months of research. You need a 14-day plan, one city, one buyer, one page, one IVR, and a small budget with a hard cap. You keep notes. You learn fast. You scale only when the numbers and calls feel steady.

Day 0 is the choice. Pick a vertical that fits your skills and tools. If you already run HVAC, pest control or plumbing is close. If you run home services, appliance repair is near. If you run insurance, home warranty or roadside help is near. Close neighbors share language, hours, and call flows. Far jumps take longer. Start close.

Write the "job to be done" in one sentence. "A stressed person needs a live human to fix [problem] today." List the top three problems people say in that vertical. For pest, they say "ants in kitchen," "roaches," or "wasps in yard." For plumbing, "leak under sink," "toilet clog," or "water heater no hot water." These words become your page and IVR.

Pick one test city. Choose a metro with enough demand and buyers who answer. Avoid the rare edge cases in week one. If you choose Phoenix again, you know the heat and the hours. If you choose a new city, write a tiny city sheet: common ZIPs, time zone, storm season, language mix.

Map one buyer. Find a network or direct buyer who will take five to ten calls a day for seven days, with clear rules and a 60–90 second timer. Get the IO in writing. Write the acceptance rules on one page: scope, ZIPs, hours, rejects, timer, and duplicates. Set net-terms that you can stand. Set a test cap of calls or dollars, whichever comes first.

Build one mobile-first page. Keep it like your best HVAC page, but swap the words and images to match the new vertical. Use the same consent line and the same sticky call bar. Put "Call [City] [Vertical] Help: [number] • [hours]" at the top. Add three quick checks that are safe, like "seal food," "wipe sugar," and "use door sweeps" for ants. Add your hours and ZIP list. Keep the page under 300 KB and test speed.

Build one IVR. Open with the recording notice. Ask for ZIP. Offer three branches that match the top problems. "Press 1 for ants, 2 for roaches, 3 for wasps." If renters are a factor, add "Press 4 if you rent." Map renter flows to a safe end or to a partner if allowed. Keep the IVR under 30 seconds to the handoff.

Train agents for one day on the new words. They already know consent, ZIP, and bridge. Teach them the new safety lines. Teach them what not to promise. Let them listen to two sample industry calls if you can find them. Practice five role plays: "ants," "roaches," "wasps," "renter," and “out of area.”

Set your dashboard filters before launch. Add the new vertical and city to your views. Prepare an alert for “wrong service,” since people may call for jobs your buyer does not take. Prepare an alert for “no answer by buyer,” since a new buyer’s line can surprise you.

Set budget and stop rules. For a 14-day test, set a budget of what you can lose without pain. Maybe $3,000 total, $200 a day, hard cap. Set your target accepted rate (for example, 55%+ in week one), timer pass rate (70%+), and cost per accepted (under your floor math). Set a stop rule: if cost per accepted is 30% over target for two days, pause and fix.

Day 1–2 is learning. Use exact and phrase match on clear intent search terms (“exterminator near me,” “ant removal [city]”), a small native test on a how-to article, and your call page. Run 8–6 only. Listen to five calls each day. Expect weird edges. Fix one thing a day. If “renter” floods, add a renter fork in IVR and change one ad line. If out-of-area rises, tighten geo and add ZIPs on page. Do not try to scale yet.

Day 3–4 is fit. If acceptance is climbing and the buyer answers, add two hours where your logs show demand. If acceptance is weak, roll back the last change and try a different one. Do not add a second buyer yet unless the first is truly full or slow. Keep notes.

Day 5–7 is stability. Aim for a full weekday run where accepted rate meets target, timer passes are steady, and refunds are under 10%. Share a short “week one” note with your buyer: counts, acceptance, top rejects, and what you changed. Ask them if the calls fit. If they say “more ants, fewer wasps,” tune the IVR order and page copy.

Week 2 is scale if numbers hold. Raise daily caps by 20%. Add a backup buyer with a small share in overflow. Add one more ad group or one more native placement. Keep your alerts on. Keep listening to five calls a day. Add one more agent hour in the strong window.

Watch cash. If the buyer is on net-30, keep the daily cap lower until you know they pay. If a network runs this vertical for you, watch their reversal and pay times during the test. Do not let "excitement" outrun "paid."

At the end of 14 days, decide with math. If accepted rate met target, cost per accepted is healthy, refund rate is low, and cash terms are fair, lift volume by another 20% and write the new SOPs. If one part lagged, fix it and run one more week with the same cap. If two parts lagged and you tried three clean fixes, pause and write what you learned. It is okay to stop. You will be better next time.

Write the new SOPs and runbooks. Make "Handle a Pest Call" with the new lines. Make "Pest IVR Map v1.0." Make "Buyer Down—Pest." Train agents on the new pages. Add "Pest" to your weekly dashboard and add one pest clip to the coaching huddle.

A small example helps. You launch "Phoenix Pest Help." Day one, "ants" calls pass often; "wasps" calls are short. You move "ants" to be the first IVR option and change the page line to "Ants in kitchen? Try these 2 steps, then call." Acceptance rises. Day four, "renter" calls are many. You add "Press 4 if you rent" and a polite route: "Please ask your landlord to call us at 602-555-0100." Next day, three landlords call and pass. Week two, you add a backup buyer for afternoons. Caps rise by 20%. By day 14, accepted rate sits at 60%, cost per accepted is $58, and refunds are 7%. You scale calmly.

A new vertical is not a leap of faith. It is a small bridge you build in two weeks: one city, one page, one IVR, one buyer, one budget, and one change a day. Keep your rules, your tone, and your proof. When the bridge feels solid, invite more cars. That is how you grow without shaking the whole road.