

Call Center 24/7 Support



#1.) INTRODUCTION

I want to start a Call Center 24/7-Support Business

- A) I have worked in a Call Center for 12 years.
- B) I have worked with different companies, offering different services, to various size companies, as a Call Center Representative.
- C) With every company that I have worked at, I have always progressed from basic support to advance support in under a year. My native language is Spanish; I live and work in El Salvador CA.
- D) I'm 37-years-old. The focus of my work has been in call center support. I have supervised up to 6 people at a time.
- E) The call center is volume-based. Unfortunately, the service of delivering support, has become very sloppy. Most people don't care about their work, and by-nature, they are very unhappy people. But working for themselves, and managing themselves, and allowing them to manage a small team can change their prospective and improve their work habits.
- F) To offer a reliable 12-person team of trained, experienced, proven, intelligent and motivated call support people.
- G) To serve the needs of companies in need of 24/7 telephone support. Focus on achieving 15 to 20 core clients.

There are **3 primary reasons** to do this:

- 1) To serve the high demand of clients in the USA. Every business in the United States has multiple phone support needs. Our new company is focused on supporting a very niche client.
- 2) This will allow me to manage my days and maximize my income.
- 3) I'm looking for an infusion of \$65,000



#2.) EXPERIENCE AND TIME MANAGEMENT

- A) With my 12 years of Call Center EXPERIENCE, I know that every Help Desk Support involves dedication and expertise. Additionally, serving clients is much more important and profitable when support people are motivated and training properly. Call Centers are great businesses if they are operated properly and are priced appropriately.
- B.) With the \$65,000 infusion, I will be able to offer a 12-person, highly trained and motivated, call-support center. By doing so, I will be able to offer a profitable business, and specialize for my future working as a CALL CENTER service.
- C.) The specific tools, equipment, and people, I will need are as follow:

• (12) Operators (paying \$600/mth) *infusion covers 1 st 3 months	\$21,600*
• (12) iPhones: (\$600 each)	\$ 7,200
• (12) iPad minis (\$600 each)	\$ 7,200
• Chargers and Headsets for iPhones (\$100 each)	\$ 1,200
• (12) New Magic jacks (\$50 each)	\$ 600
• (12) New desk phones for the MJ phone # (\$100 each)	\$ 1,200
• (12) New Plantronics wireless headsets (@ \$100 each)	\$ 1,200
• (12) New Printers (\$300 each)	\$ 3,600
• (12) Monitor (extra) Screen	\$ 2,500
• (12) Laptops (\$600 each)	\$ 7,200
• Software for 12 Laptops	\$ 3,000
• Office Equip: (lamps, chairs, cables @\$250 each)	\$ 3,000
• Advertisement for the 1 st year (\$100/month)	\$ 1,200
• Miscellaneous	\$ 5,100
• Internet (\$40/mth x 12 people each=\$480/month)	\$ 5,700
 Total	 \$65,000



D.) Marketing and Promotion will be explained in Section #3 Cash Flow, and # 4 Constant Stream of Customers.

E.) New Company Name and info:

- **Company name:** Call Center-Support
- **Ownership %:** TBD...to be determined.
- **Owner's name:** David Pineda and New Investor.
- **Office location:** 1432 North 25st Street, Fl
- **Bank:** Bank of America.

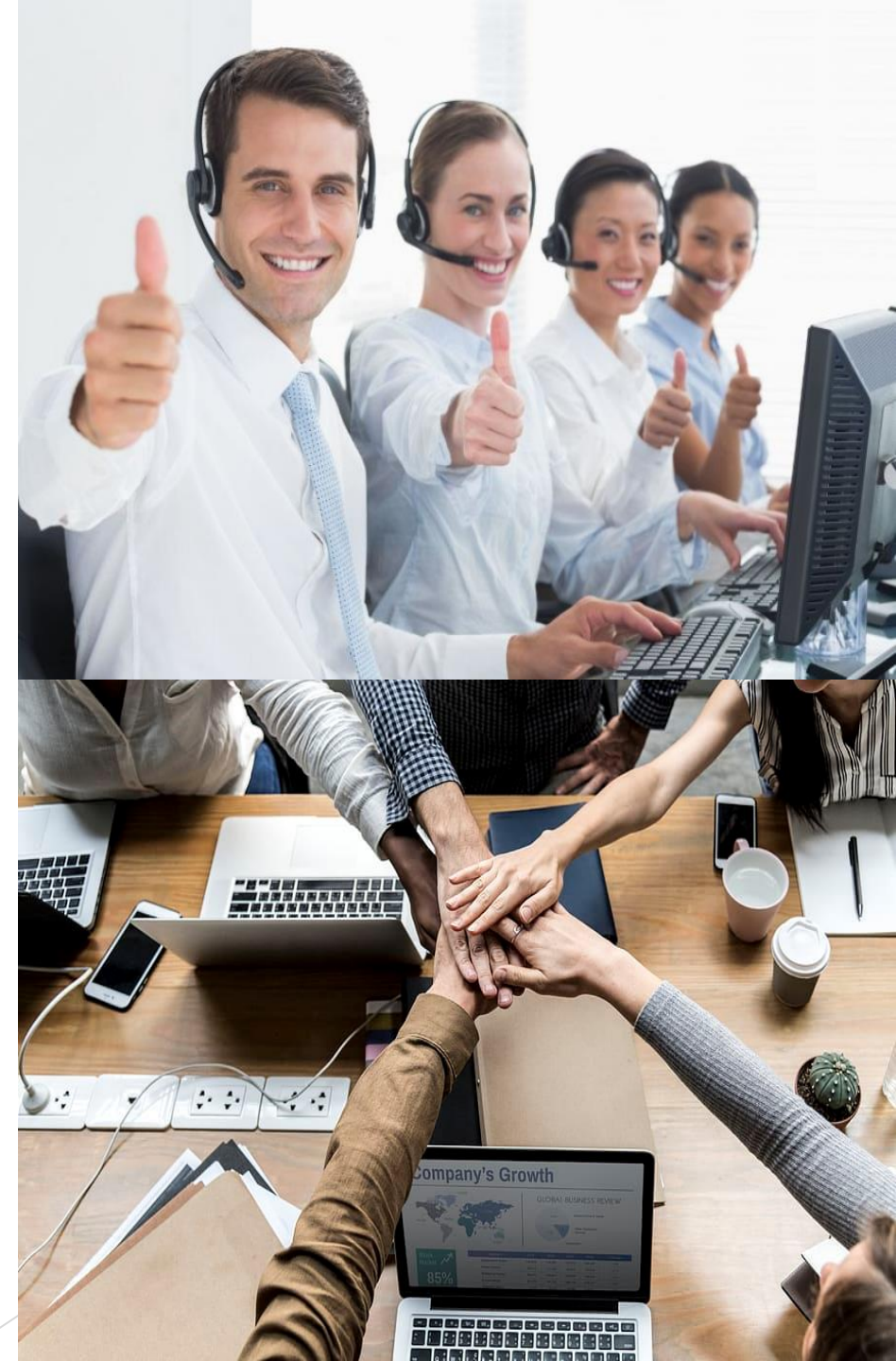
F.) Pricing, Margins, and Charges to be discussed.

G.) I have assisted clients with offering different services, to various size companies, as a Call Center Representative.

H.) I have vast experience in Call Center Support. This involves billing clients, answering the phones, training staff, listening to whiners and complainers, dealing with deficient employees, etc. I'm interviewing (asking) 50 Operator/Help Desk people to clarify who will make the 12-person team.

I.) I will continue to work at my present job. My free time away from work will be devoted to this new business. I will work a desk and provide support to clients just as the other 12 Operators guys do (during my off-work hours).

J.) I will also manage the 12-person Team of Operators and all aspects of the company. The new Call Center Support Team will schedule according to demand (under my supervision).



#3.) CASH FLOW:

Involves the Inflows and Outflows of Cash... and that is the focus of this Section. Some aspects of Cash Flow involve the use of the initial cash investment; this is how we view Cash Flow in these circumstances.

A) This Cash Flow analysis involves the Cash Flow for the New Company, **Call Center Support**. For example, (before we get into the Cash Flow), the use of some of the cash infusion will be as follow:

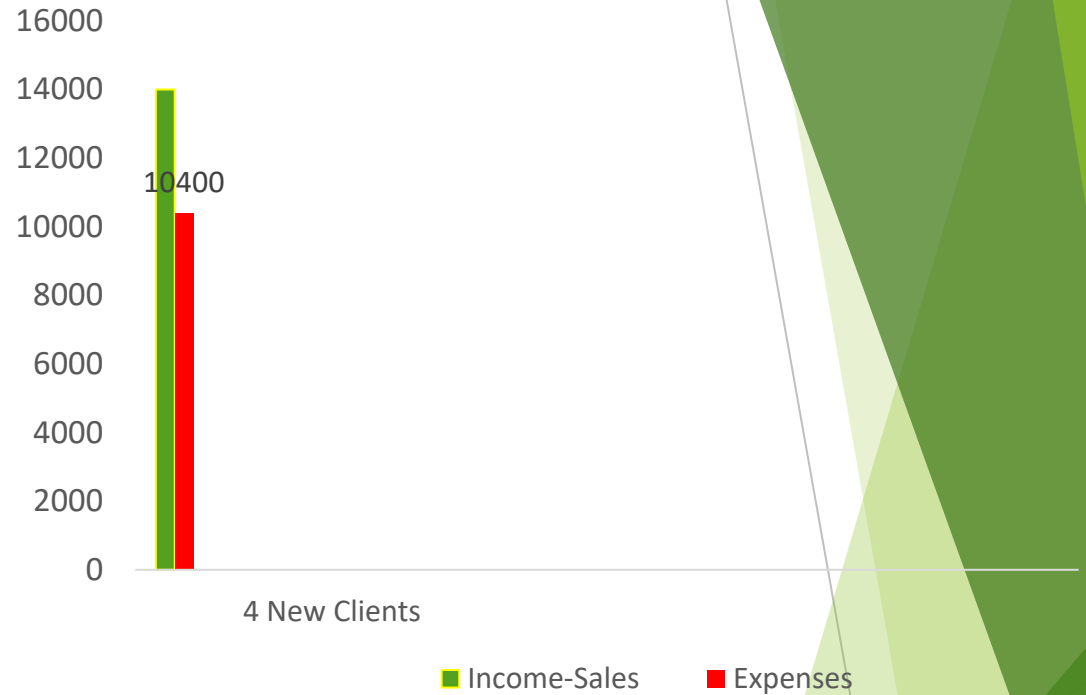
• (12) Operators (paying \$600/mth) *infusion covers 1 st 3 months	\$21,600*
• (12) iPhones: (\$600 each)	\$ 7,200
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• Advertisement for the 1 st year (\$100/month)	\$ 1,200
• Miscellaneous	\$ 5,100
• Internet (\$40/mth x 12 people each=\$480/month)	\$ 5,700
Total	\$65,000



A.) Accordingly, a very succinct Cash Flow is as follow:

Cash Flow for New Company , **Call Center-Support Business**

Monthly Cash Inflows (Income)		Monthly Cash Outflows (Expenses)	
4 Projected New Clients at \$3,500 per job. (After the 1 st 90 days)	\$14,000	(12) Operator/Help Desk salary (\$600/mth)	\$7,200
		Advertisement	\$100
		Internet	\$480
		7% dividend on the \$65,000 Investment	\$380
		Monthly payback to Investor (42 payments)	\$1,550
		Miscellanies	\$200
		Accounting	\$500
Total Monthly Income	\$14,000	Total Monthly Expenses	\$10,400



SUMMARY OF PROJECTION#1: A rough Summary of the monthly Cash Flow is: Cash Inflows (Income) - \$14,000 – Cash Outflows (Expenses) of - \$10,400 = \$3,600

#4.) CONSTANT STREAM OF CUSTOMERS

Much of this PLAN, Call Center-Support, needs to focus on how to obtain a **Constant Stream of Customers**. Here is a list of pro-active prospecting activities that David will need to implement in order to ensure that he has a **Constant Stream of Customers**.

- a.) Phone time availability is the KEY. Scheduling Operators for support is a primary task for this business.
- b.) Four groups of three operators focus on support of business during their ON-Time.
- c.) David will have 2 nightly gatherings a month. Constantly Recruit; be on the lookout for intelligent and motivated Operators.
- d.) Each worker utilizes the 5 x 8 postcard system: input weekly from into data base.

There are **5 specifics things** that David is accountable for each day:

1) **What will he do (specifically)?**

- a.) Always answer his phone.
- b.) Supervise 12 Operators (four groups of three).
- c.) Proactively make prospecting phone calls, when necessary.
- d.) Schedule the jobs with the 12 Operators and support their needs.
- e.) Solve any concerns.



2.) When will he do it?

- a.) His hours are from 8:00am to 4:00pm at his present job. He will work all other hours at this new business.
- b.) He is responsible for the day-to-day operations for the company. He will schedule his work, accordingly. Pro-active calls each day; he will monitor the 12 team members performance on a quarterly basis.

3.) How will this prospecting work?

- a.) Telephonically, pick up the phone.
- b.) Focus on Target markets/Affluent Small Businesses.

4.) Why do it at all?

- a.) Prospecting works.
- b.) Need to keep score.
- c.) Other advertising will follow in 3 - 6 months.

5.) How much should we call?

- a.) As much is needed ...can be adjusted
- b.) David will serve as the communication-hub of the new business.



#5.) DAILY PLAN

A.) Daily Plan for Workflow

- 1.) Notebooks, which describe a daily Plan of Action, will be completed daily by David and the Operators.
- 2.) Daily Plan is not optional.
- 3.) David will text the 12 Operators Support Team with the activities of the day.
- 4.) David will update daily by using a calendar...what everybody needs to work on.
- 5.) Reality: David will be constantly available for the 12 Operators Support Team.

B.) Daily Plan for David

- 1.) Develop communication processes (i.e. Billing, E-mail, Communication with Clients, Communication with the 12 Operators Support Team, Use of Book-Keeping Software).
- 2.) David will review appropriate information with the 12 Operators Support Team and Clients ... daily.
- 3.) Keep Executive Book with you at all times.
- 4.) COOPERATE with the Operators Support Team and Clients.

C.) Daily Plan for David and the Operators Support Team

- 1.) Incorporate Daily Plan for David and the 12 Operators Support Team into a working and cooperative overall Daily Plan.



#6.) ORGANIZATION

Organization is 1 of the 10 Components of creating a Fully-Developed Plan. When you are organized, you are serious about your work. When you are disorganized, you have little chance of succeeding.

A.) Organize your Target Market

- Target Residential and Small Business Community.
- Affluent Neighborhoods are prime candidates.
- Focus on Niche Markets: Schools, Small Business, Students, Parents.

B.) Organize your Clients

- Understand - the 80-20 Rule.
- Identify – know who your top 500 Clients are.
- Categorize/Segregate... don't waste your time on time-wasters.

C.) Organize your Desk

- David needs to keep his desk, and everyone organized.
- David handles all BILLING (100% of the billings should be electronically).
- Daily Action Plan needs to be printed-out each day by David.



#7 PERSONAL PREPAREDNESS

A.) Are you ready to do this?

- 1) David and the 12 Operators Support Team need to speak to each other each night to evaluate the day's activities and plan for the next day's needs.
- 2) David needs to train these 12 Operators into 4 different 3-person teams.
- 3) David has sufficient energy to entertain this business.
- 4) David wants this to be his retirement business income.
- 5) This re-focusing of his business life will be more profitable and a bit less stressful for him as he gets older.

B.) Personal Assessment

- 1) David is 37 years old. His physical and mental health is excellent.
- 2) David is excited to transition to his new businesses; and to focus on help clients to solve any concerns
- 3) There are no personal, business, or other obligations in his life that will impede him from doing this new business.

C.) Compelling Reason

There are **3 primary things** that David wants from this business.

- 1) Re-focus this business to serve this niche Call Center Client base.
- 2) To sell this type of business as a business opportunity (nationally ... after 1 of operations).
- 3) To allow him more flexibility – and to earn more income.



#8.) PROJECTIONS

I'll present 3 different Projections Scenarios ... which are Projections. The 1st Projection is from the CASH FLOW of this presentation. The last 2 Projections are just changes to the amount of business generated ... or jobs completed.

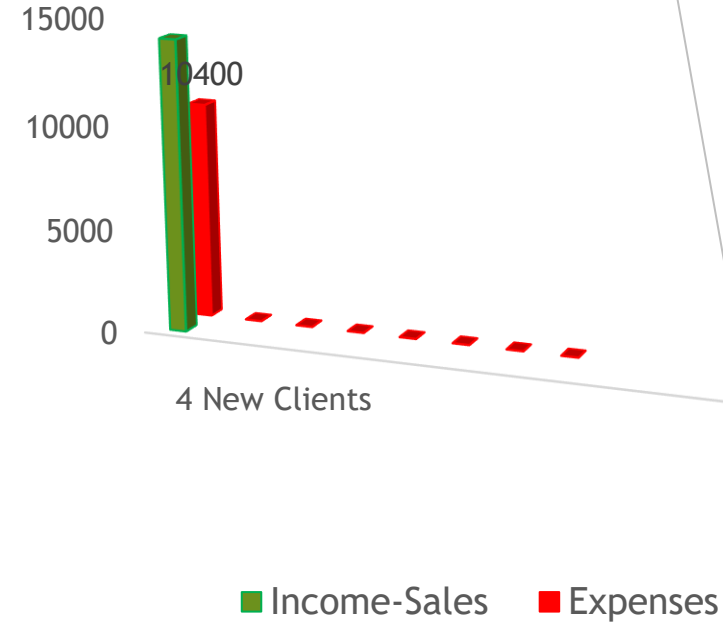
These Projections are simply meant to illustrate the projected revenue from activities. Four additional things to consider:

- #1.) These Projections have nothing to do with his present job.
- #2.) These Projections can be altered and reconfigured at any time.
- #3.) These Projections involve a 1-time Capital Infusion of \$65,000.
- #4.) These Projections should be reviewed with David and the Investor – against actual revenues – to determined actual expectations, going forward.



PROJECTION: SCENARIO#1

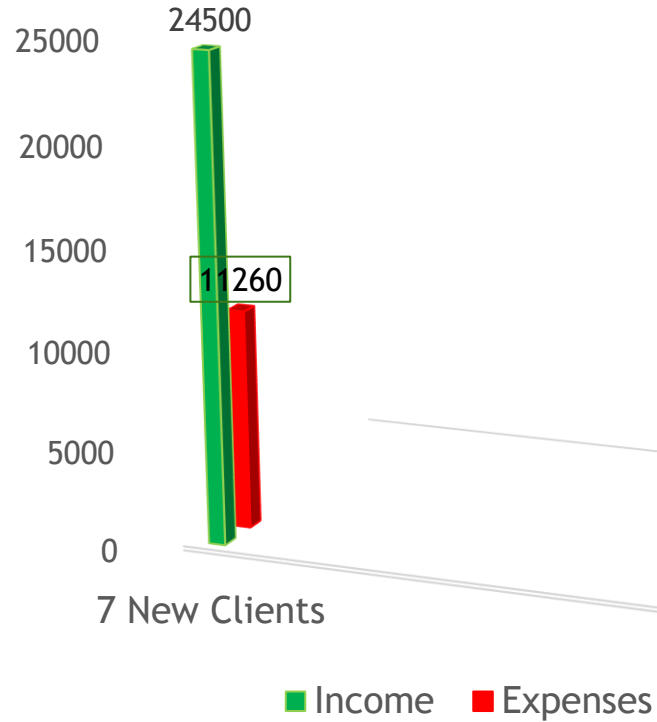
Monthly Cash Inflows (Income)		Monthly Cash Outflows (Expenses)	
4 Projected New Clients at \$3,500 per job. (After the 1 st 90 days)	\$14,000	(12) Operators/Help Desk salary (\$600/mth)	\$7,200
		Advertisement	\$100
		Internet	\$480
		7% dividend on the \$65,000 investment	\$380
		Monthly payback to Investor (42 payments)	\$1,550
		Miscellanies	\$200
		Accounting	\$500
Total Monthly Income	\$14,000	Total Monthly Outflow	\$10,400



SUMMARY OF PROJECTION#1: A rough Summary of the monthly Cash Flow is Cash Inflows (Income) - \$14,000 – Cash Outflows (Expenses) of - \$10,400 = **\$3,600 Positive Monthly Cash Flow.**

PROJECTION: SCENARIO#2

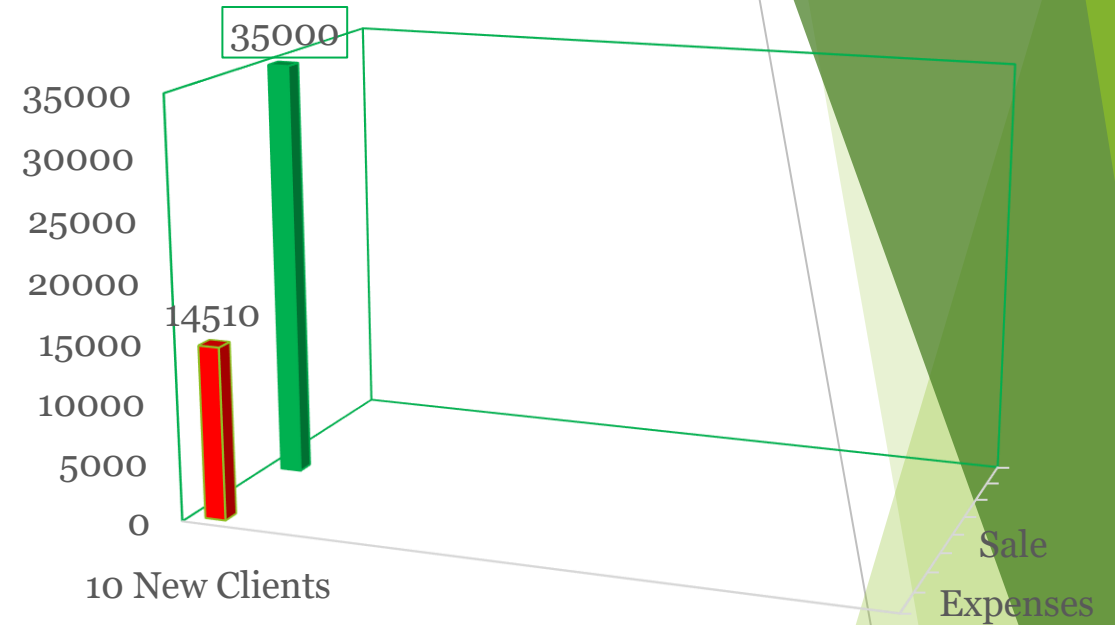
Monthly Cash Inflows (Income)		Monthly Cash Outflows (Expenses)	
7 Projected New Clients at \$3,500 per job. (After the 1 st 90 days)	\$24,500	(12) Operators/Help Desk salary (\$600/mth)	\$7,200
		Advertisement	\$200
		Internet	\$480
		7% dividend on the \$65,000 investment	\$380
		Monthly payback to Investor (42 payments)	\$1,550
		Miscellanies	\$750
		Accounting	\$700
Total Monthly Income	\$24,500	Total Monthly Expenses	\$11,260



SUMMARY OF PROJECTION#2: A rough Summary of the monthly Cash Flow is Cash Inflows (Income) - \$24,500 – Cash Outflows (Expenses) of - \$11,260 = **\$13,240 Positive Monthly Cash Flow.**

PROJECTION: SCENARIO#3

Monthly Cash Inflows (Income)		Monthly Cash Outflows (Expenses)	
10 Projected New Clients at \$3,500 per job. (After the 1 st 90 days)	\$35,000	(12) Operators/Help Desk salary (\$600/mth)	\$7,200
		Advertisement	\$300
		Internet	\$480
		7% dividend on the \$65,000 investment	\$380
		Monthly payback to Investor (42 payments)	\$1,550
		Miscellanies	\$1,000
		Accounting	\$1,000
		Travelling/Entertainment	\$3,000
Total Monthly Income	\$35,000	Total Monthly Expenses	\$14,510



SUMMARY OF PROJECTION#3 A rough Summary of the monthly Cash Flow is Cash Inflows (Income) - \$35,000 – Cash Outflows (Expenses) of - \$14,510 = **\$20,490 Positive Monthly Cash Inflow.**

#9.) CAPITAL INVESTMENT

The Capital Investment of \$65,000, as previously stated in Section #2 (Experienced People and Time Management), is as follows:

CAPITAL INVESTMENT

Based on the CASH FLOW AND PROJECTIONS, the CAPITAL INVESTMENT is \$65,000.

A.) The Investment of \$65,000, as previously stated, is as follows:

- (12) Operators (paying \$600/mth)
 infusion covers 1st 3 months \$21,600
- (12) iPhones: (\$600 each) \$ 7,200
- (12) iPad minis (\$600 each) \$ 7,200
- Chargers and Headsets for iPhones (\$100 each) \$ 1,200
- (12) New Magic jacks (\$50 each) \$ 600
- (12) New desk phones for the MJ phone # (\$100 each) \$ 1,200
- (12) New Plantronics wireless headsets (@ \$100 each) \$ 1,200
- (12) New Printers (\$300 each) \$ 3,600
- (12) Monitor (extra) Screen \$ 2,500
- (12) Laptops (\$600 each) \$ 7,200
- Software for 12 Laptops \$ 3,000
- Office Equip: (lamps, chairs, cables @\$250 each) \$ 3,000
- Advertisement for the 1st year (\$100/month) \$ 1,200
- Miscellaneous \$ 5,100
- Internet (\$40/mth x 12 people each=\$480/month) \$ 5,700
- Total \$65,000



B.) Parameters:

- 1–Time Infusion of \$65,000.
- Targeted infusion to cover specific costs (Advertising, Internet, Equipment, Miscellaneous, (12) Operators, Accounting, etc.)
- Collateral (All Equipment being purchased, is the property of the Investor, until payback is made in full.
- \$65,000 Infusion to be made upon completion of a signed EXECUTED AGREEMENT.

C.) Payback of Investment

- **DIVIDEND:** 7% - monthly to Investor, 36 days after initial infusion, (\$380 per month).
- **Each month,** Investor gets paid \$1,550 until \$65,000 amount (amount of total infusion), is paid in full. This results in an effective 42-month payback.
- **After \$65,000 is paid in full,** Investor is paid \$2,000 per month.
- **David is paid \$2,000 per month.** After 9 months of business activities, David and the Investor can choose to increase David's salary, depending on revenues. After Investor has been paid back the \$65,000 infusion, David will be free to decide his new salary.
- **After initial investment has been paid in full,** David reserves the right to utilize any excess profits as he deems appropriate.
- **David reserves RIGHT OF FIRST ACCEPTANCE/REFUSAL,** to buy out Investor. (Based on 10% ... or \$6,500).



EXECUTION OF THE PLAN (PLAN #7)
PLAN FOR CALL CENTER-SUPPORT
TERM SHEET

CAPITAL INFUSION: \$65,000

ENTITY: Business to be operated under Newly Formed LLC.

OWNERSHIP: Percentage of ownership is based-upon the described monthly payment to Investor and David. For example, Investor is paid \$1,550/per month for 42 months, until the \$65,000 is paid back in full. For LLC purposes, the percentage of ownership is 50% - 50%.

PAY-BACK: Investor is paid \$1,550 per month until \$65,000 infusion is paid

back in full. Thereafter, Investor is paid \$2,000/per month.

DIVIDEND: 7% dividend payable monthly to Investor, 90 days after initial infusion (\$380 per month). Dividend payment ceases when \$65,000 is paid in full.

DAVID PAY: David is initially paid \$2,000 per month; based on his direct participation on activities. After 9 months of activities, David and the Investor can change that salary, based on revenues.

ONGOING: After initial investment has been paid in full, David reserves the right to utilize any excess profits as he deems appropriate.

David reserves the RIGHT OF FIRST ACCEPTANCE/REFUSAL, to buyout Investor (based on 10% buyout, or \$6,500)

COLLATERAL: The Newly purchased Equipment is the property of the Investor.

COVENANTS:

- a.) David and Investor speak three times a week.
- b.) David reserves the right for acceptance/refusal when/if the Investor wants to sell his share and/or increase his Income-stream or additional infusion of capital is warranted.
- c.) David manages the everyday activities of the company.
- d.) Investor may interface with David and (12) Operators at any time.

PARAMETERS:

- a.) 1-Time Infusion of \$65,000.
- b.) Targeted infusion to cover specific costs ((Advertising, Internet, Equipment, Miscellaneous, (12) Operators, Accounting, etc).
- c.) \$65,000 Infusion to be made upon completion of a signed EXECUTED AGREEMENT.

Investment Made: _____

DATE: _____

David Pineda
Call Center-Support

(Investor)