

# Ambitious Edge ISA - Company Overview

End-to-end inside-sales follow-up: recruit, train, manage. A managed inside-sales department function installed, operated, and governed in your business.

## What Ambitious Edge ISA is

- A managed inside-sales follow-up function for residential real estate teams, brokerages, and high-volume producing agents.
- Dedicated full-time ISA resourcing per client (no pooling), with two-layer management (ISA + ISA Manager).
- Built around a certified operating system: SLAs, cadence, QA, reporting, and governance.

<b>Speed-to-lead + Nurture</b> SLAs and follow-up discipline so leads don't leak.	<b>Management + QA</b> Call QA and coaching loops that keep quality stable.	<b>CRM Integrity</b> Clean dispositions, notes, and stages for decision-grade visibility.
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## What it is not

- Not a lead-gen or marketing vendor. Your leads are your leads - we run what happens after the lead hits your CRM.
- Not a generic VA firm or call center. This is a dedicated ISA under standards and governance.
- Not a closing/negotiation service. Agents still consult, negotiate, and close.

## Typical outcomes (process-led)

- Faster contact and tighter follow-up discipline when lead inputs are consistent.
- More consistent qualification and appointment-setting standards.
- Cleaner pipeline tracking for better decisions and coaching.

## Delivery model at a glance

Install	Run	Govern
Recruit and onboard a dedicated ISA	Daily outreach + follow-up cadence (call/text/email)	Weekly scorecards + QA review + coaching loop
Definitions, scripts, and SOPs installed in your CRM	Dispositions, tasks, notes, and clean handoffs	Exception-based escalation + continuous optimization

## Client inputs that matter

- Lead flow routed into the CRM with source tags and timestamps (so speed-to-lead is measurable).
- A clear definition of Qualified and a consistent handoff rule to agents.
- Agent availability and fast response on handoffs (calendar discipline prevents leakage).
- Compliance posture confirmed (DNC, opt-out handling, recording/text consent).

# The Operating System

Systems, not heroics. We install standards, workflows, and governance so appointment production stays stable and measurable.

## The problem we solve

- Most ISA efforts fail for predictable reasons: the role is vague, 'qualified' is undefined, and reporting drifts into vanity numbers.
- Operators become the escalation point because the function lacks a management cadence and proof-quality documentation.

## The Ambitious Edge ISA Operating System

- Definitions that create integrity: what counts (and what doesn't) for qualified leads and qualified appointments.
- Workflows that make execution provable: routing, dispositions, tasks, handoffs, and calendar confirmation standards.
- Quality control: call QA, coaching loops, and certification gates before full production.
- Governance cadence: weekly scorecards, exception-based escalation, and continuous optimization.

<p><b>Designed before hiring</b> Diagnosis and role engineering first; then recruiting.</p>	<p><b>Measured in the CRM</b> System-of-record reporting; no black-box numbers.</p>	<p><b>Stabilize then scale</b> Quality gates first; volume second.</p>
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## What you get

- A dedicated ISA and a managed system that compounds (scripts, SOPs, dashboards, and coaching artifacts).
- A function you can run with visibility - not a person you have to babysit.

## Weekly cadence (example)

Activity	Cadence	Output
Scorecard review	Weekly	Driver trends + action items
Call QA sampling	Weekly	Coaching priorities + rubric scores
Pipeline hygiene	Daily	Clean stages, tasks, notes
Script/SOP updates	Monthly	Controlled iteration (no chaos)

## Core artifacts installed

- Routing map + attempt cadence by lead type.
- Disposition taxonomy + documentation standards (decision-grade CRM).
- Qualified Lead / Qualified Appointment definitions (what counts / what doesn't).
- QA rubric + coaching templates + certification gates.
- Governance agenda + escalation triggers.

# Engagement Models

Three operating models so you can match delivery to your team, systems, and management bandwidth.

## Choose the right engagement architecture

Ambitious Edge ISA is delivered through three operating models. The best choice depends on your lead flow, ops readiness, and how much management bandwidth you want to keep internal.

### Model 1: Managed Execution

- Best for teams with lead flow who want end-to-end delivery without becoming the sales manager.
- Includes: engineered role + recruiting + training + two-layer management + weekly governance.

### Model 2: Systems Build

- Best for operators who want to internalize the function, but need the operating system designed correctly.
- Includes: definitions, scripts, workflows, dashboards, QA rubric, and enablement plan; optional recruiting support.

### Model 3: Optimization and Turnaround

- Best for teams that already have an ISA, but need integrity: definitions, QA, reporting, and coaching standards.
- Includes: diagnosis, reset of standards/workflows, and a stabilization plan before scaling.

Fit-first	Clear boundaries	Governed delivery
We confirm inputs and constraints before committing.	No implied lead-gen or closing services.	Cadence + QA so performance doesn't drift.

## Quick selection guide

- Managed Execution - you want the full inside-sales function run under standards and governance.
- Systems Build - you want the operating system installed (and optionally you hire the ISA).
- Optimization - you already have an ISA, but need QA, governance, and measurable standards.

## Ownership at a glance

Model	You own	We own
Managed Execution	Offer, agent availability, compliance posture	ISA staffing + training, daily execution, QA + governance
Systems Build	ISA hiring (if internal), execution	Definitions, workflows, scripts/SOPs, reporting + playbooks
Optimization	ISA execution	QA, coaching loop, scorecards, controlled iteration

# The 6-Phase Delivery Roadmap

A phased build that stabilizes quality before scaling activity - so appointment production becomes durable, not personality-dependent.

## The six-phase delivery roadmap

Inside-sales execution is fragile when teams skip foundations. We use a phased build so standards and proof-quality workflows exist before scaling activity.

<p><b>Diagnose &amp; Align</b> Clarify goals, lead sources, definitions, handoffs, and constraints.</p>	<p><b>Build / Setup</b> Configure CRM + comm stack so execution is provable (fields, stages, routing, dashboards).</p>	<p><b>Recruit &amp; Onboard</b> Source and vet ISA talent matched to the engineered role.</p>
<p><b>Train &amp; Certify</b> Enable qualification discipline, objection handling, documentation integrity, and cadence.</p>	<p><b>Integrate &amp; Go-Live</b> Stabilize speed-to-lead, follow-up, and confirmations before scaling volume.</p>	<p><b>Operate &amp; Optimize</b> Weekly governance, QA, coaching loops, and continuous improvement.</p>

## Why the phases matter

- Definitions and workflows come before volume - otherwise reporting inflates and handoffs degrade.
- Certification gates prevent go-live with untrained behavior.
- Governance keeps performance stable through market shifts, list changes, and staffing transitions.

## Outputs + gates by phase

Phase	Key outputs	Gate to advance
1. Diagnose	Lead flow review, role scope, definitions, KPIs	Definitions + routing approved
2. Build	SOPs, scripts, CRM workflow, tracking	CRM fields/dispositions live
3. Recruit	ISA selection + onboarding plan	ISA hired + access provisioned
4. Train	Certification, talk tracks, QA rubric	Passes certification gate
5. Go-Live	Calendar rules, handoff, QA cadence	Stable execution for 2+ weeks
6. Operate	Weekly governance + optimization loop	Ongoing continuous improvement

## Client responsibilities

- Provide CRM access, lead routing rules, and source tagging.
- Confirm compliance posture (DNC, consent, licensing boundaries).
- Ensure agent availability and response standards for handoffs.

# Definitions and Standards

Clarity that protects your agents and your pipeline. Strict definitions reduce inflated reporting and improve appointment quality.

## Definitions that protect your calendar

If 'qualified' is vague, appointments inflate and agents lose trust. We use strict definitions so what gets handed off is worth working.

### Qualified Lead (QL)

- Reachable contact with enough context to continue a real conversation.
- Relevant to your business and within a reasonable intent window.
- Documented in the CRM with accurate notes and disposition.

### Qualified Appointment (QAppt)

- Confirmed meeting with the right person, clear purpose, and documented context.
- Scheduled within agreed guardrails (timing, channel, and required information).
- Includes confirmation standards (reminders, reschedules, and show-rate hygiene).

### Held vs Set (and what doesn't count)

- Set = scheduled. Held = the prospect shows and the agent conducts the conversation.
- No-credit examples: duplicate bookings, no-shows without confirmation steps, or meetings that violate the definitions.
- The CRM is the system of record - if it isn't documented, it isn't reportable.

<p><b>Integrity</b> Definitions prevent number games and protect agent trust.</p>	<p><b>Coachability</b> Clear standards make coaching repeatable.</p>	<p><b>Visibility</b> Clean tracking improves decision-making.</p>
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## Counts vs doesn't count (examples)

Metric	Counts	Doesn't count
Qualified Lead	Confirmed intent + fit + next step captured	Just a conversation or 'maybe later' with no criteria met
Qualified Appointment	Confirmed date/time + buyer acknowledges + agent accepts	Tentative hold, no confirmation, or agent unavailable

## Minimum CRM documentation

- Lead source + timestamp (for SLA reporting).
- Disposition + next task/date (no orphan leads).
- Conversation notes that justify the qualification decision.
- Handoff record: who, when, and what the prospect agreed to.

# Scorecards, QA, and Governance

A simple cadence that keeps execution visible, measurable, and improving - without turning you into the sales manager.

## Decision-grade reporting

- Weekly scorecards tied to the CRM as the system of record (no black-box reporting).
- A small set of controllables that predict outcomes: speed-to-lead compliance, cadence adherence, and documentation integrity.

## What we track weekly (examples)

- Speed-to-lead SLA compliance and contact attempt coverage.
- Cadence compliance by segment (new leads vs database nurture).
- Qualification integrity: notes quality, disposition accuracy, and handoff completeness.
- Set vs held trends (and why) to isolate execution vs lead quality vs agent follow-through.

## Quality assurance + coaching loop

- Call QA sampling (where lawful/approved) using a simple rubric.
- Coaching outputs: targeted drills, talk-track corrections, and updated scripts when patterns emerge.
- Exception-based escalation so operators are not in the weeds daily.

Visibility	QA	Optimization
Weekly updates without constant pings.	Quality gates prevent drift.	Continuous improvement tied to proof.

## Sample scorecard (drivers, not vanity)

Driver	What it answers
Speed-to-lead SLA	Are we contacting fast enough to prevent decay?
Attempt coverage	Are we executing the required touch cadence?
Contact rate	Is reachability changing by source/campaign?
Qualification integrity	Are QL/QAppt standards being followed consistently?
Set to held integrity	Are appointments real and confirmed (not inflated)?
Documentation completeness	Is the CRM decision-grade for management?

## QA rubric dimensions

- Compliance + permission-based control
- Discovery quality + intent clarity
- Qualification logic (fit, timeline, motivation)
- Next-step control + calendar confirmation
- Tone, brand safety, and accurate documentation

# Compliance and Brand Protection

Conservative guardrails for calling, texting, recording, data access, and licensing boundaries - designed to reduce risk.

## Non-negotiables

- Honor all do-not-call requests immediately; document and suppress the same day.
- Text only with documented consent (or counsel-confirmed permissibility); include opt-out language and log messages.
- If calls are recorded, comply with applicable laws and use clear notice/consent language.
- No misrepresentation: identity, affiliation, licensing status, or intent.
- Never perform restricted licensed activities without proper licensing/sponsorship in the jurisdiction.

### **DNC request (say this exactly)**

Understood - I'll put you on our do-not-call list right now. Thanks for letting me know.

## How we handle common situations

- DNC request: acknowledge, stop pitching, document, and end politely.
- Where did you get my number?: explain the source, offer opt-out, do not argue.
- Recording refusal: stop recording where possible or end the call when consent is required.

## Data access posture

- Least-privilege permissions; access only what's necessary to execute the engagement.
- No database export or secondary use without written authorization; revoke access upon termination.

## Escalate same-day if

- A complaint, threat, or regulatory concern is raised.
- Consent is unclear (texting/recording) or an opt-out is disputed.
- A script deviation creates brand or compliance risk.
- Any unusual access/event suggests a data security issue.

# ICP Fit Guide

A fast way to see if a managed inside-sales function will work in your business - based on inputs, ops readiness, and agent follow-through.

## Primary fit

- Teams and small brokerages (3-20 agents) with consistent inbound lead flow and/or a meaningful CRM database.
- High-volume producing solo agents when volume supports a dedicated ISA.
- Operators who want measurable controllables and a governance loop (not heroics).

## Secondary fit

- Expansion teams entering new markets that need fast pipeline build and clean tracking.
- Leaders with compliance sensitivity who need structure and visibility.
- Teams with neglected databases and reactivation opportunities.

## Disqualifiers (not a fit)

- Inadequate lead flow or refusal to provide database access.
- Refusal to adopt speed-to-lead and routing standards.
- Weak agent follow-through on handoffs/appointments that can't be enforced.
- Expectation of guaranteed deals or revenue promises.

Lead inputs	Ops readiness	Agent behavior
Volume and quality matter.	CRM discipline and routing standards are required.	Handoff responsiveness must be enforceable.

## Fit scoring (0-8)

Category	0	1	2
Lead flow	Inconsistent	Moderate	Consistent + tagged
Ops readiness	No standards	Some process	Defined + enforceable
Agent follow-through	Slow/unreliable	Mixed	Fast + disciplined
Risk alignment	Unclear posture	Partial	Clear + conservative

Interpretation: 6-8 strong fit | 4-5 conditional fit | 0-3 not operationally ready yet

If conditional, we address one constraint first (routing/definitions, calendar discipline, or compliance posture).



# Client Readiness Checklist

Prerequisites that protect performance: access, definitions, routing, and agent participation - so outcomes are constrained by controllables, not chaos.

## What you provide for success

A managed ISA function works when inputs and handoffs are real. This checklist prevents a 'good ISA' from being set up to fail.

### Access + systems

- CRM access (system of record), dialer/text tooling, and calendar permissions for scheduling.
- Routing rules by lead source and time-to-response expectations (SLAs).
- Suppression lists, consent records (if texting), and recording settings where applicable.

### Definitions + standards

- Agreement on what counts as qualified lead and qualified appointment.
- Handoff requirements: what the agent receives (notes, context, confirmed time).
- Confirmation standards (reminders, reschedules, and show-rate hygiene).

### Agent participation

- Clear expectation for response time to handoffs and working booked appointments.
- Feedback loop: what agents report back so scripts and qualification tighten over time.
- Participation in a simple weekly cadence (governance call or written update review).

## Week 0 readiness checklist (minimum viable)

Item	Owner
CRM + dialer/text access provisioned	Client
Lead routing rules + source tags confirmed	Client + AE ISA
Disposition list + documentation fields agreed	AE ISA
Calendar links + availability rules set	Client
Handoff process + agent response standard set	Client
DNC/opt-out + consent posture confirmed	Client + AE ISA
Reporting dashboard baseline established	AE ISA

If prerequisites aren't met: We can proceed, but we'll slow go-live until routing, definitions, and calendars are stable (to protect quality and reporting).

# Alternatives and Differentiation

A factual comparison across common options - focused on management, QA, operating system, and accountability (not hype).

## How prospects typically compare options

There are several valid ways to run follow-up. The right choice depends on your management bandwidth, need for proof, and tolerance for drift.

## Options

Option	Best when	Common trade-offs
In-house ISA hire	You can recruit, train, and manage consistently and want full internal control.	Hidden management cost; quality and reporting can drift without QA and standards.
VA / admin follow-up	You mostly need admin support (light touches, reminders, data cleanup).	Inside-sales qualification is a different skill set; conversion accountability is limited.
Lead-gen vendor	You already have strong follow-up and need more top-of-funnel volume.	Lead volume increases but leakage remains if follow-up is weak.
Automation only	You want baseline nurture at scale and have a team that still makes live calls.	Automation can't replace real conversations for many leads.
Ambitious Edge ISA	You want dedicated resourcing plus a managed operating system, QA, and governance.	Requires inputs: lead flow/database access and agent follow-through; not a shortcut.

## Decision matrix (fast)

Criteria	In-house	VA	Lead vendor	AE ISA
Management burden	High	Med	Low	Low
QA + standards	Varies	Low	Low	High
CRM visibility	Med	Low	Low	High
Dedicated resourcing	Yes	Sometimes	No	Yes

## How to decide

- If you have strong management bandwidth and want full control, an in-house ISA can be excellent.
- If you mainly need admin cleanup or reminders, a VA can fit (but qualification often suffers).
- If you need volume, a lead vendor can help - but follow-up discipline still determines outcomes.
- If you want dedicated resourcing plus a managed operating system, AE ISA is built for that.