Monday Morning Call — August 3, 2026

Discovery Appointment Deep Dive + New Bonus Announcement | Host: Jason Reed | Guest: Mac McRoberts

---

[00:13:49] — Opening & Housekeeping

Jason welcomed new team members **Don Auberry** and **Kalie Ward** to their first Monday Morning Call. No cameras required on Monday trainings. Goal: keep calls under an hour so reps stay in the field.

> *"We're in the goldmine part of the year. This is the time when you want to be out there prospecting, setting appointments, doing presentations, getting proposals done, closing deals."*

[00:14:50] — July Bonus Recap

- Deals **active** with statements submitted → bonus should be paid.
- Deals **not yet active** → paid once accounts go live.
- No statement submitted → 30-day wait to verify volume.

[00:15:45] — NEW: 2-Month Bonus (August–September)

Bonus #1 — $10,000: 7 new dual pricing deals | Min $300,000 combined volume | Due by end of September

Bonus #2 — $2,000: 5 new traditional deals (surcharging counts) | Min $200,000 combined volume | Same window

> *"I don't care if you have zero pipeline built up. Start now."*

> *"Mac McRoberts: August, you're working your butt off, building that pipeline, closing deals — and installing them in September."*

[00:17:33] — The Prospecting Formula (Steve Miner, 10-year vet)

5 days a week. 9 to 5. 2 appointments set. 25 doors walked.

> *"It's a numbers game. You put the numbers in, the results happen. It's not hard. Go do it."*

- Hit at least **15–20 businesses minimum per day.** 3–5 won't build anything.
- You're not closing on cold walk-ins. You're building a list of 20–25 interested businesses to run through your 5-touchpoint cycle.
- Prospecting should not be miserable. You're meeting new people, beta-testing the market, and walking in knowing you're the most profitable customer they'll ever have.
- If you set 3–4 appointments in a morning, call it early. Work smarter.

[00:07:05] — ShopConnect Pro Update

John Mitchell asked about ShopConnect Pro — the bridge software connecting PCBancard processing to existing billing systems (law firms, healthcare, etc.). **Josh Yagow's update:** Early hiccups (text/email-to-pay, fee pass-through, surcharge line items on invoices) are resolved. Now running on all 3 account types. Customer service significantly improved.

> *"Josh: Step one — figure out what software the merchant is using. Confirm the integration exists on ShopConnect's site. Have them run a demo before you go in head first."*

- Law firms = simpler than Josh's early accounts. Fewer moving pieces.
- Contact **Kenny or Eric** in IT to coordinate with ShopConnect before approaching any merchant.

[00:22:30] — Main Topic: The Discovery Appointment

Jason called this the **#1 mistake in all B2B sales** — reps who skip straight to presenting instead of asking questions. The discovery call has one job: find a problem to solve.

The 4 goals of every discovery appointment:

- Build rapport and relationship
- Find a problem to solve
- Surface objections early — before the closing table
- Get pre-commitments + walk out with a statement

"90% of your talking during this call should be asking questions."

- You have about a **20% chance of closing on the first appointment.** Set expectations. This is rapport-building, not closing.
- Small talk first. Tour the business. Ask about family, how long they've been open, what they love about it. Business owners talk about their business the way parents talk about their kids.
- Do not open your pitch book until you have identified a problem. Going through it blind bores them to death.

[00:30:26] — Live Role Play: Discovery Appointment (John's Auto Service)

Jason walked a full discovery with John Mitchell playing a 27-year auto shop owner (Heartland, ~$50K/month volume, $1,500–$1,800/month in fees).

Discovery questions Jason modeled:

- How long have you been at this location?
- How are you accepting payments — terminal, software, or both?
- What do you like or dislike about your equipment?
- Who are you processing with, and how long?
- Does your rep check in on you regularly?
- How long does it take to get your funds?
- Does your processor give you access to capital quickly if needed?
- What would you change about how you accept cards?
- Roughly how much do you pay per month in fees?
- What are 2 things you think could help you grow — and why haven't you done them yet?

What the merchant revealed (without realizing it):

- High fees ($1,500–$1,800/month)
- Old terminal — no one ever offered an upgrade
- No local rep who advocates for them
- No access to capital
- Growth blocker: can't afford to hire another mechanic

Presenting the 3 options (after discovery, not before):

- **Traditional:** Lower existing fees, eliminate junk fees. $1,000 savings guarantee.
- **Dual Pricing:** $64.95/month flat fee — no more credit card fees. Perfect for auto service: customers have time to get cash while their car is being worked on.

- **Surcharging:** 3% added on credit cards only. Debit fees remain.

> *"Elimination sounds pretty good. → Most auto shops in the area chose dual pricing. → Merchant chose dual pricing. → Jason started filling out the application."*

The 'I need to think about it' version:

> *"I completely appreciate that. What part didn't quite make sense, so I can address it when I come back?"*

John's real objection: concern that customers would balk at a 3.99% card price on large bills. Jason's reframe: when your costs go up, you raise prices — and customers stay. This gives them a **choice** instead of a price hike. You're not raising prices on anyone.

[00:53:32] — The 5-Touchpoint Map (From the Role Play)

#	Touchpoint	What Happened
1	Cold walk-in	Introduced himself, took it away, set the appointment
2	Discovery appointment	Built rapport, found problems, got pre-commitments
3	Mid-week drop-in	Quick reminder — not pushy, building relationship
4	Friday — pick up statement	4th touchpoint, more rapport, statement in hand
5	Closing appointment	Proposal ready, objections already handled, close

> *"By the time I get to that closing table, I know what he cares about, what he worries about — and I can close."*

[00:58:57] — Q&A;: Converting a Merchant Already Surcharging

Mac McMillan asked how to convert a merchant already charging 3% surcharge to dual pricing at 3.99%.

> *"Mac McRoberts: They usually don't even know they still have a bill. Get the statement. Show them their bill went from $5,000 to $600 — but that's still $7,000 a year. Build the proposal on that. Would you like it back? There's no data showing customers care about the difference between 3% and 3.99%."*

- Compliment them first: *'Great job offsetting your fees — you've got the concept right.'*
- Then ask: *'So why are you still paying fees at all?'*
- Very few companies can offer **compliant dual pricing.** The merchant may not even know it's available.
- Ask if customers complained since they started surcharging. Answer is almost always: 90% don't notice, 10% don't care.

[01:08:29] — Mac McRoberts' Closing Nugget

> *"We're looking for a problem, then we're solving it. A lot of times, the problem isn't even the cost. I closed someone a couple months ago because they didn't get a paper statement. Write it down, present it right before the pitch, say you're solving their problems."*

Jason: Don't assume it's fees. That's just the cherry on top.

[01:09:12] — Send-Off

> *"August and September — go out there. Let's put $10,000 in your pocket. Use your mentors, use Mac, use the office. The more of you hit this bonus, the more PCBancard grows."*
