

Client Onboarding Communication Scripts

This page contains all client onboarding communication scripts — covering welcome messages, document collection requests, portal setup instructions, and first-week check-in templates.

This page provides all **Client Onboarding Communication Scripts** for Crowned Credit CSRs. The onboarding process is one of the most critical phases of the client journey. A smooth, professional onboarding experience sets the tone for the entire client relationship. CSRs are responsible for guiding new clients through portal setup, document collection, credit monitoring enrollment, and service agreement completion.

Onboarding Checklist Overview

Before a client can begin their first round of disputes, all of the following must be completed. CSRs should track each item per client and send follow-up messages for any outstanding items.

Onboarding Step	Who Completes	Status Tracking
Client portal created in DisputeFox	CSR	GHL note + stage update
Onboarding tutorial link sent to client	CSR	GHL note
Driver license copy received	Client uploads via portal	DisputeFox document log
Proof of address received (utility bill or bank statement)	Client uploads via portal	DisputeFox document log
Social Security card copy received (or 2 POA alternatives)	Client uploads via portal	DisputeFox document log
SmartCredit or MFSN enrolled - Premium plan	Client	GHL note with credentials
Service agreement reviewed and signed	Client via portal	DisputeFox agreement log
Onboarding complete message sent	CSR	GHL note

Portal Creation Notification Script

Send this immediately after creating the client portal in DisputeFox:

SMS - Portal Just Created

“ Hey [Name]! Check your email. I have just finished completing your client portal. You should have the login in your email and we highly recommend downloading our mobile app - it makes the entire onboarding process much easier. Please watch this tutorial first before completing onboarding: <https://getcrownedcredit.com/onboarding/> - It shows you exactly what to do. Completing onboarding incorrectly can result in processing delays. Send us a message here when completed. - Crowned Credit

Document Collection Scripts

SMS - Requesting All Onboarding Documents

“ Welcome to Crowned Credit! To get started on your credit file, we will need the following documents:

Required Documents:

- Driver License Copy
- Proof of Address (Utility Bill or Bank Statement)
- Social Security Card Copy

For credit monitoring, please sign up here: <https://www.smartcredit.com/crownedcredit>

Once enrolled, please send us your username and password.

Thank you for choosing Crowned Credit! Questions? Call or text us at (336) 310-0090.

- Crowned Credit Team

SMS - Following Up on Specific Missing Documents

Hi [Name], we are so close to completing your onboarding! We are just waiting on the following from you: [LIST SPECIFIC MISSING ITEMS]. Once we have those, our dispute team can get started on your file right away. Please send them as soon as you can so we do not lose any time!

SMS - No Social Security Card Available (Alternative Documents)

“ If you do not have your Social Security card available at the moment, no worries. You may instead provide us with 2 Proof of Address documents (for example, two utility bills or a utility bill and a bank statement). Please send those and we will be able to proceed from there.

Credit Monitoring Enrollment Scripts

SMS - Asking Client to Set Up SmartCredit

“ Hi [Name], we need your 3-bureau credit report to begin working on your file. Please sign up for SmartCredit using this link: <https://www.smartcredit.com/crownedcredit> - Once enrolled, please send us your login username and password so our team can access your report and begin preparing your disputes. If you have any trouble signing up, let us know right away!

SMS - SmartCredit Plan Upgrade Required

“ We are one step away from completing your onboarding and beginning your first round of disputes. We noticed your SmartCredit subscription is currently on the Basic plan. Please log in and upgrade to the Premium plan - since we need your full 3-bureau report, the Premium plan is the most effective and cost-efficient option for your goals. Once upgraded, let us know and we can get started!

Billing Date Setup Scripts

SMS - Asking for Preferred Billing Date

“ We are setting up your monthly billing schedule going forward. What day of the month works best for you to be billed starting next month? Please let us know and we will adjust it accordingly.

SMS - Confirming Billing Date

“ Thanks! We have adjusted your billing date to the [DATE] of each month. Your next payment will be due on [NEXT DATE]. Let us know if anything else comes up!

Service Agreement Scripts

SMS - Only Remaining Step is Signing Agreement

“ Almost done with your onboarding! All we need now is for you to review and sign the service agreement. Please log in to your portal using the link below and look for the agreement section: <https://getcrownedcredit.scorexer.com/Portal/login.jsp> - Use your portal login credentials to sign in and complete this final step. Send us a message once it is done!

Onboarding Completion Scripts

SMS - Onboarding Successfully Completed

“ Thank you, [Name]. Your reports have been successfully submitted to our Dispute Team and you are now on your way toward improving your credit! Once the disputes are filed, it typically takes about 30 to 35 days for the bureaus to respond. After that, we will update your credit report and send you the results via email. We will keep you informed throughout the

process and share any important updates along the way. In the meantime, do not hesitate to reach out if you have any questions. - Crowned Credit

Contact and Support Information to Share with New Clients

“ If you have any questions about the process or need clarification at any point, please do not hesitate to call or text us at (336) 310-0090. We are here to help and want to make sure your experience is as smooth as possible. You can also reach us by email at info@getcrownedcredit.com.

App Download Information

SMS - Sending App Download Links

“ Download the Credit Tracker app to track your progress on the go:

Apple App Store: <https://apps.apple.com/us/app/credit-tracking/id6477532250>

Google Play Store: <https://play.google.com/store/apps/details?id=app.credittracker>

Log in using your portal credentials once installed.

Common Onboarding Delays and How to Handle Them

Delay Reason	Action
Client has not submitted documents after 3 days	Send gentle reminder SMS. Offer to help if they are having trouble uploading.

Delay Reason	Action
SmartCredit enrollment incomplete	Resend signup link. Offer to walk them through it on a call if needed.
Service agreement not signed after 48 hours	Resend portal link with specific instructions on where to find the agreement.
Client does not have Social Security card	Accept 2 proof of address documents as an alternative.
Client has MFSN instead of SmartCredit	Proceed with MFSN if they already paid. Recommend switching at next billing cycle.

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