

Department Overview

Customer Service at a Glance

Welcome to the **Customer Service Department at Crowned Credit**. This team is the primary point of contact for all active clients and plays a critical role in delivering a smooth, consistent, and results-driven client experience from the moment someone signs up to the day they graduate with a transformed credit profile.

□ Department Mission

To effectively maintain active client relationships by providing a clear, professional, and reliable experience — ensuring every client feels supported, informed, and confident in the credit repair process.

What the CSR Department Does

The Customer Service Department manages the **entire post-sale client relationship**. Once a client pays and enters the system, they are entirely in our hands. We are responsible for:

- **Portal Setup & Activation** — Collecting documents, setting up DisputeFox and SmartCredit, and ensuring the client is onboarded correctly
 - **Active Account Management** — Monitoring every client's dispute pipeline, reviewing results, and communicating progress on a consistent schedule
 - **Client Communication** — Responding to all inbound SMS, calls, and emails within our defined SLAs; proactively reaching out with updates
 - **Retention & Satisfaction** — Handling concerns, de-escalating frustrated clients, and keeping clients engaged in the process to reduce churn
 - **Billing Support** — Resolving payment failures, managing subscription changes, and handling billing-related disputes
 - **Escalation Management** — Routing complex issues to the appropriate team lead or department head when they fall outside standard scope
 - **Graduation & Referrals** — Celebrating client wins, closing out graduated accounts, and securing referral and review opportunities
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Department Structure & Team Size

The Customer Service Department is composed of three specialized sub-teams, each with a defined scope and area of ownership:

Team	Headcount	Primary Responsibility	Owns
Onboarding Team	8-10 Specialists + 1 Lead	Convert new clients into active, engaged participants within 7 days	Docs collection, DisputeFox setup, onboarding call, SmartCredit activation
Billing Team	3-5 Specialists	Manage all payment and subscription-related issues	Failed payments, billing disputes, plan changes, account status (active/paused/cancelled)
Credit Case Specialists (CCS)	10-15 Specialists + 1-2 Leads	Manage active client accounts through the dispute journey	Dispute updates, client communication, progress monitoring, credit guidance, escalations

📄 About Our Team

Crowned Credit is fully remote. Our team operates across the Philippines, Nigeria, Colombia, and the Dominican Republic. All team members work in English and follow standardized SOPs to ensure consistent service regardless of timezone or location.

Core Metrics & Performance Standards

Every CSR team member is measured against the following key performance indicators (KPIs). These metrics define what good performance looks like and are reviewed on a regular basis by team leads.

Metric	Target	Why It Matters
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SMS Response Time	Within 2 hours (business hours)	Clients who wait too long churn; fast responses build trust
Call Answer Rate	>90% of inbound calls answered	Missed calls = missed opportunities to retain clients
Onboarding Completion Rate	>85% within 7 days	Delayed onboarding = delayed results = early churn
Client Retention Rate	Target: >80% monthly	Retention is directly tied to revenue sustainability
Escalation Resolution Time	Same shift or within 24 hours	Unresolved escalations compound into cancellations
Unread Inbox at End of Shift	Zero unread during business hours	Every unread message is a client left waiting
Update Call Completion	100% of scheduled calls completed	Proactive communication prevents reactive complaints

Service Standards & Expectations

All team members are expected to uphold the following standards at all times. These are non-negotiable behaviors that define how Crowned Credit operates.

Always Do

- Communicate clearly, professionally, and promptly
- Follow established SOPs before improvising
- Set realistic expectations — never overpromise results or timelines
- Take ownership of client concerns until resolved or properly escalated
- Log every client interaction in GHL with accurate notes
- Maintain confidentiality of all client data
- Escalate when in doubt — silence is never the answer

Never Do

- Guarantee specific score increases or removal timelines
- Ignore or delay response to upset or frustrated clients
- Give legal or financial advice outside your scope

- Log off without clearing your inbox or handoff notes
- Discuss internal team issues with clients
- Make promises you can't keep or haven't verified
- Skip escalations because you're uncomfortable asking for help

Tools We Use Daily

Tool	Purpose	Used By
GoHighLevel (GHL)	CRM, inbox (SMS/email/chat), automation, tasks, pipeline tracking	All CSR teams
Aircall	Inbound/outbound phone calls, voicemail, call recording	All CSR teams
DisputeFox	Dispute pipeline management, credit report tracking, letter generation	CCS, Onboarding
SmartCredit	Client credit monitoring — tracks score changes and bureau updates in real-time	CCS, Onboarding
Team Communication Channel	Internal team updates, shift handoffs, escalation alerts	All teams

How to Use This SOP

This wiki is your **primary reference** for daily operations. It contains every process, script, and guideline needed to perform your role effectively. If it's not in here, ask your team lead — and if the answer is valuable, it will get added.

- Use this section to understand the big picture and where your role fits
- Navigate to specific books and pages for step-by-step processes
- When in doubt, follow documented procedures before making judgment calls
- If a process is outdated or wrong, flag it — don't work around it silently

Remember

Understanding how the entire department operates — not just your role — makes you a better team member. The best CSRs at Crowned Credit know how onboarding, billing, and dispute work together. Learn the full picture.

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