Orientation Call

This page gives you the full script, checklist, and goals for the Orientation Call — which should be done after onboarding has been completed. This sets the tone for the program and manages expectations early on.

Orientation Call — Script & Checklist

The Orientation Call is the time where we can set client expectations early on to avoid any misconceptions about the process, as well as provide some key reminders to make sure the process goes smoothly. Keep it warm, confident, and energizing.

> **Call Overview**
> **Duration:** 5-10 minutes
> **Goal:** Welcome the client, set expectations, build trust, and provide all reminders
> **Tone:** Warm, professional, confident — like a trusted advisor, not a call center agent
> **Tools Open:** GHL (contact record), SmartCredit (ready but not yet reviewing)

Pre-Call Checklist

Complete these tasks before dialing:

Task	Done?
Confirm if onboarding has been completed	☐
Review the client's GHL contact record — know their name, plan, signup date	☐
Have the call script open and ready	☐

Task	Done?
Aircall is set to "Unavailable" if you are making an outbound call	☐

Call Script

Opening

Hi {{contact.first_name}}, this is [Agent] from Crowned Credit — just wanted to do a quick orientation after your onboarding and make sure everything is clear on your end. So as of now, your credit reports have already been forwarded to our Dispute Team, and you're enrolled in the [Essentials/Accelerated/Momentum] Plan at [$99 per month/$199 per month/a one time fee of $1095].

Your plan is billed monthly [except for Momentum], and it also includes our 90-day refund policy in the event that no major negative items are removed within that timeframe. In terms of timeline, you can expect your first set of results within about 30 to 35 days, since that's the standard investigation period with the credit bureaus.

Client Responsibilities

"While we're working on your file, there are a few important things on your end:

- Keep an eye out for messages in the portal from our dispute team
- If you receive any letters from creditors or the bureaus, don't respond to them — just upload them to your client portal so our team can review
- Make sure to keep your credit monitoring subscription active so we can continue accessing your reports
- Avoid making payments on any collections or charge-offs that are currently being disputed
- But continue making on-time payments on any active accounts you have."

Normalize Fluctuations

"Also, just a heads up — your credit score may fluctuate during the process, and that's completely normal while disputes are ongoing."

Where Updates Happen

"All updates will be posted in your client portal on a monthly basis, so that will be your main place to track progress. We also send a progress report through email."

Support + Accessibility

If anything important comes up on your file, one of our Case Specialists will reach out to you directly. And of course, if you ever need anything, you can always give us a call at 336-310-0090 — we're here to help.

Closing

That's everything on my end — do you have any questions for me right now, or anything you'd like me to clarify? [If none,] Thank you for your time, and have a good rest of your day.

> ⚠ **Important — "ort-done" Tag:** After completing the orientation call, you **must** add the `ort-done` tag to the client's GHL contact record. This tag stops the onboarding automation from sending reminders to clients who have already completed onboarding and orientation. If you skip this step, the client will receive confusing "complete your onboarding" messages — this causes unnecessary support tickets and a bad client experience.

Post-Call Checklist

Task	Done?
Update pipeline stage to "Orientation Call Complete"	☐
Add the "ort-done" tag to the client's GHL contact — This tag tells GHL the orientation is complete and prevents onboarding reminder automations from re-firing. Without this tag, clients will keep receiving "complete your onboarding" messages even after they are fully onboarded.	☐
Relay any additional concerns to the appropriate agent if there are any	☐
If the client did not pick up and it went to voicemail, send them the orientation SMS instead	☐

Orientation SMS Template

> *Hi {{contact.first_name}}, this is [Agent] from Crowned Credit-Onboarding. I just wanted to give you a quick recap on your onboarding.*
>
> *Your credit reports have been successfully submitted to our Dispute Team, and you’re enrolled in the (Essentials/Accelerated/Momentum Plan) for ($99/$199)/month. [End at Momentum Plan for clients on Momentum.]*
>
> *Your plan is billed monthly and it includes a 90-day refund policy if no major negative items are removed. Most clients begin to see initial results within 30–35 days.*
>
> *While we’re working on your file, please keep the following in mind:*
> *• Check your client portal regularly for updates and messages from our Dispute Team*
> *• Keep your credit monitoring subscription active*
> *• Upload any letters you receive to your portal (no need to respond to them)*
> *• Avoid making payments on collections or charge-offs that are being disputed*
> *• Continue making on-time payments on your active accounts*
>
> *Please note that your credit score may fluctuate during the process this is completely normal. Updates will be posted in your client portal on a monthly basis.*
>
> *If anything important comes up, one of our Case Specialists will reach out to you. You can also contact us anytime at 336-310-0090 if you need assistance.*
>
> *We’re excited to work with you and help you reach your credit goals!*
>
> *[Agent]*
> *Crowned Credit – Onboarding*

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