

Post-Consultation Onboarding Callback SOP — 10–15 Minute Handoff

Overview

When a client books a consultation and the call wraps successfully (sale closed or services accepted), some clients ask for **live onboarding help by phone** instead of going straight to the self-serve onboarding flow. This page documents the standard handoff so closers, CSRs, and onboarding callers all use the same words and the same timing.

☐ **Created from #customer-support, April 24, 2026** — Heinz Aldana documented the live use of this SOP after wrapping a call with Natalie Lehmann who requested a callback for onboarding assistance.

The SOP — Closer / CSR Side

After the consultation/sale call ends, **if the client requests onboarding help via phone:**

1. **Confirm the request on the call.** Repeat back: *"Got it — you'd like one of our onboarding specialists to walk you through setup over the phone, correct?"*
2. **Set the expectation: 10-15 minutes.** Say exactly: *"An onboarding specialist will call you in the next 10 to 15 minutes."*
3. **Post in** `#customer-support` tagging the onboarding role with:
 - Client full name
 - That you just wrapped the call
 - That the client requested onboarding assistance via call
 - End with a thank-you to the team
4. **Do not promise email-only onboarding** when the client asked for a call. The phone callback is the commitment.

Example post (use this format)

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@Onboarding Team — just wrapped up my call with **[Client Name]**, she would like onboarding assistance via call as well. As per the new SOP, I advised her that an onboarding specialist would call her in the next 10-15 minutes ☐☐
Thank you!

The SOP — Onboarding Specialist Side

When a callback request lands in `#customer-support`:

1. **Claim it fast.** Reply "*on it*" in-thread within 2 minutes so the team knows it's covered and the closer can move on.
2. **Call the client within the 10-15 minute window** the closer promised. The clock starts at the closer's post, not when you read it.
3. **If you can't make the window**, immediately tag another onboarding specialist who can. Do not let the window slip silently.
4. **After the call**, post "**all good**" (or a brief outcome note) in the same `#customer-support` thread. This closes the loop and signals to the closer that the client was served.
5. **Tag completion in GHL** per the [ORT-Done Tagging Protocol](#).

Timing Rules

Step	Owner	Window
Closer posts handoff	Closer	Immediately after call wraps
Specialist claims	Onboarding	Within 2 minutes
Specialist calls client	Onboarding	10-15 minutes from closer's post
Specialist posts "all good"	Onboarding	Right after the call wraps

If the client doesn't pick up:

- **First miss:** wait 5 minutes, call again.
- **Second miss:** SMS via GHL with the standard onboarding text, log the attempts, post outcome in `#customer-support`.
- Do **not** consider the handoff closed until the SMS goes out *or* the call connects.

Why This Exists

Before this SOP, closers sometimes told clients "someone will reach out" with no time window, and onboarding callbacks could lag 1–4 hours. That created:

- Clients calling back into Aircall confused about who was supposed to call them
- Closers being asked for status mid-shift, breaking their pipeline focus
- Unclear ownership between closer, CSR, and onboarding teams

The 10–15 minute window plus a single Discord post plus an "on it" claim eliminates all three problems. **Stick to the script.**

When NOT to Use This Flow

- **Self-serve clients.** If the client says "I'll do the portal myself," skip the callback request and follow the [Day 0-30 Onboarding Process](#) automated flow.
- **Active-client re-onboards.** Existing clients re-engaging are routed to the **CSR team**, not onboarding. See the [AI Booking Agent — Appointment Reassignment](#) page for the active-client routing rule.
- **Outside business hours.** Onboarding is staffed **Mon-Fri 9 AM - 6 PM ET** ([Onboarding Callers — Availability and Hours](#)). For after-hours requests, log in `#customer-support` and the next-shift specialist returns the call at start of shift.

Related Pages

- Onboarding Callers — Availability and Hours
- Day 0-30 Onboarding Process
- Client Onboarding Communication Scripts
- ORT-Done Tagging Protocol
- AI Booking Agent — Appointment Reassignment & Missing Closer Records
- Speed-to-Call Protocol

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