Role Overview

This page outlines the full scope of the Onboarding Specialist role — what you're responsible for, what success looks like, and why this position is one of the most impactful on the entire team.

Role Overview — Onboarding Specialist

The Onboarding Specialist is the first human touchpoint in a new client's journey at Crowned Credit. This role is critical — it sets the tone for the entire client relationship and directly impacts retention, satisfaction, and results.

> **Role Purpose**
> Turn new clients into fully onboarded, engaged participants in the Crowned Credit program — ideally within 7 days of signup. The Onboarding Specialist bridges the gap between "just signed up" and "active in disputes."

Position Details

Field	Detail
Job Title	Onboarding Specialist
Department	Onboarding
Reports To	Onboarding Team Lead → Operations Manager
Primary Location	Philippines (majority) / Nigeria
Shift Type	Full-time, shift-based (Eastern hours preferred)
Tools Used	GoHighLevel (GHL), Aircall, SmartCredit, DisputeFox

Core Responsibilities

1. Portal Setup & Access

- Create the client's GHL contact record and sub-account portal within 24 hours of purchase
- Generate and send login credentials via email and SMS
- Troubleshoot any access issues the client experiences

2. SmartCredit Enrollment

- Guide the client through creating their SmartCredit account
- Ensure all three credit bureaus (Equifax, Experian, TransUnion) are pulling correctly
- Pull initial credit report and save to DisputeFox profile
- Note credit score from each bureau at the start date (baseline)

3. Document Collection

- Request and collect required identification:
  - Government-issued photo ID (driver's license, passport, state ID)
  - Proof of address (utility bill, bank statement — dated within 60 days)
  - Signed service agreement / authorization form
- Upload all documents to the client's GHL contact record and DisputeFox profile
- Follow up until all documents are received

4. Orientation Call

- Schedule and conduct the 5-10 minute orientation call after onboarding is complete
- Follow the Orientation Call script
- Set expectations for the credit repair timeline, communication cadence, and client responsibilities
- Answer initial questions and address any anxiety or skepticism

5. Onboarding Call

- This is done on a case to case basis if the client or closer requests it
- Guide the client smoothly through the onboarding process

6. Transition to CSR Team

- Once onboarding is complete (portal + docs + both calls done), mark client as "Onboarding Complete" in GHL pipeline

- Ensure DisputeFox profile is complete and ready for Dispute Team to begin Round 1

Required Skills & Qualities

- **Excellent English communication** — both written and verbal. Client-facing calls require clear, confident, warm delivery.
- **Empathy and patience** — many new clients are anxious or skeptical. The Onboarding Specialist must put them at ease quickly.
- **Attention to detail** — missing a document or a wrong date on a form can delay the dispute process by weeks.
- **CRM fluency** — must be comfortable navigating GHL, updating pipelines, and logging notes accurately.
- **Organization and follow-through** — each specialist typically manages 20–40 clients in various stages of onboarding at once.
- **Problem-solving mindset** — clients will have tech issues, missing documents, and scheduling conflicts. Find solutions, not excuses.

> **Pro Tip for New Onboarding Specialists**
> The first 72 hours after a client signs up are the highest-risk period for churn. If a client doesn't hear from us within 24 hours, they start to have doubts. Speed, warmth, and professionalism in those first interactions directly determines whether they stick around for months or cancel after week one. Prioritize new signups above everything else.

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