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**SOP- Client Care Inbox - Systems Vault**

**PREREQUISITES**

[Master: SOP- Client Care- Systems Vault](https://docs.google.com/document/u/0/d/1Z4sj_avVyYRnrrNoJP47GlVQT21g6zG0NKQUVAiAkmY/edit)

SN Template (Email)- General Autoresponder

[team@sarahnoked.com](mailto:team@sarahnoked.com) access

[Ontraport](http://sarahnoked.com/ontraport)

[Teamwork PM](http://sarahnoked.com/teamwork)

[Master: URLS (master links)](https://docs.google.com/spreadsheets/u/0/d/1mlQjpjNMlD4NJVtNFufaUVEE326vNw4TkKrwULAD43U/edit)

SOP- Banning Non-Paying Clients - Sarah Noked OBM

SN MASTER: Client Care Email Templates

**PURPOSE**

To follow up quickly with requests and issues in the client care inbox. To ensure our clients always have the best possible experience with us, even if they are being negative or disrespectful.

**POLICY**

We use [team@sarahnoked.com](mailto:team@sarahnoked.com) to manage client care inquiries and requests and for keeping accurate accounts of client correspondence.

Client care management officially happens daily **Monday to Friday.** Sunday we check in for urgent emails, but most are left for the client care VA to take care of Monday.

***As a general rule, all email inquiries should be answered within 24 hrs.***

This canned email SN Template (Email)- General Autoresponder is automatically sent when ANY inquiry comes in to [team@sarahnoked.com](mailto:team@sarahnoked.com) reinforcing our policy to respond within 24-72 hours on working days.

As a general rule of thumb, client care requests sent to any @sarahnoked.com team member email addresses should be forwarded to [team@sarahnoked.com](mailto:team@sarahnoked.com) so that we are replying from one central place.

**Note:** [info@sarahnoked.com](mailto:info@sarahnoked.com), [obm@sarahnoked.com](mailto:obm@sarahnoked.com), [partners@sarahnoked.com](mailto:partners@sarahnoked.com) and [support@sarahnoked.com](mailto:support@sarahnoked.com) are all aliases under [team@sarahnoked.com](mailto:team@sarahnoked.com)

Always archive and **never delete emails** from the [team@sarahnoked.com](mailto:team@sarahnoked.com) inbox.

If you are have questions or concerns please contact the Operations Manager

This SOP is for general client care inquires, tech, billing, affiliate/JV management is handled here: links to SOPs

At times, we encounter difficult customers and contacts from our list. We do our best to provide resolution and polite response but we tag this contact in Ontraport for internal use. If possible, we remove this contact from our Confident OBM Community Facebook Group and ban them. See: SOP- Banning Non-Paying Clients - Sarah Noked OBM

**PARTY**

Virtual Assistant

**PROPERTY**

Online Business Manager

**PROCESS/ CATEGORIES**

**Part 1: Review Client Care Email Inbox**

**Part 2: Reply and Follow up**

**Part 3: Sending Copies of Invoices**

**PROCEDURE**

\*\* Client inquiries are sent across a variety of issues detailed in the SN MASTER: Client Care Email Templates spreadsheet.

**Part 1: Review Client Care Email Inbox**

1. Screen Emails:
   1. Review emails in the inbox
   2. Screen for urgent issues
2. Label/Tag Emails:
   1. Tag the person: the assignment map with details of the person to tag can be found in our SN MASTER: Client Care Email Template sheet, on the second tab.
   2. Tag the department according to the following naming conventions:
      1. ACCOUNTS & BILLING: this label is applied for any payment or billing related inquiries.
      2. GENERAL CLIENT CARE: this label is applied for general client care inquiries that are not related to payment issues, tech, affiliates/partners, course inquiries (from students) or feedback from courses or sales/SQL (sales qualified leads)
      3. PARTNERS & AFFILIATES: this label is applied to all inquiries related to promotions (people wanting to promote SN or people wanting SN to promote their products) as well as podcast interview requests, guest post requests and summit requests and should be forwarded to [tovi@sarahnoked.com](mailto:tovi@sarahnoked.com) and archived.
      4. PROGRAM MANAGER- this label is applied to all inquiries related to programs including questions from students and feedback
      5. SQL (Sales Qualified Lead): this label is applied to all inquiries that are qualified sales leads. These emails should be forwarded to [sarah@sarahnoked.com](mailto:sarah@sarahnoked.com) and archived.
      6. TECHNICAL ISSUES- this label is applied to all inquiries that are technically related, such as login access, issues with members area, etc.
      7. CLOSED TICKETS- this label is applied when the ticket is complete and there is no further action needed. Once a ticket is closed it should be archived.

**Part 2: Sorting and Replying to Inquiries**

Some emails require no follow up reply and can simply be closed and archived. For example, Wordpress notification emails that a member has changed their password

General email inquiries can often be answered with a simple canned response. The ones marked “General Client Care”. If you have any questions about the reply or are unsure of how to reply, follow these steps:

1. First, look in the SN Master: Client Care Templates sheet for an accompanying SOP to the request.
2. If you are still unsure, send a message on TW chat to the SN Internal channel asking for assistance.

**Part 3: Sending Copies of Invoices**

**THRIVECART:**

1. Search for the contact in the search box
2. Find the transaction > click the ‘More’ button
3. You will be directed to the customer’s transaction summary
4. Scroll down until you see the Re-send to customer button
5. Click on that button then the invoice will now be sent to the contact.

**ONTRAPORT:**

1. Go to the contact’s record and head over to Purchases.
2. Under Transactions, hover over the transaction status.
3. Click on the tiny square beside it, and then choose “resend invoice”.

**Created by:**

**Department:** Operations & Support

**Date:**

**Revised:**

**Revised By:**