

## 3 Free Agency SOPs

Three of the operating procedures behind an AI automation agency — the qualification, sales-call, and onboarding flows you can copy.

### SOP 1 — Lead Qualification

- Trigger: a new lead comes in from any channel.
- Step 1 — Greet and set context in one short message.
- Step 2 — Ask exactly 3 questions: what they do, what result they want, and their rough budget/timeline.
- Step 3 — Score the lead: qualified (real intent + fit), nurture (interested, not ready), or disqualified (wrong fit).
- Step 4 — Qualified leads get a booking link immediately. Nurture leads enter a follow-up sequence. Disqualified leads get a warm, honest no.
- Rule: never let a qualified lead wait more than a few minutes for the next step.

### SOP 2 — Sales Call (question-led, not a script)

- Open — confirm what they want to get out of the call.
- Discover — ask more than you talk (aim 70/30). 'Walk me through what happens now when a lead comes in.'
- Quantify — 'How many leads do you think you lose to slow follow-up?'
- Reflect — summarise their problem back before you pitch: 'So the real issue is X — is that right?'
- Present — only after they've confirmed the problem, show the specific fix.
- Anchor on the cost of doing nothing, not just the price of the solution.
- Close with a clear next step framed as a question.

### SOP 3 — Client Onboarding (first 2 weeks)

- Day 1 — Kickoff call: confirm goals, map their lead sources, agree what 'qualified' means for them.
- Day 2-3 — Set up channels, CRM access, calendar sync, notifications.
- Day 4-5 — Test with real messages before going live; verify response time and routing.
- Day 8 — Go live, monitor the first batch of leads closely.
- Day 14 — First optimisation review: what's converting, what to tune.
- Deliverable: a short operation manual so the client's team knows exactly what happens and what to do.

The full AI Agency Starter Kit includes every SOP, template, pricing structure, and script needed to launch. Message us on WhatsApp to get it.

