

● [01 / PURPOSE & SCOPE]

SHOEB LODHI - GROWTH SYSTEMS ARCHITECT

Lead Response Automation SOP

Make every new inquiry reach a useful response and an accountable owner.

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Purpose: prevent missed inquiries, conflicting follow-up and context-free handoffs. I use this SOP to make the next action visible from intake through booking and sales acceptance.

Scope: new inquiries from forms, ads, portals, phone, chat, WhatsApp and manually entered leads. It covers capture, first response, qualification, booking and handoff. The service team owns delivery after an accepted sale.

Entry: a valid new inquiry or a reviewed reactivation request. **Exit:** accepted handoff, agreed nurture, closed inquiry, invalid record or suppression, each with a recorded reason.

New → Validated → Assigned → Responded → Qualified → Booked → Handoff accepted

Document control

Business / service / applicable locations

SOP owner / approving manager

Effective date / next review date

CRM / inbox / calendar systems

Staffed hours / contact hours / timezone

Duty contact / backup / incident channel

Non-negotiable operating rules

- ☐ Every active inquiry has one owner, one next action and a due time.
- ☐ Check permission, contact hours and suppression before every outbound action.
- ☐ Use approved facts and questions. Unknown answers remain unknown.
- ☐ AI agents identify themselves and offer a human route.
- ☐ Confirm a booking only after the calendar accepts it.
- ☐ Keep a shared history so a reply or opt-out stops competing workflows.

Before adoption: replace the example targets, name the people behind the roles and approve the communication and data policies. Timing examples are operating choices, not industry benchmarks or legal requirements.

● [02 / ROLES & SERVICE LEVELS]

Name the owner before the timer.

RACI describes human accountability. AI and automation can execute approved steps, but they do not own an exception.

LD: lead desk. **SA:** assigned sales agent. **RO:** revenue operations. **DM:** duty manager.
R: performs the work. **A:** accountable decision owner. **C:** consulted. **I:** informed.

Activity	LD	SA	RO	DM
Capture, validate and deduplicate	R	I	A	C
Permission and first-response process	R	I	A	C
Qualification and booking	R	A	C	I
Prepare and accept the handoff	R	A	I	C
Capacity and overdue escalations	C	R	C	A
Approve and release workflow changes	C	C	R	A
Daily QA and source reconciliation	R	C	A	I

Example service-level targets

Timer starts at	Example target	Overdue action
Valid inquiry received	Acknowledge within 1 clock minute where permitted.	LD checks intake and delivery queue.
Staffed queue entry	Assign an owner within 2 staffed minutes.	DM allocates a backup.
Staffed queue entry	Attempt a useful first response within 5 staffed minutes.	DM reviews capacity and the failed action.
Booking confirmed	Assigned SA accepts handoff within 15 staffed minutes.	Backup SA, then DM takes ownership.
Human help requested	Acknowledge immediately; person reviews within 15 staffed minutes.	DM provides a realistic callback commitment.
After-hours inquiry	AI acknowledges when permitted; human reviews in the first 30 minutes of the next shift.	Opening-shift LD reconciles the overnight queue.

Clock time runs continuously. Staffed time runs only within the approved shift calendar. Contact-hour restrictions can defer a send; keep the original receipt time and log the reason. Report automated acknowledgement and two-way contact separately.

LD / SA names and backups

RO / DM names and backups

Approved targets / staffed calendar / escalation destination

● [03 / PROCEDURE 1-3]

Capture, assign and respond.

01 / Register and validate the inquiry

Owner: LD. Trigger: source event received.

1. Save the source event ID, received time and original message. Create an inquiry linked to an existing contact when appropriate.
2. Validate a usable contact method, service interest and source. Mark missing or disputed data for review rather than guessing.
3. Check duplicate events and active inquiries. A retry must not create a new sequence, assignment or booking.
4. Record channel preference, language and permission evidence. Check suppression before any contact action.

Completion evidence: inquiry ID, contact ID, source, received timestamp and valid, invalid, duplicate or review status.

02 / Assign one accountable owner

Owner: LD, with RO routing rules.

1. Preserve an appropriate active relationship owner. Otherwise filter by service, language, shift and available capacity.
2. Assign a named person or a queue with a named duty owner. Start the acknowledgement timer.
3. If the assignment is unaccepted, route to the backup at the approved threshold. Notify the DM if no eligible person is available.
4. Log any reassignment with old owner, new owner, reason and time.

Completion evidence: owner, acceptance state, next action, due time and backup route.

03 / Send the first useful response

Owner: LD or an approved AI flow under LD oversight.

1. Read the inquiry and existing conversation. Answer the original request using approved information.
2. Identify the business and the AI assistant when automation converses. Ask whether now is suitable on a voice call.
3. Ask one missing question or offer one relevant next step. Do not send a generic pitch unrelated to the request.
4. Record attempted, delivered, replied or failed. A delivery receipt is not two-way engagement.

Hold conditions: unclear permission, wrong number, a complaint, sensitive advice or a request for a person pauses ordinary outreach and creates an owned review task.

Intake failure queue / daily reconciler

First-response template / approving owner

● [04 / PROCEDURE 4-6]

Qualify, book and transfer context.

04 / Qualify the next step

Owner: LD; SA accountable for the qualification policy.

- Ask the approved questions for goal, fit, timing and relevant constraints.
- Use existing answers. Confirm ambiguous numbers, dates and names.
- Separate confirmed facts, unknowns and questions for specialist review.
- Choose one outcome: ready to book, nurture by agreement, human review, not a fit, unreachable or opted out.

Completion evidence: required fields, outcome, reason and a dated next action. An AI recommendation alone is not an eligibility or suitability decision.

05 / Book the appropriate appointment

Owner: LD; assigned SA approves exceptions.

1. Choose the service calendar, location, duration and host. Confirm the lead's timezone.
2. Read live availability and offer clear dated options.
3. Read back the chosen slot and ask for explicit confirmation.
4. Create the booking once. Save the appointment ID before sending confirmation.
5. If the tool fails or the slot is taken, explain that nothing is confirmed. Offer a fresh option or an owned callback.
6. Send permitted confirmation and reschedule instructions. Changes update the original appointment and reminders.

06 / Prepare and accept the handoff

Brief field	Required content
Identity and context	Inquiry ID, source, goal, language and allowed channel.
Qualification	Confirmed answers, unknowns, objections and specialist questions.
Appointment	Booking reference, date, time, timezone, host and location.
Commitments	What was promised, by whom, and the relevant conversation reference.
Ownership	Accepting SA, next action and due time.

The SA acknowledges the brief and checks unresolved questions. Until acceptance, the LD retains responsibility for chasing the handoff. After the meeting, the SA records held, cancelled or no-show, the commercial next step and the due date.

- ☐ A handoff is complete only when a named person has accepted it.
- ☐ A live human conversation pauses overlapping AI and nurture messages.

● [05 / EXCEPTIONS & AFTER HOURS]

Escalate without losing the lead.

Trigger	Immediate action	Owner / closure evidence
Opt-out or wrong person	Stop the sequence, suppress the affected contact route and cancel queued sends.	LD verifies stop propagation; correction or suppression logged.
Human requested / complaint	Pause persuasion, acknowledge and create a priority human task.	DM assigns a person; accepted task and response logged.
Advice outside scope	Record the exact question without answering beyond approved material.	SA or designated specialist accepts review.
Overdue or unowned inquiry	Alert backup, then DM. Keep the original receipt time.	DM names a new owner and next action.
Connector / calendar failure	Queue a controlled retry; do not claim delivery or booking success.	RO reconciles source events and repairs affected records.
Duplicate or conflicting facts	Pause conflicting flows; preserve both histories for review.	LD corrects identity with an audit trail.
Potential data incident	Stop the affected workflow and use the approved incident route.	DM and designated data owner assess and direct recovery.

After-hours AI handling

AI voice, chat or WhatsApp may acknowledge and collect approved basic details within the reviewed contact policy. The agent identifies itself, states staffed availability and creates an owned task for the next shift. It does not imply a human is currently reviewing the case.

"I'm the AI assistant for [business]. The team is currently closed. I can record your request or check approved appointment options. The next staffed response window is [window and timezone]. Would you like a callback?"

A requested callback must be accepted by a staffed owner. In the next opening sweep, LD reconciles overnight sources, failed messages, pending callbacks and appointments. Urgent safety concerns follow the business's approved urgent-response process, rather than a sales sequence.

Pause and recover

RO pauses affected outbound actions, preserves inbound capture and logs the scope. Before replaying failed events, recheck permission, current owner and existing bookings. Resume only after the defect is understood and a test inquiry passes.

Pause control / permitted operator

Opening-shift sweep owner / time

● [06 / TEMPLATES & QA]

Use short, context-aware messages.

First response

“Hello [name], I'm [name or AI assistant] from [business]. We received your request about [specific topic]. [Approved useful answer]. May I ask [one missing question] so I can arrange the right next step?”

Human handoff and booking failure

“I will ask [team] to help with [specific question]. May I share this summary: [confirmed facts]? [Owner or team] will respond by [realistic staffed deadline and timezone].”

“I cannot confirm that appointment right now. It has not been booked. Would you prefer another available time or a callback?”

No-response follow-up and opt-out

“Would it help to clarify [one relevant point], or would you prefer us to close this inquiry for now?”

“Understood. I have recorded your request to stop this outreach. Thank you for letting us know.”

Do not say a request is recorded until the system has saved it. If a stop action fails, pause the sending workflow and escalate immediately.

QA checklist for a reviewed inquiry

- ☐ Source, inquiry ID, contact and receipt time match the original request.
- ☐ Permission, language and suppression state were checked before contact.
- ☐ One owner and backup were visible throughout the journey.
- ☐ AI identity and any approved recording notice were used correctly.
- ☐ Questions and summaries match the lead's actual answers.
- ☐ Unknowns and advice requests were routed to the right person.
- ☐ Booking, cancellation and reminder state agree with the calendar.
- ☐ The handoff was accepted and includes one dated next action.
- ☐ Replies, opt-outs and owner changes stopped stale queued messages.

Review method: inspect a mixed sample of booked, unresponsive, declined and escalated inquiries. Add every complaint, false confirmation and suppression failure to review. Log the defect, owner, fix and evidence of retest.

QA reviewer / sample period

Defect / correction owner / retest due

● [07 / METRICS & REVISION LOG]

Keep the process observable.

Metric	Definition and review
Capture coverage	Unique accepted inquiries / valid source inquiries. Reconcile daily.
Response and contact	Received-to-first-attempt and received-to-first-two-way-contact separately. Include unanswered records and report staffed versus clock time.
SLA attainment	Eligible inquiries completed within the approved target / eligible inquiries. State exclusions and pause rules.
Qualification / booking	Completed qualification / engaged inquiries; confirmed bookings / qualified inquiries. Use the same cohort window.
Handoff acceptance	Accepted handoffs / handoffs created, plus oldest unaccepted task.
Reliability and QA	Failed events, duplicate actions, opt-out defects and reviewed records needing correction.

RO owns definitions and source reconciliation. DM reviews capacity and overdue work. The dashboard must show the reporting timezone, cohort window and unique-inquiry rule.

Daily close and weekly review

LD closes the day by checking unassigned leads, unread replies, pending bookings and failed deliveries. Weekly, RO reviews defects with sales and the DM, approves one focused change, and retests the affected exit paths.

Revision log

Version	Date	Change	Approved by
1.0	October 2026	Source template issued; business adoption pending.	

Adoption approval / effective date

Next review / improvement owner

Want help implementing this?

Bring the completed role map, your lead sources and one missed handoff. We can turn this SOP into a working response system.

shoebloodhi.com/contact