

AI Lead Callback SOP

Call back within the hour and let a human close

THE PLAY (ONE LINE)

Have a named human call every new lead back within an hour, open with small talk, ask the fit questions a form can't, and book the follow-up before you hang up.

Why this matters

Rich picked up three new customers in one month. Each said the reason was speed: “We called back within an hour of the lead coming in off of AI.” AI finds the buyer, but for anything costly, “AI might have brought me there, but I want to talk to somebody.”

3

new customers in a month
(Rich Thomas, CHAOS)

1 hour

callback on AI-sourced leads
(Rich Thomas, CHAOS)

50%+

of service firms never responded
(Jake Melendy, Ignitvio study)

2%

of responders followed up twice+
(same study)

The 8 steps

- 1
- Name one owner for every new lead. Plus a backup. Leads alert their phone, not a shared inbox.
- 2
- Call back within the hour. Business hours: under 60 minutes. After hours: first call next morning.
- 3
- Read what brought them in. Page, request, search. “AI will get you there to one point, but now you have to do the rest of the work.”
- 4
- Put a human on the phone. Automate the alert and the “got it.” A person runs the conversation.
- 5
- Small talk first, then business. A few sincere minutes, respect their time, then lead into business.
- 6
- Ask the questions a form can’t. Three to five fit questions, every call. Rich asked height and weight to fit safety glasses.
- 7
- Make it right, then follow up. Fix old problems first. Book the next touch, date and channel, before you hang up.
- 8
- Ask every new customer why they picked you. Log the answer next to the lead source. Protect what keeps coming back.

Callback opener

1. “Hi, this is [name] at [company]. You reached out about [thing], so I wanted to call you myself.” 2. Small talk, two or three minutes. 3. “Tell me what you’re trying to solve.” 4. Your fit questions. 5. “I’ll send [X] today and call you [day].”

Lead log

Lead / source	Came in	Called	Follow-up date	Why they picked us

- ☐ Lead owner + backup named
- ☐ Alerts go to a phone, not an inbox
- ☐ One-hour callback rule written down
- ☐ Fit questions (3 to 5) written down
- ☐ Follow-up booked on every call
- ☐ “Why us?” asked and logged