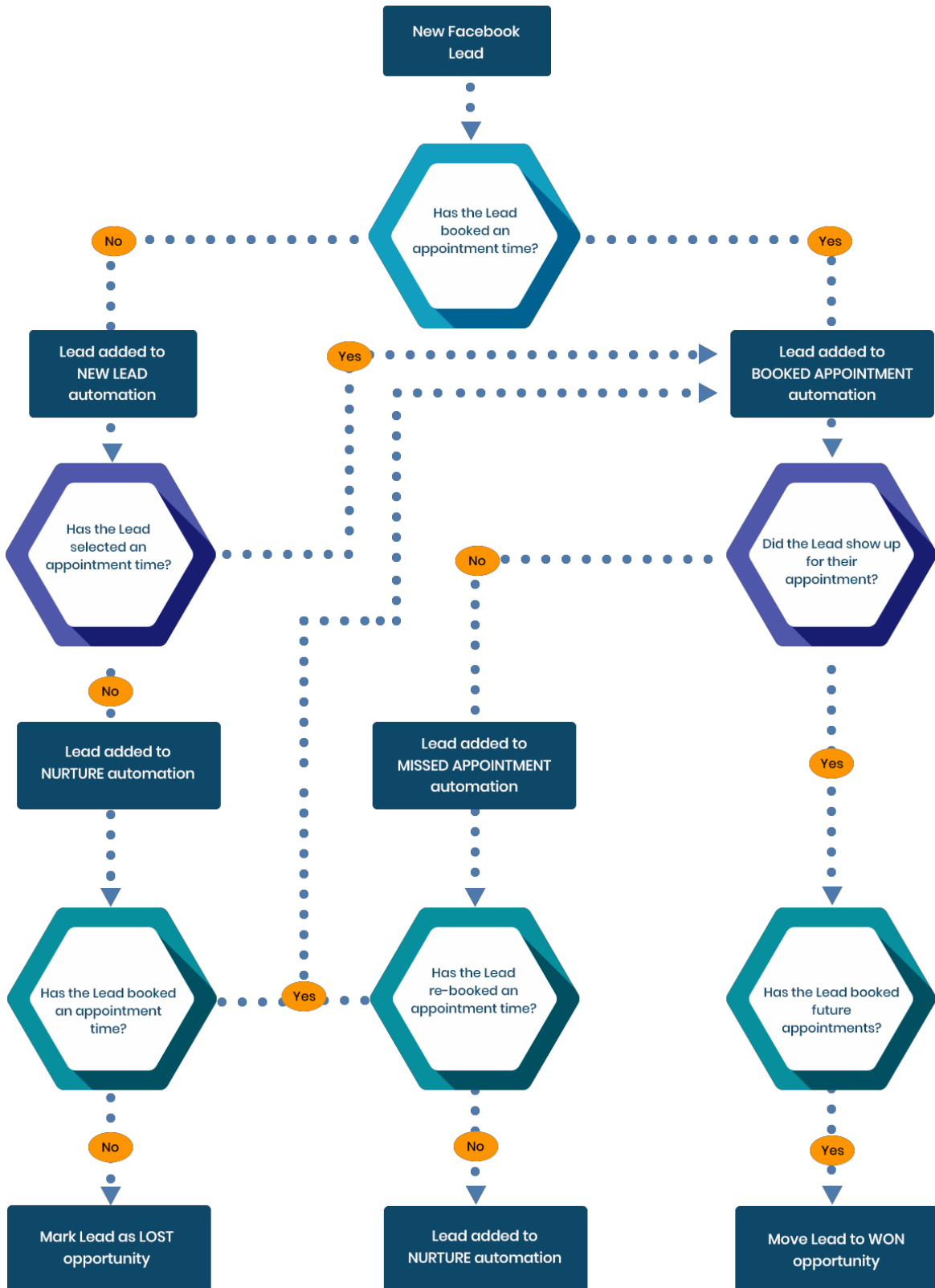


Summary of Automations

Lead management is easier with Innate Marketing! Our proprietary platform takes care of the follow up in automation without you lifting a finger! Learn more about our four core Lead Automations here.

The Lead Automation Workflow



New Lead Automation

The purpose of this automation is to nurture a new lead with the end goal of getting them to book an appointment with you in any of the following ways: online, by SMS, by email or by telephone. Each new lead will go through the below 5-day automation. The automation will stop if the patient schedules or responds to a message.

- **Day 1 of New Lead**

- **Automated Call** – Your office gets an automated call which connects you with the lead automatically.
- **SMS** – Lead gets a text message with your contact info urging them to schedule or call.
- **Email**- Lead gets an email with your contact info urging them to schedule or call.
- **Second Automated Call (3 hours later)** – If no success with any of the above, your office gets a second automated call which connects you with the lead automatically.
- **Voicemail (if no answer)** – Our system automatically drops a ring less voicemail in the Lead's voicemail urging them to call your office.

- **Day 2 of New Lead**

- **Automated Call** - Your office gets an automated call which connects you with the lead automatically.

- **Day 3 of New Lead**

- **Email**- Lead gets an email with your contact info urging them to schedule or call.

- **Day 4 of New Lead**

- **Reminder SMS** - Lead gets a text message with your contact info urging them to schedule or call.

- **Day 5 of New Lead**

- **Email**- Lead gets an email with your contact info urging them to schedule or call.

Booked Appointment Automation

The purpose of this automation is to remind a patient of their upcoming appointment in order to reduce no-shows.

- **Day 1 of Booked Appointment**
 - **Email** – When a Lead books an appointment, they will get a notification by email.
 - **SMS** - When a Lead books an appointment, they will get a notification by text message.
- **24 Hours Prior to Booked Appointment**
 - **SMS** – Lead gets a reminder text message 24 hours prior to their scheduled appointment.

Missed Appointment Automation

The purpose of this automation is to urge a Lead that has missed their new patient exam appointment to reschedule. All messaging is geared towards this. The automation stops if the Lead rebooks their appointment or responds to a message.

- **Day 1 of Missed Appointment**
 - **Automated call** – Your office gets an automated call which connects you with the lead automatically.
 - **Voicemail (if no answer)** - Our system automatically drops a ring less voicemail in the Lead's voicemail urging them to call your office
 - **SMS** - Lead gets a text message with your contact info urging them to reschedule their appointment.
 - **Email** - Lead gets an email with your contact info urging them to reschedule their appointment.
- **Day 2 of Missed Appointment**
 - **SMS** - Lead gets a text message with your contact info urging them to reschedule their appointment.
- **Day 3 of Missed Appointment**
 - **Email** - Lead gets an email with your contact info urging them to reschedule their appointment.



Nurture Leads Automation

The purpose of this automation is to nurture Leads that expressed interest but did not follow through with an appointment. We follow up with these leads for half a year following, urging them to book an appointment. The automation will stop if the patient schedules or responds to a message.

- **Day 1 of Nurture Leads**
 - **Email**– Lead gets an email with your contact info urging them to schedule an appointment.
- **Day 30 of Nurture Leads**
 - **Email** - Lead gets an email with your contact info urging them to schedule an appointment.
 - **SMS**–Lead gets a text message with your contact info urging them to schedule an appointment.
- **Day 60 of Nurture Leads**
 - **Email**- Lead gets an email with your contact info urging them to schedule an appointment.
 - **SMS**- Lead gets a text message with your contact info urging them to schedule an appointment.
- **Day 90 of Nurture Leads**
 - **Email**- Lead gets an email with your contact info urging them to schedule an appointment.
 - **SMS**- Lead gets a text message with your contact info urging them to schedule an appointment.
- **Day 120 of Nurture Leads**
 - **Email**- Lead gets an email with your contact info urging them to schedule an appointment.
 - **SMS** - Lead gets a text message with your contact info urging them to schedule an appointment.
- **Day 180 of Nurture Leads**
 - **Email**- Lead gets an email with your contact info urging them to schedule an appointment.
 - **SMS** - Lead gets a text message with your contact info urging them to schedule an appointment.



THANK YOU!

We're here to help anytime.



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