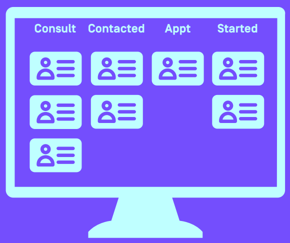
# PRACTICEBEACON QUICK GUIDE




**Call & Leave Voicemails Persistently**
5 Minutes / 2 Hours / 24 Hours
At Minimum

**Move Patient Opportunities To Columns**
In Real-Time
Every Day

**Respond Promptly**
Calls With Voicemails,
Texts & Emails

# POTENTIAL PATIENT FOLLOW-UP

What should our follow-up cadence look like?

1. PP Opts In To Ad
2. **1 min** — PB Sends 1st Text & Email To PP Within 5 Minutes
3. **5 min** — First Call Should Happen via PB Call Connect
4. **2 hr** — Manually Call Again Day 1
5. Connecting Text
6. **Day 2** — PB Sends 2nd Text & Email To PP On Day 2
7. **Day 2** — Third Call Should Happen via PB Call Connect

# TOP 10 TIPS

## 1 - It's Not Magic
PB isn't a magic tool that converts new patients on its own. Your team must put in the effort.

## 2 - Call Within 5 Minutes
Our most successful partners call PPs within 5 minutes of opting in to the ad.

## 3 - Be Persistent
Our most successful partners call/text PPs 6-12 times, and add notes and create tasks within PB. More than 93% of conversions happen after 6 attempts.

## 4 - Update Columns In Real Time
You need to move new patients through the columns in real time, if possible.

## 5 - Communication is Key
Make sure your team is communicating and moving Scheduled Appointments promptly to the appropriate columns such as Started Treatment, Pending, Now Show, Observation, etc.

## 6 - Keep Scheduled Appts Column Clean
Make sure PPs do not stay in the Scheduled Appointments column very long.

## 7 - Schedule PPs As Soon As Possible
If PPs are responsive to texts, then schedule them via text or ask them when they can speak to get more info.

## 8 - Make Calls Within PB
Use PB to make phone calls so they are recorded and tracked.

## 9 - Understand Lead Flow
Review the PB lead flow to understand the PB automations and how a lead flows through the nurture sequence.

## 10 - Don't Rely on Automations Alone
Be persistent and follow-up manually. If PPs don't respond to automations or outbound calls, we suggest creating tasks in PB for reminders to keep following up once a week with a call and text within PB. The most successful partners have a thorough follow-up process.