

- Action by Admin
- Action by Practitioner or Team Member
- Automated!!

Advertise/ Lead Gen

Prospect Registers

Confirmation Email  
Contains video + class info

Text Message  
Contains welcome video

24hr Reminder Email  
Includes testimonials from previous events

15min Before Email  
include link to video & link to Masterclass

15min Before Text  
include link to video & link to Masterclass

If did not show

Masterclass

If Discovery call not scheduled  
Separate Sequence for no-shows with replay

Text and Email for next event

If Discovery call scheduled

Nurture, Re-offer, Repeat

Pre-DC Emails & Texts Sequence  
+ Call the day before  
Include Pre-DC Video  
Practice Better Texts & Email Sequences

Follow up email  
1 day after Masterclass

Follow up email  
3 days after Masterclass

If PME is not sch If PME is not scheduled

Discovery Call

Follow up email  
5 days after Masterclass

Follow up email  
1 week after Masterclass

Nurture

If PME is scheduled

Re-offer

Add lead to Active Campaign

Downsell

Pre-PME Email  
Include new patient paperwork pre-PME  
video + confirm

Repeat

1 week (Thursday) Reminder call  
confirm all paper work is complete

24 Hr Reminder call  
Confirm all paperwork is complete and if spouse will be present

Nurture, Re-offer, Repeat

PME

