

# APPOINTMENTS & EDUCATIONAL WORKSHOP

## BINDER DELIVERY APPOINTMENT CONFIRMATION PROCESS



# 1

### AFTER APPOINTMENT IS SCHEDULED

Email appointment confirmation along with office map immediately after the appointment is made.  
(template available)



# 2

### THREE DAYS PRIOR TO APPOINTMENT

Email appointment reminder.  
(template available)

\*If email address is unavailable, "snail mail" a class reminder letter along with school map.



# 3

### DAY BEFORE APPOINTMENT

Call to confirm appointment.



# 4

### MORNING OF APPOINTMENT

Text message thru Infusionsoft or Keap.

\*If texting is unavailable, skip step.

