

APPOINTMENTS & EDUCATIONAL WORKSHOP

EDUCATIONAL WORKSHOP CONFIRMATION PROCESS



1

AFTER REGISTRATION IS SCHEDULED

Email confirmation along with school map immediately after registration. (template available)

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

2

SEVEN DAYS PRIOR TO CLASS

Text message thru Infusionsoft or Keap.

*If texting is unavailable, skip step.

3

THREE DAYS PRIOR TO CLASS

Email appointment reminder. (template available)

*If email is unavailable, call to remind registrant of the upcoming class. Confirm they are familiar with where to park and the location of classroom.

4

DAY BEFORE APPOINTMENT

Call to confirm registration.

5

MORNING OF APPOINTMENT

Text message thru Infusionsoft or Keap.

*If texting is unavailable, skip step.

If a voice message was left the previous day, call registrant to confirm.

