

APPOINTMENTS & EDUCATIONAL WORKSHOP

REVIEW 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.

