

# APPOINTMENTS & EDUCATIONAL WORKSHOP

## PROCESS FOR VIRTUAL APPOINTMENTS (EW, 1ST, 2ND, 3RD, BINDER DELIVERIES AND REVIEW APPOINTMENTS)



# 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.

# 5

### 15 MINUTES BEFORE APPOINTMENT

Email the Zoom link (or whichever preferred virtual entity) to the prospect 15 minutes prior to the appointment

