

New Patient Onboarding – Part 2

Follow-up after initial inquiry



Inspire confidence



Provide overview of how you work with patients and what CR process looks like



Explain next steps

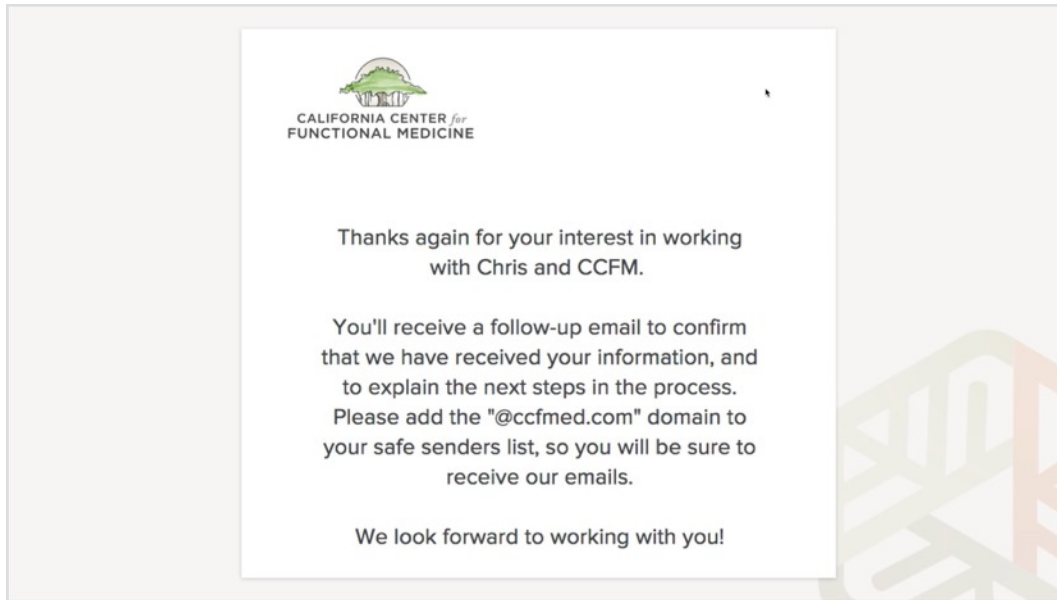


Offer support

So after the initial application is submitted, the next step is to get them registered in your electronic health record and to schedule their initial consult, and this can happen in one of two ways: it can be automated via email and electronic, or it can be a phone call. If you're just getting started and only getting a few inquiries a week, you might want to do a phone call; also, this comes down to personal preference and personality to some degree. Some people really feel more comfortable following up with a phone call than with an email or automated process, so there's no right or wrong way to do it, but if you're getting really busy and you're getting multiple inquiries a week and you have a full practice, I think automating the process probably makes more sense.

As a general principle, what we've discovered from doing this for a long time is that automating repetitive tasks and things that can be automated is a really good idea because that frees up more time and attention for stuff that can't be automated or shouldn't be automated, things that require some kind of personal interaction or sensitivity that isn't possible with an automated electronic process, and that's really the value of automation and technology. The goal is not to automate everything; the goal is to automate what can be automated so you have more time to create that higher-touch experience for the things that really can't or shouldn't be automated. Not only can they be added to an e-mail list, but you can trigger something called an autoresponder, and we're going to talk a little bit about that in a second, but basically it just means that if they fill out that application then they get added to an email list and they get automatically sent an email with some follow-up information.

So here's what we do, and this is actually in the process of changing right now, we're updating our process so I don't have screenshots for the next iteration, but I'll tell you a little bit about it. After the patient submits the Wufoo application to become a new patient, they see this confirmation page.



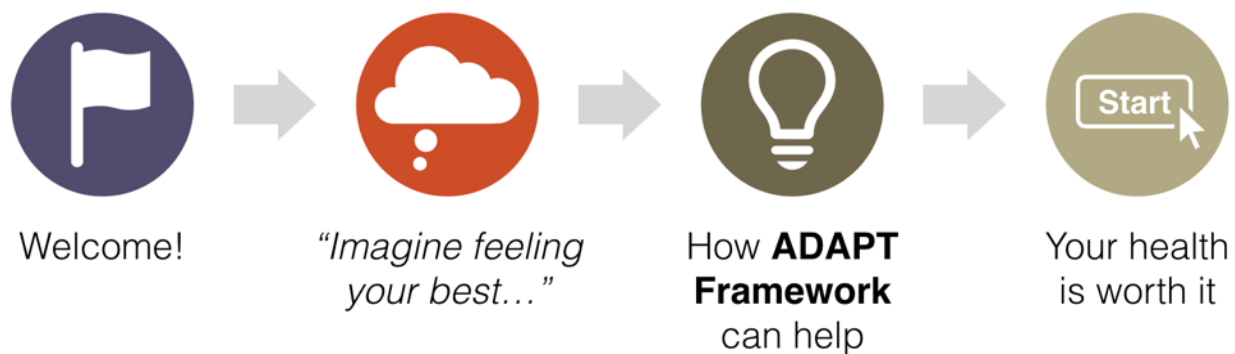
So, it thanks them for their interest in working with us, tells them they're going to receive a follow-up email to confirm that we've received their information, and then explains the next step in the process, asks them to add our domain to their safe senders list, so they make sure that the emails don't go to spam. In the new version of this, the confirmation page is going to have a video of me. I welcome them to the practice, talk a little bit about what to expect, and then there'll be some text information similar to what we have here underneath the video, and the reason for that is just to add a little bit more of a personal touch to the process, even though it's automated. It's a little bit more personal and more direct than just having text on a page, so it's really easy to add video to a confirmation page in Wufoo, you can pretty much add anything that you want. If you're set up to do video and have that capability, it's just a nice additional touch that you can make.

In addition, we're going to have a link directly to the MD HQ registration page on this new confirmation page that I'm talking about, and that will take them directly to the next step. As it currently stands, they get the information on what to do next in the email, but we're going to put it on the confirmation page with the video, that link to MD HQ, and we're also going to include that in a follow-up email. And that's important, because let's say a patient fills out the form, and they come to this thank-you page, and then all of a sudden their four-year-old kid starts crying in the other room and they have to go and deal with that and they completely forget about the confirmation, they come back and close their browser and it's gone, so it's a really good idea to set up Wufoo and MailChimp or whatever email provider you're using to send the same information in an email to people after they submit their application. If you're automating this process, there's kind of a hybrid model that you could consider. If for some reason a patient does not register your EHR, MD HQ or whatever you're using, within three or four days of completing the application, you could have a member of your staff call and say, "Hi, we noticed you filled out the application, just wondering if there's anything we can do to help or any questions that we can answer," and that can help move people along to the next step in the process.



Okay, so once they've submitted their online application, I mentioned before that you can not only add them to an email list, but you can also trigger an autoresponder. An autoresponder, or AR for short, is a sequence of emails that's delivered automatically on a schedule that you choose as a provider. It can be anywhere from one email, in that case it would just be a single email that's delivered after they're added to that segment, or it can be 50 emails or more. We use several autoresponders throughout our new patient onboarding process, and they're triggered at different points in the process. So, for example, we send a follow-up email after they apply to become a new patient. We also send a series of three or four emails after they schedule the initial consult; we also have a few emails that we send after they've actually had their initial consult, and then we have a couple that we send after the case review, so we do it at different points in the process.

I debated on how much detail to go into with this. I know people are coming to this from really different points in the process, and I didn't want to overwhelm with too much detail. If you have any questions about the autoresponder and how to set them up, let me know in the webinar and we'll talk more about it, but I didn't want to go into too much detail here, because I think for someone just starting their practice it's a bit overwhelming, and there are other things that would probably be more productive to focus on first.



Okay, so just to give you a little bit more of an idea of how an autoresponder can work. I'm going to go into some detail on one of the parts of our sequence here. So this is the autoresponder that's triggered after they submit the initial application, and for us it consists of four emails, and the purpose of it is to inspire confidence in working with us, provide an overview of how we work with

patients, what the case review process looks like, to explain the next steps, and to offer any support that they might need. So, email number one confirms that their initial consult was scheduled. I say a few words about what to expect at the initial consult and inform them that we'll be sending more information soon.

Email number two, the subject line is "Imagine feeling your best," and this email paints a picture of what their life would look like when their health has been recovered. When people have been sick for a long time, it can start to feel routine and they can forget, even, what it was like to feel healthy and they can lose a connection with that sense of hope for ever getting better in the first place, and part of our job as clinicians is to maintain that hope for our patients and help them stay connected to that because it can be really challenging and difficult, especially if they've seen a whole bunch of doctors or practitioners and they haven't gotten better. Patients can really just kind of get down and feel like there's no point in doing any more work, and I know that firsthand because I went through that myself when I was healing, going through the ten years of being sick and trying to recover my health, I definitely had times where I just felt like giving up. And I'm glad I didn't, and I'm glad that there were clinicians along the way that inspired me not to give up, so that second email is really important and it helps them to hold the vision of what their life would be like if they get better.

The third email goes into some detail about how the ADAPT framework can help them. We talk about the powerful combination of functional medicine and ancestral nutrition using cutting-edge lab testing, evidence-based treatment protocols together with that, how powerful that synergy really is, and there's a video of me telling my story about my illness and recovery, and then we remind them to register for MD HQ and schedule their initial consult.

And then email number four addresses the biggest obstacle or objection that a lot of patients have in seeking care, which is financial. It acknowledges the expense and commitment, but it also conveys the power and effectiveness of the ADAPT framework and the importance of health, just to living a fulfilling and rewarding life.

So that's an idea of how the autoresponder sequence can work, so a patient submits the initial application, they get these four emails, and software's getting a lot more sophisticated now, so that let's say after email number two the patient clicks on the link and schedules their initial consult, you can set it up so that the emails will stop at that point; they won't continue to get email number three or four, so it can be customized based on patient behavior.