

AR Outline

PROSPECTIVE PATIENT AR SEQUENCE (SENT AUTOMATICALLY AFTER PATIENT SUBMITS APPLICATION)

1. Welcome and next steps
 - a. Video: welcome, so glad you're here, inspire confidence/excitement
 - b. Next step: link to MD HQ to register and schedule Initial Consult (IC)
 - c. Testimonial or patient story
2. Imagine feeling your best
 - a. The cost of being sick
 - b. How would your life be different with your health back?
 - c. Have you registered and scheduled your appointment?
 - d. Testimonial or patient story
3. How the ADAPT framework can help you recover your health
 - a. Have you registered and scheduled your Initial Consult?
 - b. Video: my story, investigative medicine, ADAPT framework
 - c. Combine functional medicine (FM), ancestral nutrition, and personalized treatment
 - d. Use cutting-edge lab testing and diagnostic methods
 - e. Evidence-based treatment protocols
 - f. Reminder to schedule IC
 - g. Link to new testimonials from patients
4. Your health is worth it
 - a. I know that the functional medicine is a big commitment—of time, energy, and money
 - b. But it's the most effective approach to treating chronic illness that I've encountered; it's the product of my own experience and treating hundreds of patients
 - c. Completely different than what is offered in the conventional model, or even at most other FM clinics
 - d. More on how we can help / testimonial
 - e. Reminder to schedule IC
 - f. Phone number to call with questions or concerns

NP INITIAL INQUIRY FOLLOW-UP AR SEQUENCE

1. Your Initial Consult has been scheduled. What now?
 - a. Welcome them again
 - b. Few words about what to expect at IC
 - c. Testimonial

NP INITIAL CONSULT FOLLOW-UP AR SEQUENCE

1. A huge leap forward
 - a. Welcome to the practice
 - b. We enjoyed speaking with you during the Initial Consult and are looking forward to working with you
 - c. We know how challenging it is to struggle with chronic illness, and we'll do everything we can to guide and support you on your journey back to health
 - d. You'll be receiving a call from one of our staff members within 48 hours of your appointment to check in and answer any questions you may have
 - e. They will also help you to schedule your Case Review appointment
 - f. In the days to come, we'll be sending you some info about how to prepare for the Case Review, including completing your labs and the case review paperwork, as well as more information about CCFM
2. The CCFM difference
 - a. Co-directors are globally recognized thought leaders in functional and integrative medicine
 - b. Staff clinicians are trained extensively and committed to ongoing research and lifelong learning
 - c. Admin staff is warm, caring, and supportive and shares mission of creating happier/healthier world
 - d. Leverage latest technology to streamline and improve care; from online appointment scheduling to an EHR that gives you easy access to your records and lab results and an efficient way to communicate with your clinician and the staff
 - e. Educate and empower patients; we don't just prescribe treatment, we also provide instruction and handouts on diet, lifestyle, and self-care so that once you recover your health you'll have the tools and skills you need to maintain it
 - f. Reminder to schedule your CR appointment if you haven't already
3. Guide to completing your labs
 - a. Why the labs are so important
 - b. Empathy for how time-consuming
 - c. Advise them on how to create a plan; project management; template they can use?

- d. Link to FAQ documents
- e. Offer staff support
4. Coming to the Bay Area
 - a. Travel tips (airports, BART, transportation, parking, etc.)
 - b. Local hotels (discount?)
 - c. Local restaurants (Mission Heirloom, etc.)
 - d. Things to do & see
5. We will never give up on you
 - a. My experience > I never gave up
 - b. We will never give up on you
 - c. Key is sticking with it > methodical approach
 - d. Identify underlying problems, address, re-test, continue
 - e. Most other clinics lack this rigor, why they don't get results
 - f. Testimonial or patient story
6. Prepping for your CR
 - a. What to expect
 - b. What we need from you
 - c. How to prepare
 - d. Testimonial or patient story
7. See you soon!
 - a. Inspiration and excitement

NP—CASE REVIEW FOLLOW-UP AR SEQUENCE (SENT AFTER PATIENT HAS CR; MUST BE TRIGGERED MANUALLY BY STAFF)

1. Next steps after your Case Review
 - a. We hope you enjoyed the Case Review and are excited about moving forward
 - b. In the next 48 to 72 hours you'll be receiving a detailed follow-up from the staff with instructions on how to implement the treatment protocol your clinician prescribed
 - c. Your clinician will also upload your report of findings, with some notes from your appointment, to the documents section of your patient portal
 - d. You'll be receiving a call from one of our staff members within 48 hours of your appointment to check in and answer any questions you may have
 - e. In the notes you'll receive, your clinician will indicate when you should schedule your first follow-up appointment > make sure to do this as far in advance as possible, as we

- are a busy clinic and the wait time for follow-up appointments can be as long as six-plus weeks
- f. We love to hear feedback from patients about their experience and are always trying to improve our process >> link to feedback form?
2. How are you doing?
 - a. Just a quick note to check in
 - b. I know the Case Review and treatment plan can be a little overwhelming, often involves a lot of changes
 - c. Resources for support (?)
 - d. Reminder to schedule first follow-up
 3. What can we do better?
 - a. Link to feedback form