



Follow-Through Process Checklist

At Consultation:

- ☐ Immediately: Book the F/U NOW while they are in front of you Text them a reminder so they add the F/U to their calendar.

Same Day of Consult:

- ☐ Email them a “nice to meet you + social proof + reminder you’ll call them tomorrow.

Next Day:

- ☐ Call: *“Hello, Sara, it’s Karen from Dr. Smith’s office. Are you ready to book your procedure? I still have 2 dates available next month on the 25th and the 30th. Do either of those work for you?”*
- ↳ If the patient is still thinking about it:
 - ☐ *“Sure Sara and out of curiosity, what questions or concerns do you have that I can help you with?”*

Day 2:

- ☐ Call to address an objection they had and to see if they are ready to book now:
Example: *“Hello Sara, I talked to our nursing service, and they would be happy to care for you after your surgery. They just ask that we give them two weeks’ notice. \ How does that sound?”*
- ↳ If you get voicemail:
 - ☐ Leave same message you would have told them live.
 - ☐ Email the same message as above and add B/A photos of similar patient.
 - ☐ Text them to call you back if you get voice mail.

Day 4:

- ☐ Call with new information.
- ☐ Email with social proof + urgency.
- ☐ Text with urgency “check your email”.





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Day 6:

- ☐ Call with urgency.
- ☐ Email with social proof + urgency.
- ☐ Text with urgency "check your email".

Day 7:

- ☐ Text with last chance urgency killer special offer and must hear back right away.

Day 8:

- ☐ Call: *"Ok, Sara, it seems you're not quite ready to move forward. Let me know when you are. In the meantime, please follow us on IG, TikTok, etc., and keep in touch."*
- ↳ If you get voicemail:
 - ☐ Leave the same **message** you would have told them live.
- ☐ Email and Text them the same message and include your social media links. Thank you!
- ☐ Have them follow you on Instagram, TikTok, etc.
- ☐ Add them to your **email list** and stay in touch forever.