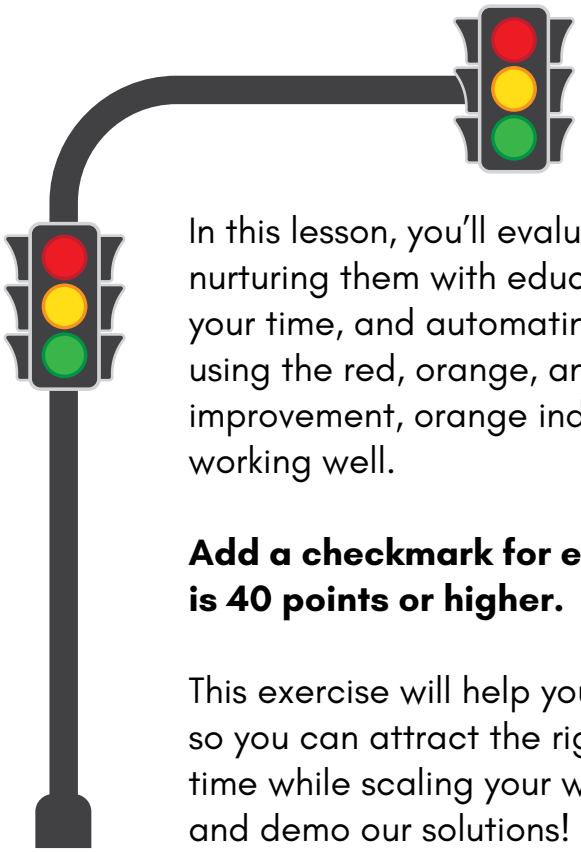
Staffless LeadPilot SYSTEM

TRAFFIC SURVEY

The goal of The LeadPilot System is to get provide the nessesary tools to properly attracting, nurturing, educating, and scheduling your Perfect Practice Member.



In this lesson, you'll evaluate your current systems for attracting the right leads, nurturing them with educational content, optimizing your first visit to protect your time, and automating tasks where possible. For each area, grade yourself using the red, orange, and green system: red means it needs major improvement, orange indicates it could use some work, and green means it's working well.

Add a checkmark for each green and tally your score at the end—your goal is 40 points or higher.

This exercise will help you identify areas to improve, streamline, and automate, so you can attract the right clients, nurture them effectively, and protect your time while scaling your wellness business. Book a call with our team to review and demo our solutions!

Perfect Practice Member Attraction

Have you clearly defined who your perfect practice member is, including their needs and pain points?	○	○	○
Does your marketing messaging directly address the challenges and goals of your perfect practice member?	○	○	○
Are you marketing on the same platforms where your perfect practice member spends time online?	○	○	○
Is the content you create (e.g., blogs, videos, social media) aligned with your perfect practice member's preferences?	○	○	○
Do your brand visuals and tone appeal to your perfect practice member?	○	○	○
Are you receiving engagement (likes, comments, shares) from your perfect practice member audience?	○	○	○
Have your current practice members provided feedback that matches the profile of your perfect practice member?	○	○	○
Have you clearly identified and communicated what makes your practice unique to your perfect practice member?	○	○	○
Are your calls to action (CTAs) clear and compelling for your perfect practice member?	○	○	○
Do your analytics show that you're reaching your perfect practice member demographic (age, gender, location, interests)?	○	○	○
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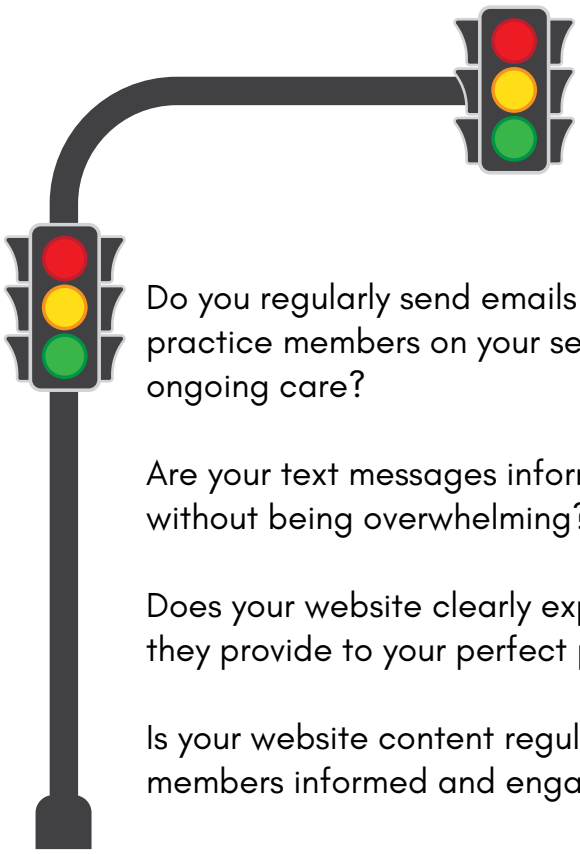


PPM Nurturing (Education)

Do you regularly send emails that educate your perfect practice members on your services and the benefits of ongoing care?

Are your text messages informative, timely, and helpful without being overwhelming?

Does your website clearly explain your services and the value they provide to your perfect practice members?

Is your website content regularly updated to keep practice members informed and engaged?

Do your social media posts consistently educate, engage, and remind perfect practice members about the services you offer?

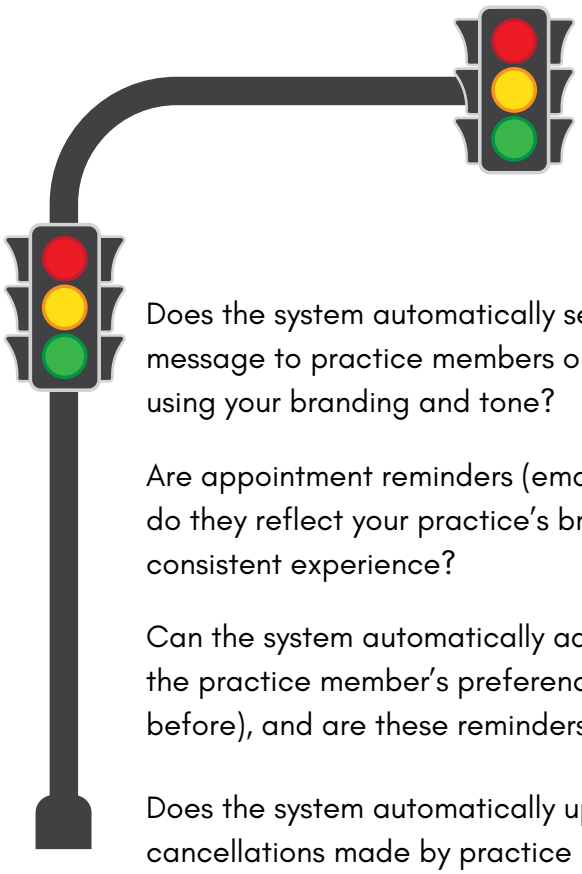
Are you using storytelling or testimonials in your communication channels to demonstrate the impact of your care?

Do you segment your email list to send tailored information based on your perfect practice members' needs or care plans?

Is your messaging consistent across all platforms (email, text, website, and social media) to reinforce your practice values and services?

Do you provide easy access to resources (like FAQs, blogs, or videos) to help practice members better understand your services?

Have you received positive feedback from your practice members about the helpfulness and relevance of your communication?



Pre Visit One (Schedule/Notify)

Does the system automatically send a personalized confirmation message to practice members once they schedule their first visit, using your branding and tone?

Are appointment reminders (email, text, etc.) sent automatically, and do they reflect your practice's branding and language to maintain a consistent experience?

Can the system automatically adjust reminder frequency based on the practice member's preferences (e.g., 24 hours before, 48 hours before), and are these reminders personalized to each member?

Does the system automatically update you with any changes or cancellations made by practice members, ensuring you stay informed without extra manual input?

Are practice members automatically provided with a branded pre-visit guide (what to bring, forms to fill out, etc.) that reflects your practice's values and voice?

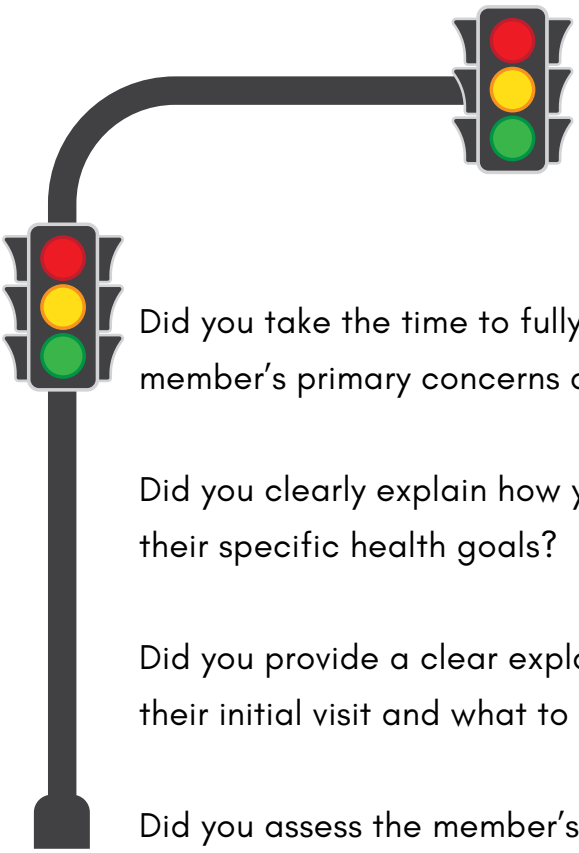
Can practice members automatically access and complete any required forms online, which are customized to your practice and automatically linked to their appointment?

Does the scheduling system automatically flag and prevent conflicts or overbookings, saving you time by handling it without your intervention?

Can practice members easily reschedule or cancel their appointments automatically, with the option to receive personalized messaging and reminders aligned with your practice's brand?

Are practice members automatically prompted with relevant location information, instructions, and additional details based on their visit time, all presented in a personalized, branded format?

Does the admin system automatically gather feedback or address common issues from practice members, presenting the information to you in a way that's easy to manage and aligned with your practice's communication style?



Visit One (Experience)

Did you take the time to fully understand the practice member's primary concerns and health goals during the visit?	○	○	○
Did you clearly explain how your approach to care aligns with their specific health goals?	○	○	○
Did you provide a clear explanation of the steps involved in their initial visit and what to expect moving forward?	○	○	○
Did you assess the member's readiness to begin treatment or care during the visit?	○	○	○
Did you actively listen to and address any concerns or hesitations they expressed about their care?	○	○	○
Did you clearly explain the benefits of the care plan in a way that resonates with the member's personal goals?	○	○	○
Did you ensure that the member understood the time commitment involved in their care plan?	○	○	○
Did you discuss the financial aspects of care, including costs and payment options, during the visit?	○	○	○
Did you provide actionable next steps for the member, including what they need to do between visits?	○	○	○
Did you ensure that the member left the visit feeling confident in how their time, energy, and financial investment would be respected in their care plan?	○	○	○
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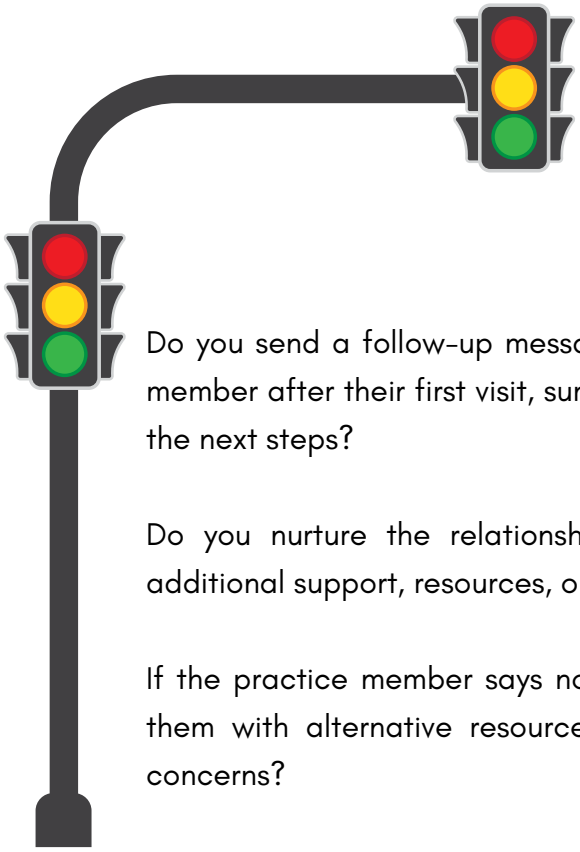

Post-Visit 1 (Stats)

Do you send a follow-up message (email or text) to the practice member after their first visit, summarizing what was discussed and the next steps?

Do you nurture the relationship with the member by offering additional support, resources, or information after their visit?

If the practice member says no to ongoing care, do you provide them with alternative resources or suggestions for their health concerns?

If the practice member says yes to care, do you confirm their next appointment and clarify the plan moving forward?

Do you set a clear timeline for follow-up regarding their progress, whether or not they decide to continue care?

Do you track their progress after the first visit (e.g., improvements, goals met) and follow up accordingly?

Do you check in with the practice member if they miss a visit or stop attending after a certain visit cadence?

Do you send personalized reminders or check-ins to encourage the practice member to stay consistent with their care plan?

Do you review and update the care plan with the practice member after a certain number of visits to ensure it's still aligned with their goals?

Do you track the practice member's stats (e.g., progress metrics) after their initial visits and follow up with them based on that information?

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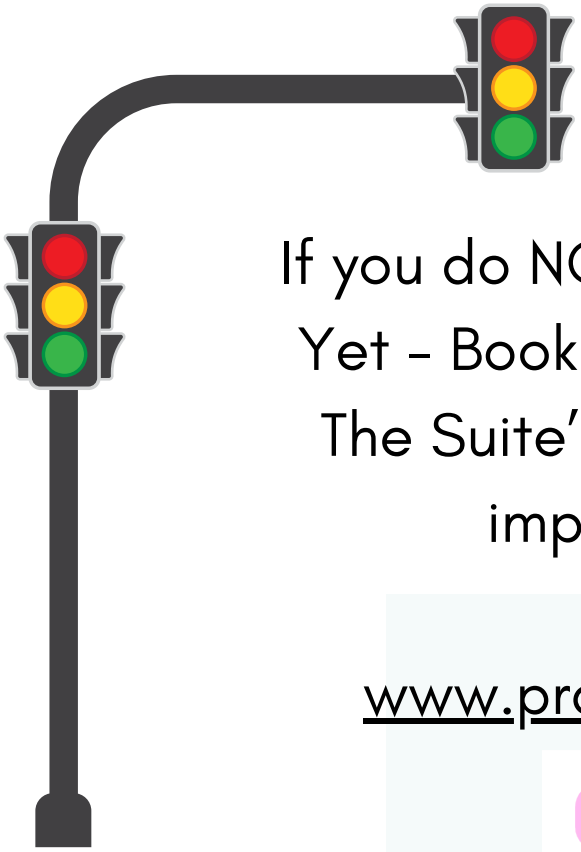

If you do NOT have a Practice Suite Yet - Book a Demo to Review How The Suite's LeadPilot System can improve your score!

www.practicesuitedemo.com