CLEAR//STONE

Lead Management Systems Job Aid

In addition to your marketing campaign/advertising Clearstone has developed systems to assist you with the following:

- Maximizing your phone calls with leads to achieve the best schedule and show rates
- Ensuring timely follow up and tracking of leads
- Confirmations and reminders with your leads via text and email
- Tracking your progress on leads as they move through the process and move toward becoming a new patient!

To be successful in using these systems you will need to do the following:

- Ensure that staff is utilizing both the Inbound and Outbound calling scripts that are provided.
- Allow staff dedicated time each day to utilizing the Clearstone 360 system to follow up with leads. We recommend 2-4 hours/day with time being spent both mornings and afternoons doing follow ups.
- Ensure that tasks assigned in the Clearstone 360 system to follow up and contact leads are being completed timely.
- Keep proper notes and add manual tasks where needed in the system to reflect the status of the lead and necessary actions.

If being used properly the Clearstone 360 system should tell the "story" of how your program is running… so it's important to keep it updated with proper notes and have each lead reflected in the appropriate stage in their interactions with your practice. This Job Aid and Training has been designed to assist you in maximizing this system so you can help MORE people! In this document you will find the following information:

To book coaching, refresher or other training sessions related to the use of Clearstone 360 systems please reach out to your Account Manager for assistance. Prior to reaching out to your Account Manager please make sure you have reviewed this guide as well as the training videos and FAQ's on our Help Desk regarding this system! Click here to go to our Help Desk now for more training and information!

For urgent questions regarding your Clearstone 360 system or to change settings within your Clearstone 360 systems (i.e. change to email, phone numbers, addresses, etc. for your practice) contact Client Support at clientsupport@clearstone.co or leave a message for the support team at (800) 301-1005 ext 2.

Overview of Lead Stage Types and Associated Actions in
Clearstone 360 2.0

To ensure that your lead is getting the proper communications, and that you are getting tasks assigned to follow up appropriately making sure **the lead STAGE (Pipeline/Stage) is reflective of where the lead is in the sales process**. The goal is to move the lead through the system until you can mark them as either WON (they become a patient) or LOST (they or your office have determined that the relationship will not move forward).

Pipeline/Stage	Description	Automated Communications and Tasks
Consult/Seminar Lead *Note: this stage does not apply to Call Only Campaigns*	This stage indicates that a two way communication has NOT begun with this contact. (aka that have not communicated with your office other than to submit their information as a lead). An outgoing voice mail, text or email communication sent to them from your office does not qualify as direct contact. A Lead is automatically placed into this stage when they fill out a form on your landing page.	● Email confirmation of receipt of sign up to lead ● The lead will also receive text messages requesting they contact your practice if they remain in lead status for more than 24 hours. ● Tasks assigned to staff at specific intervals, over about a 3 week period, to call the lead to get them scheduled.
Hot Lead	Someone that shows motivation to take an action with the office. (Replies to an email, text, Facebook messenger or by calling the office to schedule, ask questions etc.)	● Office receives notification on SMS, email, voice mail or FB Messenger to go reply to lead

Reactivation - Short Term	This is for leads transfered from old 360	● Sends messages trying to spark interest and entice them to schedule with your office. ● If the lead replies while in this campaign, they will be moved automatically to the Hot Lead campaign. ● If they go through the entire reactivation campaign, the system will wait 2 days, then push them into the Long Term Follow-up campaign.
Long Term Follow Up	This is a category for those leads that you have exhausted all initial contacts with. Or, for leads that have cancelled and are not wanting to reschedule, you will need to manually move cancelled clients over to this stage in the Opportunities section by dragging and dropping.	● Your staff will be assigned tasks to follow up with leads in this status about every 3-4 weeks until they are either moved to another stage or marked as won/lost.

Consult/Seminar Booked	This is for leads that have booked an initial consultation or seminar. This is to be used for the first appointment only. It is NOT for future appointments such as the exam, etc. *IMPORTANT NOTE: after you enter the appointment date and time of their appointment they will be moved by the system into "Consult/Seminar Booked" to initiate the communications about their appointment and discontinue communications from the lead stage. DO NOT MOVE the lead to the booked stage yourself.*	● Once the lead enters this stage they will receive an email confirmation with their appointment date and time. ● The day prior to the appointment the lead will be sent a reminder email and text of their appointment. ● The day of the appointment they will also receive a text reminder. *Note: If the lead calls to reschedule you will need to update their date/time in the system. This will generate a new set of confirmation emails and reminders for the appointment.*
Consult/Seminar No Show	Place the lead in this category if they do not arrive for their scheduled consultation or seminar (aka 'No Show'). **If someone is a no show for their consult/seminar they should be moved to this category no later than 20 minutes after the appointment time.**	● The lead will receive an email and text immediately asking them if everything is "OK" because they didn't arrive for their scheduled appointment. ● The staff will also have a task assigned to call and follow up with the lead.

Consult/Seminar Non- Committal	This is for leads that came in for their appointment and left without booking a follow up exam. If they have indicated that they do not wish to have any further contact from your office you need to mark them as LOST. However, if they leave stating they want to think about it, etc. You will leave them in this category and the system will schedule a task for you to follow up and check in with them. *IMPORTANT NOTE: if the lead tells you that they want you to call them back or they will call you back at a future date, move them back to the Hot Lead stage by dragging and dropping them in the Opportunities page. Then, appropriately assign a task for the call back.*	● Your staff will receive automatic task assignments to follow up with these leads to see if they want to move forward with treatment.

Exam Booked	For those that come to a consult/seminar and book an exam. Note that the appointment time in the Clearstone system does need to be updated with this new appointment time.	Email and text reminders will be sent once the appointment date and time are put into the system.
ROF Booked	Once you schedule a lead for their ROF Appointment, using the ROF Calendar, they will be moved into this stage.	They will receive text and email reminders about their appointment date, time and office location.

ROF No Show	This is where you will move a lead to next if they do not arrive for their scheduled for their Report of Findings appointment (aka No Show). If someone is a no show for their ROF they should be moved to this category no later than 20 minutes after the appointment time.	● The lead will receive an email and text immediately asking them if everything is "OK" because they didn't arrive for their scheduled appointment. ● The staff will also have a task assigned to call and follow up with the lead.
ROF Non-Committal	This is for leads that came in for their appointment and left without signing up for a program. If they have indicated that they do not wish to have any further contact from your office you need to mark them as LOST. However, if they leave stating they want to think about it, etc. You will leave them in this category and the system will schedule a task for you to follow up and check in with them. ***IMPORTANT NOTE: if the lead tells you that they want you to call them back or they will call you back at a future date then leave them in this stage and assign tasks appropriately.***	● Your staff will receive automatic task assignments to follow up with these leads to see if they want to move forward with treatment.

Changing the Status of a Lead

IMPORTANT: Do not move clients into the "Consult/Seminar BOOKED" stage. The system automatically moves them to the consult/seminar booked stage when an appointment is booked in the system.

A Leads status can be changed when:

1. **An appointment is booked in a specific calendar (consult, exam ROF)** *The Lead will then be automatically be moved to the appropriate stage by the system.*
2. **An Appointment is created in the Contact Section** *The Lead will then be automatically be moved to the appropriate stage by the system.*
3. **An Appointment is created through the Lead in the Opportunity Section.** *The Lead will then be automatically moved to the appropriate stage by the system.*
4. **An Appointment is created through the Caller Script** *The Lead will then be automatically be moved to the appropriate stage by the system.*

Option 1: Drag the lead record in the "Opportunity" section into the correct stage. You can do this by:

1. Hovering over the lead (your mouse pointer will turn into a hand) you wish to change
2. Left click on the lead and hold
3. Drag the lead over into a new stage
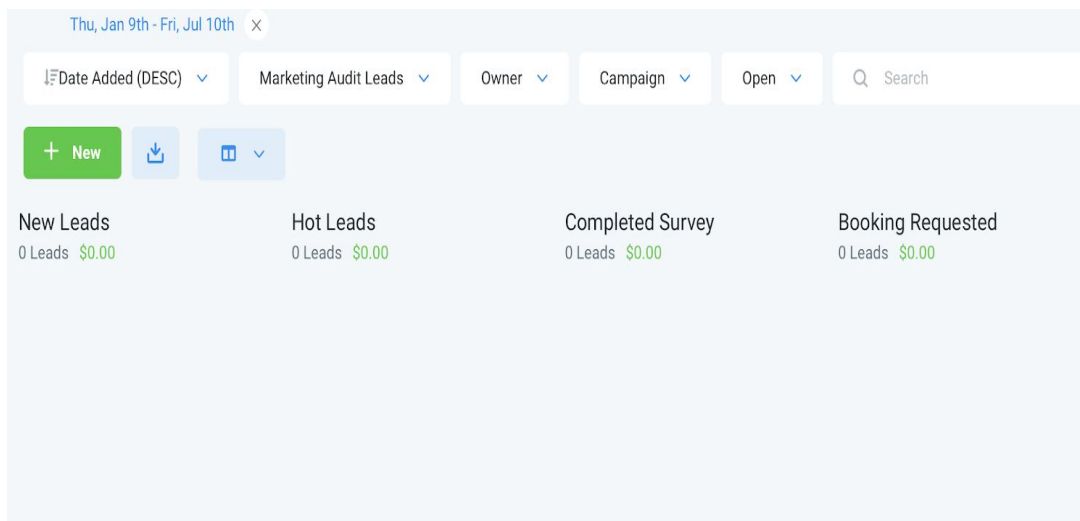
Option 2: Go to the Contact Section for the lead and add the opportunity.

1. Find your contact in the Contact section
2. In the Contact Section, click on the lead you are changing the status.
3. You will see three sections, on the left will be the lead's information.
4. Scroll down to where you see Active Campaigns. Click 'Add Campaign'
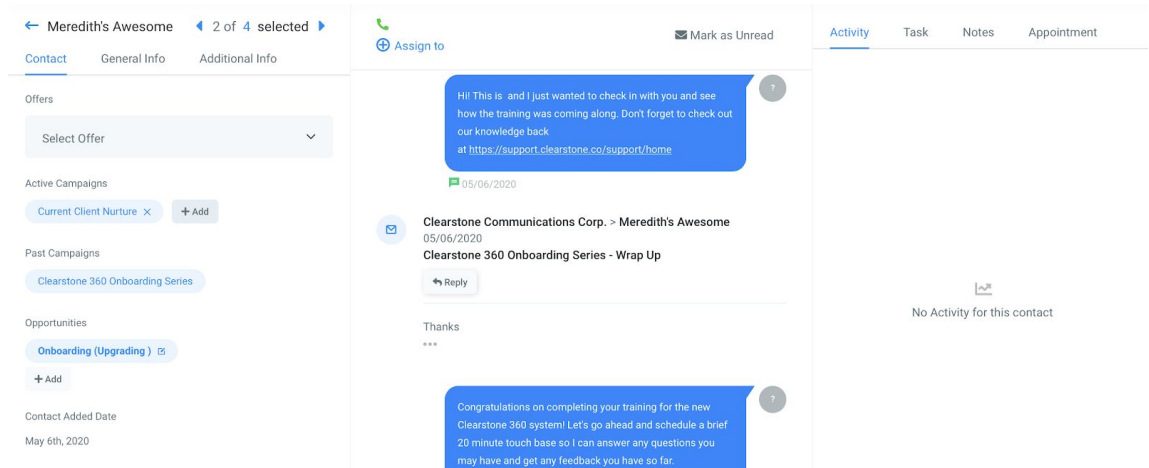
5.   Choose the appropriate campaign

Scheduling A Lead for Consultation or Seminar

It is important to follow the proper process for scheduling a lead for their consultation or seminar. This is the lead's first interaction with your practice and your opportunity to begin building a relationship with them.

Following the scripts provided will assist you in this as well as getting the best schedule and show rates possible.

Note for practices using call only campaign: always use your script for scheduling a lead for their consultation or seminar. Following this process, and filling out the information in the script, will automatically have the lead entered into the system with the appointment date/time as well as put them into the "Consult/Seminar Booked" stage.

To update an EXISTING LEAD with an appointment for a consultation or seminar take the following steps:
1. Open the Contacts tab in the Clearstone360 system and **find the lead**
2. Click on the leads name to open their contact record
3. Once in the contacts record, on the upper right hand corner, you will see where it says 'Appointment'.
4. Click on the word 'Appointment', then under that, click on 'Add New'
5. You will then be able to schedule that appointment by choosing the appropriate calendar from the drop down menu.
6. Once the appointment is booked, the lead will be moved to the new stage by the system. You DO NOT NEED to move them.

CONSULT/SEMINAR RESCHEDULES: If a lead with an existing appointment calls to reschedule, you will want to update their record new appointment time. Go to the Appointments tab under 'Scheduling'. Find their name, and on the left hand side click on the drop down menu that says 'Confirmed'. Choose the 'Reschedule' option. You will then enter their new appointment date and time. They will remain in the "Consult/Seminar" booked stage. The change of appointment will automatically generate a new appointment confirmation and reminders.

Completing and Adding Tasks

Completing and managing tasks properly is a critical component to being successful in maximizing this system and your results. In the various lead stages staff will be assigned tasks prompting them to call and follow up with the leads. You can also manually assign tasks in the system for instances where a lead asks you to reach out to you at a specific date/time or within a timeframe.

- Tasks can be completed and added in the individual lead's Contact record, or in the Dashboard.

Tasks can be viewed in the task list on the Dashboard (below)

Tasks		Kelli Wheeler ∨	Pending ∨	Due Date (ASC) ∨

☐ **Call**   Due today
Call to schedule
Contact: **Meredith Test**   Due: **Jul 9 2020, 8:00am**   Assigned: **Kelli Wheeler**

Tasks can also be viewed in the Lead's Contact Record (below)

Select user ∨   Pending ∨   Due Date (ASC) ∨

☐ **Call**   Due today
Call to schedule
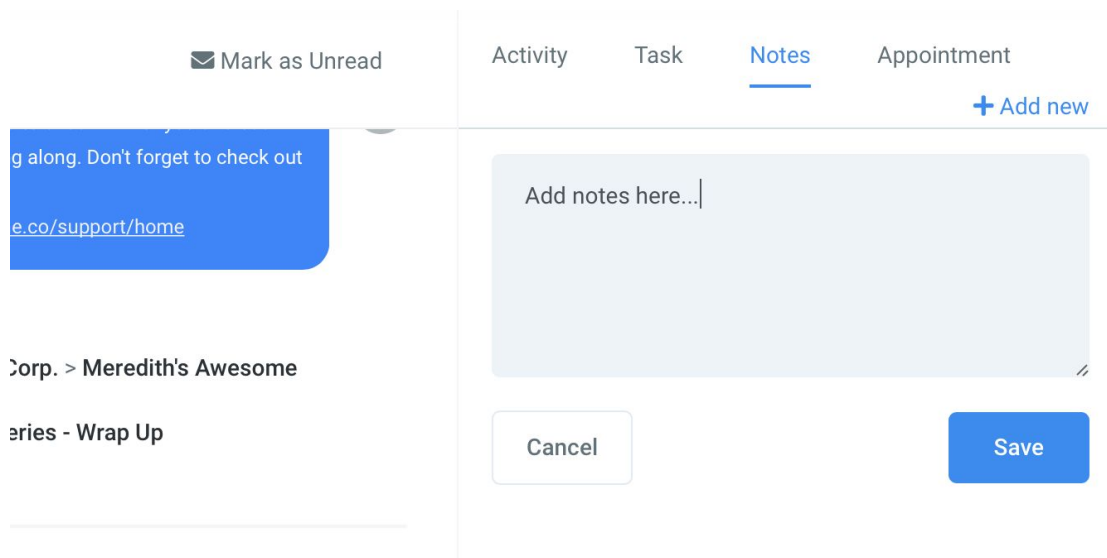Due: **Jul 9 2020, 8:00am**   Assigned: **Kelli Wheeler**

- To edit the task, (date, details, etc.) click on the blue square with a pencil. This is where any/all editing will be done.
- To delete the task, (not recommended) click on the trash can.
- To mark the task complete, click in the box next to the name of the task. Once you click there, the task will disappear. To look at the task again, you will need to filter to 'Completed' tasks.

Viewing and Adding Notes

Updating notes on a lead's record is important particularly in offices where there are multiple staff members working on leads and follow ups. Accurate notes will assist the staff and doctors in keeping track of the status of a lead, keep pertinent information on the lead such as their symptoms, activities, etc. and can help you as a reference when the lead calls or comes in for their appointments. Adding notes on lead interest and activities is also helpful as it can help you and the doctor to make connections with the leads when they come in as well.

- To view the notes on a lead's account, click on the "Notes" tab in the top right corner of the lead's Contact record.
- To add a note to a lead's record/account, click on the "Note" tab in the Lead's Contact Record, then click 'Add New'. Enter your note and click save.
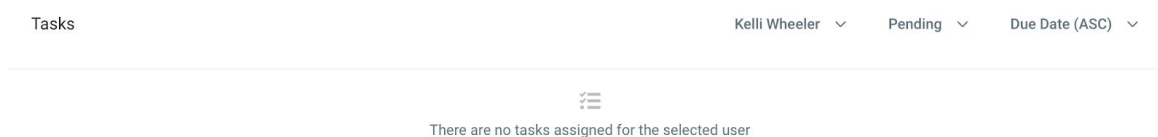
(See Image Below)

Managing Your Task List

Keeping up to date on tasks and follow ups with your leads will be the most crucial component to your campaign's success. While the Clearstone 360 system will automatically send some emails and texts to your leads, the personal follow up and conversations are what will draw the leads into your practice and ultimately result in them becoming patients.
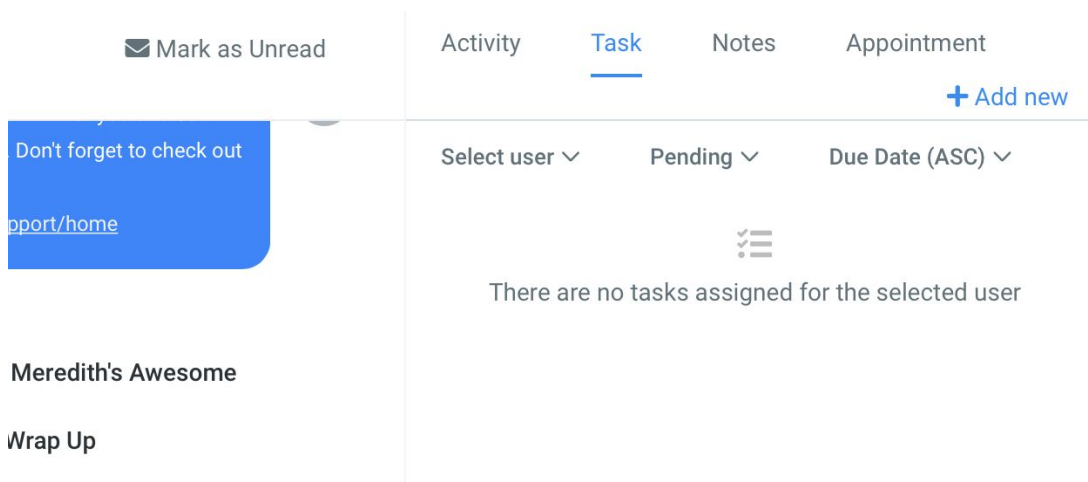
The Task List in your Clearstone 360 System can be found on your Dashboard in the Task section or in the Leads Contact Record.

The tasks in the Dashboard will appear here:

Tasks		Kelli Wheeler ⌄	Pending ⌄	Due Date (ASC) ⌄

There are no tasks assigned for the selected user

The tasks can be filtered by person assigned, their status (All - Pending - Completed), and by the Date Added or Date Due.

The tasks in the Lead's Contact Record will be found by clicking on Contacts>click on the Lead's name:

✉ Mark as Unread | Activity | **Task** | Notes | Appointment
+ Add new

Don't forget to check out
pport/home

Select user ⌄   Pending ⌄   Due Date (ASC) ⌄

There are no tasks assigned for the selected user

Meredith's Awesome

Wrap Up

As you can see, this can also be filtered in the same way, and a task can manually be added, by you, by clicking on the 'Add New' link.

In this view it does not matter what stage the lead is in, this is for managing the tasks and follow ups that you need to do for each lead regardless of stage. So, you could be calling a new lead for the first time or you could be following up with a Report of Findings Non-Committal to see if they want to move forward.

You will click on the lead name to enter their record and take the appropriate action based on the Task that is due. Be sure to always update the notes and make any appropriate changes to the record for the lead before moving to the next Task.

Tasks are categorized as follows: Due Today, Due in 1 Day, Due in 2 Days, Due in 3 Days

- Tasks that are further than 3 days out will still show up, but will not be categorized.
- Leads that have "No Assigned Task" are in a stage that does not require a task or they are waiting for the next task to be assigned via automation.
- All tasks due on a particular day will be listed as 'Due Today'

Tips:

- Always make sure you COMPLETE your tasks. If you have multiple tasks due on the same lead by the time you get to it then you'll want to complete them all or update the additional tasks with new dates by clicking on them and editing the details.

Clearstone 360 FAQ's

Q: If a lead is not in the system how do I enter it?
A: You should utilize the Inbound Call Script provided for your practices office to make sure that you are maximizing the interaction, capturing the information and getting the lead scheduled.

Q: Can I do a quick search for a lead/contact in the system?
A: Yes, you can go to the "Contacts" section of the system and then use the search box to quickly find a lead/contact in the system. You can also do this in the conversations tab to quickly find and read through communications that have already taken place with the lead.

Q: What do I do if a lead becomes a patient? Will they still get automated contacts and tasks?
A: When a lead becomes a patient you should mark them as "Won". They will remain in your contacts list; however, they will no longer receive automated communications and you will not be assigned any tasks.

Q: What do I do if a lead no longer wants to be contacted or if we do not want to pursue them further as a lead? Will they still get automated contacts and tasks?
A: You would mark this type of lead as "Lost". They will remain in your contacts list however they will no longer receive automated communications and you will not be assigned any

tasks. In this circumstance, you should **always** turn on the DND (Do Not Disturb) Toggle in their contact record. This will assure they are not contacted and will not receive any communications from your office.

Q: What do I do if someone wants to reschedule their consultation or seminar?

A: If a lead with an existing appointment calls to reschedule, you will want to update their record new appointment time. Go to the Appointments tab under 'Scheduling'. Find their name, and on the left hand side click on the drop down menu that says 'Confirmed'. Choose the 'Reschedule' option. You will then enter their new appointment date and time. They will remain in the "Consult/Seminar" booked stage. The change of appointment will automatically generate a new appointment confirmation and reminders.

Q: What do I do if someone cancels an appointment and does not reschedule?

A: If a lead cancels an appointment, and does not reschedule, go to the Opportunities tab, click on that lead, and drag them over to the Long Term Follow Up Column.

Q: What columns should I NOT be putting leads into?

A: Leads should not be dragged and dropped into the Consult Booked and Exam Booked campaigns. The system will move them over appropriately once the appointment is set in the system.

Q: What do I do if I do not see the changes I have made right away?

A: If you do not see the changes right away, please refresh the page you are working on so the system can update.

Q: What do I do if I am not seeing the day available on my schedule when I am trying to schedule someone?

A: If this happens, check your calendar section located in the scheduling tab, directly above the appointments.

Q: What category will someone go into if we are not doing consults and only paid exams?
A: If you are not doing consultations, please schedule the lead using the appropriate niche's exam calendar. They will then be placed in the Exam Booked stage, and will receive email and text reminders.

Q: What if we do the exam and ROF as the same appointment?
A: If doing both the exam and ROF as the same appointment, please schedule them using the appropriate niche's ROF calendar. This will place the lead into the ROF Booked stage, and they will receive email and text reminders.