RevRx AI Consulting

PATIENT GROWTH GUIDE

Lead Conversion System

You paid for the lead. Don’t let it go cold.

For practices that want more inquiries to turn into booked visits.

Reply · Route · Call · Follow up · Hand off · Book

Most Leads Don’t Say No. They Just Stop.

People often reach out to more than one practice. The one that answers first, and makes booking easy, has the advantage.

Lead leak self-check

- [ ] Leads wait hours for a first call.
- [ ] No one owns a lead until someone “gets to it.”
- [ ] After-hours leads wait until the next day with no reply.
- [ ] Staff call once, then stop.
- [ ] There’s no set time each day for follow-up calls.
- [ ] No one tracks how many leads become booked visits.

Every check is a place leads leak out. Pages 3 to 8 show how to plug each one.

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Review our lead handling for **[practice type]**: **[steps, response times, staff]**. Find where leads stall. Mark each gap as people, process, or tool. Do not assume results we have not measured.

02 | SPEED

Set a Response Standard and Hold to It

Decide how fast your practice responds to each type of lead. Write it down. Measure it every week.

LEAD TYPE	INSTANT (AUTOMATED)	HUMAN FOLLOW-UP
Website form	Text and email with booking link*	Call within **[target]** minutes
Ad lead form	Text and email with booking link*	Call within **[target]** minutes
Missed call	Text back with booking link*	Call back within **[target]** minutes
Text inquiry	Auto-reply with booking link	Staff reply within **[target]** minutes
After hours	Agent replies and offers booking	Call next business morning by **[time]**

**Text only with consent. Email only without it.*

Our standard

First human call within _____ minutes

After-hours follow-up by ____ the next morning

Who checks this every week _____

INSTANT REPLY TEMPLATE

Hi **[First name]**, thanks for reaching out to **[Practice]**. You can book here anytime: **[Link]**. A member of our team will call you shortly. Reply STOP to opt out.

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Write instant reply messages for a **[practice type]** for these lead types: website form, ad lead form, missed call, text inquiry, and after hours. Each should thank them, include a booking link, say when a person will follow up, and include opt-out wording for texts. Keep each under 300 characters.

Every Lead Needs One Owner

When everyone owns a lead, no one does. Route each lead to one person the moment it arrives.

1. **One owner per lead.** Assign by service, by schedule, or in rotation.
2. **A backup if it isn't touched.** If the owner hasn't called within [time], the lead goes to a backup.
3. **One record.** Every lead lives in one system, with its source tagged.
4. **Clear status.** New, contacted, booked, nurture, or closed.
5. **End-of-day check.** No new lead goes home without a first attempt.

LEAD SOURCE	ASSIGNED TO	BACKUP	NOTES
Website			
Ads			
Phone			
Text			
After hours			

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Design lead routing rules for a [practice type] with [number] front desk staff and these lead sources: [list]. Include who owns each lead, the backup rule if a lead isn't contacted within [time], the status stages, and an end-of-day check. Keep it simple enough to run without new software.

One Call Is Not Follow-Up

Many leads are reached on a later try, not the first. Follow a set cadence so no lead falls through.

DAY	CALL	TEXT (WITH CONSENT)	EMAIL
Day 1	Call, and leave a voicemail	Text with booking link	Email with booking link
Day 3	Call	Short check-in text	
Day 7	Final call	Final text: “Should we close your request?”	Final email
After day 7		Long-term nurture with consent	Monthly email

VOICEMAIL SCRIPT

Hi **[First name]**, this is **[Name]** from **[Practice]**. You asked about **[service]**, and I’d love to help you get scheduled. You can call me back at **[phone]** or book anytime with the link I just texted. Talk soon.

DAY 7 TEXT

Hi **[First name]**, we haven’t been able to connect. Should we keep your request open? Reply YES and we’ll reach out, or book anytime here: **[Link]**

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Write a 7-day lead follow-up cadence for a **[practice type]** with calls, texts, and emails on day 1, day 3, and day 7. Include a voicemail script, short texts with opt-out wording, and a final message that asks if they still want help. Keep the tone friendly and not pushy.

Block the Time. Make the Calls.

Follow-up calls get pushed aside when the front desk is busy. A daily Dial for Dollars block protects that time.

WHEN

the same time every day, for example [time] to [time].

WHO

named staff, with phones off other duties.

CALL ORDER

1. New leads not yet reached
2. Day 3 and day 7 follow-ups
3. Recent cancellations and no-shows
4. Older leads in nurture

GOAL

booked visits, not just calls made.

Three call openers

1

"Hi [First name], this is [Name] from [Practice]. You reached out about [service]. Do you have two minutes to find a time that works?"

2

"Hi [First name], I'm following up on your request about [service]. What questions can I answer before you book?"

3

"Hi [First name], we had an opening come up this week, and I thought of you. Would [day] or [day] work better?"

DAILY TRACKER

DATE	CALLS MADE	CONVERSATIONS	BOOKED VISITS	CALLER

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Write a speed-to-lead SOP with a daily Dial for Dollars call block for [practice type]. Include routing, call and text cadence, what the after-hours agent may and may not do, handoff rules, consent checks, and three short call openers.

An Assistant at Night. A Person in the Morning.

An automated assistant can answer after hours, so leads don't sit until morning. Set clear rules for what it can and can't do, and when a person takes over.

The agent may:

- Answer common questions: hours, location, services
- Share prices or ranges you approve
- Send the booking link or book into open times
- Collect name, contact information, and the service they want
- Flag the lead for a morning call

The agent may not:

- Give medical advice or say whether a treatment is right for someone
- Promise results
- Quote prices you haven't approved
- Handle complaints
- Pretend to be a person

Handoff rules

- Always tell people they're talking with an automated assistant.
- Hand off to a person when someone asks a medical question, asks for a person, or is upset.
- If someone describes a medical emergency, the agent tells them to call 911.
- A person follows up on every flagged lead by **[time]** the next business morning.

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Write the instructions for an after-hours assistant for a **[practice type]**. It may answer questions about hours, location, services, and approved prices **[list]**, share our booking link, and collect contact details. It must say it is an automated assistant, never give medical advice or promise results, tell anyone describing an emergency to call 911, and flag every conversation for a staff follow-up.

Get Consent First. Keep Proof.

Fast follow-up only works if it follows the rules. Build consent into every way a lead reaches you.

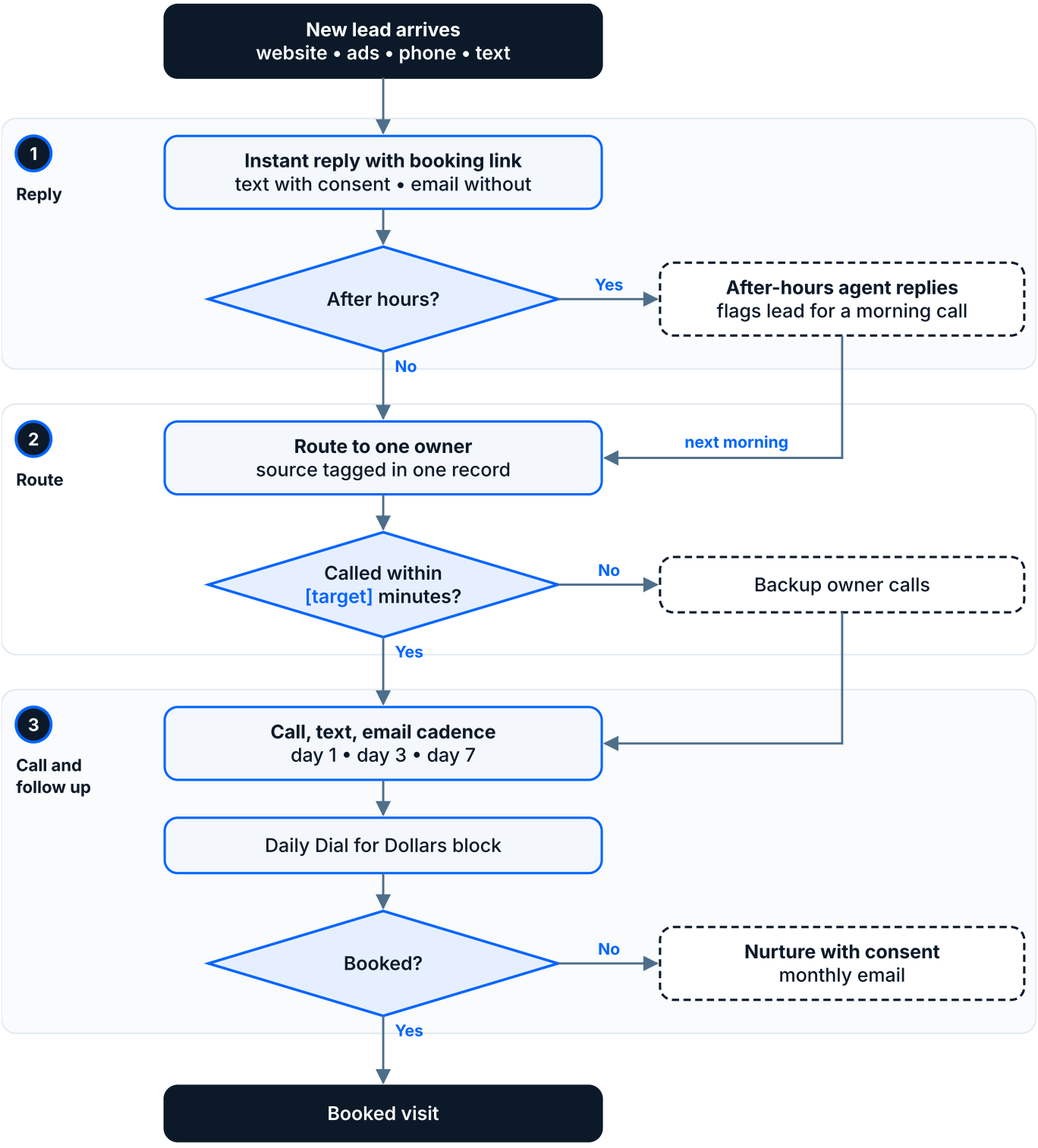
- [ ] Every form has a clear, unchecked consent box for texts
- [ ] The consent wording names your practice and says what messages they'll get
- [ ] You keep a record of when and how consent was given
- [ ] Every text says who it's from and how to opt out
- [ ] Opt-outs are honored right away, across every system
- [ ] Calls and texts respect quiet hours
- [ ] No texts go to leads without consent; use email instead

Rules vary by state and change over time. Review your forms and messages with your counsel.

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Review the consent wording on our lead forms: **[paste text]**. Check that it is clear, names our practice, explains what messages they'll receive, and explains how to opt out. Suggest plain-language improvements. Flag anything our counsel should review. Do not give legal conclusions.

From New Lead to Booked Visit



Solid boxes are the main path. Dashed boxes are where a person or a rule steps in.

09 | NEXT STEP

Find Where Your Leads Go Cold

RevRx AI helps practices turn more inquiries into booked, kept visits.

STEP 1

Take the MedSpa Revenue Leak Scorecard

Answer 10 questions and see where your practice is losing patients.

Take the Scorecard

https://www.revrxai.com/consumer-health-tools

STEP 2

Book a Discovery Call

A 30-minute call to walk through how your practice handles leads and where they slip away.

Book a Discovery Call

https://api.revrxai.com/widget/bookings/30-minute-meeting-with-terryrovrku

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