Email Marketing Cheatsheet for PTs:

5 Steps to Creating a New Patient Welcome Series

Step-by-Step Campaign Overview	 Email 1 **Welcome**	 Email 2 **Stay Connected**	 Email 3 **Check In**	 Email 4 **Referral Request**	 Email 5 **Review Request**
What Is It?	Welcome the patient to the practice and thank them for choosing you. This is also a great time to tell them about the practice, what they can expect, and what makes you unique.	Invite patients to stay connected with the practice on social media by "liking" the practice Facebook page and following you on Twitter.	Send this email to patients during treatment to check in on how their visits are going. This a good way to gauge progress and catch negative feedback early.	By now the patient should be seeing results from their treatment. Now is the time to encourage referrals to friends and family.	At the end of treatment it's important to request a review you can use on your website and in your marketing.
What To Include?	• "Thank you for choosing XYZ pratice!" message • Links to your website blog and patient testimonials	• Social media icons linked to your profiles • Practice logo	• "We'd love to know how things are going" message • Direct them to where they can leave feedback	• Links to your website's conditions pages or medical library • A link to a referral form on your website	• Review links to your online review system. • Practice logo
When To Send It?	Right after you recieve a new patients email address. Ideally the same day as their first appointment.	3-4 days after their first appointment.	3 weeks after beginning treatment.	5 weeks after beginning treatment.	6 weeks after beginning treatment.