PatientFetch Process

Process

1. Ask Sales to fill out the Internal Transition Form
2. Email the client a Welcome Email
3. Set up Project Timeline
   - Make a copy of the template before making any changes
4. Schedule Client Intake Call
5. Create a sitemap draft from the Sitemap Template prior to Intake Call
   - Make a copy of the template before making any changes
6. Have Intake Call
   - Take ample notes for the copywriter and paid media (if applicable)
7. Finalize the Sitemap and send the Sitemap to the client using the Sitemap Email
8. Reach out to Sara to see if she's available to write the site
   - She charges ~$50/page
9. Create the Homepage Copy Template
   - Make a copy of the template before making any changes
   - Fill in any headlines or notes you have for the writer (I usually write the headlines for each section just to give the writer some direction)
10. Create the *Copywriter Notes*
    - Examples: ARA - Copywriter Notes & RBD - Copywriter Notes
11. After the Client approves the Sitemap finalize the *Homepage Copy Template* and *Copywriter Notes*
12. Provide Sara (or writer) *Homepage Copy Template* and *Copywriter Notes* along with due dates
    - Make sure to include Project Management whenever you contact Sara
13. When the writer finishes the homepage copy you need to prep the copy for Dev
    - Look over the homepage copy for grammar, spelling, accuracy, and overall readability
    - Find photos on Shutterstock and copy the Shutterstock link into the Homepage Copy document.
    - Add the correct hyperlinks to the buttons on the homepage (eg [Learn More] button should hyperlink to www.xyz.com/contact-us)
    - Create a "build site" Basecamp task and include:
      - Current Website
      - Homepage Copy
      - Logos & Assets
      - Sitemap
14. When the writer finishes the site copy you need to prep the copy for Dev
    - Look over the site copy for grammar, spelling, accuracy, and overall readability
    - Provide the site copy to Dev in the same "build site" Basecamp task as the Homepage copy
15. After Dev has finished, QA the site in its entirety and make any necessary changes
    - *I usually clean up the formatting and make sure the colors coordinate with the client's brand.*
16. Send the Dev-link to the client using the Website Review Email template
17. Once the client gives feedback on the Dev-link, assign edits to Dev or, if the edits are easy then make the edits yourself
18. When you're ready for the site to go live create a "Launch" Basecamp with the following information
    - Checklist: Website-Launch-Checklist
    - Page URL:
    - GTM Tag:
    - Analytics:
    - Verification of the correct phone number:

- ○ Email addresses for notifications:
- ○ Domain Login:
19. Once the site is live, QA the site in its entirety
20. Send the client "your site is live" email

Timeline

- ● Elisa alerts the team of the signed MSA
- ● Sales should fill out the [Internal Transition Form](#) **as soon as possible but no more than 1 day**
- ● Send the "Welcome Email" **as soon as possible but no more than 1 day** after receiving the clients' contact information
- ● Client intake call should be scheduled **7 days** after Elisa's initial email
- ● The Sitemap should be sent to the client no later than **7 days** after the intake call
- ● The client has **7 days** to approve the Sitemap
- ● After the client approves the sitemap we have **30 days** to finish the PF site

Email Templates

Welcome Email

Hi CLIENT,

Welcome to PatientFetch! My name is Regina, and I will be your designated account manager. We are excited to have you on board and will be working to get your beautiful new marketing-smart practice website up and running as soon as possible.

To help us get started, please send over as many of the following you can, as soon as you are able:

1. [Please fill out this form to help our team get to know you!](#)
2. A high-resolution practice logo in .PNG format
3. High-resolution photos of all providers as well as photos of the interior and exterior of your medical office
4. CVs for all providers that will be featured on the website
5. A link to any testimonials you may already have online, or a document of testimonials
6. Your website host login, so we can back up your current site (if applicable) (GoDaddy, BlueHost, HostGator, etc.)

In addition to these items, we'd like to schedule your first call. Are you available for a quick call on XXXX at XXX?

Thanks so much! I look forward to working with you,
Regina

Sitemap Email
Hi CLIENT,

It was a pleasure speaking with you today and we're excited to work on your website! Attached you can find this final sitemap for your new PatientFetch website. We'll need your approval before we can assign our writer to complete these pages, so let me know if you see any major issues.

This sitemap is representative of the different pages on your new website, but we will make sure to include the specific details we discussed in the copy of each page.

If we don't hear back from you by the end of the day on Monday, August, 24th, we will assume there are no major issues and proceed to complete your site based on this sitemap. Please, let me know if we have your approval and we'll get your website copy completed ASAP!

Website Review Email

Hi CLIENT NAME,

Your new PatientFetch website is ready for review! We're really proud of this one, and I know it will help you meet your goals.

[https://arapb.wpengine.com/]

Please take some time to go over the copywriting for accuracy. If we got anything wrong, please let me know by *Monday, September 14th*.

We have a couple more outstanding items to finish your site. Please provide them as soon as possible.

- [list outstanding items]

Looking forward to launching your new site!