Automate Med Spa Lead Follow-ups

> *“I get leads from social media and my website, but I don't have time to follow up with all of them, and they go cold.”*

Category: lead-management	**Setup Time:** ~45 minutes	**Estimated Hours Saved:** 5 hrs/week	**Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Connect your lead forms directly to an automated SMS and email sequence. When a lead asks about a treatment, immediately send a text confirming receipt and offering a booking link, followed by a drip of educational emails about the procedure. This keeps your clinic top-of-mind without any manual data entry, turning passive interest into booked consults.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **HighLevel (GoHighLevel):** **(paid)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Connect Lead Sources**
   Link Facebook Lead Ads or your website form to your CRM using a webhook or native integration.

2. **Build the Day 0 SMS**
   Draft a short text: 'Hi [Name], got your inquiry about [Treatment] at [Clinic]. Would you like to schedule a quick consultation? Here is our calendar link: [Link]'

3. **Set up a 3-Day Email Drip**
   Write 2-3 short emails explaining the treatment benefits, recovery time, and showing before/after photos. Schedule these to send on Days 1, 3, and 5.

4. **Add a Stop Condition**
   Ensure the automation stops as soon as the lead books an appointment or replies to the text.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.
[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.
[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.
[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.
[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Can automated texting meet HIPAA requirements?

A: It can be configured to support HIPAA obligations — keep PHI (Protected Health Information) out of message bodies, use a platform that signs a Business Associate Agreement, and collect explicit opt-in — but whether a given workflow is compliant depends on your practice's policies. Have your compliance or legal counsel review the setup before launch.

Q: Will leads find this impersonal?

A: Not if written casually. Speed matters more than extreme personalization for initial inquiries.