# Check in after a treatment without remembering to

> *“I mean to follow up after a treatment to see how someone is doing, and I almost never actually do it.”*

**Category:** customer-communication | **Setup Time:** ~30 minutes | **Estimated Hours Saved:** 2 hrs/week | **Direct Software Cost:** $0 / month

## SOLUTION SUMMARY

Trigger a short check-in a set number of days after the appointment type, automatically. A message asking how someone is healing does three jobs at once: it catches a problem early, it demonstrates care that generates referrals, and it opens the natural moment to rebook. Set the delay per treatment type and it runs without anyone remembering.

## REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Your booking system:** **(Free Tier / Wholesale)**
- **Mailchimp:** **(Free Tier / Wholesale)**
- **Klaviyo:** **(Free Tier / Wholesale)**

## STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Pick the right delay for each treatment**
   Different procedures have different windows where a problem shows up. Ask what the clinically sensible check-in point is rather than using one delay for everything.

2. **Write it as a question, not a broadcast**
   'How are you doing after Tuesday?' invites a reply. A newsletter-shaped message does not, and replies are the entire point.

3. **Make replies reach a person**
   Route to an inbox someone actually reads. A check-in that goes unanswered is worse than never sending one.

4. **Add the rebooking prompt only at the end**
   Ask about them first. If the rebooking link is the opening line it reads as marketing and the care signal is lost.

5. **Exclude anyone who already has the next appointment booked**
   Otherwise you prompt someone to book something they already booked.

### 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: Should this be text or email?**

A: Text gets read and replied to far more often for a short check-in. Keep it to a sentence or two if you use it.

**Q: What does it cost?**

A: Often nothing if your booking system sends it. Otherwise a messaging tool with a free tier covers it until your volume outgrows the limit.

**Q: Is there a compliance issue with clinical follow-up by text?**

A: There can be, depending on what you write and where you operate. Keep it to a general wellbeing check with no clinical detail, and take advice before including anything specific to treatment or diagnosis.