

Top Five Ways Care Sherpa Can Impact Growth

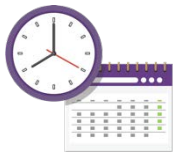
1. Consistent high touch new patient service and follow up



Lead Response in Minutes Not Days

All prospective patients receive outreach 9 or more times across a variety of days and times.

2. Prioritization for consistent progression in shortest time frame



Beyond First In to First Out.

Prioritization linked to your strategic goals such as urgency for conversion, payer mix, procedure mix and value.

3. Patient pipeline management and volume prediction



Proactive Planning vs. Reactive.

Quantify in real time, expected volumes or barriers to conversion as well as predictive revenue.

4. Elevated patient experience and outcomes



Patient and Care Giver satisfaction

Educate and inform patients along their journey for greater consumer experience and post care reviews.

5. Measurable impact on performance



Quantified and Benchmarked

Measured performance along growth KPIs to monitor progress or diagnose barriers to growth.

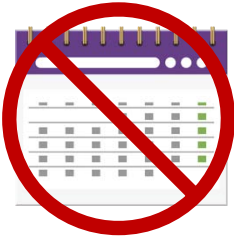


CARE SHERPA

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IMPACT:

0% No Shows



Patients Under Management

33-day Reduction



Prospect to Patient Timeline

27% Increase

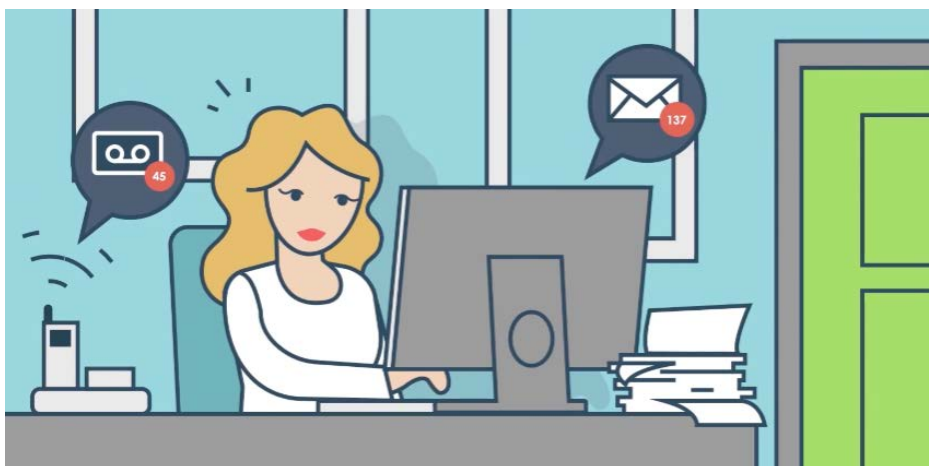


Patient Satisfaction

CASE STUDY:

46% Procedure Volume Increase with \$160K savings in 8 months

- **\$4.32 : \$1** Net Profit ROI
- **2.7 mos.** time to pay for cost of partnership based on net profit return
- **\$161,438 Labor cost reduction** – 2.5 FTEs eliminated from future payroll
- **\$57,288 Lower Marketing Cost** – Elimination of non-performing investments
- **81% increase** in overall lead volume
- **9% increase**- Profitable payor procedures
- **33 Day reduction** in prospect to patient timeline



5 Best Practices to Stop Ghosts in their tracks and repair your leaky conversion funnel!



| | |
|---|-----------------------|
| R | Rapid Respond |
| E | Engage Interest |
| A | Available Information |
| C | Clean Sources |
| H | Have Capacity |

INSTANT RESPONSE WITH PATHWAY OUTLINED

GIVE THEM SOMETHING TO DO

GIVE THEM WHAT THEY WANT

TAKE OUT THE TRASH

NEW PATIENT APPOINTMENTS IN 4 DAYS

RAPID RESPONSE EMAIL SAMPLES

Rapid Response Emails Include:

- Immediate Response
- Personalization to Receiver
- Personalization from Sender
- Contact Information
- Timeline for Next Steps
- Setting Expectations

SAMPLE RAPID RESPONSE EMAIL 1:

Hello <PATIENT NAME>,

Thank you so much for your interest in our program! I have received your request for a consultation and I will be following up in the next 24 hours regarding next steps at the telephone number you provided . Until then, I wanted to ensure you have my contact information.

I took forward to finding out more about your objectives, and answering any questions you may have about treatment. At this stage many patients need some help to determine if they are a good candidate for treatment, have questions about costs or may want to discuss possible surgery dates.

This discussion is really important and is best done over the phone. Once the phone call is completed, you will have the information you need to decide if you'd like to proceed to the next step and schedule a consultation with your surgeon.

If I don't reach you, I'll try to call you again in the next few days. Also, please feel free to call me at a time that suits you at <PHONE NUMBER>.

Have a wonderful day,

<NAME>

Patient Care Coordinator

<CLINIC>

Text/SMS: <PHONE NUMBER>

<EMAIL>

<WEBSITE>

SAMPLE RAPID RESPONSE EMAIL 2:

Dear <Patient Name>

Thank you for your inquiry with our practice. We are excited to learn more about you and how we may be able to help you.

My name is <NAME> and I am part of <PROVIDER> Service Excellence Team. We are here to help patients considering available treatment options. We believe in taking a comprehensive approach with our patients and I am here to support you through the process and I look forward to finding out more about you and goals.

We like to do a quick introductory call prior to scheduling a consultation with <PROVIDER>. This call will help you answer any questions you may have, discuss costs and any other information that will help you not only determine if this is the right procedure for you, but to also help you get a sense of our approach to patient care. During this 20 min call we will cover:

- Discuss your goals
- Review your history
- Answer any questions you have about the treatment or procedure
- Review the price range based on your needs
- Discuss what to expect with the treatment or procedure
- Share what to expect with any recovery needed
- Review timing and next steps

Our discussion is the first step to see how we may be the best partner for you. **Is there a date and time that works best for you to talk in the next day or so?**

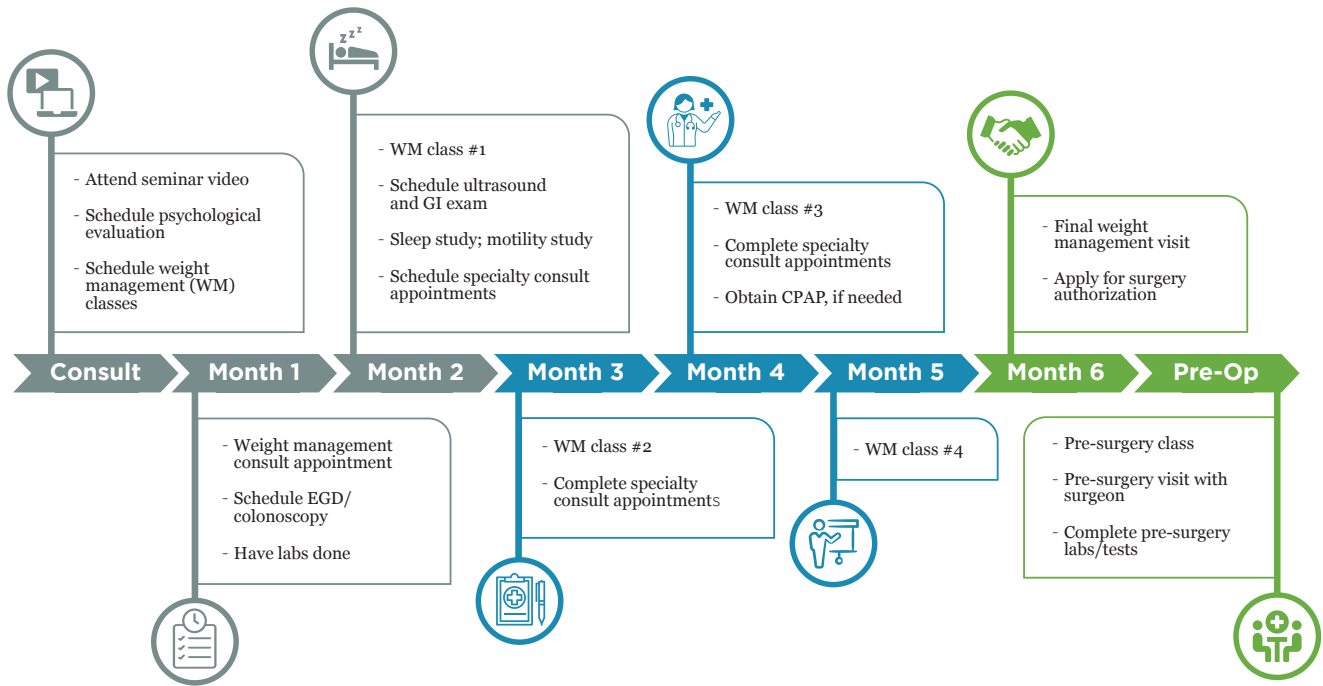
Sincerely,
<SENDER NAME>

Patient Services
E: <EMAIL>
D: <PHONE NUMBER>
W: <WEBSITE> | O: <OFFICE NUMBER>

Bariatrics Patient Process Timeline

Bariatric surgery is a journey that may require education, evaluation and preparation. While it may seem overwhelming, following this expected timeline ensures your best outcome.

- **Health Evaluation** (Consult - Month 2)
- **Health Conditions Management** (Month 3 - Month 5)
- **Prepare & Plan** (Month 6 - Pre-Op)



STEPS TO TAKE TO START YOUR LIFE-CHANGING WEIGHT LOSS JOURNEY

Whether you are just beginning to consider weight loss surgery or you are already in the process of researching which procedure may be right for you, it is normal to feel some apprehension about starting the process. At we are committed to personalized care. When patients come to us ready to change their lives, we honor their trust by answering all questions, guiding them every step of the way, and giving them the resources they need to succeed. Each patient will have unique needs and goals and the timeline to bariatric surgery can vary based on a number of factors, such as health insurance or medical conditions, but here is a general outline of the steps for a bariatric surgery patient:

STEP 1 FREE INSURANCE CHECK



Fill out our [free insurance check](#) so our team can check your health insurance plan to determine your coverage for weight loss procedures. Self-pay patients can get information on [finance options](#) and [special pricing](#).

STEP 2 YOUR CONSULTATION APPOINTMENT



Our team of bariatric experts will evaluate your health, discuss your goals, and answer your questions during a one-on-one appointment. Your consultation will include an individualized medical workup to assess any possible risks and ensure that your treatment plan is as safe as possible. Additional tests or labs may be required.

STEP 3 PRE-SURGICAL WEIGHT LOSS PROGRAM



Some insurance plans require a physician supervised weight loss program prior to surgery. We don't take a one-size-fits-all approach to weight loss. Your individual diet recommendations will be determined by your surgeon and our registered dietitians.

STEP 4 PRE-SURGICAL APPOINTMENT



Some self-pay patients may not require this step, but most patients will have an office appointment within 1 month of surgery. This appointment allows us to update your history and ensure that you are optimized for surgery.

STEP 5 LIVER SHRINKING DIET



Some patients will need to follow a special diet prior to surgery called a liver shrinking diet. This low-sugar diet is designed to reduce the size of your liver, which can make surgery safer.

STEP 6 SURGERY DAY



Bariatric surgery typically takes 30 to 90 minutes, depending on which procedure is being performed. We'll make sure that you are ready for surgery day and have all the information you need to feel empowered in your choice.

STEP 7 RECOVERY AND BEYOND



How much time you'll need off of work will depend on which procedure you have and what type of job you have. Our team will give you detailed recovery guidelines for your customized treatment plan, but most patients are able to return to work within 1 to 2 weeks. You can typically expect to schedule follow-up visits 2 weeks, 6 months and 1 year after surgery, as well as dietitian appointments.

Content Info

Patient Journey Map

FREQUENTLY ASKED QUESTIONS ABOUT THE BARIATRIC SURGERY PROCESS

IS THE INITIAL CONSULTATION APPOINTMENT FREE?

IF MY INSURANCE DOES NOT COVER BARIATRIC SERVICES, WHAT ARE MY PAYMENT OPTIONS?

DO YOU HAVE A PROGRAM FEE?

HOW LONG DOES IT TAKE FROM MY FIRST APPOINTMENT UNTIL SURGERY?

WILL I HAVE TO GO ON A DIET OR LOSE WEIGHT BEFORE SURGERY?

WHAT MEDICAL TESTS WILL I NEED BEFORE BARIATRIC SURGERY?

CAN I HAVE SURGERY AT

WHAT CAN I DO TO PREVENT WEIGHT GAIN AFTER SURGERY?

Fee Disclosure

Insurance Info

Timeline

Pre-Op Planning

Clinical Questions