

Campaigns

Campaigns consist of a series of templates that can be emailed, texted or conveyed by phone to a Lead or existing Patient based on your preferred schedule. This new feature allows clinics to actively engage patients with interesting information or educate them about their choice for Chiropractic care. In addition, this feature streamlines this important process, to just a few clicks each day.

To begin the process we have to setup Templates in Atlas. Templates can be setup for Email, SMS (text message) or scripts to be used in a phone conversation.

In our example, we will setup a Campaign to help educate New Patients with information during their first 2 weeks of care.

Setup > Templates

In Templates you can choose to create an Email or Messaging Template or a Phone Call Template.

- **Email or Messaging:** templates created to send via email or text message here is a short refresher on setting up email templates:
<https://bit.ly/2Nu490M>
the same method applies for SMS templates except there is no Subject line and you are more limited in the length of the message text
- **Phone:** templates created that will display a script to follow during a phone call

In the example window you will note we have created two Email templates (Family Plan and Why Chiro) as well as an SMS template (Happy Day) to use in our campaign.

After creating your templates it's time to create the campaign schedule.

Setup > Campaigns

Multiple campaign series can be created allowing you to apply different courses to different types of Patients (example: create a campaign for Potential Patients – Leads and another for New Patients actively engaged in the office)



