

ADVANCE LEADS

ADvance Leads Proposal

[Client Name] - [Client City]



What is ADvance Leads?

ADvance Leads is a Sales & Marketing software designed to simplify tracking and automation of the lead-to-patient conversion process for plastic surgery practices.

The features and automation are geared towards increasing your patient volume for

Breast Procedures

Body Procedures

Facial Procedures

Non Surgical Procedures



The features are just the beginning; when the technology is connected to campaigns, your team will become much more efficient, saving you money while generating more surgeries.

Sales Features & Campaigns



PATIENT SALES PIPELINE

APPOINTMENT MANAGEMENT PIPELINE

PATIENT MANAGEMENT PIPELINE

REACTIVATION PIPELINE

Sales Features & Campaigns

Patient Sales Pipeline

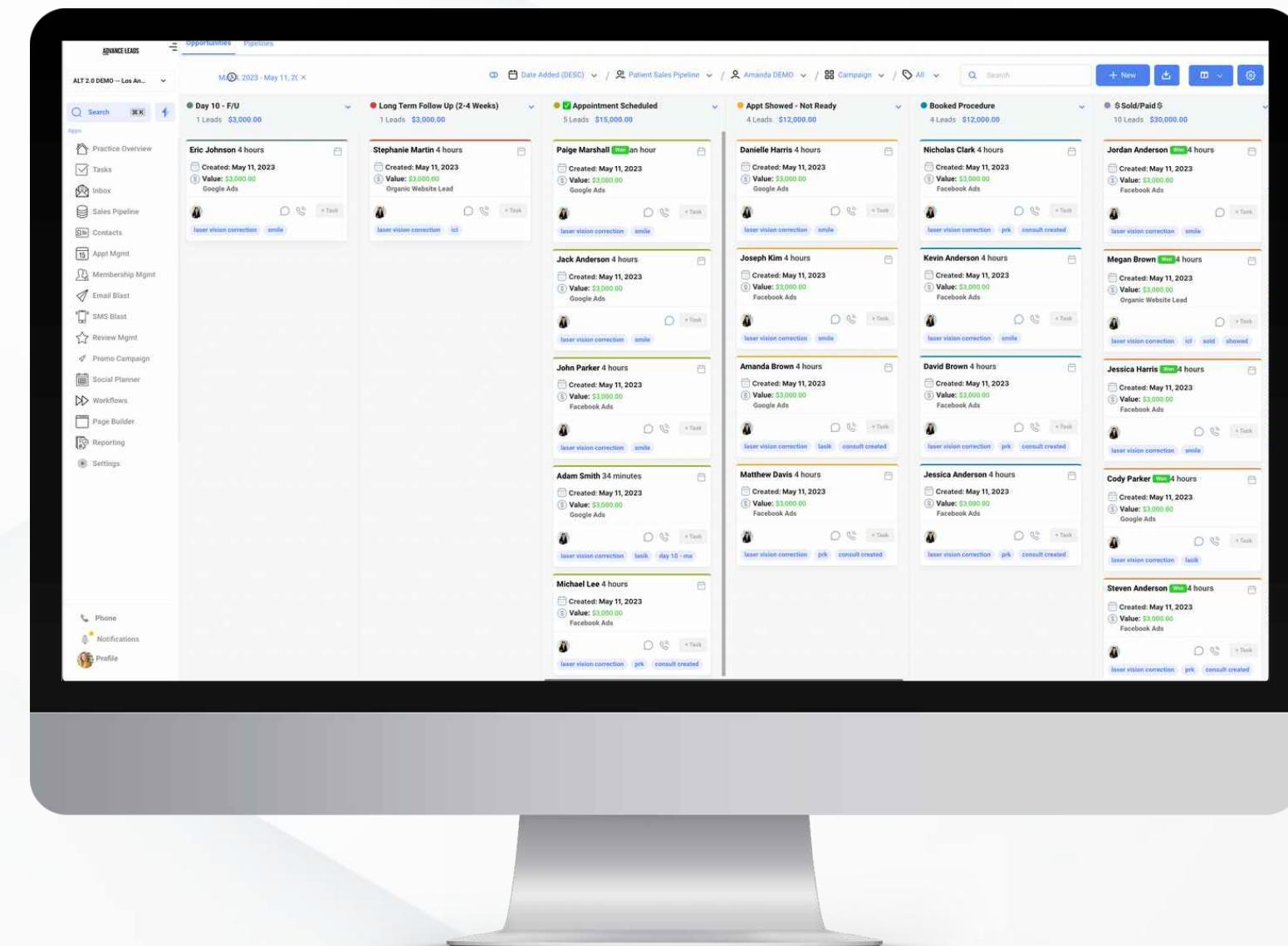
Effectively manage your new lead sales pipeline and improve your lead nurturing process.

Categorize Leads Based on Potential Value and Readiness

Systematic Approach to Nurturing Leads at Each Stage

Tracking System for Lead Progress

Data-Driven Decisions and Sales Strategy Improvements



Sales/Core Business Campaigns

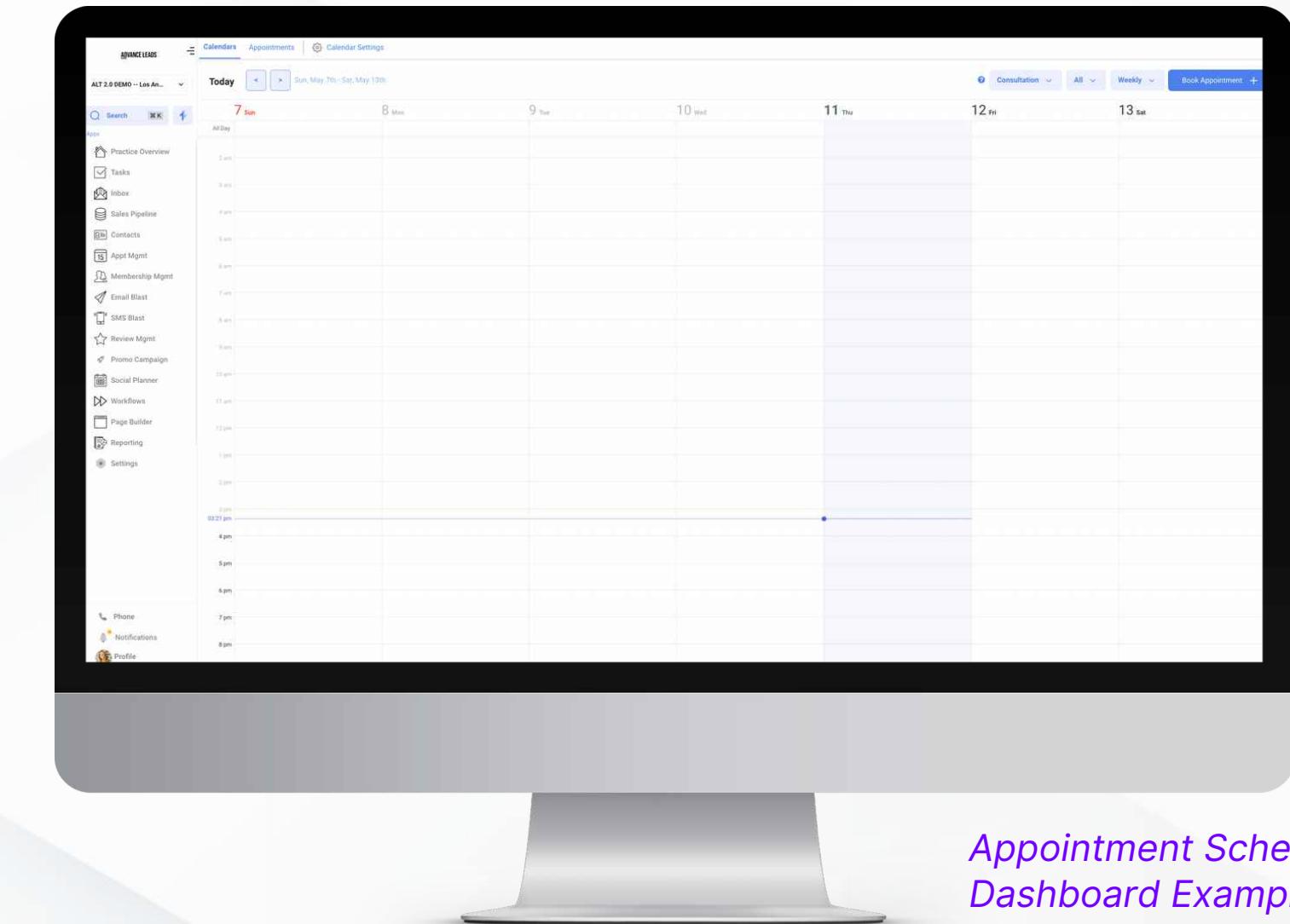
Convert more leads into surgical sales through our custom campaign sequences. Advance Leads is your practice's virtual sales admin.

New Opportunity Messaging Automation Campaign

Preconfigured follow-up automations designed to get your refractive website/advertising leads to come in for a consultation. Uses Emails, SMS, and MMS.

Appointment/Consultation Messaging Automation Campaign

Prepare your prospects to become patients with appointment reminders and other details like financing pre-approvals and intake forms.



*Appointment Scheduling
Dashboard Example*

Sales/Core Business Campaigns

Convert more leads into surgical sales through our custom campaign sequences. Advance Leads is your practice's virtual sales admin.

Review Campaign

Generate reviews for your practice after a procedure by requesting one via SMS and Email.

After Hours Automated Messaging

Automated responses to inquiries letting them know that your office is closed and you will follow up during business hours.

Canceled/Missed Appointment Follow Up Campaign

Did your prospect miss or cancel their appointment? Add them to this campaign to get them back on your books!

Post Consultation Follow Up Automation Campaign

Did your consult not sign up during their visit? Put him/her into this campaign to increase your chances of booking the procedure.

Marketing Campaigns

Utilize your existing patient/contact lists to generate more surgical sales through our curated campaigns

SMS/MMS Blast Campaigns

Email Blast Campaigns

Birthday Campaign

Say Happy Birthday to your patients during their birthday month. Fully automated.

Optional: Add a Special Offer!

Referral Campaign

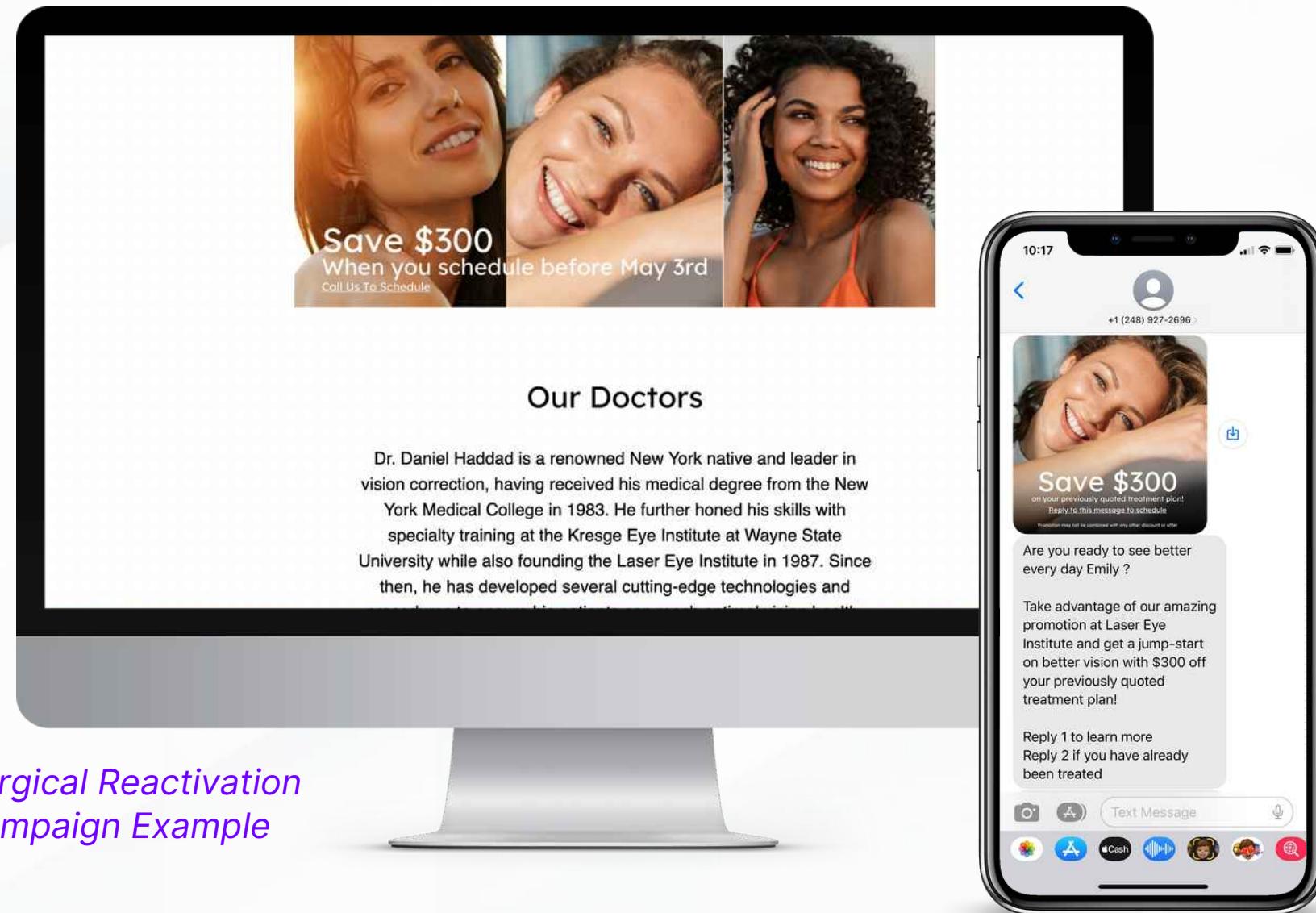
Generate referrals to your practice from your existing patients.



Birthday Campaign Example

Marketing Campaigns

Utilize your existing patient/contact lists to generate more surgical sales through our curated campaigns



Surgical Reactivation Campaign Example

Surgical Reactivation Campaign

ADvance Leads presents a chance for your practice to re-engage prospects to generate quick revenue to add to your bottom line! This campaign is designed to reactivate consultations from the past 6-12 months that did not close. 45-Day Campaign that really works!

Marketing Campaigns

Utilize your existing patient/contact lists to generate more surgical sales through our curated campaigns

Viral Giveaway (Sweepstakes) Campaign

Promote your practice by running a viral sweepstakes giveaway.

Event Promotion Campaign

Use ADvance Leads to promote and manage your in-practice educational and holiday events.

Multi-Channel Promotional Campaigns

Send out your special promotions over the course of a month using SMS, MMS, and Email. Think of this as your monthly email blast on steroids!

Marketing Campaigns

Utilize your existing patient/contact lists to generate more surgical sales through our curated campaigns

Flash Sale Campaign

Promote a 3-Day Flash Sale using our pretested campaign. Leverages Voicemail Drops, SMS, MMS, and Emails.

End of Year Price Increase Campaign

Create urgency and increase booking volume through a campaign geared towards your existing database.

Dermal Fillers

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Non-Surgical Facelift

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{{contact.first_name}} - We are thrilled to announce a one-week flash sale at {{custom_values.practice_name}}, and we want you to be a part of it!

From May 8th to May 14th to celebrate Mother's Day, we are offering an unbeatable discount to use on any of our treatments.

Get 20% off any treatment when you book for yourself and your mom!

At {{custom_values.practice_name}}, we are committed to providing you with the highest quality treatments using the latest technology and techniques. Our friendly staff is always here to help you choose the right services for your needs and make sure you leave feeling refreshed and rejuvenated.

Don't miss out on this amazing opportunity to save on your favorite treatments. This deal is available for a limited time only, so make sure to book your appointment now before spots fill up!

This is dedicated to providing you with high-quality treatments that you can't find anywhere else. Don't wait too long, book your appointment now and get ready to look your best!

[Call Us Today To Schedule](#)

[Flash Sale Example](#)

Account Features

HIPAA Compliance

Mobile App Integrations with CallRail, Gravity Forms, Typeform & more with Zapier

2 Way Conversations (SMS/Email)

1 Location Address/Brand

Custom Domain Email Service (for bulk email)

Custom Domain Phone Service (for bulk SMS/MMS)

Staff Training & Support

Reporting (Basic)

Forms



Account Features

Ringless Voicemails

Review Widget Example

Contact Management

Review Widget for Website

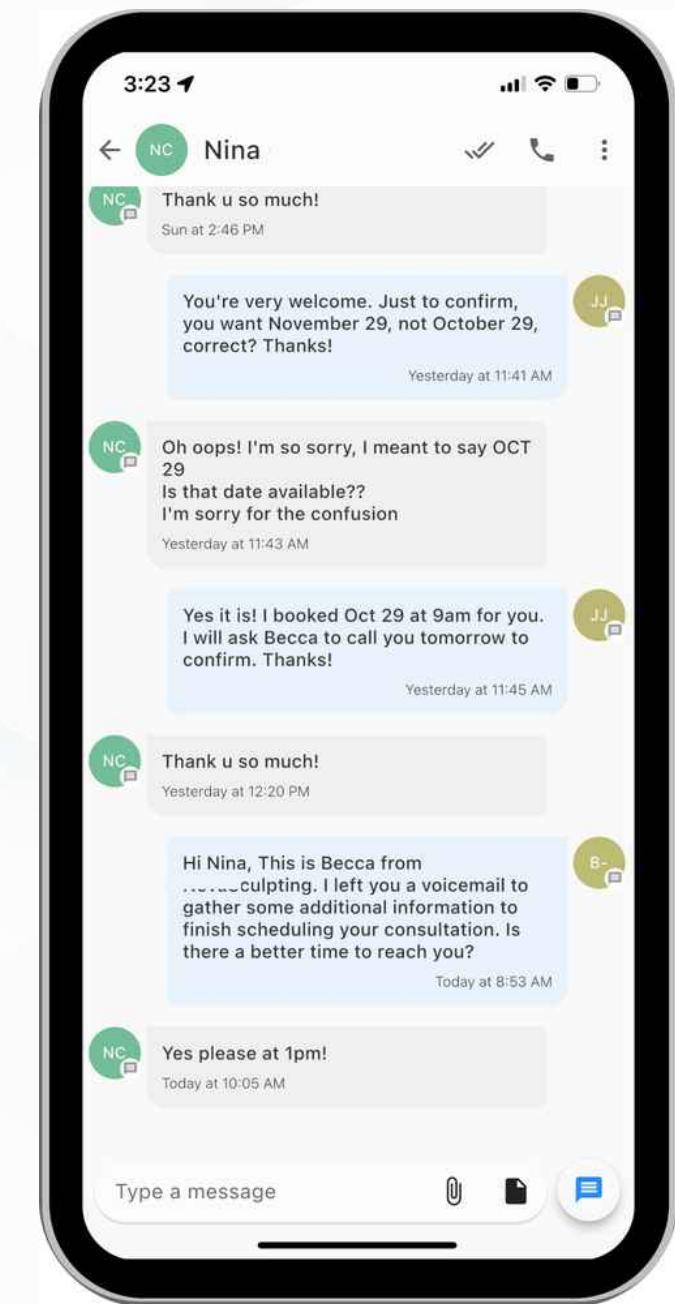
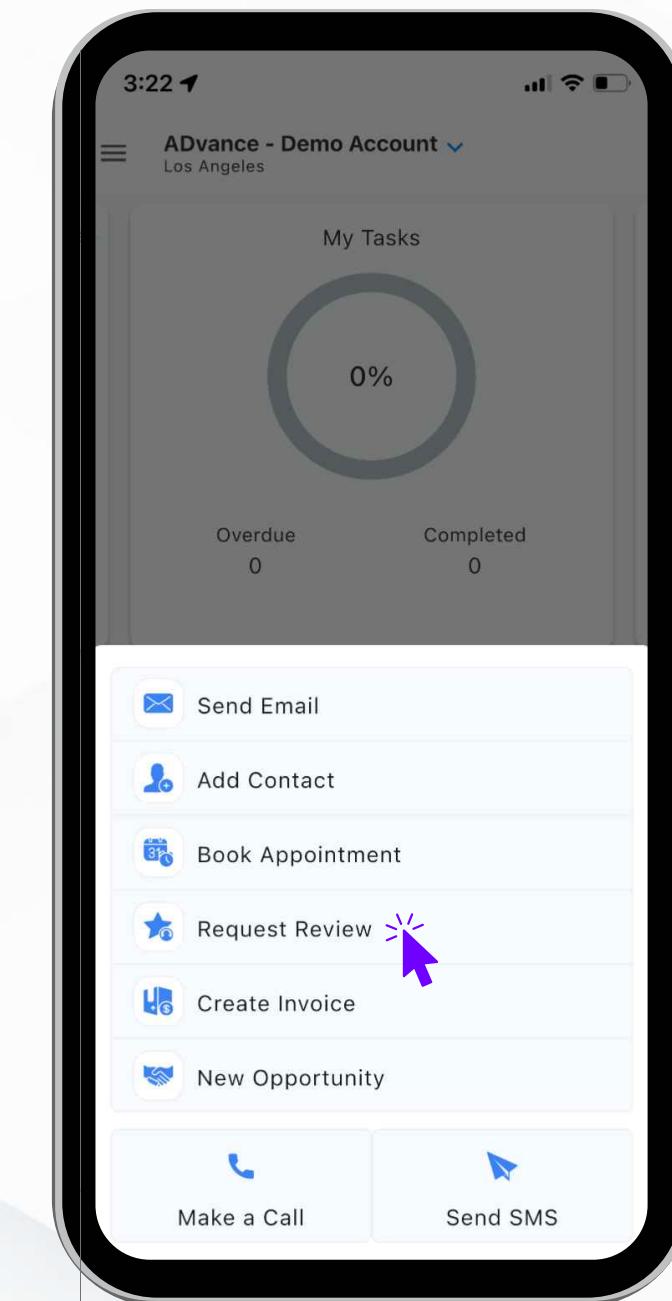
2-Way Social Media Messaging (Facebook, Instagram, Google My Business)

Chat Widget on Website

Chat Widget on Landing Page

Booking Calendar Link (for Self Service Appointments)

Google Calendar Integration



Live Chat Widget Example

Account Features

Social Media Scheduling Tool

Call Connect from Form Submissions

Missed Call Text Back

Attribution Tracking

Trigger Links

Reporting (Enhanced) - (Pro & Elite Only)

Enhanced Dashboard for Conversion
Tracking

Consultation Fee Collection on
Calendar (Elite only)

Membership Program (Elite only)

Interaction Audit Log (External)
(Elite only)

Multiple Locations in Single Metropolitan
Area (Pro & Elite Only)

Done For You Monthly Service

ADvance Leads Done For You (DFY) Service is an add-on program designed to aid practices wishing for support in running more advanced campaigns.

When you select this service, you will be given access to the ADvance Leads Strategy team, who can help with campaign planning and graphics support for the campaign, as well as offer configuration and offer recommendations. Our DFY program is ONLY available with an annual commitment.



Done For You Monthly Service

During each contract term, we will help you run any combination of up to 8 premium campaigns:

Surgical Reactivation Campaigns*

Self Serve Advertising Campaigns*

Flash Sale Campaigns**

Event Promotion Campaigns**

Viral Giveaway (Sweepstakes) Campaign**

Referral Campaign**

Multi-Channel Promotional Campaigns**

*Requires Elite License

**Requires Pro or Elite License

\$595

per month

+

\$795

one-time
onboarding fee

Packages & Pricing

ADVANCE LEADS **BASIC**

Month to Month Price
\$1,250

Annual Contract
\$1,000
**Paid monthly*

One Time Onboarding Fee
\$1,000

Users
2

Practice Locations
1

CRM Contacts
Unlimited

ADVANCE LEADS **PRO**

Month to Month Price
\$1,875

Annual Contract
\$1,500
**Paid monthly*

One Time Onboarding Fee
\$1,500

Users
5

Practice Locations
2

CRM Contacts
Unlimited

ADVANCE LEADS **ELITE**

Month to Month Price
\$2,500

Annual Contract
\$2,000
**Paid monthly*

One Time Onboarding Fee
\$2,000

Users
10

Practice Locations
3

CRM Contacts
Unlimited

Usage Fees

USAGE TYPE

COST PER SEND

1 Email **\$0.0018**

1 SMS **\$0.028**

1 MMS** **\$0.053**

1 Call Minute/Ringless VM **\$0.042**

1 Extra Phone Number* **\$2.40**

1 Extra User **\$25.00**

**5 Local Phone Numbers are Included*

***MMS messages sent with text will be billed for both MMS and SMS. Additional credit can be purchased at any time and will roll over from month to month.*

Package Inclusions

ADvance Leads Opportunity Tracking/Pipelines Included

OPPORTUNITY STAGE TRACKING

BASIC

PRO

ELITE

New Opportunity Pipeline



Appointment Management Pipeline



Patient Management Pipeline



Package Inclusions

ADvance Leads Campaigns: Standard campaigns

STANDARD CAMPAIGNS

BASIC

PRO

ELITE

New Opportunity Messaging Automation Campaign	✓	✓	✓
Appointment/Consultation Messaging Automation Campaign	✓	✓	✓
Cold Lead Follow Up Campaign	✓	✓	✓
Post Consultation Follow Up Automation Campaign	✓	✓	✓
After Hours Automated Messaging	✓	✓	✓
SMS/MMS Broadcast (Blast) Campaigns	✓	✓	✓
Email Blast Campaigns	✓	✓	✓
Birthday Campaign	✓	✓	✓
Review Campaign	✓	✓	✓
Cancelled/Missed Appointment Follow Up Campaign	✓	✓	✓

Package Inclusions

ADvance Leads Campaigns: Premium Campaigns

PREMIUM CAMPAIGNS

BASIC

PRO

ELITE

Viral Giveaway (Sweepstakes) Campaign



Multi-Channel Promotional Campaigns



Event Promotion Campaign



Flash Sale Campaign



Referral Campaign



Surgical Reactivation Campaign



DIY Advertising Campaigns (Facebook/Instagram)

