Preparing for Your Onboarding Session

CRTX Agent + Platform Handy Checklist

To ensure a smooth and productive onboarding experience, please gather or think through the following information before your scheduled session:

Client Pre-Onboarding Checklist

1. User Information

- ☐ **User Accounts**: Determine who on your team needs access to CRTX and be ready to add additional users. Each user will have their own username and password.

2. Marketing Integration Details

- ☐ **Google Ads and Google Analytics (GA4)**: Ensure you have admin access to your Google Ads and GA4 accounts to connect them during the session.
  - ☐ Verify that you know your login credentials for both accounts.
- ☐ **Meta (Facebook and Instagram) Ads**: Ensure you have a **Meta Business Account** and an **Ads Manager** set up.
  - ☐ Admin access to the Meta Ads account is required for integration.

3. Website Information

- ☐ **Website Platform**: Know the platform your website is built on (e.g., WordPress, Squarespace, custom HTML) to determine the best way to integrate the CRTX platform.

- ☐ **JavaScript Access**: If embedding the CRTX widget, ensure you or your web developer can access the website's header to embed the JavaScript code.
- ☐ **WordPress Plugin**: If using WordPress, ensure you have access to install and configure plugins.

4. Online Scheduling Calendar Setup

- ☐ **Appointment Availability**: Review and prepare your practice's appointment availability, including preferred times, days, and any blocked-off periods.
- ☐ **Service Options**: Make sure you have details ready for the types of appointments patients can schedule online (e.g., consultations, procedures, follow-ups).
- ☐ **Reminders & Confirmations**: Consider how you want to handle appointment reminders and confirmation messages, including the timing and content for automation.

5. Lead and Patient Data (Optional)

- ☐ **Patient List (if migrating)**: If you are importing existing patient leads, ensure you have this data ready in a compatible format (CSV, Excel).
- ☐ **Lead Tags**: Prepare a list of any custom tags you'd like to use for organizing leads (e.g., procedure, financing, etc.).

5. Communication Preferences

- ☐ **Email and SMS Templates**: Prepare any pre-written email or text templates that your practice uses for lead follow-up or appointment confirmations.
- ☐ **Automation Preferences**: Consider which stages in the patient journey (e.g., booking, no-show) you'd like to automate follow-ups for.

6. Virtual Consultation Setup (if applicable)

- ☐ **Virtual Consultation Preferences**: Have any specific information ready about how you plan to conduct virtual consultations (e.g., preferred appointment times, consultation fees).

7. File Preparation for CRTX Agent

- ☐ **Instruction Documents for CRTX Agent**: Prepare any documents that you want to upload to train the CRTX Agent (FAQs, treatment details, patient guidelines). These can be in formats such as PDF, DOCX, TXT, or JSON.

8. Questions or Goals

- ☐ **Key Questions or Concerns**: Prepare any questions you may have about using the CRTX platform, integrating with your systems, or training the virtual assistant.
- ☐ **Practice-Specific Goals**: Consider your practice's goals for the platform (e.g., increasing patient acquisition, improving follow-up efficiency) so the onboarding specialist can tailor the session to your needs.

Having these items ready will make the onboarding session more productive and help ensure that the platform is set up to meet your needs from day one.