

Building Your MyRepChat Process

Meeting Reminders

Before you create anything, here's a few items you'll want to consider

1. How do you want clients to reschedule?

- Instruct them to call your office
- Reschedule via online scheduling tool (i.e. Calendly)
- Your team will call them

2. Do you want to reach out to clients that don't respond?

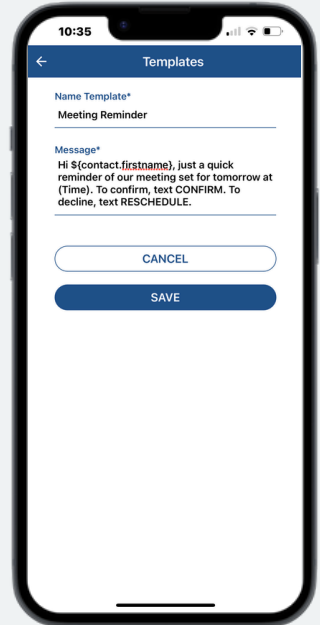
- What will your process be?

Foundational steps

1. Send your first text to the client so that they opt in to receive messages

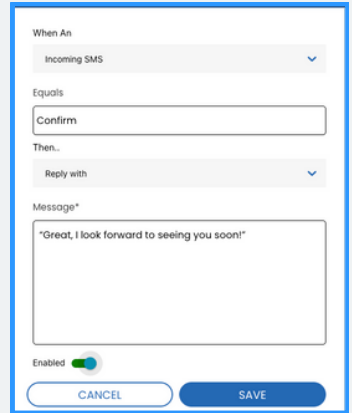
2. Create your meeting reminder text message template.

- Go to Templates > Create Template Message
- Create a new message titled **Meeting Reminder** and save message
- **Sample text:** Hi $\${contact.firstname}$ just a quick reminder of our meeting set for tomorrow at (Time). To confirm, text CONFIRM. To decline, text RESCHEDULE.



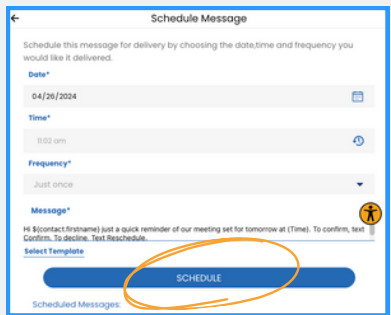
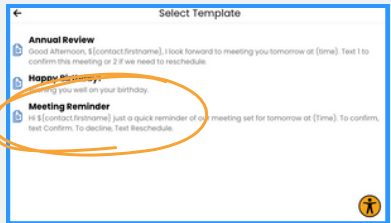
3. Create the texts that will go to clients when they respond to the meeting reminders.

- Create an automatic response that will be sent if the client replies with the word **Confirm**:
- Go to Auto Response > Create Auto Responses
- Click **Create Auto Response**
- Type **Confirm** in the Equals box
- Type the following message in the message box: **Great, I look forward to seeing you soon!**
- Create an automatic response that will be sent if the client replies with the word **Reschedule**:
- Go to Auto Response > Create Auto Responses
- Click **Create Auto Response**
- Type **Reschedule** in the Keyword box
- Type the following message in the message box: **Sorry to hear that you need to change our meeting time. Please schedule a new time via the link: (add your link)**



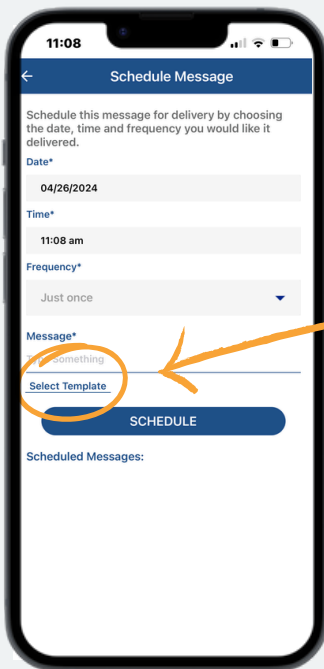
Regular weekly process - on desktop

1. Print out a list of your advisor/firm appointments for the week
2. Go to **Messages** in the main menu
3. Search for the contact and select them in results
 - Note that you will need to schedule separate messages for each person in a household since you are using a template
4. Click the paperclip attachments icon, and then select **Templates**. Select your Meeting Reminder template.
5. Insert the time of the client's appointment into the message.
6. Do NOT hit the send button. Instead, click the **scheduling icon**.
7. Schedule the message to go out at your preferred reminder time.
8. Click **save message**.
9. Repeat steps 2 through 8 until all reminders are scheduled for the week.



Regular weekly process - using the mobile app

1. Print out a list of your advisor/firm appointments for the week
2. Go to the **Messages** tab.
3. Search for the contact and select them in results
 - Note that you will need to schedule separate messages for each person in a household since you are using a template
4. Click the **paperclip icon**.
5. Click **Schedule Message**.
6. Enter the date and time that you want the message to be sent and then click **Select Template**.



7. Select **Meeting Reminder** template.
8. Insert the time of the client's appointment in the message.
9. Click **Schedule**.
10. Repeat steps 2 through 10 until all reminders are scheduled for the week.

