

Pipeline stages worksheet

Examples of Intake Scheduling Stage Options

- New Unengaged Potential Client
 - ◆ Submitted a webform but that is it, no other contact or responses by client
 - ◆ Allowing system to send automated emails and tasks to staff to call periodically
- New Potential Client
 - ◆ Working with them to get them scheduled
 - ◆ Gathering the information needed to schedule
- Benefit Verification (For insurance based practices)
 - ◆ Verify insurance benefits
- Appointment Confirmed
 - ◆ Won Stage (You did it!)
- Awaiting Paperwork/Consent Forms
 - ◆ Could be used as a pre confirmed stage then move into Scheduled
- Waiting for Clinical Director or Intake Coordinator Recommendation
 - ◆ Could be a pre scheduled stage
- Waiting for Clinician to Claim Lead
 - ◆ Could be a pre scheduled stage
- Unable to Schedule/Lost
 - ◆ Lost Stage (Like Scheduled, this is a final destination stage)
- Waitlist
 - ◆ Holding Stage or pipeline to determine if they will schedule or be lost

Examples of Tasks or Action Items Within the Stages

- Collect all demographic information
- Collect all billing/ payment information
- Identify client availability
- Identify all the services the client is interested in
- Select appointment options for client
- Send intake paperwork to client
- Receive intake paperwork from client
- Send email confirmation of appointment to client
- Send email notification to clinician that they have a new intake scheduled
- Verify benefits (for insurance based practices)
- Communicate benefits to client
- Communicate benefits to clinician
- Follow up on attendance of that intake

Pipeline Brainstorm

Consider how you respond to potential clients when they reach out to you over the phone vs email. Select the stages from above in the order in which you move the potential client through the process. Omit anything that does not make sense, move from left to right, and add any other stages that fits your process.

Phone Form: The phone form is submitted, what stage do they land in?

Stage 1 Name: _____

Circle What Kind of Stage This is: Start Stage Middle Stage Final Stage

What tasks need to be completed or information gathered before this person can move on to the next stage in your process?

Task 1:

Task 2:

Task 3:

Task 4:

Stage 2 Name: _____

Circle: Start Stage Middle Stage Final Stage

What tasks need to be completed or information gathered before this person can move on to the next stage in your process?

Task 1:

Task 2:

Task 3:

Task 4:

Stage 3 Name: _____

Circle: Start Stage Middle Stage Final Stage

What tasks need to be completed or information gathered before this person can move on to the next stage in your process?

Task 1:

Task 2:

Task 3:

Task 4:

Stage 4 Name: _____

Circle: Start Stage Middle Stage Final Stage

What tasks need to be completed or information gathered before this person can move on to the next stage in your process?

Task 1:

Task 2:

Task 3:

Task 4:

Stage 5 Name: _____

Circle: Start Stage Middle Stage Final Stage

What tasks need to be completed or information gathered before this person can move on to the next stage in your process?

Task 1:

Task 2:

Task 3:

Task 4:

*Identify which stages are a start stage, middle stage, or final stage. There might be several that are in each of these categories. Example, Scheduled and Did Not Schedule/Lost may both be final categories. While Benefit verification and Waiting for clinical recommendation may be middle stages. New potential client and New unengaged client might both be starting stages depending on whether the person came in through your webform or phone call.