

Offboarding Checklist

Marketing Platform

Thinking about canceling Marketing Platform? Here's a checklist to guide you through the process. Each item may impact your patient experience, communication, and office workflow, so we encourage you to review carefully before proceeding.

- Prepare for Technical Support Needs:** If you transition away from Marketing Platform, you may need technical help to uninstall the PMS data sync, port phone lines, or verify your systems meet the requirements for new service providers. This could involve additional costs.
- Inform Patients of Transition:** You must inform patients that their patient portal will no longer store their information, and they may need to create an account through a new platform in the future. Set expectations for the timeline of the transition, as well as details about any additional lost or different functionality.
- Remove Widgets from Web Pages:** Before cancellation, remove any widgets from your practice website or other public web pages that correspond with Marketing Platform. These widgets could include links to patient forms, reviews, and online scheduling.
- Export All Patient Feedback:** It is your responsibility to download any data from Marketing Platform that you need, including data from patient reviews and surveys. RevenueWell will not keep this feedback after the contract ends.
- Export All Custom Campaign Content:** If you've created Custom Campaigns in Marketing Platform, it's important to download that content before cancelling. This content will not be kept by RevenueWell after the contract ends.
- Export All Patient Communication Preferences:** To maintain a consistent patient experience, it is essential to transfer patient communication preferences stored in Marketing Platform to your new service provider. In order to do this, download communication preferences before you end your service.
- Download the ASAP List:** You must download your list of patients currently on the ASAP List so you can maintain communication with them once your Marketing Platform access is lost.



- **Prepare to Build New Forms:** If you use RevenueWell Forms, be aware that you will need to create new forms in your new system. You will not be able to transfer forms in Marketing Platform to a different service provider. Download versions of your forms so you can build them to match.
- **Plan for Loss of Microsite Rankings:** By transitioning away from Marketing Platform, you will lose your practice microsite along with its web rankings. This can negatively impact your online visibility and make it harder for patients to discover your practice, especially if your microsite performed well in rankings.
- **Prepare for Loss of Customization:** Cancelling your Marketing Platform services means you will lose practice-specific customizations like branded emails, unique shortcodes for text messaging, and messaging templates. Ensure you have a plan for managing patient communication when this is no longer available.
- **Anticipate Changes in Results:** Take into consideration that moving away from Marketing Platform can cause a negative change in your practice results, especially regarding patient communication, bookings, no-show rates, and overall practice efficiency. **If you're switching to a new provider, check that their offerings can support the positive results you're currently experiencing with Marketing Platform.**
- **Prepare for TCR Registration:** When starting services with a new provider, you will need to complete TCR registration again to maintain communication with patients through SMS text messaging. If you used RevenueWell Phone, you will also need to complete another phone registration. Prior registrations will not transfer to a new service provider.

If you have questions or concerns about offboarding, please contact your Customer Success Manager.