



Private Group Reminder System Process

Upon receiving the reminder email to process quarterly private group reminders, follow the steps below to complete the reminders from all private groups in upcoming quarter from 2 years ago.

There will be 3 main parts to this process:

- Mailing a letter to each private group
- Sending an email reminder template to each private group
- Calling each private group

Step 1: Access the Private Group Reminder List in Dropbox

Login to Dropbox (info@acsls-bls-nashville.com)

Go to the Dropbox Folder: 1 - Private Group Management

Then go to sub folder 1 – Reminder Lists By Year

Open the Private Group Reminder List excel file spreadsheet for the year you will be processing reminders.

NOTE: Always access the list from 2 years ago. If they did their training in 2020, we send reminders in 2022.

Step 2: Open each location sheet on the spreadsheet and locate the private groups you will be reminding based on the quarterly schedule below:

January 1st Reminder- process 1st quarter private groups from 2 years ago in months:

- April
- May
- June

April 1st Reminder- process 2nd quarter private groups from 2 years ago in month:

- July
- August
- September

July 1st Reminder- process 3rd quarter private groups from 2 years ago in month:

- October
- November
- December

October 1st Reminder- process 4th quarter private groups from 2 years ago in month:

- January
- February
- March

Step 3: Mail A “city” specific Reminder Letter to each private group listed for the months you are reminding from 2 years ago

Each City has a Sheet on bottom of the excel file.

Go sheet by sheet and locate the groups you need to mail a letter to for this term.

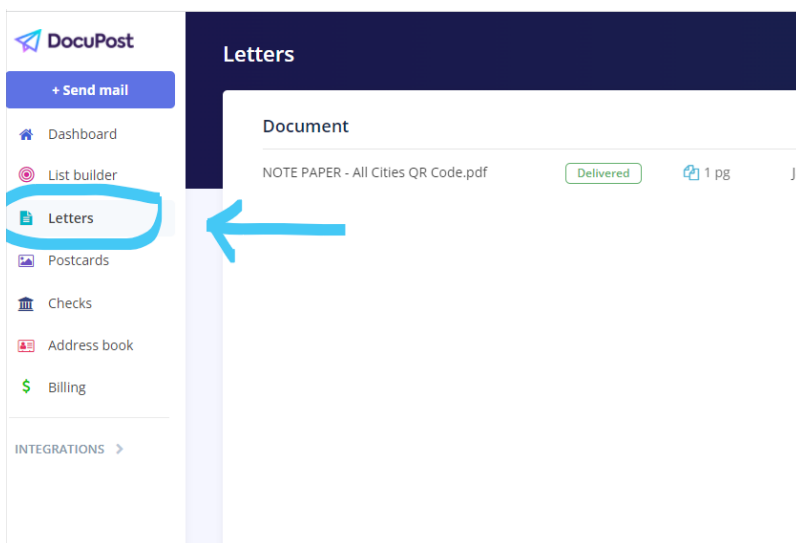
Select your first private group to mail a reminder letter to and then-

Login to Docupost.com

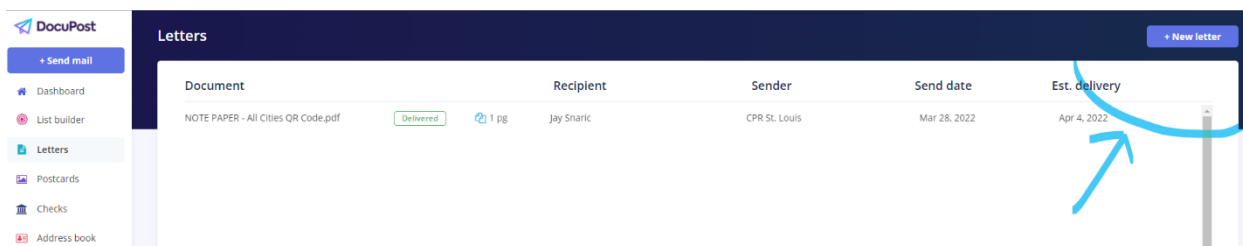
Username- jsnaric@gmail.com

Password- rxz2nsF77Tz@6^^q

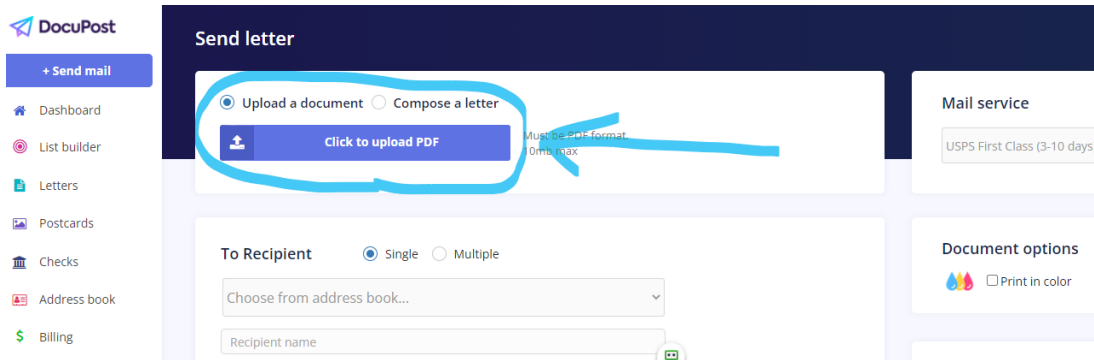
Click on LETTERS in the left column



Next, Click + New Letter at the top right corner of the webpage



Next, you will need to **UPLOAD** the PDF Letter you want to mail to the first private Group

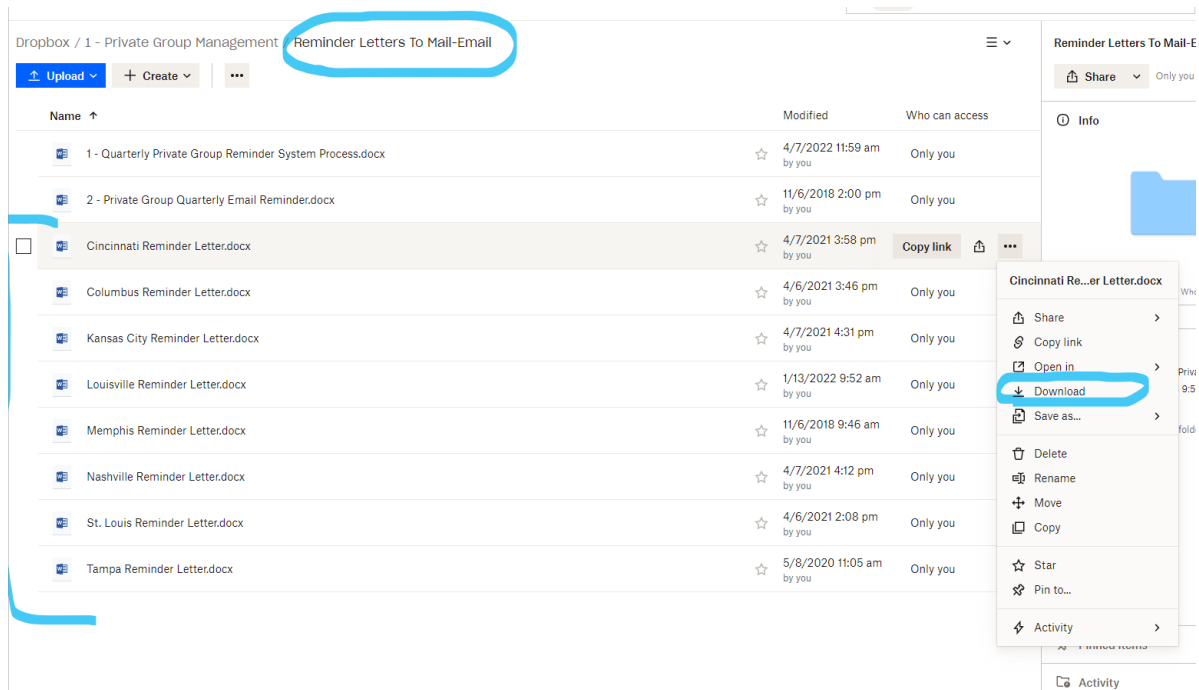


To Access the Letter to Upload to Docupost-

Go to the Reminder Letters to Mail-Email

(sub folder of 1 - Private Group Management in Dropbox)

Next, select and download the **city specific reminder letter** PDF file you want to send



Upload the PDF file to Docupost

Next, enter the TO RECIPIENT details in Docupost.

For Recipient name, put the company name first followed by c/o the contact's name we have on file. You may have to play with the company name and contact name to get everything to fit. Follow this by the most current address we have on file.

Search for the company name in CPR.Center before mailing to make sure the company contact/physical mailing address has not changed from what is on the spreadsheet.

The screenshot shows the DocuPost 'Send letter' interface. The 'To Recipient' section is highlighted with a blue circle. It includes a dropdown menu for 'Choose from address book...', input fields for 'Recipient name', 'Address line 1', 'Address line 2', 'City', 'State', and 'Zipcode', and a 'Save to address book' checkbox. The document name 'Cincinnati%20Reminder%20Letter.pdf' is visible at the top.

Next, enter the FROM SENDER Details

Click the dropdown menu for CHOOSE FROM ADDRESS BOOK and select the CPR City we are sending the letter from

The screenshot shows the DocuPost 'Send letter' interface with the 'From Sender' section highlighted by a blue circle. It includes a dropdown menu for 'Choose from address book...', input fields for 'Sender name', 'Address line 1', 'Address line 2', 'City', 'State', and 'Zipcode', and a 'Save to address book' checkbox. The 'Mail service' is set to 'USPS First Class (3-10 days)' and 'Certified options' is set to 'None'. The 'Document options' section shows 'Print in color' and 'Double-sided' checked. The 'Letter preview' section displays the following text:

CPR Cincinnati
American Heart Association Training Site
4225 Mahabury Road
Suite 204
Cincinnati, OH 45242
Phone - 513-828-3488
Email - info@CPRcincy.com

RE: Reminder Letter -Expiring CPR Certifications

Dear Office Manager,

According to our records your staff is due to renew one or more American Heart Association CPR certifications.

To schedule your renewal class at your office, please call us 513-828-3488.
We look forward to working with your group again!

Sincerely,

The bottom of the interface shows a 'Send letter' button with a price of '\$1.05 - 1 pages'.

Next, select Mail Service and Document Options

For mail service-

Always select First Class 3-10 days and NONE for certified option

For Document Option-

Leave the PRINT IN COLOR box unchecked. We want all letters to mail in black and white.

Leave Unchecked the Double-Sided Box

The screenshot shows the docupost.com/sendletter interface. The 'Mail service' dropdown is set to 'USPS First Class (3-10 days)' and the 'Certified options' dropdown is set to 'None'. The 'Document options' section shows 'Print in color' checked and 'Double-sided' unchecked. The 'To Recipient' section is filled with 'Mayfield Spine Center c/o Sheila Watson' and 'Address line 1'. The 'From Sender' section is filled with 'CPR Cincinnati' and '8348 Little Road'. The 'Letter preview' section shows the following text:

CPR Cincinnati
American Heart Association Training Site
4225 Malsbury Road
Suite 204
Cincinnati, OH 45242
Phone - 513-828-3488
Email - info@CPRcincy.com

RE: Reminder Letter -Expiring CPR Certifications

Dear Office Manager,

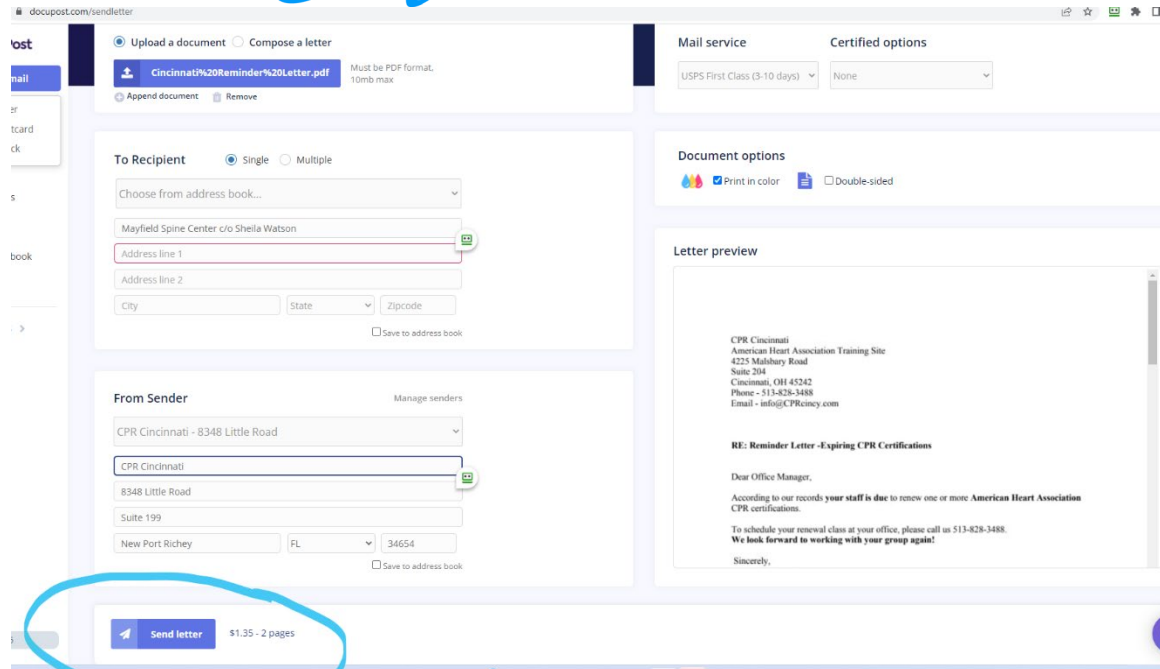
According to our records **your staff is due** to renew one or more American Heart Association CPR certifications.

To schedule your renewal class at your office, please call us 513-828-3488.
We look forward to working with your group again!

Sincerely,

At the bottom left, there is a 'Send letter' button with a price of '\$1.35 - 2 pages'.

After verifying everything is entered and correct, click SEND LETTER in the bottom left corner



Update the PRIVATE GROUP REMINDER LIST spreadsheet Column that the reminder LETTER was sent. Enter the date the letter was sent and your initials.

*****Repeat Step 3 for all other Reminder letters that need to be mailed for the months due for each city sheet on the excel file.*****

Step 4: Send the Reminder Email Template- All Cities

Email each of the contacts from the spreadsheet for the months you are issuing reminders for using the Reminder Email Template- All Cities

*located in the Reminder Letters to Mail-Email sub-folder of 1 - Private Group Management in Dropbox

Originate the reminder email for the city specific Outlook account
BCC info@aclstlouis.com on all reminder emails sent

Search for the company name in CPR.Center before emailing to make sure the company contact/email address has not changed. Insert the appropriate contact's name, class type, and month the certifications are due in the email template.



Example Email:

Hi Marybeth!

We are emailing you because the ACLS certifications from the class we provided at your facility in June of 2020 will soon be expiring.

The certifications need to be renewed by the end of June 2022.

We would be delighted to help you schedule your renewal class!

As a reminder...

We Come to You! Our instructors will bring everything to your office/group.

- 100% American Heart Association 2-Year Certifications.
- No Hassles. We Provide Everything Your Office Needs!
- Our Instructors Cater the Training to Accommodate Your Group's Background and Experience.
- STRESS-FREE Class with Fun, Experienced Instructors! No Worries.
- We Work Around YOUR SCHEDULE!
- We'll come to YOU morning, noon, or night.
- You Relax! We Take Care of the Record Keeping.
- Never have anyone expire again. Free Reminder System – It's now our job to remind you when it's time to renew. Also, we will maintain dated records of your certifications in case you ever need them.

Call us at 314-600-2075 or email us info@aclsstlouis.com to schedule your class. Act fast to get the date you want, as our calendar is filling quickly.

We look forward to working with you again soon!

Have a great day!

Kimberly

Team CPR St. Louis

314-600-2075

Update the PRIVATE GROUP REMINDER LIST spreadsheet Column that the reminder EMAIL was sent. Enter the date the EMAIL was sent and your initials.

*****Repeat Step 4 for all other Reminder EMAILS that need to be sent for the months due for each city sheet on the excel file.*****



Step 5: Call the Company

Using the phone number from the spreadsheet, call the company and ask for the contact's name listed on the spreadsheet.

If the number you call is a cell phone number, leave a voicemail using the template below. Then, Google the company name and find the company phone number. Update the spreadsheet with the correct phone number and call the company. Call the company phone number.

If the company says that “contact no longer works here”, tell them-

“My name is (your name) and I am calling from CPR (city name). We did your CPR class 2 years ago. Our records show that your staff’s CPR certifications will expire at the end of (month). Is there someone else I can speak with about scheduling your recertification class?”

If you are able to speak with the contact, proceed with-

“Hi (contact name) I am calling from CPR (city name). We did your CPR class 2 years ago. Our records show that your staff’s CPR certifications will expire at the end of (month). We wanted to reach out with a friendly reminder to see if you would like to schedule your renewal class.

If they say yes, ask if there is a specific date/time they have in mind for their training.

Collect all of their details using the private group template information email and send it to info@aclstlouis.com - Attention Kimberly Private Group

Tell them our private group coordinator will check on dates and be in touch shortly after checking on dates and availability.

If you get voicemail, proceed with-

“Hi (contact name), my name is (your name) and I am calling from CPR (city name). We did your (class type) class 2 years ago. Our records show that your staff’s (class type) certifications will expire at the end of (month). We wanted to reach out with a friendly reminder to see if you would like to schedule your renewal class. Please call us at (city phone number) when you have time. We look forward to helping you get scheduled! Thank you and have a great day 😊

Update the PRIVATE GROUP REMINDER LIST spreadsheet Column that the reminder PHONE CALL was sent. Enter the date the call was completed and your initials.

*****Repeat Step 5 for all other Reminder CALLS that need to be made for the months due for each city sheet on the excel file.*****