

SOP: Gen 2 Mult-e-Portal Endo Training With Elliquence

(Updated on 4/24/26)

Consider new target: Reps

Touchpoints Prior to Next Lab:

2 mo outreach - if applicable

Notify everyone via SM and Email blast about the next lab.

Scott sends first email blast via Elliquence audience list - also to reps and distributors < internal

CK sends 1 week after Scott's - to CK's email audience list

1mo

Social Media - Shows previous labs - Faculty monologue - testimonials

Email blast - Sign Up Date and CTA - links to SM videos

Mention Reps - "reps welcomed"

Social media collab with Reps?

Scott sends first email blast via Elliquence audience list - also to reps and distributors < internal

CK sends 1 week after Scott's - to CK's email audience list

Update email for correct dates and info - then send to interested sign-ups (for anyone).

*NOTE: Separate email audience - patients from surgeons

Reps audience category for email blasts? - asking Brian...

2 week

Get Poll for Zoom Time - Elliquence

Send "What to expect" email - starting with Pre-Lab Zoom - to people who've signed up

CRM update for attending surgeons

Personal text from CK for Zoom - to anyone who has not responded

Personal text invite Reps

1 week

Pre-Lab Zoom

During Event:

Dry Lab Drills - record times

2 Dry Lab Stations - Left hand (or both) / Right hand (clock drill)

Prioritize who needs to leave first

"Mind melt" convo with Plaud recording during lunch

Get a video testimonial with their certificate before they leave

Post event:

Navy Seals method - team breakdown

Process all recordings with Plaud transcripts and summaries - Store in Google Drive (automated)

CRM update for attended surgeons - send CK "contact cards" with their updated info

STRATEGY: Outreach is not necessarily directly to the surgeons, but to their rep. We contact the rep to:

1. Stay in touch - get their contact first and get a reply.
2. Find out when the surgeon's next case is
3. Loop in Dr. Kim to evaluate if that case is a good first endoscopic case
4. Dr. Kim gives them a social media shout out, helps them with their exposure. I get good footage of them with endo - for their website and marketing.
5. Make sure Elliquence is in touch with them to purchase their equipment when ready.

Follow ups

1. **Within 1 week** CK sends a personal "Thank You" text
 - a. Halleck needs to remind
 - b. Get feedback from Reps - via text?
2. **2 weeks**
 - a. Email Reps - feel out what their plan is (first case?)
 - b. Ask reps about OTHER surgeons who might be interested
 - c. Social Media - start preparing collaborations with some surgeons
3. **1mo**

- a. Get a feel for where they're at with Endo
 - b. Offer Social Media push
- 4. 2mo
 - a. Okay, if not then what's up? Last call. "What can we do to help, what's missing..."

[END OF SOP]

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Next To Do's (as of 4/24):

- Get Tomi's rep name/info - Brian/Scott
- Ascertain Montesano: is he rat pack faculty - Brian/Yuki
- May 8 strategize WCMISST social event at Elliquence facility to show "who we are" - Yuki
- Checklist update via Claud - Halleck
- Get Nick Schulk's rep info - Erin
- Previous years reps - of those who adopted endo or whose surgeons attended training (Steven/Brian question)
- Add dates to CTA landing page on TopSurgeon side
- Shane Hawksworth - scott is asking Brian
- Shane brought his rep - Karl Karam (get his info)