Software OverviewTraining Video Script (3–5 Minutes)

[Opening – clean UI visuals, team working across devices, calm music]

Voiceover:

At Aylara Pelvic Health & Wellness, our systems are not optional tools.
They are the operational infrastructure that ensures consistency, accountability, and scale.

Every clinic operates through four core platforms:

- **Aylara CRM**
- **PT Everywhere (EMR)**
- **QuickBooks Online (QBO)**
- **G-Suite (Google Workspace)**

Each system has a defined role.

[Section 1 – Aylara CRM]

[Visual – lead enters from website or ad]

The Aylara CRM manages everything that happens **before a patient becomes a scheduled visit.**

Lead Capture & Intake Workflows

All inquiries are captured and organized automatically.

There are no missed leads and no manual tracking systems.
Each lead follows a defined intake workflow from first contact to booking.

Patient Communication Automation

The CRM automates:

- Text communication

- Email communication
- Appointment reminders
- Follow-ups

This ensures speed, consistency, and professionalism without relying on manual effort.

Follow-Up & Reactivation Campaigns

The system continues working even when staff are not.

It manages:

- Unconverted leads
- Past patients who have dropped off
- Long-term reactivation campaigns

No patient is lost due to lack of follow-up.

Inquiry-to-Conversion Tracking

All activity is measured.

We track:

- Lead volume
- Conversion rates
- Time to booking
- Drop-off points

This data drives performance and decision-making.

[Transition]

Once a patient is scheduled, the experience transitions into **PT Everywhere.**

[Section 2 – PT Everywhere (EMR System)]

[Visual – therapist documenting, scheduling interface]

PT Everywhere manages the **entire clinical and patient care lifecycle.**

Patient Intake & Documentation

All patient records are stored digitally, including:

- Intake forms
- Medical history
- Consents

Everything is organized, secure, and compliant.

Evaluations & Progress Notes

Therapists document:

- Initial evaluations
- Ongoing progress
- Clinical findings

Documentation must be accurate, complete, and entered in real time.

Treatment Plans & Outcomes Tracking

Each patient follows a defined plan of care.

The system tracks:

- Progress over time
- Outcomes
- Adjustments to treatment

This ensures care is intentional and results-driven.

Scheduling & Visit Management

All appointments are handled within PT Everywhere.

There are no external scheduling tools.
Everything is centralized to maintain consistency.

Compliance Standards

PT Everywhere ensures:

- Proper documentation practices
- Audit readiness
- Consistency across providers and clinics

Billing & Financial Tracking (Patient-Level)

The system manages:

- Patient charges
- Payments
- Visit-level financial records

Accuracy and transparency are required.

[Transition]

While PT Everywhere handles patient-level financials,
QuickBooks Online manages the business-level financials.

[Section 3 – QuickBooks Online (QBO)]

[Visual – financial dashboard, reports]

QuickBooks Online is the system of record for all financial operations.

Business Financial Management

QBO tracks:

- Revenue
- Expenses
- Profit and loss
- Cash flow

This is the source of truth for financial performance.

Standardized Reporting

Each clinic is required to maintain accurate, up-to-date financials.

Key reports include:

- Monthly Profit & Loss
- Expense categorization
- Revenue tracking by service

This enables leadership to evaluate performance across all locations.

Expense & Payment Tracking

All business expenses must be recorded and categorized correctly.

There are no off-system transactions.
There is no delayed entry.

Financial visibility must be real-time and accurate.

[Transition]

To support all systems and communication, Aylara uses **G-Suite.**

[Section 4 – G-Suite (Google Workspace)]

[Visual – Google Drive, Docs, Sheets, Calendar]

G-Suite is the central platform for internal communication, documentation, and collaboration.

Email & Communication

All team communication runs through company-managed Gmail accounts.

No personal emails are used for business operations.

Document Management

Clinic-specific files may be stored in Google Drive, including:

- Clinic documents
- Internal resources

Documents must be:

- Organized
- Accessible
- Up to date

Calendar & Scheduling Coordination

Google Calendar manages:

- Internal meetings
- Team schedules
- Operational planning

All scheduling must be visible and coordinated.

[Section 5 – System Integration & Expectations]

[Visual – systems working together seamlessly]

Each system has a defined role:

- **CRM** → Lead management and communication
- **PT Everywhere** → Patient care and clinical operations
- **QBO** → Financial management and reporting

- **G-Suite** → Communication, documentation, and collaboration

---

Non-Negotiable Standards

- All leads must be managed through the CRM
- All patient care must be documented in PT Everywhere
- All financials must be recorded in QBO
- All internal communication and documents must be in G-Suite

Accuracy, consistency, and real-time usage are required across all platforms.

[Closing – steady, confident tone]

These systems are what allow Aylara to operate at a high level—consistently, across every clinic.

They remove guesswork.
They create accountability.
They enable scale.

When used correctly, they ensure that every patient receives the same level of care, and every clinic performs to the same standard.