CHAPTER 11 CHECKLIST

Operations

- [ ] Write the full order flow with an owner per step
- [ ] Set a target time per step and a daily stuck-order report
- [ ] Platform configured: registration, intake, routing, orders, pharmacy link, communications, admin and reporting
- [ ] Provider network integrated: roster, consult pathways, review workflows, transmission, escalation
- [ ] Pharmacy integrated: connectivity, formulary, routing, transmission, shipping, statuses, tested
- [ ] CRM integrated: lead capture, forms, pipelines, routing, automations, conversion tracking, call handoff
- [ ] No health details in marketing fields; BAA in place if the CRM holds health information
- [ ] A2P 10DLC brand and campaign registered before any business texting (Re-check before publication.)
- [ ] Phone workflows, routing, scheduling and escalation in place
- [ ] Agents trained on clinical boundaries
- [ ] Refund policy published
- [ ] Recall and adverse-event process agreed with your pharmacy, and a mock recall run

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