



**DEPUTY**  
*Scheduling and HR*

**CURRENT STATE:** No integration  
**IDEAL:** Sync data to Acuity to avoid scheduling double up.  
**DEVELOPMENT:**

- Acuity Integration
- Explore integration options to have Deputy as single source of truth for staff (Priority: Moderate)

**ACUITY SCHEDULING**  
*Schedule*

**CURRENT STATE:** Pracs and patients use to book appts and see schedule. Email  
**IDEAL:** Scheduling done through Pipedrive no need to go through deputy.  
**DEVELOPMENT:**

- Book directly using the calendar in Pipedrive and push to Acuity (Priority: Low)

**PIPEDRIVE**  
*CRM/ Central Source of Patient Data*

**CURRENT STATE:** Functional.  
**IDEAL:** Seamless integration flow and iframe to other systems.  
**DEVELOPMENT:**

- CS Process
- Sidebar recalibration
- Product integration
- WooComm iframe
- Automated SMS/Emails
- Patient Flow in HH

**WOOCOMMERCE WORDPRESS**  
*Orders, Ecommerce, HH*

**CURRENT STATE:** Clunky process, freezing  
**IDEAL:** Simple process for patient and staff, fully integrated reporting  
**DEVELOPMENT:**

- Elementor
- Order form
- PD integration
- Launch to patients
- Mobile App

**SHIPSTATION**  
*Dispensary/ Shipping*

**CURRENT STATE:** Integrated with both WooComm sites. Seamless shipping.  
**IDEAL:** PO process as well  
**DEVELOPMENT:**

- Automated printing
- Returns labels
- Purchase orders

**BIG TIN CAN/ BRAINSHARK**  
*Role Play and Training*

**CURRENT STATE:** No integration  
**IDEAL:** Sync data to Avoma or from Avoma, so we can get a central view of progress. Potentially to Deputy.  
**DEVELOPMENT:**

- Setup HH Training
- Explore integration options (Priority: Moderate)

**AVOMA**  
*Sales Coaching*

**CURRENT STATE:** AI scoring setup for DCs and Initials  
**IDEAL:** Centralised conversation intelligence, predictions and best practice conversations  
**DEVELOPMENT:**

- Setup conversation tracking, AI search capability
- Pipedrive integration

**KEAP**  
*Marketing Automation*

**CURRENT STATE:** Legacy System, Hundreds of funnels  
**IDEAL:** Renee and I would love a new system but it's a big job  
**DEVELOPMENT:**

- Double check tag and appt integration.
- No system migration planned

**SMS BROADCAST**  
*SMS*

**CURRENT STATE:** SMS sent via Keap are sent through SMS Broadcast.  
**IDEAL:** One provider only  
**DEVELOPMENT:**

- Deboard from Keap and Onboard AirCall

**ZOOM**  
*Video Conferencing*

**CURRENT STATE:** Zoom details sent automatically through Acuity.  
**IDEAL:** Seamless integration with PD as well  
**DEVELOPMENT:**

- Click to join on PD activities. Links automated in PD emails.

**HEIDI**  
*Treatment Plans & Notes*

**CURRENT STATE:** No integration  
**IDEAL:** Two way sync  
**DEVELOPMENT:**

- Push TP and Treatment notes into PD
- Pull contextual data and appointments from PD (Priority: Low)

**PATIENT BANK**  
*Lab Testing Results*

**CURRENT STATE:** One way sync from PD. Manual upload of results  
**IDEAL:** Two way sync and automated upload of results  
**DEVELOPMENT:**

- DOB and ID to PB from PD
- Sample arrival and testing completed dates to PD

**EMAIL GOOGLE DRIVE**  
*Email & Doc Storage*

**CURRENT STATE:** No integration  
**IDEAL:** Two way sync  
**DEVELOPMENT:**

- Push TP and Treatment notes into PD
- Pull contextual data and appointments from PD (Priority: Low)

- KEY**
- Future (dotted arrow)
  - Current (solid arrow)
  - Direct API (gear icon)
  - Via Make (gear icon)
  - Via Zapier (book icon)
  - Automations in Notion (Z icon)