

Title: AI-Enabled Content Production & Operations System

Organization: Active Family Chiropractic

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1. PURPOSE

This SOP documents the AI-enabled content production and operations system designed and implemented for Active Family Chiropractic between November 2025 and January 2026. The system comprises two distinct AI agent branches: one supporting internal operations and patient acquisition, one supporting marketing and content production. Implementation reduced ad content creation time by 50%, fully automated after-hours patient interaction, eliminated after-hours team calls entirely and nearly doubled response time to patient and staff questions through an AI-powered intake chatbot.

2. SCOPE

This procedure applies to the Marketing Strategist and any staff member interacting with the AI operations agent. It covers the full lifecycle of both agent branches: build and training, content generation, lead handling, patient scheduling coordination and performance review. It does not cover clinical documentation, in-office treatment protocols or financial reporting.

3. DEFINITIONS / GLOSSARY

AI Operations Agent: The AI agent branch configured to handle inbound staff questions via chatbot and outbound phone calls to leads generated through paid ad campaigns, with the goal of scheduling new patients with a provider.

AI Marketing Agent: The separate AI agent branch configured to generate social content, ad copy and campaign messaging based on uploaded brand case files and strategic briefs.

Canva: Design platform used to create visual assets for organic and paid social content prior to scheduling in Meta Business Suite.

Case Files: A series of detailed brand, voice and operations documents built by the Marketing Strategist and uploaded into AI memory to train both agents on Active Family's tone, services, clinical language and messaging standards.

Script Database: The library of approved call scripts, response frameworks and messaging templates used to guide AI-generated output across both agent branches.

GoHighLevel (GHL): The CRM platform used to connect the AI operations agent to inbound lead data, automate outbound communication and track pipeline activity.

Meta Business Suite: The platform used to build, launch and manage paid advertising campaigns on Facebook and Instagram.

ChiroTouch: Active Family's electronic health records and patient scheduling system.

Aloha (formerly ReviewWave): Patient communication and scheduling platform used in coordination with ChiroTouch.

Brand Voice Guidelines: The documented tone, language and messaging standards embedded in the case files and applied across all AI-generated content.

4. ROLES & RESPONSIBILITIES

Marketing Strategist (Abigail Shaw):

- Designed, built and trained both AI agent branches
- Maintains and updates the case file and script database
- Creates weekly content briefs for the AI Marketing Agent
- Reviews and approves all AI-generated content before publication
- Builds and manages paid ad campaigns in Meta Business Suite
- Monitors GHL pipeline and agent performance
- Troubleshoots agent behavior and refines prompts as needed
- Tracks performance metrics across both branches

AI Operations Agent:

- Responds to staff questions via internal chatbot
- Initiates outbound calls to new leads generated by paid ad campaigns
- Qualifies leads and schedules new patient appointments
- Does not make clinical recommendations or override staff judgment
- All call scripts subject to Marketing Strategist review and approval

AI Marketing Agent:

- Generates first-draft social captions, ad copy and campaign messaging based on approved briefs and uploaded case files
- Does not publish autonomously. All output requires human review before use

5. PROCEDURE - STEP BY STEP

BRANCH A: Operations & Lead Handling

Step 1: Lead capture: A prospective patient engages with a paid ad campaign running through Meta Business Suite. Lead data is captured and routed automatically into GoHighLevel.

Step 2: Outbound AI call: The AI Operations Agent initiates an outbound phone call to the lead using an approved script from the script database. The agent introduces Active Family, answers basic questions about services and works to schedule the lead with a provider.

Step 3: Scheduling handoff: If the lead agrees to an appointment, the agent coordinates scheduling through ChiroTouch and Aloha. Confirmation is sent to the patient through the appropriate platform.

Step 4: Staff support: The operations agent remains available to answer internal staff questions via chatbot throughout the business day, pulling from the case file and script database for responses.

Step 5: Pipeline review: The Marketing Strategist reviews GHL pipeline data daily during initial system deployment. Once stabilized, review cadence moves to Monday and Thursday, monitoring lead status, call outcomes and scheduling conversion rate.

BRANCH B: Marketing & Content Production

Step 1: Weekly content brief: The Marketing Strategist prepares a weekly brief for the AI Marketing Agent, including:

- Campaign focus and key messages
- Active promotions or offers
- Platform-specific requirements
- Any compliance or sensitivity flags

Step 2: AI draft generation: The brief is submitted to the AI Marketing Agent alongside relevant case files. The agent generates:

- Social captions per platform
- Ad headline and body copy variations
- Any requested email or SMS copy

Step 3: Human review: The Marketing Strategist reviews all output against Brand Voice Guidelines. Review checklist:

- Accuracy of clinical claims
- Compliance with healthcare advertising standards
- Tone and voice consistency

- No guarantee language or testimonial misrepresentation

Step 4: Revision or approval: Content requiring revision is edited directly or returned to the agent with specific feedback. Approved content moves to the scheduling queue.

Step 5: Scheduling and publication: Visual assets are designed in Canva and paired with approved copy before publication. Paid content is scheduled and launched through Meta Business Suite. Organic content is posted directly through Meta Business Suite. Content calendar status is updated to reflect: Draft / In Review / Approved / Scheduled / Published.

Step 6: Performance review Weekly metrics are pulled and logged in the KPI tracker:

- Reach and impressions per platform
- Engagement rate
- CTA click-through rate
- Ad campaign cost per lead
- New patient scheduling conversion rate

System performance benchmarks established post-implementation:

- Ad content creation time reduced by 50%
- After-hours team calls eliminated. 100% of after-hours patient interaction handled by AI Operations Agent
- Staff and patient question response time nearly doubled through AI intake chatbot

6. QUALITY CONTROL

All content referencing clinical outcomes or patient results is reviewed by the Marketing Strategist prior to scheduling. Call scripts used by the AI Operations Agent are reviewed and approved before deployment and updated any time services, offers or compliance requirements change. Agent behavior is monitored on an ongoing basis and case files are revised as needed to correct tone, accuracy or scope drift.

7. REVISION HISTORY

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