RisenFynix / MVA Simplified

Healthcare VA Learning Hub

Lead List Tracker

Resource Type	Tracker
Who it is for	Aspiring Medical VAs, Medical Billers, AR follow-up specialists, and healthcare admin learners preparing respectful direct-client outreach.
When to use it	Use when building a public-business lead list before direct-client outreach.
Last reviewed	July 2026

Purpose

Organize qualified clinic leads, outreach status, follow-up dates, and discovery call opportunities without collecting private data.

How to use this resource

- Read the funnel first: Niche -> Location -> Lead List -> Warm Email -> Follow-Up -> Discovery Call -> Pilot.

- Replace bracketed fields with truthful, specific details.

- Use only public business information. Do not scrape private data or collect patient details.

- Keep outreach respectful, low-volume, and easy to decline.

- Track status and stop contacting anyone who asks not to be contacted.

Tracker Columns

Column	What to enter
Date Added	Date you found the public business lead
Niche	Clinic category or specialty
Location	City and state focus
Clinic Name	Public business name only
Website	Public website URL
Public Contact Route	Public business email, contact form, or role-based contact route
Decision Maker Role	Office manager, practice manager, billing manager, owner, admin team
Lead Score	1-5 using qualification signals
Personalization Note	One public detail from the website or profile
Outreach Status	Not contacted, emailed, follow-up 1, follow-up 2, replied, call booked, not fit, stop contact
Next Action Date	Your respectful next action date
Notes	No PHI, no private data, no scraped private contact details

5-Point Lead Scoring

Signal	Score
Working website or official public profile	+1

Signal	Score
Public business email or contact form	+1
Multiple providers or service lines	+1
Insurance-heavy service or specialty	+1
Visible public pain signal such as hiring, backlog clue, busy practice, or admin role need	+1

Fictional Example Row

Field	Fictional example
Clinic Name	Sunrise Pediatric Care
Location	Austin, TX
Website	https://example.com
Contact Route	Public contact form
Lead Score	4
Personalization Note	Website mentions new-patient scheduling and insurance accepted
Status	Not contacted
Next Action	Draft warm email using public service detail

Common Beginner Mistakes

[ ] Sending the same message to every clinic without personalization.

[ ] Claiming broad expertise instead of one focused healthcare admin offer.

[ ] Using real patient, payer, clinic, account, or login information in practice.

[ ] Pressuring a clinic after they do not reply or ask not to be contacted.

[ ] Discussing pricing, scope, or access before understanding the workflow need.

Safe Practice Reminder

Practice with fictional clinic names, example.com email addresses, and public business information only. Keep outreach respectful, low-volume, and truthful.

No-PHI Practice Reminder

Do not use or enter real patient names, dates of birth, insurance IDs, member IDs, claim numbers, medical record numbers, addresses, phone numbers, diagnoses, treatment details, login details, or protected health information. Use fictional data only when practicing.

Educational Use Only

This resource is for beginner-friendly healthcare admin education only. It is not medical advice, legal advice, coding certification, payer-specific billing authority, a replacement for employer training, or a guarantee of employment. Always verify current requirements with official sources, employer policy, payer rules, client instructions, and updated guidance.

Source/review note

This resource is for educational and business-planning use only. It does not guarantee employment, client acquisition, income, or contract approval. Keep all claims truthful and verify privacy, business, email, and client-contract requirements before use.

Recommended Next Step

After qualifying a lead, draft a warm email using the Warm Email Outreach Template and log the next follow-up date.