



# SECRET SHOPPER

<b>PRACTICE NAME</b>	Concierge Med Spa
<b>WEBSITE - WHERE LEAD IS ENTERED</b>	<a href="https://calendly.com/emily-clientmtg/front-desk-training">https://calendly.com/emily-clientmtg/front-desk-training</a>
<b>SERVICE TESTED</b>	Botox

**RECOMMENDED ACTIONS** Please schedule a Front Desk Training:  
<https://calendly.com/emily-clientmtg/front-desk-training>

**NOTES** We received 2 texts and a welcome email after we input the lead. Unfortunately we did not receive any phone calls from you.

The salesperson that answered our call was friendly, professional, and knowledgeable. However she did not answer pricing questions in a recommended way.

## LEADS TEST

<b>DATE</b>	8/26	<b>TIME</b>	6:53am EST		
<b>NAME</b>	Jamie Jones	<b>EMAIL</b>	eruffa87@gmail.com	<b>PHONE</b>	570-730-1982

<b>WELCOME EMAIL RECEIVED</b>	<ul style="list-style-type: none"> <li>● YES</li> <li>● NO</li> </ul>
<b>LEAD CONTACTED - PHONE</b>	<ul style="list-style-type: none"> <li>● YES (1ST CALL RECEIVED) DATE:</li> <li>● YES (2ND CALL RECEIVED) DATE:</li> <li>● YES (3RD CALL RECEIVED) DATE:</li> <li>● VOICEMAIL(S) LEFT</li> <li>● NO - ACTION NEEDS TO BE TAKEN</li> </ul>
<b>LEAD CONTACTED - TEXT</b>	<ul style="list-style-type: none"> <li>● YES (WELCOME TEXT RECEIVED) DATE: 8/26/23</li> <li>● YES (2ND TEXT RECEIVED) DATE: 8/28/23</li> <li>● YES (3RD TEXT RECEIVED) DATE:</li> <li>● REPLIED TO LEAD'S QUESTIONS</li> <li>● NO - ACTION NEEDS TO BE TAKEN</li> </ul>

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## LEAD ENGAGEMENT VIA TEXT

- **CREATED CONNECTION**
- **QUESTIONS ANSWERED EXPERTLY**
- **REPLIES CAME AT TIMELY MANNER**
- **GUIDED TOWARDS MAKING AN APPT**
- **FINANCING, SALES, PROMOTIONS, PACKAGES, PRICE MENTIONED**
- **PERSONAL EXPERIENCE SHARED**
- **DID NOT RESPOND WHEN I TEXTED**

To: Concierge Med Spa

Text Message  
Sat, Aug 26 at 6:52 AM

Hi Jamie, this is Concierge Aesthetics & Plastic Surgery.  
Thanks for reaching out!  
Is it ok if we give you a call?  
Feel free to text us back here with any questions in the meantime.  
Reply STOP to unsubscribe.

Initial text  
2nd text

Mon, Aug 28 at 11:31 AM

Hi Jamie! What services are you interested in?

Began text engagement

Wednesday 11:40 AM

Hi how are you  
I have a couple quick questions  
How soon would I see botox results

Hi Jamie, that is a great question! During your complimentary consultation with one of our Master Injectors, they will answer all of your questions in detail. If you decide to go forward with the treatment, we can do it the same day! What days and times work best for you?

Response came in 17 minutes

I was hoping to just gain a little insight prior to scheduling an appointment. Can you tell me how much it costs?

Consultation encouraged, pricing mentioned

I completely understand! However, we do need to see you in order to determine if you are a good candidate for the treatment and to assess your areas of concern. Botox ranges between \$11-15 per unit, and the number of units is determined by your injector according to what you need in order to reach correction.

To: Concierge Med Spa

I completely understand! However, we do need to see you in order to determine if you are a good candidate for the treatment and to assess your areas of concern. Botox ranges between \$11-15 per unit, and the number of units is determined by your injector according to what you need in order to reach correction.

How frequently do patients typically come back for maintenance?

It depends, everyone is different. Once your injector takes a look at the area of concern, she can answer all of your questions in detail. All of our injectors are amazing and extremely knowledgeable, so you are in great hands!

Some questions could not be answered / a consultation was recommended to answer specific questions

Is there an age requirement for Botox? She's 21

Do you know of any side effects? And you said the consultation is free and I could get the treatment the same day if I'm a candidate correct?

Yes, that is correct. Let's get you scheduled for a consultation so you can get all of your questions answered in detail! Which location/days and times work best for you?

Ok sounds good! How long does the consultation take?

The consultation typically takes about 15-30 minutes...

Okay perfect. I'm going to get my schedule out for next week and get right back to you on what days work best for me. I will need a morning appointment if available

Great, thank you!

Thursday 12:53 PM

Hi Jamie! This is Gina from Concierge Aesthetics and Plastic Surgery just following up from our conversation yesterday. Were you able to take a look at your schedule to see when you are able to come for a consultation? Looking forward to hearing from you!

Follow up text received the next day

**RECOMMENDED ACTIONS:** We would love to help set up a plan for you to be contacting leads 3x in the first week with a direct phone call.



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## RECORDED CALL

<b>DATE</b>	8/31/23	<b>TIME</b>	1:31pm EST
<b>PHONE CALL RECORDING LINK</b>	<a href="https://drive.google.com/file/d/1248sqlBuxxLyMca7Z3-Poexx9zFgucxY/view?usp=sharing">https://drive.google.com/file/d/1248sqlBuxxLyMca7Z3-Poexx9zFgucxY/view?usp=sharing</a>		
<b># OF RINGS</b>	4		

<b>OVERALL ANALYSIS</b>	<ul style="list-style-type: none"><li>● EXCELLENT</li><li>● <b>GOOD</b></li><li>● FAIR</li><li>● NEEDS IMPROVEMENT</li></ul>
<b>ABILITY TO ESTABLISH RAPPORT</b>	<ul style="list-style-type: none"><li>● EXCELLENT</li><li>● <b>GOOD</b></li><li>● FAIR</li><li>● NEEDS IMPROVEMENT</li></ul> <p><b>RECOMMENDATION: STRIVE FOR FRIENDLY &amp; ENGAGING TONE</b> It is essential to establish rapport and interest in the lead.</p>
<b>CONTACT INFO REQUESTED</b>	<ul style="list-style-type: none"><li>● <b>YES</b></li><li>● NO</li></ul> <p><b>RECOMMENDATION:</b> It is essential to introduce yourself by name &amp; ask for the lead's name + contact info at the beginning of the conversation, so you can follow-up.</p>

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<p><b>PERSONALITY</b></p>	<ul style="list-style-type: none"> <li>● VERY PERSONABLE, CARING, &amp; FRIENDLY</li> <li>● PROFESSIONAL &amp; KNOWLEDGEABLE</li> <li>● PROFESSIONAL BUT NOT KNOWLEDGEABLE</li> <li>● PROFESSIONAL, DISINTERESTED, LACKING ENGAGEMENT</li> </ul> <p><b>RECOMMENDATION: CREATE EXCITEMENT &amp; CONNECTION</b></p> <p>We suggest beginning the call by creating excitement around the procedure &amp; leading the discussion with a personable approach to the treatment. This helps to establish a sense that the clinic is a warm &amp; welcoming place and that the procedure will be a positive experience.</p>
<p><b>EXCITEMENT BUILT</b></p>	<ul style="list-style-type: none"> <li>● BUILT EXCITEMENT TOWARDS SPA &amp; TREATMENT</li> <li>● BUILT EXCITEMENT TOWARDS TREATMENT ONLY</li> <li>● BUILT EXCITEMENT TOWARDS SPA &amp; PERSONNEL ONLY</li> <li>● SOMEWHAT BUILT EXCITEMENT</li> <li>● DID NOT BUILD EXCITEMENT</li> </ul> <p><b>RECOMMENDATION: CREATE EXCITEMENT &amp; CONNECTION</b></p> <p>We suggest beginning the call by creating excitement around the procedure &amp; leading the discussion with a personable approach to the treatment. This helps to establish a sense that the clinic is a warm &amp; welcoming place and that the procedure will be a positive experience.</p> <p>Reiterate the benefits of the treatment, share a short personal story (ex. <i>"I loved my final result on my abdomen!"</i> or <i>"I've seen such great before &amp; afters on the double chin area"</i>), and ask questions.</p>
<p><b>EXPERTISE</b></p>	<ul style="list-style-type: none"> <li>● QUESTIONS ANSWERED EXPERTLY</li> <li>● FAIR RESPONSES</li> <li>● NO EXPERTISE DEMONSTRATED</li> </ul>
<p><b>SALES TACTICS</b></p>	<ul style="list-style-type: none"> <li>● MENTIONED PROMOTION/FINANCING + QUOTED LOWEST PRICE</li> <li>● MENTIONED PROMOTION/FINANCING, BUT DID NOT QUOTE LOWEST PRICE</li> <li>● PRICING QUESTION NOT ANSWERED IN THE RECOMMENDED WAY</li> </ul> <p><b>RECOMMENDATION: RELAY ATTAINABILITY</b></p> <p>We recommend mentioning any special pricing &amp; financing available, or creating a sense of urgency by mentioning a current sale. When asked about cost, we recommend quoting the cost of the lowest priced applicator and then mentioning that an accurate price can't be given until they can be assessed during their complimentary consultation.</p>



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<b>GUIDANCE PROVIDED</b>	<ul style="list-style-type: none"><li>• GUIDED ME IN BOOKING &amp; PRICING</li><li>• <b>SOMEWHAT GUIDED</b></li><li>• DID NOT GUIDE ME IN BOOKING OR PRICING</li></ul>
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## SALES RECOMMENDATIONS

### STRIVE FOR FRIENDLY & ENGAGING TONE

It is our recommendation to staff answering calls from potential leads to strive for a friendly and engaging tone. It is essential to establish rapport by introducing yourself by name and asking for the lead's name and contact information at the beginning of the conversation.

### CREATE EXCITEMENT & CONNECTION

We suggest beginning the call with the potential client by creating excitement around the procedure and leading the discussion with a personable approach to the treatment. This helps to establish a sense that the clinic is a warm and welcoming place and that the procedure will be a positive experience.

Reiterate the benefits of the treatment, share a short personal story (ex. *"I loved my final result on my abdomen!"* or *"I've seen such great before & afters on the double chin area"*), and ask the lead questions. These are all great opportunities to convert the lead into a consult.

### RELAY ATTAINABILITY

We also recommend mentioning any special pricing and financing available, or creating a sense of urgency by mentioning a current sale. When asked about cost, we recommend quoting the cost of the lowest priced applicator and then mentioning that an accurate price can't be given until they can be assessed during their complimentary consultation.

### FOLLOW THROUGH

Send reminder texts to minimize no-shows. In the event of a no-show, reach out to reschedule the appointment when the lead does not show for the appointment. We recommend reaching out to attempt to re-book these leads since they are an ideal category to retarget.



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## PHONE CALL ATTEMPTS

Contacting a lead with a direct phone call is by far the best way to ensure that the lead is converted into a potential client. The conversion rates on those contacted via a phone versus those who are not are almost 4 to 1. In addition, it shows the potential lead that you value them enough as a customer to call them directly.

Top-rated facilities generally reach out to a lead within minutes or an hour after obtaining their contact information, and they make at least two additional follow-up phone calls.

## TEXT MESSAGES

Have a welcome text message sent out to potential leads quickly (this can be automated). This is very beneficial, as a welcoming text message lets a potential client know that their request has been received. It also helps to create a personal camaraderie between the spa and the potential client, and an additional channel of communication

## WELCOME EMAIL

We recommend sending out a welcoming email, as well as a personal email as other top cosmetic medical facilities do. Statistics show that sending out welcoming or confirmation emails, as well as follow-up emails, provides greater ROI results when it comes to leads. E-mails also aid in initiating and building a line of communication between the lead and the client.

Additionally, since many leads do not enter their personal cell phone number on online contact forms an email helps to cover all forms of communication to connect with a lead.

## FOLLOW-UP

We highly recommend that leads should be contacted by phone, text, and email at least 3 times in the first week. Then, we recommend repeating this process a few weeks later if there's no response from the lead.