

**(TPA) Telephone Performance Analysis**

| Name of Spa                                                                                                  | Date                 | Time                                                                                                                                                                                                                                                                                                                                   | Spa Phone    | Staff Name                                                                                                                   | Analyst                             |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------------------------------------------------------------------------------------|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Cool Aesthetics-Coolsulpt                                                                                    | 02/26/2020           | 10:24am pst                                                                                                                                                                                                                                                                                                                            | 405 842 9732 | Unknown                                                                                                                      | Lisa                                |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>(TPA) Telephone Performance Analysis</b>                                                                  |                      |                                                                                                                                                                                                                                                                                                                                        |              | <b>Yes</b>                                                                                                                   | <b>No</b>                           | <b>N/A</b>               | <b>Notes</b>                                                                                                                                                                                                                                                                                                                                                                                      |
| No recording at this time                                                                                    |                      |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          | <b>TIPS</b>                                                                                                                                                                                                                                                                                                                                                                                       |
| The phone was answered promptly.<br>If no, the phone rang approximately <u>7</u> times before being answered |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Not answering promptly can lead to a loss in client.<br>After the 6th ring a caller hangs up. We all want it now so when you delay it could lead to a loss client.                                                                                                                                                                                                                                |
| Business name given                                                                                          |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Said Oklahoma plastic surgeons<br>Always answer the spa phone with the name of your spa first followed by your name so the caller knows who they are talking to.                                                                                                                                                                                                                                  |
| Staff's name given                                                                                           |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Generally people want to know who they are talking to.<br>Giving your name helps the caller identify to you and can refer back with a name if the call gets disconnected or wants to call the spa back for more information.                                                                                                                                                                      |
| Caller name & information asked & taken at beginning of call                                                 |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Not getting the caller's name and info at the beginning could lead in a loss of a client.<br>Very important to get name and phone number at the beginning of the call so you can follow up. It takes 3-4 points of contact to make a potential client commit. Also use callers name throughout the call. It gives them the feeling that you know them and their needs and genuinely want to help. |
| Asked caller if they have ever been there before                                                             |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Getting that information right away will help you better assess their needs.<br>Helps you to know if you need to be more detailed in your explanations and to make that great first impression to schedule a consultation.                                                                                                                                                                        |
| Listened to callers needs                                                                                    |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Be genuine. A caller can tell if you really listening and want to help. Refer to their needs as often as possible during the call.<br><i>Good Job!</i>                                                                                                                                                                                                                                            |
| Staff knowledgeable of procedure                                                                             |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | People want to go where the staff know what their doing and knowledgeable about the services they seek.<br><i>Good Job!</i>                                                                                                                                                                                                                                                                       |
| Staff shared own experience with procedure or a client's success story                                       |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | While describing the procedure the staff could have shared their own experience or a happy clients. Follow Hipaa law when do this.<br>It's always nice to share your own personal story of when you had the procedure done and what it was like for you. Gives them comfort to talk to someone who has done it themselves.                                                                        |
| Staff related to caller what the procedure can do for them                                                   |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Try to be as personal as possible when telling the caller how it can benefit their needs.<br><i>Good Job!</i>                                                                                                                                                                                                                                                                                     |
| Staff gave pricing                                                                                           |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Avoid pricing. If the caller insists or says they are shopping around then give the lowest price. "It starts at..." Then inform the caller that the specialist will be able to give a more accurate price at their free consultation.<br>Gave full pricing. It's best to avoid pricing unless the caller insists.                                                                                 |
| Staff offered Free Consultation                                                                              |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Only when caller asked if the consultation costs then staff said it was \$50.<br>People like to hear FREE. Use it as often as possible so you can make that appointment.                                                                                                                                                                                                                          |
| Why your spa is unique                                                                                       |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Caller needed to have reason why your spa was the best to feel confident in booking a consultation with your spa especially if the consultation cost money.<br>A caller does not want to think too hard so if you provide a reason why your spa is above the rest they will be more likely to end their search and make a consultation.                                                           |
| Staff gave caller available date and times for appointments                                                  |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input type="checkbox"/>                                                                                                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Very important to tell the caller your available times and dates. And if the caller wants a specific date and that date isn't available, dont say its not available say we have ... available.<br>Caller did all the work in appointment making.                                                                                                                                                  |
| Staff shared with caller other procedures that they might benefit from                                       |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Always good to share other related services they may like. And include why and any personal stories.<br><i>Good job!</i>                                                                                                                                                                                                                                                                          |
| Staff member mentioned deals or promotions                                                                   |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Don't make the caller ask. Share with them your specials early in the call and get them excited to make a consultation.<br><i>Good job!</i>                                                                                                                                                                                                                                                       |
| Different payment plans                                                                                      |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Always refer to the specialist for pricing but if caller insists then give lowest price range. Mentioning payment plans can ease any concerns the caller may have about the price of the procedure.<br><i>Good job!</i>                                                                                                                                                                           |
| Staff was polite                                                                                             |                      |                                                                                                                                                                                                                                                                                                                                        |              | <input checked="" type="checkbox"/>                                                                                          | <input type="checkbox"/>            | <input type="checkbox"/> | Always a good idea to speak extra polite to someone you have never spoken to.<br><i>Good job!</i>                                                                                                                                                                                                                                                                                                 |
| Follow up Text lead response: 1 hr. 9 mins.                                                                  |                      |                                                                                                                                                                                                                                                                                                                                        |              | Staff Holly followed up on the phone call lead and sent a text with all the information talked about in the call. Great job! |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Website Lead</b>                                                                                          |                      | <b>Website Lead Response</b>                                                                                                                                                                                                                                                                                                           |              | <b>Response Notes</b>                                                                                                        |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| Date:                                                                                                        | 2/24/20              | Voicemail: <b>N</b>                                                                                                                                                                                                                                                                                                                    |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| URL:                                                                                                         | coola.mysculpt.net   | Text Message: <b>N</b>                                                                                                                                                                                                                                                                                                                 |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| Time:                                                                                                        | 10:25am pst          | Email: <b>N</b>                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| Secret Shopper Name :                                                                                        | Bree Lee             |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| Email:                                                                                                       | breetown65@gmail.com |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| Phone:                                                                                                       | 516 737 0984         |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Good Callrail Example Call: No callrail at this time</b>                                                  |                      |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Example Callrail Call Concern:</b>                                                                        |                      | <a href="https://app.callrail.com/v2/a/264010353/events/371540679?event_id=252038133&amp;event_type=call">https://app.callrail.com/v2/a/264010353/events/371540679?event_id=252038133&amp;event_type=call</a><br><a href="https://app.callrail.com/v2/a/264010353/events/6183">https://app.callrail.com/v2/a/264010353/events/6183</a> |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Areas of Concern for:</b>                                                                                 |                      |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| Gave pricing.                                                                                                |                      |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |
| Didn't make an effort to set up a consultation                                                               |                      |                                                                                                                                                                                                                                                                                                                                        |              |                                                                                                                              |                                     |                          |                                                                                                                                                                                                                                                                                                                                                                                                   |

