



SECRET SHOPPER

PRACTICE NAME	Optimum ABQ
WEBSITE - WHERE LEAD IS ENTERED	https://optimumhuman.com/weight-loss/semaglutide/
SERVICE TESTED	Semaglutide

RECOMMENDED ACTIONS Please schedule a Front Desk Training: <http://calendly.com/Vania-medstar/front-desk>

NOTES

We received 3 texts from you, however we did not receive any phone calls from you after we input a lead to you.

The person that answered our recorded call was friendly, professional, and knowledgeable. However there could have been a little more excitement built around the treatment as well as requesting the caller's contact information.

LEADS TEST

DATE	8/4/23	TIME	1:35pm EST		
NAME	Meredith Lee	EMAIL	kwr032916@gmail.com	PHONE	(209) 560-8802

LEAD CONTACTED - PHONE	<ul style="list-style-type: none"> • YES (1ST CALL RECEIVED) DATE: • YES (2ND CALL RECEIVED) DATE: • YES (3RD CALL RECEIVED) DATE: • VOICEMAIL(S) LEFT • NO - ACTION NEEDS TO BE TAKEN
LEAD CONTACTED - TEXT	<ul style="list-style-type: none"> • YES (WELCOME TEXT RECEIVED) DATE: 8/4/23 • YES (2ND TEXT RECEIVED) DATE: 8/4/23 • YES (3RD TEXT RECEIVED) DATE: 8/7/23 • REPLIED TO LEAD'S QUESTIONS • NO - ACTION NEEDS TO BE TAKEN



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LEAD ENGAGEMENT VIA TEXT	<ul style="list-style-type: none"> ● 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
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RECOMMENDED ACTIONS We highly recommend that leads are contacted 3x in the first week with direct phone calls. We would love to help set up a plan for you to be following this follow up protocol.

RECORDED CALL

DATE	8/15/23	TIME	9:25am EST
PHONE CALL RECORDING LINK	https://drive.google.com/file/d/1GqMsslHBK8zzpxLn5Cxq6Cab3UGGkVPi/view?usp=sharing		
# OF RINGS	1		

OVERALL ANALYSIS	<ul style="list-style-type: none"> ● EXCELLENT ● GOOD ● FAIR ● NEEDS IMPROVEMENT
ABILITY TO ESTABLISH RAPPORT	<ul style="list-style-type: none"> ● EXCELLENT ● GOOD ● FAIR ● NEEDS IMPROVEMENT <p>RECOMMENDATION: STRIVE FOR FRIENDLY & ENGAGING TONE It is essential to establish rapport and interest in the lead.</p>

<p>CONTACT INFO REQUESTED</p>	<ul style="list-style-type: none"> • YES • NO <p>RECOMMENDATION: It is essential to introduce yourself by name & ask for the lead's name + contact info at the beginning of the conversation, so you can follow-up.</p>
<p>PERSONALITY</p>	<ul style="list-style-type: none"> • VERY PERSONABLE, CARING, & FRIENDLY • PROFESSIONAL & KNOWLEDGEABLE • PROFESSIONAL BUT NOT KNOWLEDGEABLE • PROFESSIONAL, DISINTERESTED, LACKING ENGAGEMENT <p>RECOMMENDATION: CREATE EXCITEMENT & CONNECTION We suggest beginning the call by creating excitement around the procedure & leading the discussion with a personable approach to the treatment. This helps to establish a sense that the clinic is a warm & welcoming place and that the procedure will be a positive experience.</p>
<p>EXCITEMENT BUILT</p>	<ul style="list-style-type: none"> • BUILT EXCITEMENT TOWARDS SPA & TREATMENT • BUILT EXCITEMENT TOWARDS TREATMENT ONLY • BUILT EXCITEMENT TOWARDS SPA & PERSONNEL ONLY • SOMEWHAT BUILT EXCITEMENT • DID NOT BUILD EXCITEMENT <p>RECOMMENDATION: CREATE EXCITEMENT & CONNECTION We suggest beginning the call by creating excitement around the procedure & leading the discussion with a personable approach to the treatment. This helps to establish a sense that the clinic is a warm & 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 & afters on the double chin area"</i>), and ask questions.</p>

EXPERTISE	<ul style="list-style-type: none"> ● QUESTIONS ANSWERED EXPERTLY ● FAIR RESPONSES ● NO EXPERTISE DEMONSTRATED
SALES TACTICS	<ul style="list-style-type: none"> ● MENTIONED PROMOTION/FINANCING + QUOTED LOWEST PRICE ● MENTIONED PROMOTION/FINANCING, BUT DID NOT QUOTE LOWEST PRICE ● QUOTED LOWEST PRICE, BUT DID NOT MENTION PROMOTION/FINANCING ● PRICING QUESTION NOT ANSWERED IN THE RECOMMENDED WAY <p>RECOMMENDATION: RELAY ATTAINABILITY We recommend mentioning any special pricing & 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>
GUIDANCE PROVIDED	<ul style="list-style-type: none"> ● GUIDED ME IN BOOKING & PRICING ● SOMEWHAT GUIDED ● DID NOT GUIDE ME IN BOOKING OR PRICING

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.



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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.

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

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.