



SECRET SHOPPER

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| PRACTICE NAME | Health First Medical Weight Loss & Skin Care |
| WEBSITE - WHERE LEAD IS ENTERED | https://healthfirstweightcontrol.com/coolsculpting-elite/ |
| SERVICE TESTED | CoolSculpting |

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

NOTES

We inputted a lead, commenced with text engagement and placed a recorded call.

There was only 1 phone call and 1 text sent. There was also no response to text engagement. We highly recommended scheduling a front desk training to put a process in place to be contacting leads 3x in the first week.

The salesperson that answered the phone was friendly & knowledgeable.

LEADS TEST

| | | | | | |
|------|-----------------|-------|--------------------|-------|------------|
| DATE | 1/3/2022 | TIME | 10:00am EST | | |
| NAME | Elizabeth Ruffa | EMAIL | eruffa87@gmail.com | PHONE | 5707301982 |

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| WELCOME EMAIL RECEIVED | <input checked="" type="checkbox"/> YES 1/3/2022 <input type="checkbox"/> NO |
| LEAD CONTACTED - PHONE | <input checked="" type="checkbox"/> YES (1ST CALL RECEIVED) DATE: 1/5/22 12:43pm EST <input type="checkbox"/> YES (2ND CALL RECEIVED) DATE: <input type="checkbox"/> YES (3RD CALL RECEIVED) DATE: <input checked="" type="checkbox"/> VOICEMAIL(S) LEFT <input type="checkbox"/> NO - ACTION NEEDS TO BE TAKEN |
| LEAD CONTACTED - TEXT | <input checked="" type="checkbox"/> YES (WELCOME TEXT RECEIVED) DATE: 1/3/2022 12:27pm EST |



SECRET SHOPPER

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| | <input type="checkbox"/> YES (2ND TEXT RECEIVED) DATE: <input type="checkbox"/> YES (3RD TEXT RECEIVED) DATE: <input type="checkbox"/> REPLIED TO LEAD'S QUESTIONS <input type="checkbox"/> NO - ACTION NEEDS TO BE TAKEN |
| LEAD ENGAGEMENT VIA TEXT | <input type="checkbox"/> CREATED CONNECTION <input type="checkbox"/> QUESTIONS ANSWERED EXPERTLY <input type="checkbox"/> REPLIES CAME AT TIMELY MANNER <input type="checkbox"/> GUIDED TOWARDS MAKING AN APPT <input type="checkbox"/> FINANCING, SALES, PROMOTIONS, PACKAGES, PRICE MENTIONED <input type="checkbox"/> PERSONAL EXPERIENCE SHARED |

RECOMMENDED ACTIONS **LEADS NEED TO BE CONTACTED BY PHONE AT LEAST 3 TIMES IN THE FIRST WEEK. ENGAGING IN TEXT WITH A LEAD CAN HELP TURN THE LEAD INTO A POTENTIAL CLIENT.**

RECORDED CALL

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| DATE | 1/11/2022 | TIME | 11:47am EST |
| PHONE CALL RECORDING LINK | https://watch.screencastify.com/v/UWmYCiCfqG5NL0DIWF4h | | |

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| OVERALL ANALYSIS | <input type="checkbox"/> EXCELLENT <input checked="" type="checkbox"/> GOOD <input type="checkbox"/> FAIR <input type="checkbox"/> NEEDS IMPROVEMENT |
| ABILITY TO ESTABLISH RAPPORT | <input type="checkbox"/> EXCELLENT <input type="checkbox"/> GOOD <input checked="" type="checkbox"/> FAIR <input type="checkbox"/> NEEDS IMPROVEMENT |

SECRET SHOPPER

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| | <p>RECOMMENDATION: STRIVE FOR FRIENDLY & ENGAGING TONE It is essential to establish rapport by introducing yourself by name & asking for the lead's name + contact info at the beginning of the conversation.</p> |
| <p>PERSONALITY</p> | <ul style="list-style-type: none"> <input type="checkbox"/> VERY PERSONABLE, CARING, & FRIENDLY <input checked="" type="checkbox"/> PROFESSIONAL & KNOWLEDGEABLE <input type="checkbox"/> PROFESSIONAL BUT NOT KNOWLEDGEABLE <input type="checkbox"/> 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>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> |
| <p>EXPERTISE</p> | <ul style="list-style-type: none"> <input type="checkbox"/> QUESTIONS ANSWERED EXPERTLY <input checked="" type="checkbox"/> FAIR RESPONSES <input type="checkbox"/> NO EXPERTISE DEMONSTRATED <p>RECOMMENDATION: CONVEY UNIQUENESS STATEMENT Mention what makes your spa unique/distinguishable and why it should be chosen over the competition for the desired treatment. Personal experiences should be shared.</p> |
| <p>SALES TACTICS</p> | <ul style="list-style-type: none"> <input type="checkbox"/> HIGHLY ENCOURAGED TO SCHEDULE CONSULTATION <input checked="" type="checkbox"/> CONSULTATION MENTIONED BUT NOT ENCOURAGED <input type="checkbox"/> NOT ENCOURAGED TO SCHEDULE CONSULTATION <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> |



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| GUIDANCE PROVIDED | <input checked="" type="checkbox"/> GUIDED ME IN BOOKING & PRICING <input type="checkbox"/> SOMEWHAT GUIDED <input type="checkbox"/> DID NOT GUIDE ME IN BOOKING OR PRICING |
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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.