



# SECRET SHOPPER

|                                 |   |
|---------------------------------|---|
| PRACTICE NAME                   | SouthShore Smiles   |
| WEBSITE - WHERE LEAD IS ENTERED | <a href="https://southshoresmiles.healthandmed.net/">https://southshoresmiles.healthandmed.net/</a> |
| SERVICE TESTED                  | Invisalign  |

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

**NOTES** We received 3 calls and 3 texts from you. This is great!

The salesperson that answered our call was friendly and knowledgeable. She quoted the lowest price and explained finance options to us. However, there could have been a little more excitement built around the medical practice, treatment, and staff.

## LEADS TEST

|      |             |       |                     |       |            |
|------|-------------|-------|---------------------|-------|------------|
| DATE | 7/24/22     | TIME  | 2:50pm EST          |       |            |
| NAME | Kali Dennis | EMAIL | kalical68@gmail.com | PHONE | 2034569126 |

|                        |   |
|------------------------|---|
| WELCOME EMAIL RECEIVED | <ul style="list-style-type: none"> <li>• YES</li> <li>• NO</li> </ul>   |
| LEAD CONTACTED - PHONE | <ul style="list-style-type: none"> <li>• YES (1ST CALL RECEIVED) DATE: 7/26/22</li> <li>• YES (2ND CALL RECEIVED) DATE: 8/1/22</li> <li>• YES (3RD CALL RECEIVED) DATE: 8/3/22</li> <li>• VOICEMAIL(S) LEFT</li> <li>• NO - ACTION NEEDS TO BE TAKEN</li> </ul>         |
| LEAD CONTACTED - TEXT  | <ul style="list-style-type: none"> <li>• YES (WELCOME TEXT RECEIVED) DATE: 7/25/22</li> <li>• YES (2ND TEXT RECEIVED) DATE: 7/26/22</li> <li>• YES (3RD TEXT RECEIVED) DATE:</li> <li>• REPLIED TO LEAD'S QUESTIONS</li> <li>• NO - ACTION NEEDS TO BE TAKEN</li> </ul> |

# SECRET SHOPPER

|                          |   |
|--------------------------|---|
| LEAD ENGAGEMENT VIA TEXT | <ul style="list-style-type: none"> <li>● CREATED CONNECTION</li> <li>● QUESTIONS ANSWERED EXPERTLY</li> <li>● REPLIES CAME AT TIMELY MANNER</li> <li>● GUIDED TOWARDS MAKING AN APPT</li> <li>● FINANCING, SALES, PROMOTIONS, PACKAGES, PRICE MENTIONED</li> <li>● PERSONAL EXPERIENCE SHARED</li> <li>● DID NOT RESPOND WHEN I TEXTED</li> </ul> |
|--------------------------|---|

**RECOMMENDED ACTIONS**    Sharing personal experience during text engagement can help build a connection that will assist in converting the lead to a potential patient.

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## RECORDED CALL

|                           |   |      |             |
|---------------------------|---|------|-------------|
| DATE                      | 8/11/22   | TIME | 10:40am EST |
| PHONE CALL RECORDING LINK | <a href="https://api.twilio.com/2010-04-01/Accounts/AC085d68ab04bf58756b2be37a6666c8c8/Recordings/REb175d9d4537614d2cbafe4ded25e349d">https://api.twilio.com/2010-04-01/Accounts/AC085d68ab04bf58756b2be37a6666c8c8/Recordings/REb175d9d4537614d2cbafe4ded25e349d</a> |      |             |
| # OF RINGS                | 1   |      |             |

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

|                                      |  |
|--------------------------------------|--|
| <p><b>CONTACT INFO REQUESTED</b></p> | <ul style="list-style-type: none"> <li>● YES</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>   |
| <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><br/>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 TREATMENT ONLY</li> <li>● BUILT EXCITEMENT TOWARDS PERSONNEL ONLY</li> <li>● SOMEWHAT BUILT EXCITEMENT</li> <li>● DID NOT BUILD EXCITEMENT</li> </ul> <p><b>RECOMMENDATION: CREATE EXCITEMENT &amp; CONNECTION</b><br/>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 the final result of my smile!"</i>)</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>● QUOTED LOWEST PRICE, BUT DID NOT MENTION PROMOTION/FINANCING</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> |
| <p><b>GUIDANCE PROVIDED</b></p> | <ul style="list-style-type: none"> <li>● GUIDED ME IN BOOKING &amp; PRICING</li> <li>● SOMEWHAT GUIDED</li> <li>● DID NOT GUIDE ME IN BOOKING OR PRICING</li> </ul>   |

## 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 love my final results of my new beautiful smile"*), and ask the lead questions. These are all great opportunities to convert the lead into a consult.



# SECRET SHOPPER

## 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 staff 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.



# SECRET SHOPPER

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.