32 Step Evaluation completed during the Guest Encounter

Rated as follows:

Excellent, Good, Acceptable, Needs Improvement, Not Applicable

Website:

* Easily found phone number on home page, big and bold above “the fold”
* Clear message of products/services
* Overall impression of website
* Mobile-friendly version available

Phone Encounter:

Number of rings (ideally under 3 rings)

* Quality of outbound message and speed of response if message left
* Listening and responding
* Asked is there is a problem with the vision or is this for an annual exam
* Ability to move guest through buying cycle
* Build trust and rapport
* Inquired about the avenue of referral (How did you hear about us?)
* Explain thoroughly with patience
* Obtain contact information for follow-up
* Plan in place for follow-up or next step
* Followed-up as planned (only possible if the contact info was obtained)

In-Person visit (where applicable)

Attention:

* Avoid distractions
* Be fully present
* Give immediate acknowledgement
* Use one’s name
* Pay attention to details

Understanding:

* Listen carefully
* Ask probing questions to understand needs
* Offer appropriate solutions(s)
* Build trust
* Make it easy to do business with you
* Explain thoroughly

Personal:

* Made the interaction personal or engaging
* Met my initial business need
* Gave me a business card or contact information
* Asked best way to follow up

Physical appearance:

* Physical condition of location
* Overall appearance of the staff

Overall assessment:

* Based on this experience, I would do business here
* Based on this experience, I would recommend this business to others

Guest Encounter Audit Report

When the secret shopping calls are placed, our shoppers assess 7 specific actions that we believe are the foundation of the perfect call. Below is our call criteria and the report from your call audit.

Intake of the call

* If the call is answered by an automated system, we evaluate if the sound is clear, if the outbound message uses positive language without the word “sorry,” and if the system operates properly with tones and commands.
* If the call is answered by a support staff member, we evaluate if the person is enthusiastic, obtains contact information, attempts to answer questions personally, and makes statements that are professional and appropriate.
* If the call is answered by the key staff person or owner, we evaluate if she/he quickly engages in the sales process and creates an encounter that is positive and friendly.

Obtaining critical information

(Requested at the beginning of the call or any time during the initial conversation is acceptable.)

* How did you hear about us?
* Obtain contact information of the caller, specifically the caller’s name, the best phone number to use, and the email address.
* Are you having a problem with your eyes?

Moving the call through a sales process

* Define the steps of engagement with starter phrases like “The first step is…” “How we like to start our process is…”
* Ask clarifying questions to understand the needs of the client with careful listening and responding without interrupting.
* Balance asking questions and providing information.

Generating trust and rapport

* Build trust through complimentary statements or supportive commentary on client information.
* Look for common bonds that may exist.
* Show empathy toward stressful or challenging reveals.

Explain process thoroughly with patience and handling the questions about fees

* How the fee questions are handled can make or break a sales call. Is the information provided, or is it pushed aside with a promise of details to follow when more information is available?

Clear follow-up plan or next step

* Decide what the next step is going to be (client calls you back, you follow up, send collateral material, etc.)
* Ask for permission to check in after a certain period of time if no contact is initialed by client.

Closing the deal

* Ask for the sale.
* Get the commitment to begin the process rather than delaying the yes with promise of assessments, emails, the next call, etc.