

THE SECRET SHOPPER CHECKLIST

Why do we want you to secret shop your staff?

Often, we get calls from our clients about poor lead quality. Patients set appointments and then don't show up to those same appointments they scheduled! The first step is to find out whether your staff is following our lead calling process. This process is essential to increasing the show rate and we can easily find out if it is being followed by performing a secret shopper call.

What am I looking for with the calls?

- The patient needs to receive the First Phone Call within 5 minutes and get a voicemail.
- The Second Call is 2 hours later with a voicemail left
- The Third Call is the next morning with a voicemail left.

How often do I need to secret shop?

We recommend secret shopping your staff every other month.

Why do I need to let Be Top Local know when I secret shop?

Our system counts all the leads that have come in based on email address. If you submit a secret shopper lead and don't let us know, we will count that email as a new lead we got for you. We want you to have the most accurate lead count possible. So, please email csm@betoplocal.com whenever you submit secret shopper information.

What do I do when my staff doesn't call?

- Get your staff to attend a LIVE Q&A
- Every Tuesday at 5:00pm EST at this link <https://zoom.us/j/992564367>
- Every Wednesday at 10:00am EST at this link <https://zoom.us/j/314797721>
- Every Friday at 12:00pm EST at this link <https://zoom.us/j/291137771>

How to Secret Shop Your Staff

Click on Landing page link on the resources tab of your Lead Sheet.

Fill out the Form with "Fake" information (you want to make sure you can access the phone number and email you leave)

Let **CSM@betoplocal.com** know you secret shopped and the email address used.

Wait and See when your staff contacts you.

Remember: you should receive a call within 5 minutes, 2 hours and the next day.