

new customer calls

A strategic organized way of retaining new customers.

New Customer Call Setup

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click on the Customer button.
3. Click on the Set Default Settings button.
4. Scroll down to the question “# of days to pass before calling new customers?”
5. Type in your answer in the Answer Here field (typically 3-7 days).
6. Click the Save Answer button.
7. Click the Return to Previous Screen button.

Default Settings

Customer

Answer Here

 Save Answer

Questions	Answer
# of days to pass before calling new customers?	3
# of visits to be considered retained?	2
Default area code on new customer?	
Default city on new customer?	
Default state on new customer?	
Default zip on new customer?	
Hide Customer Information?	Yes
How many days do you wish to keep info?	90
How to Capitalize text?	First letter in...

Explanation of setting

Determines the number of days allowed to pass before a new customer should be called to see if they're pleased with their results.

Reset to Blueprint Default Return to Previous Screen

Creating a Call List

1. From the SalonBiz®/SpaBiz® menu bar, click on the Communications icon (Envelope).
2. In the View List drop down menu select New Cust Call Back.
3. In the Filter by drop down menu select Not Called. You may choose to sort your call list by date.
4. If you want to exclude customers who have future appointments from your list, click on the With No Future Appt. checkbox on the lower left hand corner.

Customer	Phone	Not Call	Call List	Booked Until	Previous Visit
AMY ABRAHAM	(111)111-1111	1/22/2009	3/31/2009	4/2/2009	No Visit
AMY ADAMS		3/24/2009	3/24/2009	4/1/2009	No Visit
ANDY BURBANK		3/14/2009	3/14/2009	3/10/2009	No Visit
ANNA ROSE	(222)222-2222	3/11/2009	3/14/2009	4/2/2009	No Visit
CAROL SMITH		4/1/2009	4/1/2009	4/2/2009	No Visit
DANNA THOMPSON		4/1/2009	4/1/2009	4/1/2009	No Visit
MICHELLE GALT		3/25/2009	3/25/2009	4/2/2009	No Visit
MURPHY HALL		12/18/2008	3/14/2009	4/2/2009	No Visit
NICHOLE ROBERTS		1/21/2009	1/21/2009	4/2/2009	No Visit
SALLY SMITH	(111)111-1111	3/26/2009	3/21/2009	4/1/2009	No Visit
SAM SMITH	(222)222-4556	3/26/2009	3/26/2009	4/1/2009	No Visit

View List: New Cust Call Back Filter by: Not Called View It Print List

Label: Avery 5160 Print Labels View Cust Cust Ref Called WordBiz Queries Email Center

With No Future Appt.

Call Back

1. Select by either double clicking on the customer name you wish to call from the list or highlight it by clicking once and then click on the View It button.
2. From the Customer Sales History screen you have all of the necessary information you need to call the customer thank them for their visit and inquire further about their service making sure you exceeded their expectations.
3. Click the Return to Previous Screen button.
4. Once a customer has been called simply click on the Called button.
5. The new customer will then be automatically removed from the list.

Customer Name: Emma Thompson Print Return to Previous Screen

Account & Cards Arrivals Referrals Promo Credits

Products Services Gift Certificates Series

Date	Staff	Service	Price
4/1/2009	Paul	Pedicure	45.00
4/1/2009	Nail	Package	140.00

Total Service: 185.00 YTD Service: 185.00

