



A Customer Experience Audit for Your Wellness Business



Want to offer an exceptional client experience?

Use this audit to see where you excel and where you can improve.

Customer experience considers every impression and perception—from how a customer learns about your business, to how they're greeted at the front desk, to the way they think about their experience afterwards.

An exceptional experience is what keeps clients coming back. It's also what sets your wellness business apart from the rest.

Does your customer experience leave a lasting impression? The following audit will help you evaluate just that. It outlines four milestones of a client's journey—awareness, conversion, loyalty, and advocacy—to help you determine where your brand excels and where there's room to improve.

Awareness

How do customers find more information about your business?

Website

Yes Not yet

Is your website branding consistent with all of your other customer touchpoints (e.g., signage, social channels, etc.)?

Can clients review your appointment schedule on your website?

Does your website have a prominent call-to-action (CTA) to book a service?

Is your website mobile-responsive?

Is your website optimized for search so clients can find you?

Does your website feature staff names, bios, and photos so clients can get to know your team and feel more comfortable booking?

Social media

Yes Not yet

Is your social media presence consistent across all channels and with your brand?

Do you post and engage (respond to comments/messages) regularly on Facebook, Instagram, and/or Twitter?

Does each of your social media profiles include up-to-date business details, i.e., a branded profile picture, professional photos of your space, completed about sections, phone number, business hours, and address?

Review sites

Yes Not yet

Have you claimed and optimized your review profiles (Google My Business, Yelp, etc.)?

Do you respond within 24-48 hours to ALL reviews, both positive and negative?

Ready to improve your website?

[Read the section](#)

Want to up your social media game?

[Read the section](#)

Need to optimize your review sites?

[Read the section](#)

Mindbody app

Yes Not yet

Are you listed on the Mindbody app?

Is your Mindbody app listing optimized with your business address, location and photos, keywords, etc.?

Ready to get on the app?

[Read the section](#)

Conversion

Do you keep your schedule full and your customers happy with a seamless booking experience?

Online booking

Yes Not yet

Can clients find, book, and pay for appointments on your website?

Do you send booking confirmation and appointment reminders?

Do you have a branded app to reinforce your brand experience and make it easier for clients to book services?

Ready to optimize your online booking?

[Read the section](#)

Front desk

Yes Not yet

Does your front-desk staff greet and provide a personalized experience for every client walking through the door?

Do you have a documented process for your front desk to ensure that the experience is consistent?

Is your front-desk staff proficient in your business software so they can respond quickly to inquiries?

Do you send any necessary forms to clients in advance so they're able to fill them out before they even arrive?

Do you provide a low-touch check-in process for clients?

Does your front desk have a way to convert missed calls into paying clients?

Do you automatically and instantly follow up with clients 24/7?

Want to revamp your front desk?

[Read the section](#)

In-person experience

Yes Not yet

Does your physical space align with your brand (i.e., lighting, colors, furniture, etc.)?

Does your staff make recommendations for retail products or add-ons?

Do you provide detailed post-care instructions for each service?

Looking to take your in-person experience to the next level?

[Read the section](#)

Checkout

Yes Not yet

Can your staff process payments quickly and on a mobile device?

Can your staff easily store contracts and receipts and send them to clients electronically?

Do you have an all-in-one point of sale (POS) system?

Is your software and payments processor PCI Level 1 Certified?

Is it easy for clients to tip?

Need to upgrade your payments?

[Read the section](#)

Loyalty

How do you engage your clients and keep them coming back?

Email and text message marketing

Yes Not yet

Do you have segmented lists and campaigns customized to different types of clients?

Have you set up automated email campaigns for:

- New clients?
- Clients who haven't booked a service in 60 days? 90 days?
- Clients on their birthdays?

Want to engage customers with email and text?

[Read the section](#)

Do you stay engaged with clients by regularly sending newsletters with upcoming events/workshops, new products or services, etc.?

Are your emails customized with your logo, brand colors, and brand voice?

Rewards

Yes Not yet

Do you incentivize service and retail purchases?

Do you have a system set up to reward and say thank you to loyal clients?

Looking to reward your clients for their loyalty?

[Read the section](#)

Advocacy

Do you turn your clients into brand ambassadors?

Reviews and referrals

Yes Not yet

Do you regularly encourage existing clients to leave reviews?

Do you reward clients for referrals with a referral system?

Want to boost reviews and referrals?

[Read the section](#)

Dig Deeper: Awareness

Website

Your online presence is one of your most important marketing tools.

Your website should have a consistent feel to all other customer touchpoints, including printed collateral, emails, social media, and your physical space. It should also highlight your services, pricing, and any introductory offer(s) you have. With Mindbody's wellness software, your clients can view your schedule and book and pay for services—without ever leaving your branded site.

Your website should be mobile-responsive, meaning the layout of your site is designed to adapt to whatever screen it's displayed on. With [70% of internet traffic coming from mobile devices](#), it's a fair assumption that most customers are looking at your website, and want to book your services, on their phones or tablets.

Your website is also where prospective customers learn about your business. Are you doing everything you can to help them find yours? With proper search engine optimization (SEO), your website will appear higher in results for relevant searches. [Download our checklist](#) to learn how to optimize your website for search engines.

For more website tips, check out our guide on [How to Redesign the Website for Your Appointment-Based Business](#).

Social media

Social media platforms like Facebook, Instagram, Twitter, and even TikTok help businesses like yours reach and engage with both prospective and existing customers.

Like your website, your social media profiles should be consistent with the rest of your customer touchpoints. Make sure you give customers a genuine and consistent sense of your brand with every post, story, comment, and message.

Regular engagement (posting valuable content and responding to comments/messages promptly) helps prospective customers get to know your brand and your services. Don't be afraid to provide the same information across multiple platforms but be sure to adapt the content to fit each platform and its audience (a video on Instagram, an article on Twitter, etc.).

Customers also look at your social media for business details. Give them what they're looking for. On Facebook, for example, this includes:

- Branded profile picture and cover photo
- Professional photos of your space

- Completed "About" sections (using keywords strategically will help improve your search ranking)
- Up-to-date phone numbers, addresses, and business hours

Are you using social media effectively to grow your business? Download our guide to refine your [social media strategy](#).

Review sites

Prospective customers are looking at your review profiles to learn more about your business. Give them the details they're looking for: fill in your business name, address, phone number, website, and description.

Customers are interested in what others are saying about your business. They're also interested in what you say back. How and when you respond to your reviews is just as important as the reviews themselves. Always respond to reviews within 24-48 hours and never delete a negative review. Instead, respond promptly and politely, offer a solution, and provide an offline point of contact. [Check out our guide for more on how to respond to negative reviews](#).

See how you can encourage glowing reviews with [Mindbody's Marketing Suite](#).

Mindbody app

The Mindbody app brings new customers to your door. It attracts consumers who are searching for businesses like yours. Make a good first impression by adding your business address, business/location description, location photos, staff photos and bios, and keywords. [Download our checklist for three simple steps to increase the strength of your Mindbody app listing](#).

Learn more about the [Mindbody app](#).

Dig Deeper: Conversion

Online booking

Keep your clients coming back with an effortless online booking experience. Your schedule should be easily accessible from anywhere and up-to-date. Mindbody's wellness software allows you to integrate your schedule and accept online payments from your website. Let your clients view your schedule, book appointments, and pay for them as well as autopay memberships and gift cards on desktop and mobile—without ever leaving your branded site.

Customers want to check your schedule and find, book, and pay for appointments whenever they want, wherever they are. With a branded app, you can stay connected with your clients and give them more access to your business.

Front desk

The experience at your front desk is one of the most important customer touchpoints. In fact, it can make or break how clients feel about your entire brand.

Hiring the right people for your front desk, and training them well, is important. A documented training process and operations manual reiterates your core values and outlines the day-to-day processes and policies employees need to know.

Check out our [Complete Guide to Staffing](#) and [staffing template](#) to document your hiring and onboarding process.

At your front desk, staff should consistently provide a personalized experience that aligns with your brand. They should:

- Greet every client by name and introduce themselves
- Answer questions warmly
- Communicate safety procedures and any protocols that clients need to follow, helping clients feel safe once they arrive
- Process transactions and resolve customer requests through your business software with ease

Your front-desk staff can easily learn how to welcomes new clients, work with schedules, and collect payments within the software through [Mindbody's free software certifications](#).

Even the most trained, organized, and effective front-desk staff can use assistance when things get busy and when calls are missed ([Did you know that 62% of calls to small businesses go unanswered?](#)). Using artificial intelligence (or AI), your front-desk staff can focus on interacting with the customers in front of them, rather than worrying about missed calls—and lost revenue for your business.

What is artificial intelligence? In the case of [Messenger^{\[ai\]}](#), it's a virtual receptionist who captures and responds 24/7 to all missed phone calls via automated and instant text responses. Your virtual receptionist can view staff schedules, book appointments, and even take payments. Messenger^[ai] can also answer customer questions, forwarding to live chat with your staff when necessary. Less time taking calls and answering frequently asked questions means taking better care of your clients.

[See how you can create a seamless experience for your clients with Messenger^{\[ai\]}.](#)

In-person experience

The ambiance of your physical space sets the tone for your overall experience. Think about how you want clients to feel when they visit: Calm and centered? Uplifted and motivated? Invigorated and energized? This should be reflected in how you paint, decorate, and light your location.

Your in-person experience will stand out when you go above and beyond to accommodate your clients' needs and preferences. When someone walks through your doors, how do you welcome them: Do you offer a soft robe or towel? Provide a complimentary beverage or snack? It's often the smallest gestures that make the biggest impact.

Caring for your clients after their service is also important. Take time to walk through any product recommendations (which is also beneficial for retail sales), answer questions, and detail any post-care instructions. Don't miss this chance to leave a lasting impression.

Looking to enhance your space with updates, new equipment, or a revamped retail section? [Mindbody Capital](#) offers flexible funding with no interest, collateral, or credit checks—as quickly as the next day.

Checkout

You might be at your front desk, you might not. You should be able to accept payments through your software and/or a mobile device. With the business app, your payment processing is integrated with the software so it's easy to accept payments and complete sales wherever your day takes you.

Keeping records of your transactions is key. Payment and contract details should be kept on file for easy reference. You can go paperless with digital contracts/memberships and receipts with the business app.

Your POS needs to keep up with your front desk and beyond. You'll have access to mobile [POS options](#) loaded with your business app. You can speed up every transaction, and take all forms of payment, including Apple Pay, Google Pay, and Samsung Pay. Capture digital signatures for contracts/memberships, waivers and receipts, and print or email receipts too.

Your customer's credit card information should be your top priority. With Mindbody, all credit card data is stored at PCI Level I standard data security (the highest standard out there), so you can rest assured that it's safe.

Learn more about the business app and payments for [wellness businesses](#).

Dig Deeper: Loyalty

Email and text message marketing

Set up automatic email and text campaign that trigger for the right clients at the right time with [Marketing Suite](#).

[Marketing Suite's](#) robust automation helps to convert first visits, win back lost customers, and keep customers engaged based on criteria and segmented lists you create. Plus, you can set it and forget it, which means no ongoing work for you and your team.

Automated campaigns help nurture prospects and clients, regardless of where they are in their journey. Whether you're looking to convert new clients or encourage referrals from loyal customers, automated email and text campaigns send the right message at the right time.

Consistent email newsletters can be one of the most effective ways to promote a new service or retail product, showcase your expertise, and maintain relationships with your clients. Marketing Suite fully integrates with your software so sending to your entire customer list is a breeze.

Remember: Each customer touchpoint should represent your brand. With [Marketing Suite](#), you'll have access to customized email templates. That way, you can create campaigns that align with the brand your customers love.

Check out our [email marketing guide](#) to learn more best practices.

Rewards

Loyal clients are essential to the success of your business. Are you expressing your gratitude to them? Take the time to call your most loyal clients, send handwritten thank you cards, or host a client appreciation event to say thank you.

With Nift, you can go above and beyond by regularly (and automatically) sending your clients gift cards they'll love—at no cost to you.

When clients take actions like attending a class or renewing a membership, they'll receive an e-gift card in their inbox. Gift cards can be used towards healthy snacks, clothes, supplements, and more.

Learn more about the [Nift Mindbody partnership](#).

Dig Deeper: Advocacy

Reviews

As you know, reviews are important. That's why you should regularly encourage your best customers to share positive feedback. Use [Marketing Suite](#) to automatically prompt your members to leave a review on your website, Facebook, Google, and other review sites.

Referrals

The most effective form of marketing is word-of-mouth. In fact, [92% of customers rely on recommendations from friends and family](#). A referral program can help increase your clientele and meet your revenue goals, and show members your appreciation.

Once you've defined your incentives (discounts on services, free products, etc.) tell your clients about the program with email marketing, social media, and signage in your facility.

With the [retention tools](#) in Marketing Suite, you can automate the process and convert happy clients into advocates with rewards for referring friends and family.



Phone Call

Hi there, sorry we missed your call. How can we help you?

[ai]

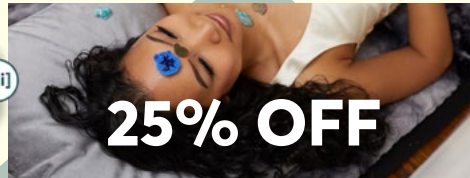
Hi! Can I book an appointment with Adrian tomorrow?

Sure! Looks like Adrian is available at 4pm Tuesday November 13. Does that work?

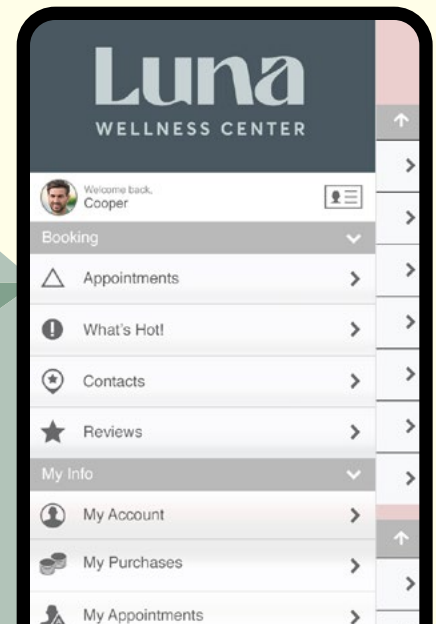
Yep, that's perfect.

Great! You're out of sessions. Would you like to buy another 5 pack?

That sounds great actually!



We miss you!



By now, you've seen where your business thrives and where you can provide an even better experience.

Now that you've audited your client experience, you know what you do well, and where you can improve. As you make changes to your various customer touchpoints, remember that consistency is key.

Clients should experience the same high-quality service online that they would from your front-desk staff. And, they should recognize your website, social media, and physical space as one unified brand.

When your brand is consistent and cohesive, your wellness business is easy for customers to promote to their family, friends, and networks. You've got this—and we're here to help.

[Schedule a consultation](#) to learn more.