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A Customer Experience Audit for Your Wellness Business

How does your customer experience stack up? Use this audit to find out.

The customer experience considers every touchpoint—from how a customer learns about your business, to the sounds and smells that greet them when they walk through the door, to the way they're interacted with after their service.

So, whether they're scrolling through reviews, checking out at your front desk, or booking a service online, a customer's experience should be branded, consistent, and memorable.

This audit template outlines four customer experience milestones—awareness, action/conversion, loyalty, and advocacy—to determine where your wellness business 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 customers 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 optimised for search so customers can find you?

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, and address?

Review sites

	Yes	Not yet

Have you claimed and optimised your review profiles (Google My Business, 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 optimise your review sites?

Read the section

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MINDBODY app

	Yes	Not yet
Are you listed on the MINDBODY app?		
Is your MINDBODY app listing optimised with your business info?		

Action/Conversion

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

Booking online

	Yes	Not yet
Can customers find, book, and pay for appointments on your website?		

Front desk

	Yes	Not yet
Does your front-desk staff greet and provide a personalised experience for every customer walking through the door?		
Do you have a documented process for your front desk to ensure that the experience is consistent?		
Do you have a seamless intake and waiver process for clients visiting for the first time and/or trying a new service?		
Is your front desk staff proficient in your wellness software so they can respond quickly to inquiries?		
Does your front-desk have a way to convert missed calls into paying customers?		
Do you automatically and instantly follow-up with customers 24/7?		

In-person experience

	Yes	Not yet
Does your physical space align with your brand (i.e., lighting, colours, furniture, etc.)?		
Do you offer something special for customers to make their experience comfortable (i.e., pre- and post-service amenities)?		
Do you provide detailed post-care instructions for each service?		

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Payments

	Yes	Not yet

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

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

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

Is your wellness software and payments processor PCI Level 1 Certified?

Need to upgrade your payments?

Read the section

Loyalty

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

Email and text messages

	Yes	Not yet

Do you have segmented lists and campaigns customised to different types of customers?

Have you set up automated email campaigns for:

- New customers?
- Customers who haven't purchased a service in 60 days? 90 days?
- Customers on their birthdays?
- Loyal customers who've purchased a gift card?

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

Are your emails customised with your logo, brand colours, and brand voice?

Want to engage customers with email and text?

Read the section

Branded mobile app

	Yes	Not yet

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

Do you send push notifications to stay connected with customers?

Ready to upgrade to a branded mobile app?

Read the section

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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 referring their friends and bringing guests with a referral system?		

Want to boost reviews and referrals?

Read the section

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Dig Deeper: Awareness

Your 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 offerings, pricing, and any introductory offer(s) you have. With MINDBODY branded web tools 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 find out about your business. Are you doing everything you can to help them find yours? With proper search engine optimisation (SEO), your website will appear higher in results for relevant searches. Download our checklist to learn how to optimise your business's website for search engines.

Social media

Social media platforms like Facebook, Instagram, and Twitter 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 and addresses

Are you using social media effectively to grow your business? Download our guide to refine your social media strategy.

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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.

MINDBODY app

Displaying your services in the MINDBODY app exposes you to millions of users. More than 5.8 million classes and appointments are booked each month on the MINDBODY app globally.[1]

The MINDBODY app brings new customers to your door. It attracts consumers looking 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.

Want to get the most out of the MINDBODY app? This blog highlights seven steps to do just that.

Dig Deeper: Action/Conversion

Booking online

Keep your clients coming back with an effortless online booking experience. Your schedule should be easily accessible from anywhere and up-to-date. MINDBODY branded web tools allow 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.

Front desk

The customer experience at your front desk is one of the most important customer touchpoints. In fact, it can make or break how customers feel about your entire brand. After having a single negative experience, 51% of customers say they won't visit a business again.

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.

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

- Greet every customer by name or introduce themselves
- Answer questions warmly

- Anticipate the client's needs (offer a beverage, a tour of your space, etc.)
- Process transactions and resolve customer requests through your business software with ease

MINDBODY's free Software Certifications help your front-desk staff learn how to welcome new clients, work with schedules, and collect payments within the software.

In-person experience

The ambience of your physical space sets the tone for your customer's experience. Think about how you want customers to feel when they visit: Calm and centred? Uplifted and motivated? Invigorated and energised? 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 customers' needs and preferences. When customers walk 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.

Payments

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 MINDBODY 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 and receipts with the business app.

Your POS needs to keep up with your front desk and beyond. As a MINDBODY customer, you'll have access to mobile POS options loaded with your business app. Capture digital signatures for contracts, 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.

Dig Deeper: Loyalty

Email and text message marketing

Staying in touch with customers throughout their journey is important. MINDBODY 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

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ongoing work for you and your team.

Automated campaigns help nurture prospects and customers, regardless of where they are in their journey. Whether you're looking to convert new visitors to members 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. MINDBODY Marketing Suite fully integrates with your MINDBODY software so sending to your entire customer list is a breeze.

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

Check out The Complete Guide to Email Marketing to learn more best practices.

Branded app

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

With a branded mobile app, you can also improve engagement and retention with push notifications. Push notifications can be used to send reminders, schedule updates, highlight upcoming events and promotions, and more.

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 MINDBODY Marketing Suite to automatically prompt your members to leave a review on your website, Facebook, Google, and other review sites after services.

Referrals

Ninety-two percent 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 MINDBODY Marketing Suite, you can automate the process and convert happy clients into advocates with rewards for referring friends and family. Remember to thank your referring clients for their support!

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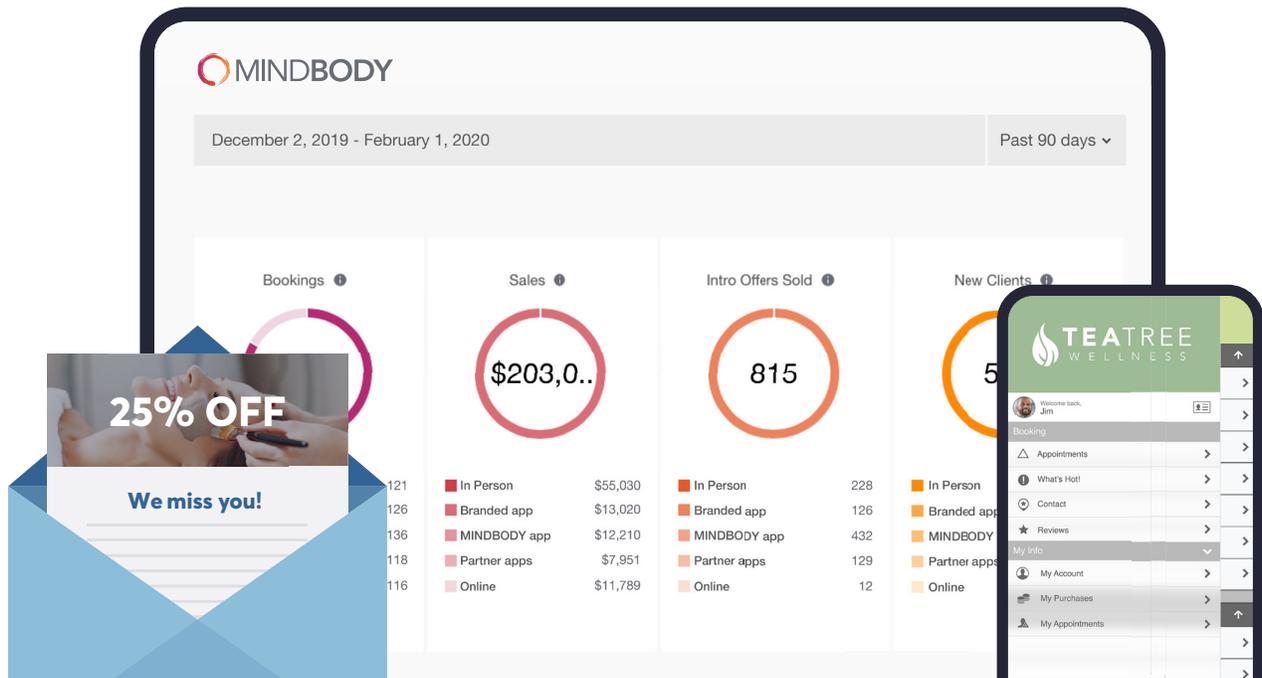
Now that you've audited your customer experience, you know what you do well, and where you can improve.

As you continue to improve your customer touchpoints, remember that consistency is key.

Customers should experience the same high-quality service online that they would from your front-desk staff. And, they should recognise 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 got this—and we're here to help.

Schedule a consultation with MINDBODY to learn more.

1 Data reflects monthly average MINDBODY global app usage from July 1, 2019 through September 30, 2019.

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