



**Best Practices Rev. 1**

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# FonGenie™ Best Practices

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We understand that no two businesses are alike, nor have the same clientele or product and services. In order to maximize sales and profit when using FonGenie, it is necessary to recognize and adhere to the "FonGenie best practices." This guideline was co-developed by retail and small business owners like yourself based on their experience and the FonGenie team.

FonGenie Best Practices quickly turn your FonGenie service into a live and personalized virtual receptionist, sales associate and a business manager for your retail and small business. It will strengthen customer relationships and loyalty while optimizing business outcomes. FonGenie accomplishes this by proactively identifying the caller's need and engaging the customer with personalized responses as well as synchronized brand, offers, message and interactions across voice, web and mobile to drive revenue growth. All of this results in increasing customer's willingness to purchase and while containing costs.

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Our staff is available Monday through Friday, 9:00AM to 5:00PM PST.

# FonGenie™ Best Practices

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## 1. Timely, relevant and informative greeting and menus.

As you complete and personalize your greeting and menus, please keep in mind that not all callers will listen to all menus available or played to them. Most callers and customers will hear the first menu or a prompt that interests them the most to engage. Therefore, it is best to experiment and find the optimum settings for your business.

One of the key features available to FonGenie is the ability for the business owner to customize how telephone calls are answered and managed. Through the convenient web interface, the business owner can monitor, update and optimize greetings and menus that are heard in real-time by your callers.

Advanced analytics and business intelligence continually monitors every aspect of your telephone traffic, providing unprecedented information and metrics. In real-time, these charts and reports show the number of calls during a particular time frame, the most-listened-to specials, where and what cities your customers are calling from and more. Use this information to optimize and update your greeting and menus.

## 2. Give your customers an incentive

Whether it's a coupon for a future discount, a daily special for "today only" or simply a pleasing and friendly voice on the phone, people love to get more than they thought they were getting. Most telephone calls are answered with the standard "Hello, thanks for calling MySpa. How may I help you?" or "Hello. MySpa".

How about answering the phone "Hello, thank you for calling MySpa. Today, May 17 we are offering a daily special on Reflexology pedicure with 15% discount until 5:00PM. Would that be an interest to you?" including a follow-on message "bring a friend and they get 50% of their purchase".

Is that realistic for all your calls? Probably not. In fact, most small businesses do not have a dedicated receptionist or a person answering the telephone calls, it is usually anyone available at the moment. As a business owner, you may force your employees to answer the telephone in certain ways and would have trained them, but enforcing such behavior and practice is difficult and not followed. But, when using FonGenie, your retail and small business will always have a consistent voice, but also have the ability to up-sell products and services or simply lead what products and/or service they should buy because there is a clear incentive for them to act immediately.

### 3. Up-selling of products and services to callers

For most business owners or the person taking the phone call, there is rarely any up-selling or recommendations to the caller for a product or service. Typically, when answering the telephone - questions are answered for routine inquiries and the customer is urged to make an appointment, reservation or schedule a time for customer to visit, or for the business to visit them.

Just making a slight adjustment of a product or service at your business isn't going to increase sales much nor create interest from customers. To up-sell successfully, the customer has to be persuaded of the benefit or there needs to be a clear incentive.

For instance, a customer calls a Nail Salon to schedule his/her Pedicure, the person answering the phone mentions a daily special being offered. Reflexology pedicure is being offered today with a 15% discount, if an appointment is made now and they come in before 5pm. What would the customer do? You bet. The customer was originally thinking about getting his/her regular pedicure, but ended-up taking the daily special and enjoyed the heavenly reflexology pedicure with a 15% discount. Result: Increased sales for the nail salon. The Nail salon was able to successfully convert a customer to spend \$50 instead of \$30 dollars and everyone is happy.

### 4. Promote higher margin services and products

Based on our experience, most businesses have a single product or service, perhaps a few that are classified as the bread and butter from the larger portfolio or menu of items sold to customers. In every industry or business, usually the product or service with the highest volume has the lowest margin, while an upgraded or a more expensive derivative of the product or service carries a margin that is often multiple times higher.

For instance, a Nail Salon offers multiple variations of pedicure; a service to pamper your feet. A standard pedicure for \$30, Spa pedicure for \$55 and Reflexology pedicure for \$70. The cost associated with delivering a Reflexology pedicure may only be slightly higher than a standard pedicure. Create incentive to an offer or daily special with urgency for an upgraded product or service when calling your business for inquiry.

### 5. Start your own customer rewards program

We're all familiar with customer rewards programs that so many large businesses have in place. But there's no reason that a small business can't have a customer rewards program, too. It can be as simple as a discount on a customer's birthday or as complex as a points system that earns various rewards such as discounts on merchandise. Done right, rewards programs can really help build customer loyalty and increase sales.

Consider using the easy-to-use Customer Relationship Management built into FonGenie to launch, operate and manage your own customer rewards program. FonGenie allows custom tagging, appointment management and note taking to profile callers and identify important customers when they call again.

### 6. Categorize and tier your customers when building their profiles

There should be a clear and obvious difference between regular and/or recurring customers and other customers – a difference that your regular customers perceive as showing that you value them. How can you expect customer loyalty if all customers are treated as “just someone off the street”? There are all kinds of ways that you can show your regular customers that you value them—from small things, such as greeting them by name, to larger benefits like giving regulars extended credit or discounts.

Attracting new customers is always important. But attracting new customers is not the only way to increase your sales, and is, in fact, the hard way of going about it. Shifting your sales focus to enticing your current customers can make increasing your sales easier – and best of all, build the customer loyalty that results in repeat sales.

Get in the habit of closing each inbound phone call with a summary of whatever action you and the caller have agreed to take or just a quick note and summary of the conversation. This can be done easily using FonGenie's Caller ID function or the Customer Relationship Management feature. While this will only take seconds in most cases, it can save you a lot of time by avoiding errors and the need to double-check. Also, when they call again, you will be surprised with the knowledge you have on the caller as it will be automatically displayed on the screen.

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### 7. Taking advantage of automation

If you run a brick-and-mortar store, there's a decent chance that you or your employees spend tremendous amount of time answering general questions on the phone: "What are your hours?" "How do I get to your store?" "Are you open right now?" and a host of other questions heard every day.

Whenever the phone rings, it would have to be answered by anyone available or closest to the telephone regardless if that employee was handling a customer. Think about an average Hair Salon; a hair stylist answering the phone while working on a customer's hair is not uncommon. For many retailers and small businesses, telephone calls take employees away from their tasks (a lot of incoming calls can be answered by FonGenie without needing to be transferred to a person).

As you define and refine the menus heard by your callers, you are anticipating the repetitive questions that many of your callers ask. These can be automated and do not have to ring your telephone for every general question. Expect your phone to only ring when customers need to make an appointment or reservation, have a specific question to ask or need to speak to you in person.

### 8. Analyze, measure and optimize your up-selling campaigns

Effectiveness of your up-selling and its performance is measured by the hit rate (caller engagement) of callers who choose to hear your teaser or introduction to your daily specials or promotions.

FonGenie's user-friendly, yet feature-rich Reports section provides clear snapshots into your customer's calling behaviors and patterns. By comparing the available reports of the callers' behaviors, viewable by defining date ranges, you can measure how your callers interact effectively with your prompts –most importantly, your promotions.

The Reports section is divided into three subsections (Call Summary, Menu Transactions and Call History) which permit alternative reporting methods and output depending upon the results required.

Measure the results of your daily "Reports" information against the previous day. At the end of the month, select to see this information with the perspective of the entire month. If you see from a day-to-day perspective that the "Post Greeting" content is not driving callers to select your special then you will need to change the wording of the message, the quality of your special, or both.

### 9. Pricing strategies

Well defined pricing strategies and daily specials will drive callers to not only select to purchase your goods or services, but also entice these callers to return to again for different specials and offers. Do you have a pricing strategy for daily specials and promotions? Does variable pricing make sense for different markets, services you provide, perishable products or based on customer types? As an example consider a florist:

You have Poinsettia prices at Christmas that vary based on the size of the plant. Should you consider lowering prices pre-December 5 (to promote early sales), and raising prices slowly after December 20 (to maximize revenues from last-minute buyers)? Have you ever considered 2-for-1 sales for holiday plants, or a coupon for a spring bouquet for people who buy fresh arrangements in January and February?

Other examples of variable seasonal pricing strategies could include spring or summer air conditioner tune ups for automobiles, snow tire removals, pedicures at a spa approaching spring or summer when toes come out into the open.

### 10. Set realistic expectations

Most marketing and advertisement programs typically deliver an average response rate, callers who choose to hear about your special, between half a percent and 3%. Additionally, the response rate can be as low as 0.25% for high value items, or as high as 25% when dealing with current customers. When building your next script inclusive of a daily special or promotion, factor in whether or not the offer is attractive to your customers.

Figuring out whether an offer or promotion is “worth it” depends on how many people engage and take the offer. If you’re promoting and up-selling a reflexology pedicure for \$60 dollars (20% or \$15 dollars off regular price of \$75 dollars) versus a standard pedicure for \$40 and had a response rate of 5% from 50 calls you have received, that’s a very profitable campaign. Conversely, a response rate of 35% may not bring in an acceptable profit if you’re up-selling a \$12 manicure service with a possible offer such as “bring a friend and he/she gets 50% off”.

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### 10. Set realistic expectations (Continued)

It's the profit your FonGenie direct marketing campaign brings in that determines whether or not your sales offer has been effective, not the response rate itself.

Targeted, timely and relevant offers are the only effective marketing strategies out there – as long as your customers hear a great deal, they will act right away. Armed with these tips, you should be well on your way to conduct a successful up-selling campaign using FonGenie.

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