



## SAMPLE TEACHING EXAMPLE | NOT CLIENT EVIDENCE

# A medspa follow-up decision

A short example of how to move from activity counts to a careful business decision.

SAMPLE. These numbers are made-up teaching inputs. They are not client data, a client result, or a forecast.

## The business question

### Would missed-call follow-up justify a paid revenue-recovery project?

I start with one sample month of lead records, because I want to see what happened before I suggest paid work. More calls alone do not tell us whether more people would buy.

We count each person once and leave out records we should not use. Then we check the next step and the cost, so the choice is based on what we can see.

### What this example can show

- How a small set of records can reveal a follow-up question.
- How to show the math without calling a model a fact.
- Why a good next step may be a basic process fix, not a paid project.

No patient names, contact details, health information, or private screenshots are used.



01 | COUNT WHAT HAPPENED

# 20 events became 12 unique contacts

Repeated calls or messages are events. They are not new people.

| EVENTS | UNIQUE | ELIGIBLE | REPLIED | BOOKED | ATTENDED | PAID |
|--------|--------|----------|---------|--------|----------|------|
| 20     | 12     | 9        | 6       | 3      | 2        | 1    |

One contact paid and the fictional records show \$600 collected. Three records were marked not eligible: one test, one spam contact, and one opted-out contact.

| CONTACT | EVENTS | ELIGIBLE | REPLIED | BOOKED | ATTENDED | PAID / COLLECTED |
|---------|--------|----------|---------|--------|----------|------------------|
| S01     | 3      | Yes      | Yes     | Yes    | Yes      | Yes / \$600      |
| S02     | 2      | Yes      | Yes     | Yes    | Yes      | No               |
| S03     | 2      | Yes      | Yes     | Yes    | No       | No               |
| S04     | 1      | Yes      | Yes     | No     | No       | No               |
| S05     | 1      | Yes      | Yes     | No     | No       | No               |
| S06     | 1      | Yes      | Yes     | No     | No       | No               |
| S07     | 2      | Yes      | No      | No     | No       | No               |
| S08     | 2      | Yes      | No      | No     | No       | No               |
| S09     | 1      | Yes      | No      | No     | No       | No               |
| S10     | 1      | No       | No      | No     | No       | No               |
| S11     | 2      | No       | No      | No     | No       | No               |
| S12     | 2      | No       | No      | No     | No       | No               |

Method: group event rows by contact ID, then count each contact once. The table is generated from the sample source file.



## 02 | TEST THE ECONOMICS

# Small assumptions, clear math

These are sample cases. They do not show money recovered.

Each scenario starts with 3 eligible unanswered contacts per month. It estimates bookings, attendance and sales, then applies the 50% gross margin and a 3-month window.

| SCENARIO | BOOK | SHOW | CLOSE | ATTEND / MO | 90-DAY GROSS PROFIT |
|----------|------|------|-------|-------------|---------------------|
| Low      | 10%  | 60%  | 20%   | 0.180 / 2   | \$32.40             |
| Base     | 20%  | 80%  | 25%   | 0.480 / 2   | \$108.00            |
| High     | 40%  | 90%  | 40%   | 1.080 / 2   | \$388.80            |

## Formula

3 unanswered contacts x booking chance x show rate x close rate x \$600 collected per sale x 50% gross margin x 3 months = modeled 90-day gross profit.

## Capacity check

Expected attended visits are capped at 2 per month. The low, base and high cases are below that cap, so the cap does not raise any scenario result. Actual capacity must be checked with the business.

**Price comparison from the offer catalog: Decision Audit \$2,500. Sprint \$7,500. The Audit credit is conditional; if approved and applied once to the Sprint, the incremental Sprint payment is \$5,000. Do not count the credited Audit fee twice.**

None of these figures includes staff time, software, acquisition costs, refunds, taxes, or implementation costs. They are not profit forecasts.



## 03 | REJECT A WEAK CLAIM

# Activity is not lost sales

A large number can still be the wrong number.

**REJECTED CLAIM: 20 call events x \$600 = \$12,000 of lost sales.**

## Why this claim fails

- Twenty events came from twelve unique contacts.
- A contact does not prove intent to buy.
- The records do not show what would have happened with a different follow-up.
- \$600 is a fictional collected value per sale, not a value for every call.

## Decision from these inputs

**NO paid recovery project on these fictional inputs. Assign a callback owner, use the current tools, log outcomes, and collect better evidence.**

The catalog keeps the medspa estimate screen at \$15,000 modeled monthly leakage, plus capacity, data, and contact-basis fit. This fictional example does not establish that threshold or pass the operating-fit checks. A model is not verified leakage.

A paid decision audit is a separate purchase. It is not justified just because the arithmetic can be completed.



## 04 | EXECUTIVE DECISION MEMO

# What to do next

I want the next step to help us see what works.

## Decision

I would start with the current tools and give each reply one clear owner. Record when we reply, who books, who shows up, and who pays. Then check what changed before we choose paid work.

## Why

The example has only three eligible unanswered contacts in one fictional month. Its 90-day gross-profit scenarios range from \$32.40 to \$388.80 before implementation costs. The assumptions are invented and the pattern may not repeat. This is not enough evidence to buy an implementation project.

## Source and method

Source inputs: the local sample teaching file *audit-specimen.json* and the versioned *offer-catalog.json*. The table groups events by contact ID. Scenarios use the listed booking, show, close, collected-value and margin assumptions. The 90-day outputs and capacity cap are recomputed when this PDF is built.

## Limits

- Probabilities and margin are invented teaching assumptions, not verified recovery evidence.
- The month-to-month repetition assumption may fail.
- Seasonality, offer changes, capacity, existing bookings, opt-outs, cancellations and refunds must be reconciled.
- A before/after difference alone does not prove that one change caused a result.
- No patient identifiers, private screenshots or real contact details appear in this dataset.

## Next steps

- Name one person to own each callback.
- Use current systems and record what happens; do not add a tool yet.
- Review enough real, permissioned business records to test whether the pattern repeats.
- Only consider a paid audit if the evidence, operating fit, and current offer rules support it.

Offer reference: \$2,500 Decision Audit; \$7,500 Sprint. A \$2,500 Audit credit toward an approved Sprint is conditional and may be applied only once under the catalog terms. Confirm the current signed scope before purchase.