



OPEN WORKSHEET | NO EMAIL OR ACCOUNT NEEDED

Check the next step

A plain, self-guided look at missed calls, replies and bookings.

Use business records only. Do not write patient names, health details, phone numbers, or private screenshots here.

1. Missed calls and reply ownership

- ☐ Do we know who checks missed calls each day?
- ☐ Does every new inquiry have one clear person to reply?
- ☐ Can we see when the first reply was sent?
- ☐ Do staff know what to do if the owner is away?

What is one step we can check today?

2. Look at 10 recent business inquiries

Look at the last 10 leads you can use and count each person once. Leave out tests, spam, and people who opted out, so the count shows real chances to help. Keep names out of this sheet.

#	REPLIED?	BOOKED?	ATTENDED?	PAID?	NO-SHOW / CANCEL?
1	☐	☐	☐	☐	☐
2	☐	☐	☐	☐	☐
3	☐	☐	☐	☐	☐
4	☐	☐	☐	☐	☐
5	☐	☐	☐	☐	☐
6	☐	☐	☐	☐	☐
7	☐	☐	☐	☐	☐
8	☐	☐	☐	☐	☐
9	☐	☐	☐	☐	☐
10	☐	☐	☐	☐	☐

Count only the real outcome you can confirm. A call is not a booking. A booking is not an attended visit. An attended visit is not collected payment.



KEEP THE NEXT STEP SIMPLE

Choose one useful change

I want to help you use what you have before you pay for more.

3. Make the next step clear

- ☐ Does every reply tell the person what to do next?
- ☐ Can people choose a real appointment time when that is the right step?
- ☐ Do we have a clear path for cancellations and no-shows?
- ☐ Is there one person who checks that follow-up happened?

One small change to try

4. Ask for honest reviews

- ☐ Do we ask customers for honest reviews in a steady, fair way?
- ☐ Can everyone share an honest review, even if we think it may be negative?
- ☐ Do we avoid filtering who gets a review request?

How will we ask in a fair and consistent way?

5. Check cost and a starting point

- ☐ Do we know how many usable inquiries came in during this period?
- ☐ Do we know how many got a reply, booked, attended and paid?
- ☐ Have we counted staff time, tools, refunds and cancellations?

Time period and business-only record source

What would make this a better process?

Keep this self-guided. The catalog keeps the medspa modeled-leak screen at \$15,000 per month, with fit checks for capacity, data and contact basis. This worksheet does not prove that threshold.

Book A Call: start with the medspa call path at bluestarmarketingfirm.com/medspa#book. This link is informational; it does not claim to open a live Cal.com event. A paid Decision Audit is \$2,500 only if the offer and fit are confirmed.

Do not send this worksheet with patient information. Do not share private records through a public form.