Phorest

Get More Clients

Watch the recording

Phorest

- Referrals
- Leads Management
- Ads Manager

Phorest

Referrals

People believe other people when they are given a recommendation or a referral to a business.

Let's look at how we can get your existing clients who love your salon to recommend friends?

We can incentivise these referrals in Phorest.

Help Sheet:
How can I set up a Referral program for my clients? – Phorest

Word-of-Mouth is Key – With Phorest, It's Easier Than Ever!

53%

of consumers **discover salons through word of mouth** & referrals from family and friends, making it the most common method!

18

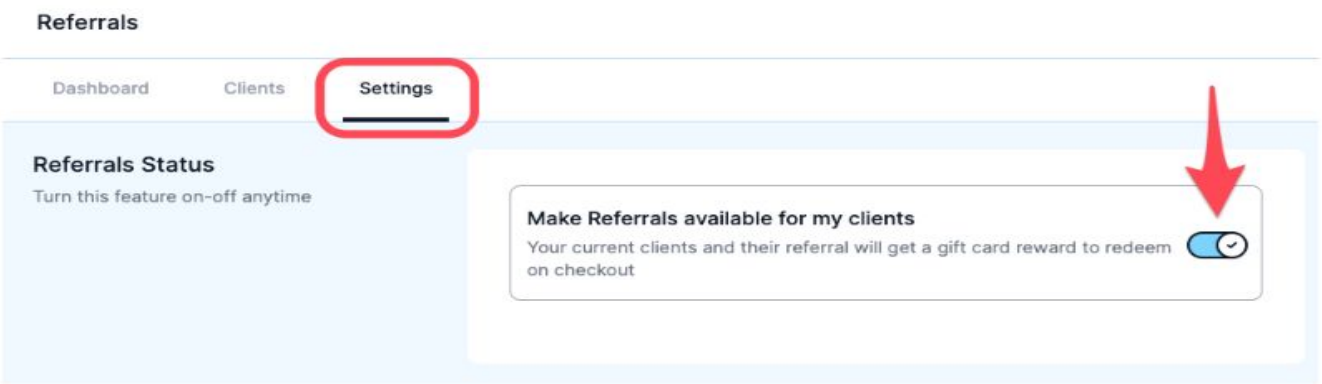
new clients are gained by salons on average using the Phorest Referrals feature.
*(And **48%** of those clients **returned** for additional services!)*

$20,000

in **additional revenue** is generated by salons on average using the Phorest Referrals feature.

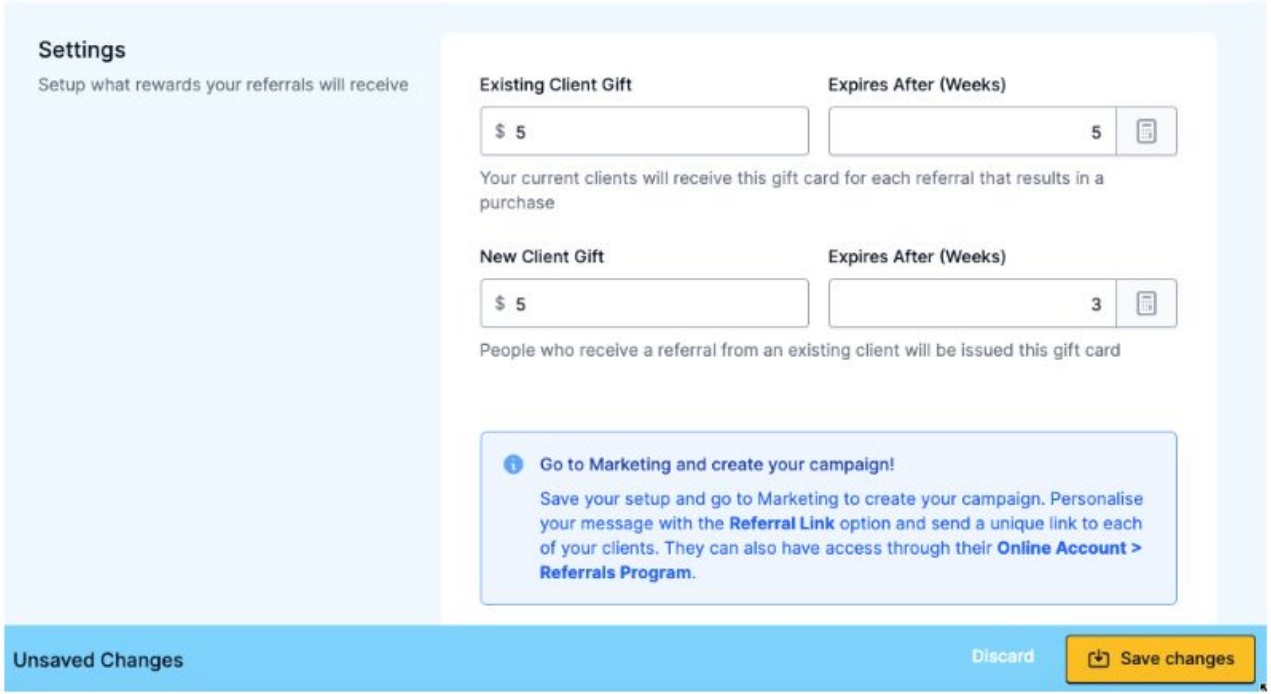
How to steps:

To get started, go to **Marketing** > **Referrals** > **Settings**, then enable **Make Referrals available for my clients.**



Help Sheet:
How can I set up a Referral program for my clients? – Phorest

Set the referral reward:



Help Sheet:

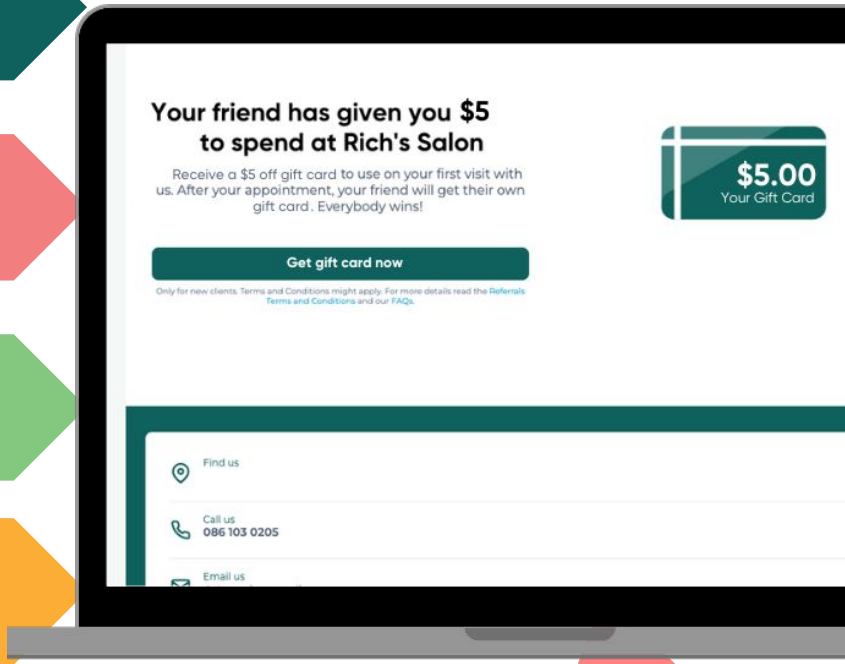
How can I set up a Referral program for my clients? – Phorest

Clients can access their referral link through the **Branded App**, the **online booking page** or a **marketing campaign**

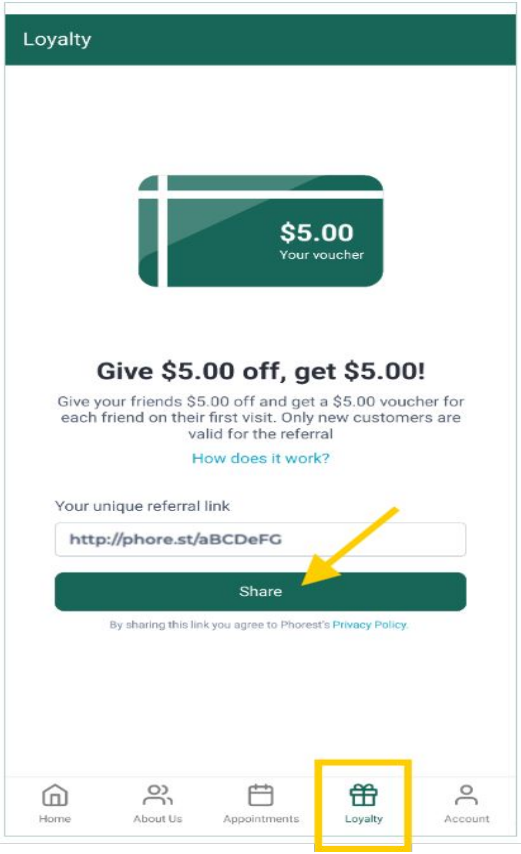
They share their unique link with friends & family who can **easily sign up and book their appointment**

Once they've booked, **a voucher is automatically added to their client card** and is available at checkout

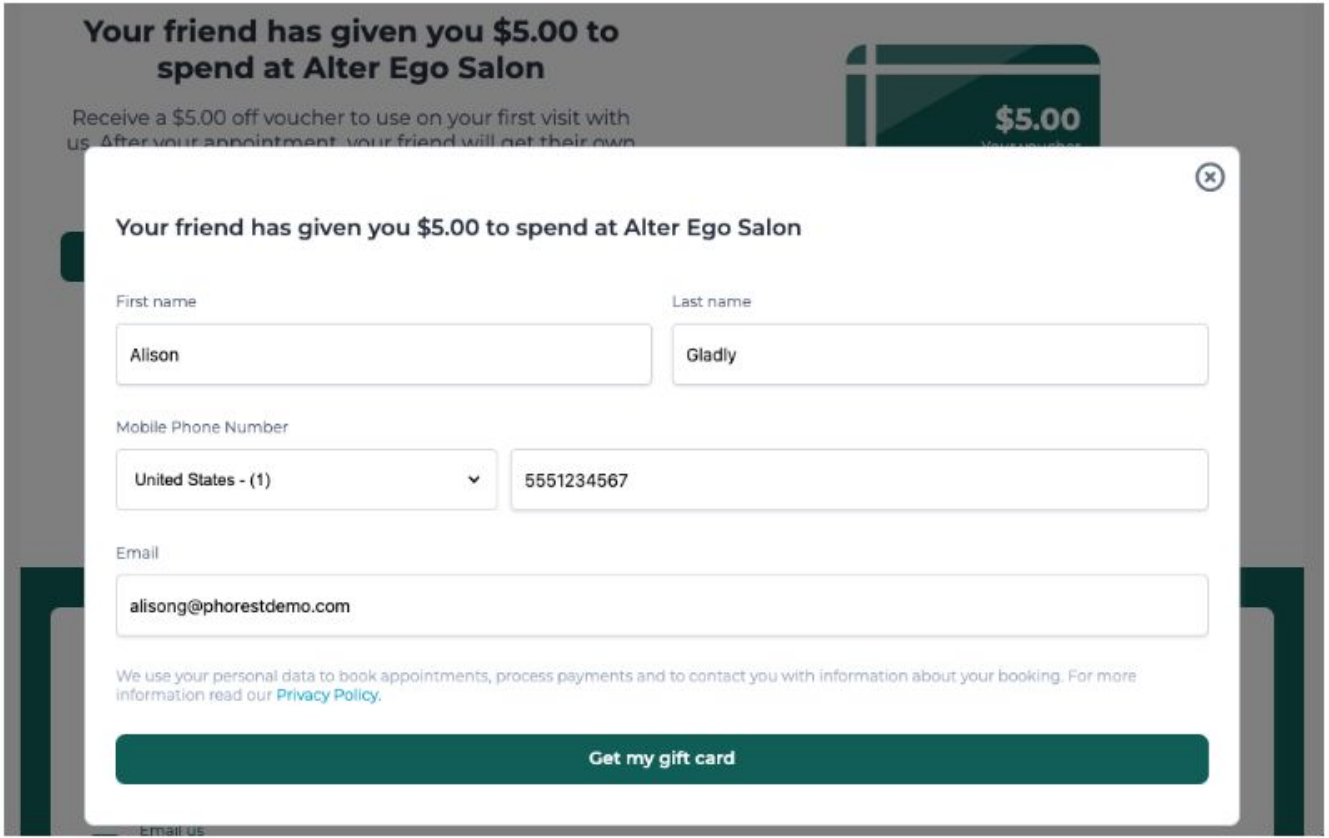
After the new client pays for their visit, the **referrer's voucher is added** to their client card too. Simple as that!



Phorest



Tell your clients about this new feature: the best results we've seen are when a clients uses the Referral Link in the Branded App,
or use our pre set templates in the Marketing suite.



Once a new client clicks the link and follows the instructions, they enter their information online and claim their gift card.

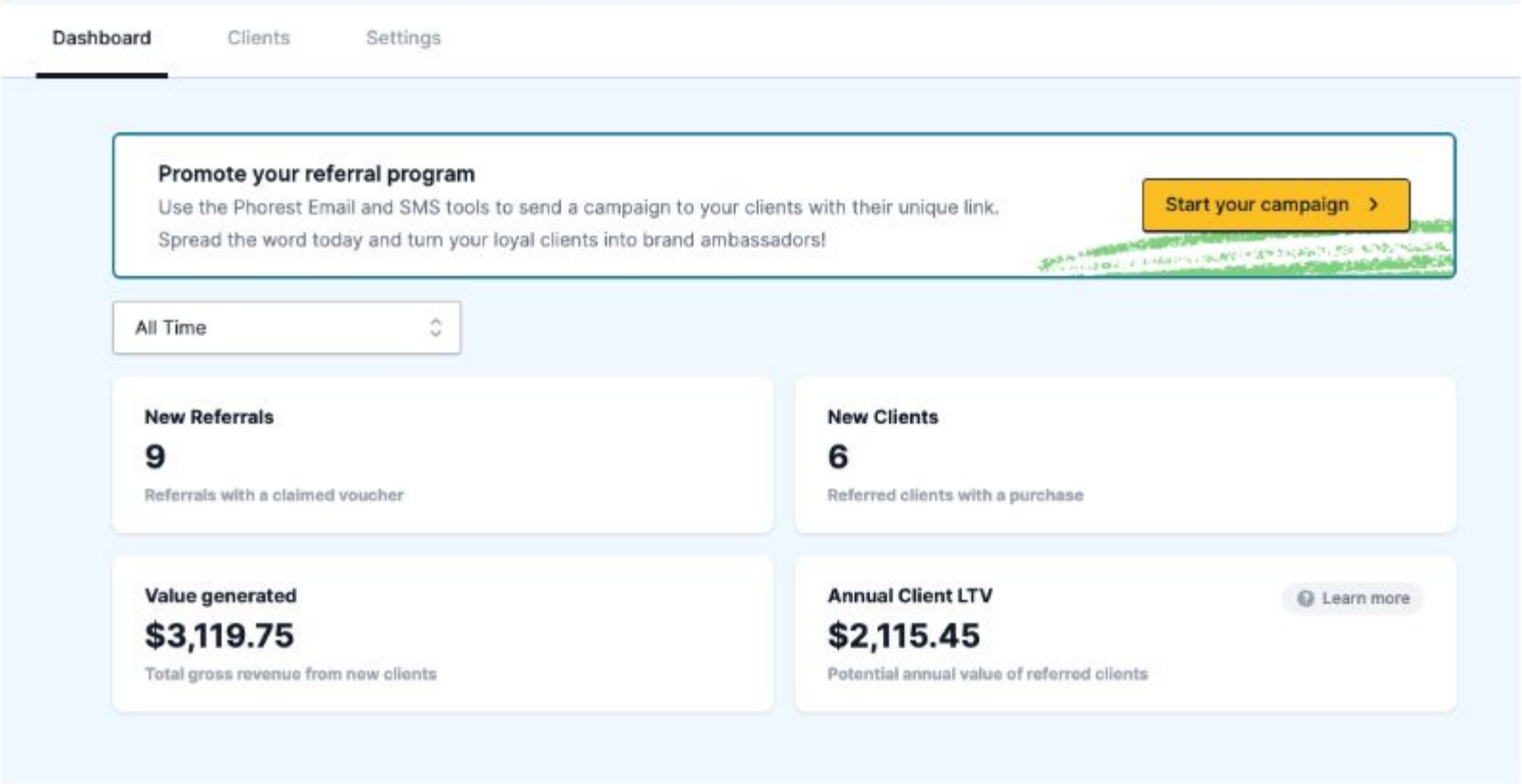
Dashboard | Clients | Settings

Search by client name

All statuses

Client name	Status	Voucher serial	Client created date	Appointment date	Referred By
April O'Neil	Booked	10318811	January 9, 2025	January 9, 2025	Jane Garcia
Alison Mertens	Referred	62666883	January 9, 2025	-	Jane Garcia
Penny Lane	Booked	48218162	October 25, 2024	January 9, 2025	Jane Garcia
Amber Blovka	Referred	42661140	January 9, 2025	-	Jane Garcia
Peter Klaven	Referred	89517815	January 9, 2025	-	Jane Garcia
Alison Gladly	Referred	20377192	January 9, 2025	-	Jane Garcia

Click the Clients tab to see a list of all clients who have been referred, their referral status, who referred them, and more.



To see how well your Referral program is performing, go to Referrals, and you'll be brought straight to the Dashboard where you can see the performance.

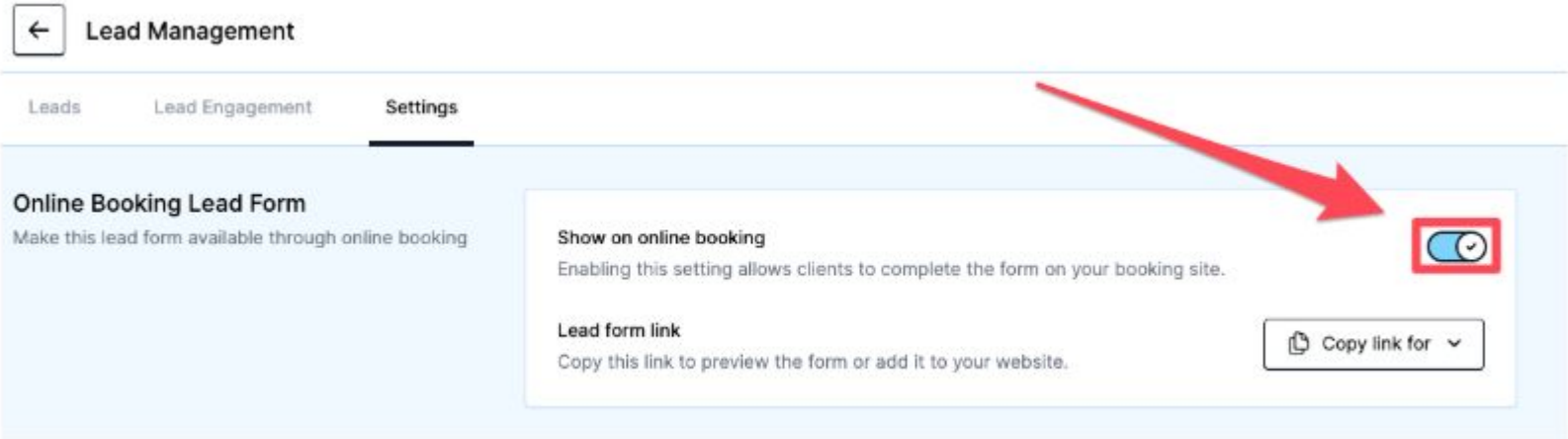
Phorest

Leads Management

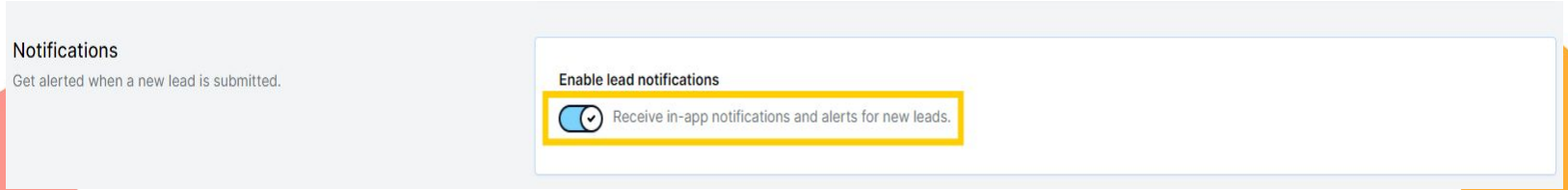
Lead Management is designed to help you capture new client interest and grow your business.

Leads Management enables you to track incoming leads and see the conversions.

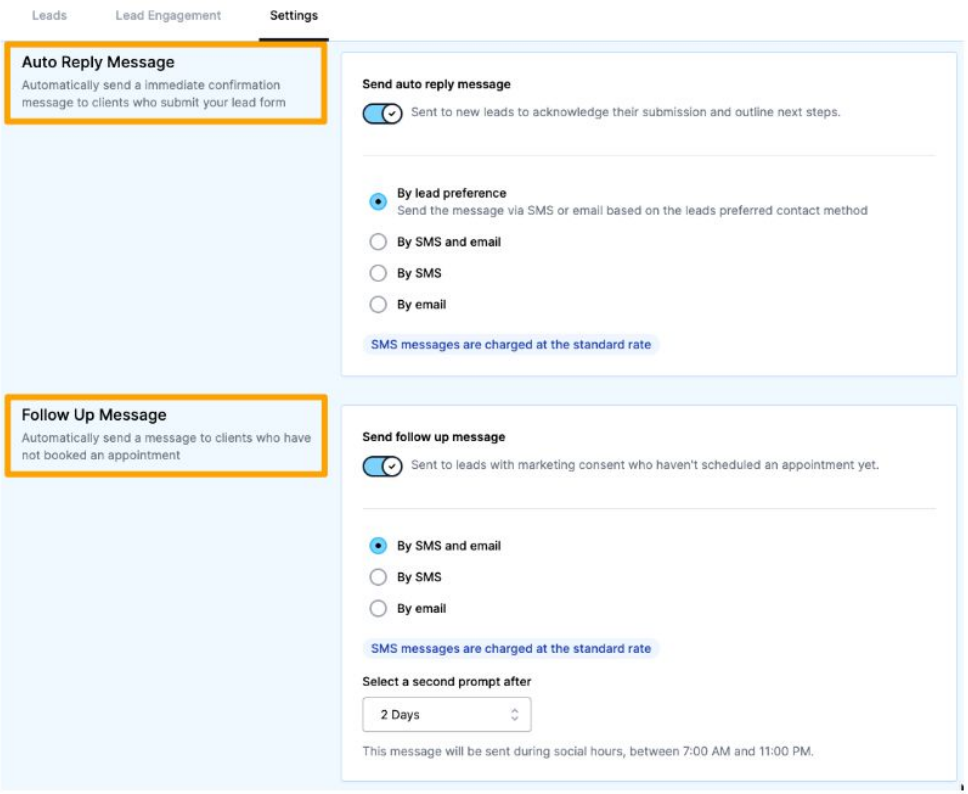
Help Sheet:
Lead Management – Phorest



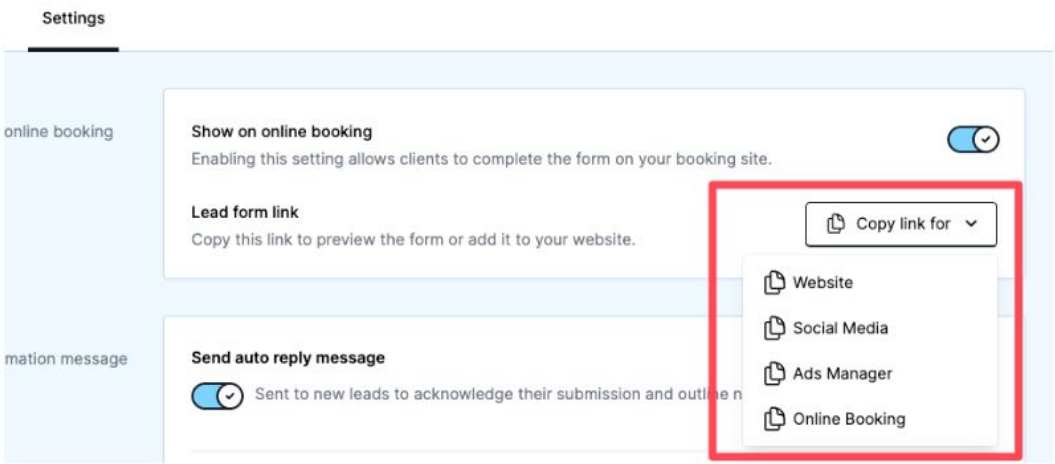
Leads: Enable leads from Marketing > Leads Management > Settings



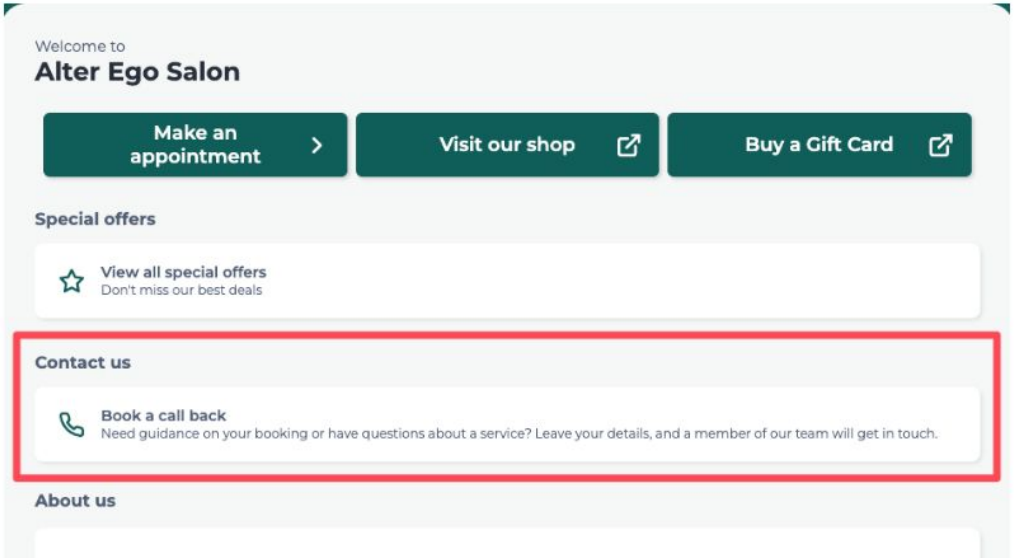
Enable the Leads Management feature, including the notifications option



Set up Lead Engagement Auto Replies and Follow Up Messages



You can also copy your lead form link and place it on your website, social media page, or wherever you prefer. Each type of link includes unique source tracking, so when a client completes the form, you'll know exactly where the lead came from.



From your Online Booking website, clients click the Book a call back option and complete the form

Request a Call Back

Please share your contact details, and a member of our team will be in touch with you.

First name: Alex

Last name: Camino

Mobile Phone Number: United States - (1) 5551112222

Email: alex.camino@alteregodemo.com

Tell us more about your needs and how we can help:

I have tried a couple of other salons in the area, but have never been to yours. I've been considering visiting you for a while now, but I have a unique hairstyle that I want to confirm you can work with first.

How would you prefer to be contacted?

- [x] Phone
- [ ] Email

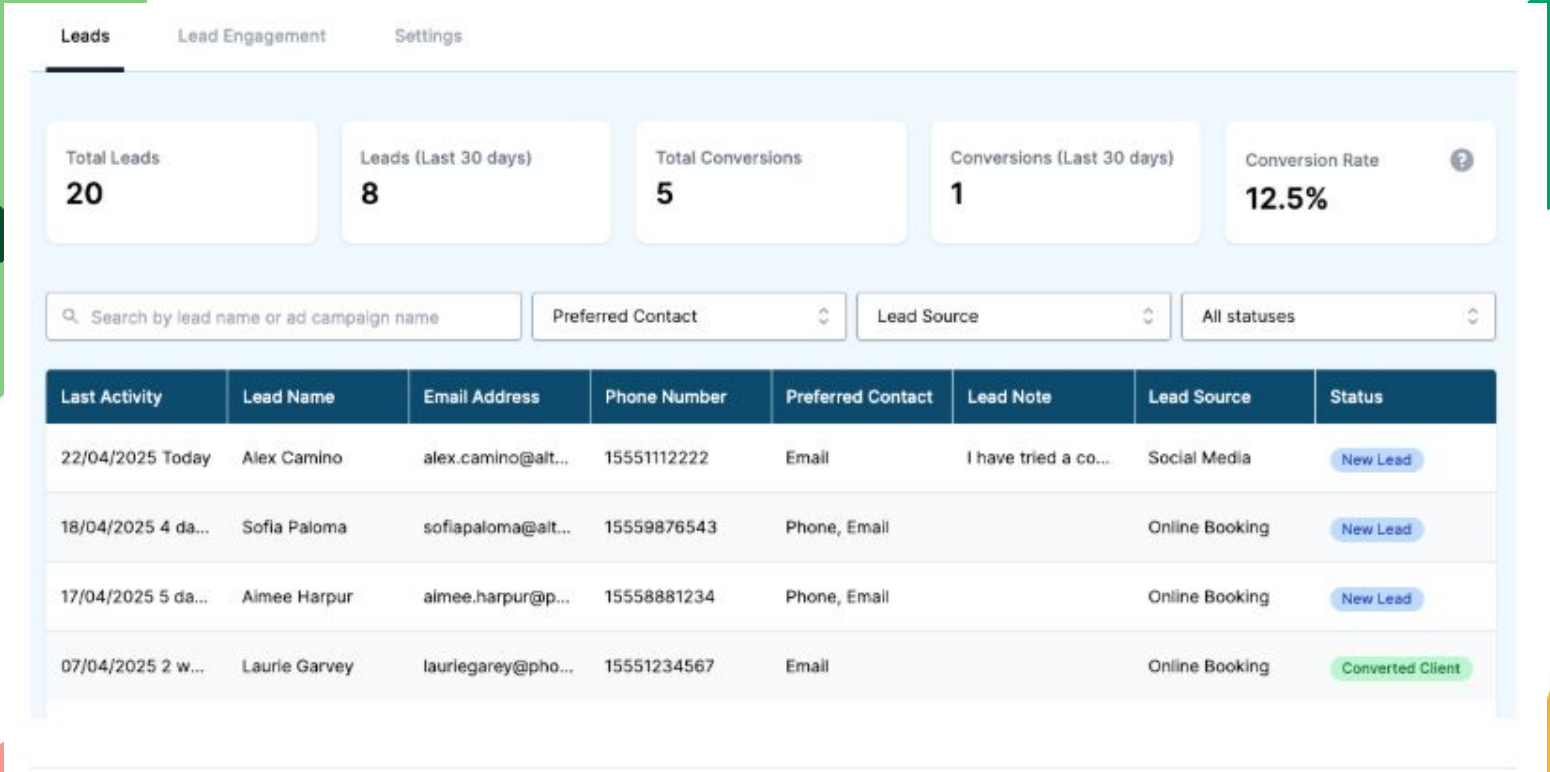
Marketing Preferences

- [x] By checking this box, you agree to receive email and SMS marketing communications.

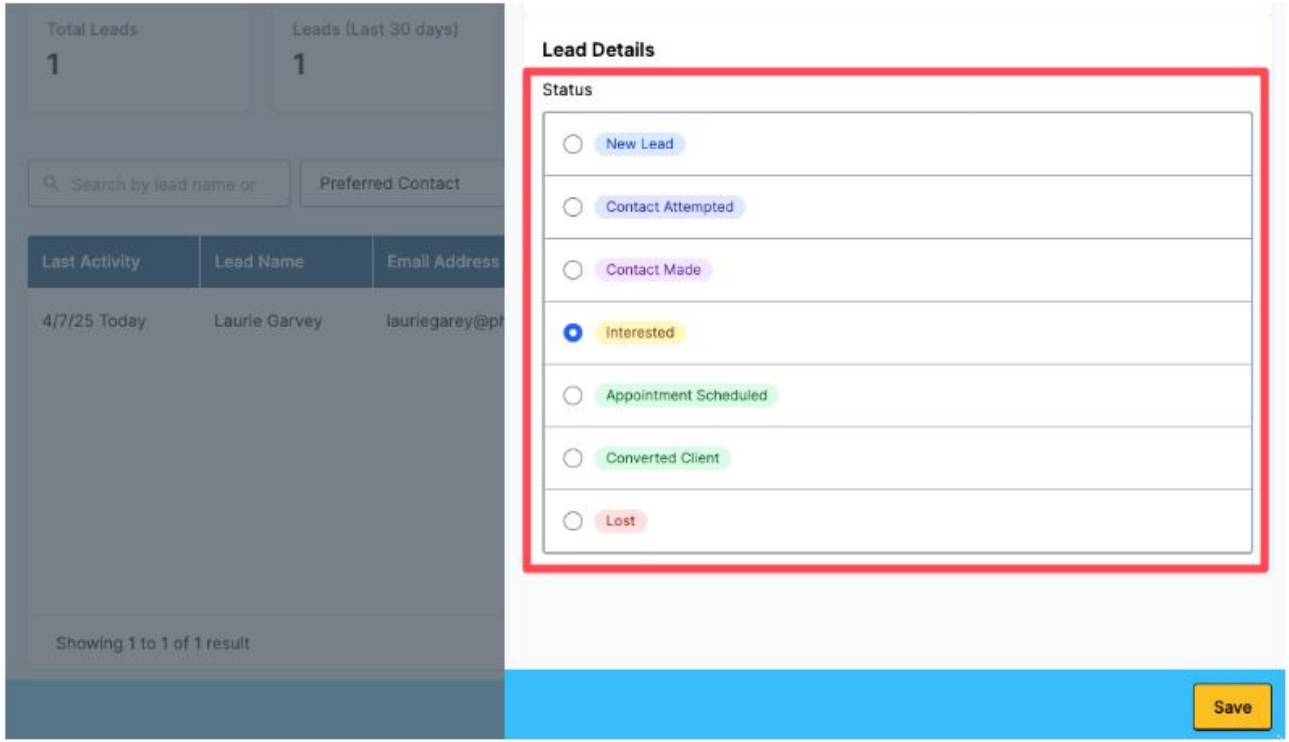
We use your personal data to book appointments, process payments and to contact you with information about your booking. For more information read our Privacy Policy.

Submit

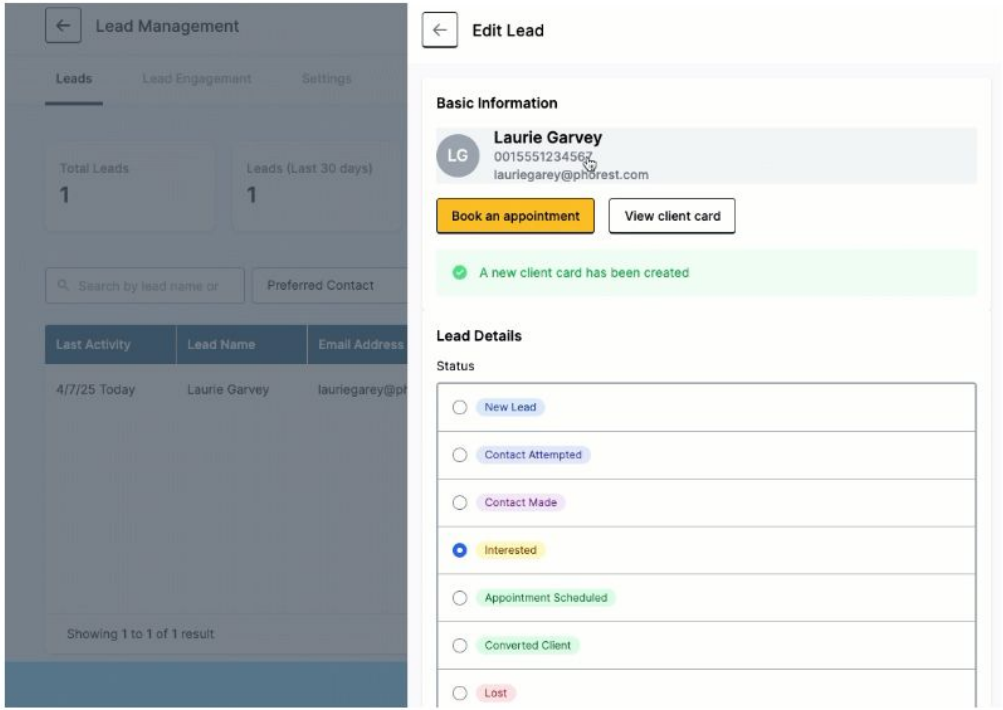
Prospective clients complete the Lead form and click Submit.



When someone submits the lead form, their details go straight into your Phorest system, making it easy to follow up and convert leads into loyal clients.



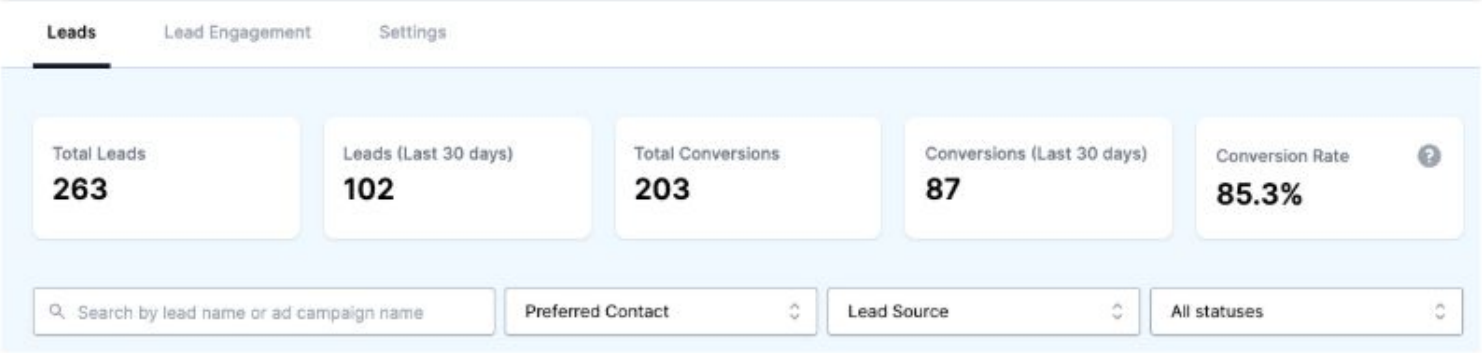
When following up on a Lead, click the appropriate Status



If the lead is ready to book an appointment, select them and click Create as New Client. Then choose the “Book an Appointment” button. You’ll be taken straight to the Appointments screen, where you can schedule their booking.

Reporting on Leads and Conversions

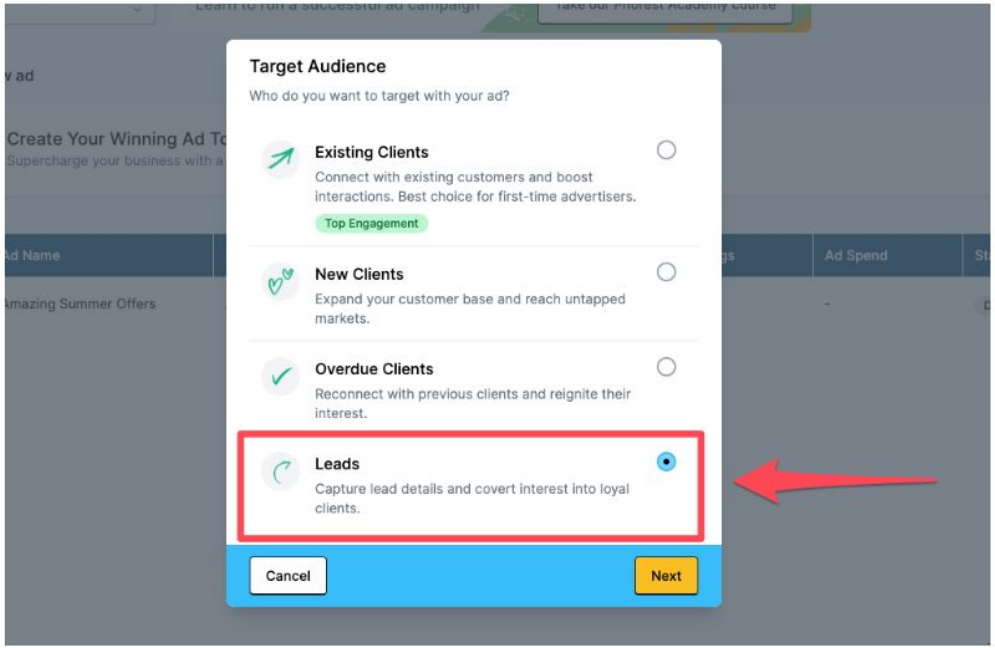
You can view the number of new client leads generated along with the conversion rate at the top of the **Leads** screen under **Marketing** > **Lead Management**.



The **Conversion Rate** is based on leads generated and converted in the last 30 days.

Using Lead Management with Phorest Ads Manager

If you use Phorest Ads Manager, you can also link to your lead form in a Facebook and Instagram ad by choosing **Leads** as the target audience when creating your ad.



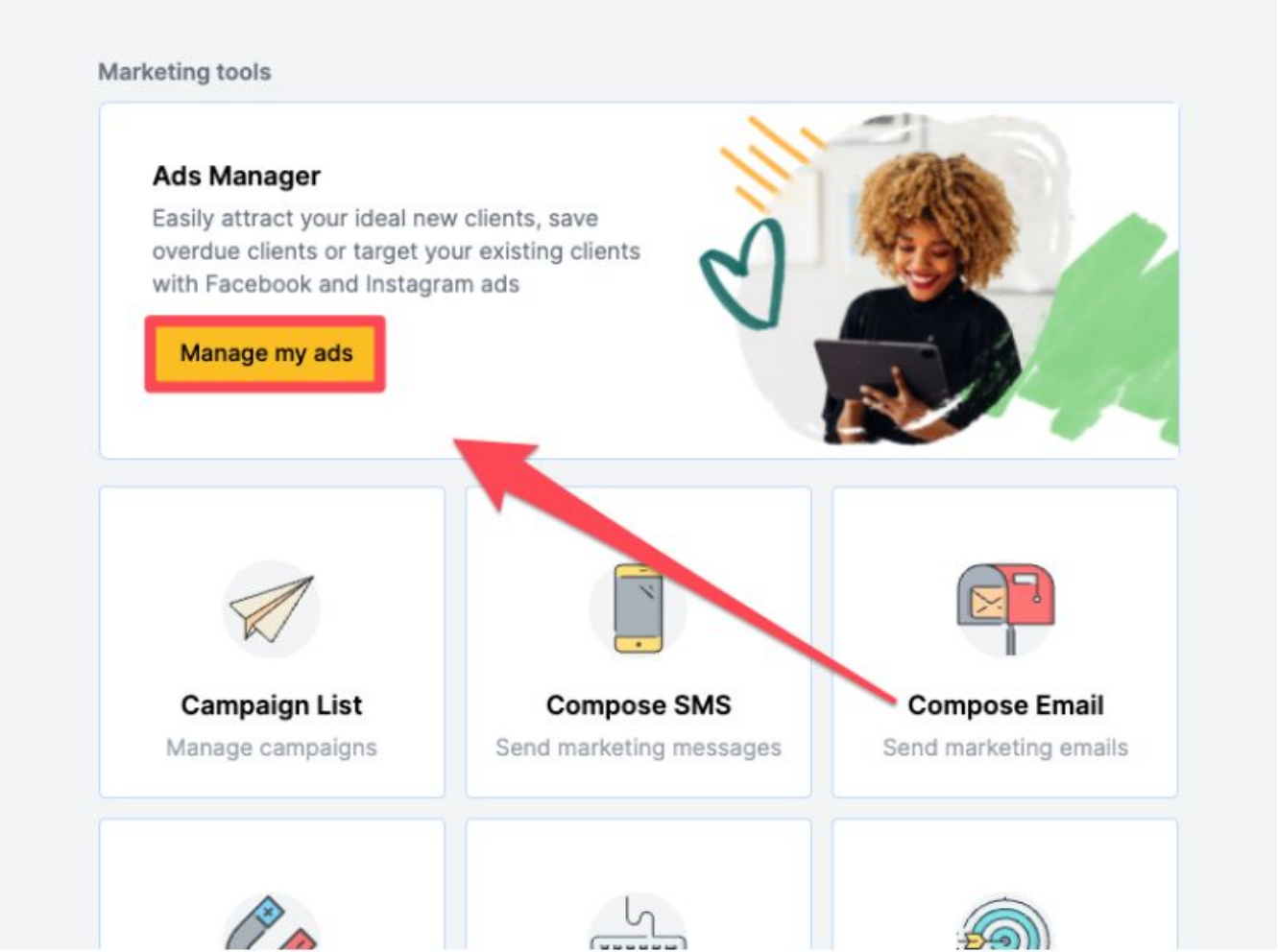
This targeting option works just like the New Clients targeting feature—it pairs your highest-spending clients in Phorest with Meta's ad algorithm to help attract similar, high-value new clients. Existing clients will not see the ad.

The call to action button for your Leads ad will say Sign Up, and will direct users to your lead form.

Ads Manager

- Ads Manager utilises your Phorest client data and Meta's tools to build highly accurate "Lookalike Audiences."
- This allows you to efficiently target new clients who are highly likely to book.
- It also enables you to re-engage existing clients.
- The average return on Ad spend in Australia in 2025 via Phorest Ads Manager was $66.65 per dollar spent.

Help Sheet:
Ads Manager – Phorest



*Link your Ads Manager to Meta

Click Manage my Ads > Create New Ad

Select the type of new Ad you would like to create:

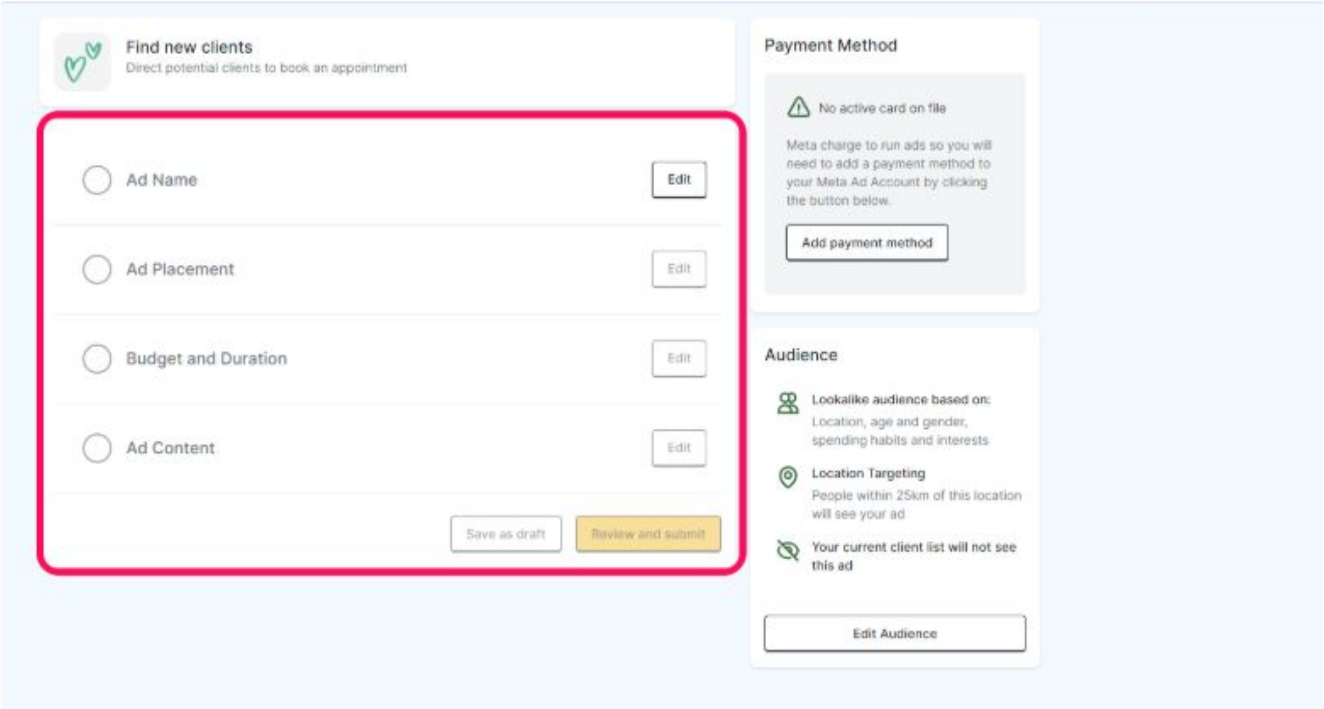
- **Find new clients** : Pairs your top-spending clients in Phorest with Meta's ad algorithm to attract ideal new clients to your business. Existing clients will not see this ad.

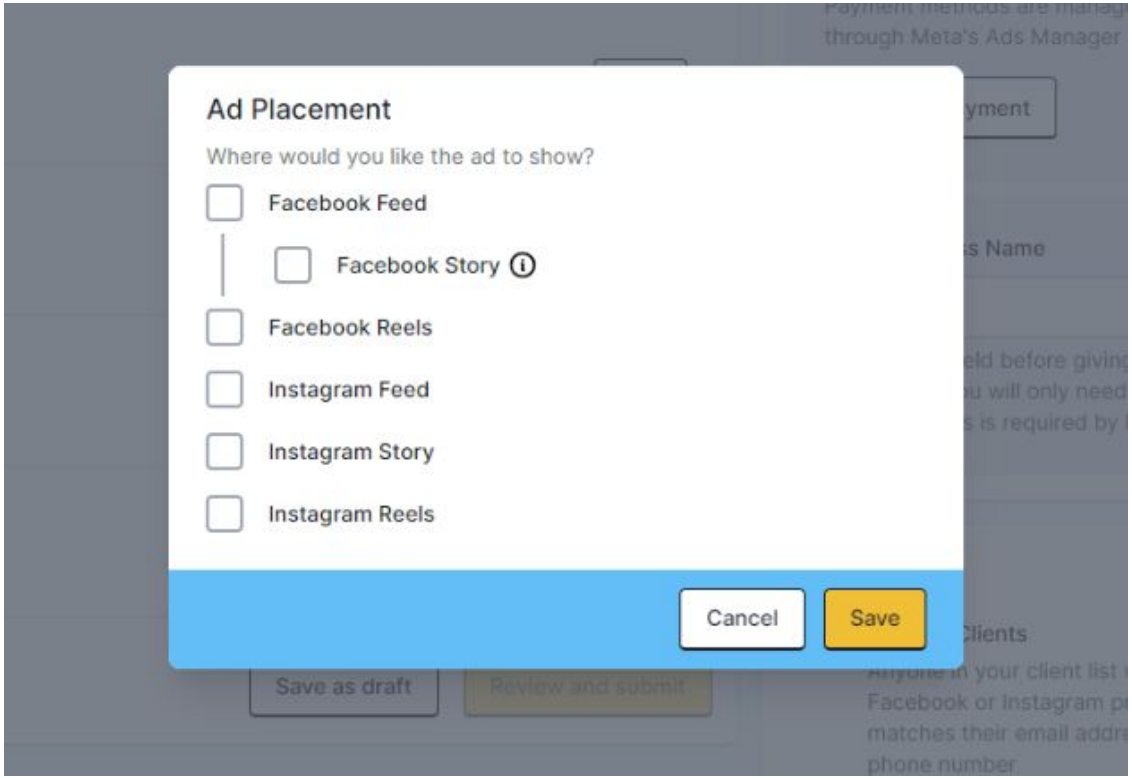
- **Reach existing clients:** Your ad will appear to clients who already exist in your current client list in Phorest. Clients are identified on Facebook by their email and/or mobile number.

- **Save overdue clients**: Your ad will appear to existing clients who have visited your business at least three times in the past but have not visited in the last six months.

- **Leads:** Your ad will direct your audience to your Lead Management form, allowing you to generate new leads from Meta.

Create New Ad





Ad Placement Options

When setting up your Ad, decide where you want it to appear:

- Platform: Select Facebook, Instagram, or both.
- Location: Choose to display the Ad in people's Feeds, or expand your reach by including Reels and Stories.

Where do we place the Ad?

- **Facebook** advertising targets a broader, older demographic (25-54+), excelling at community, lead gen, and diverse interests,
- **Instagram** focuses on younger, visually-driven users (18-34) for lifestyle, fashion, and brand awareness

Next, decide where you want your Ad to appear when a client is scrolling through:

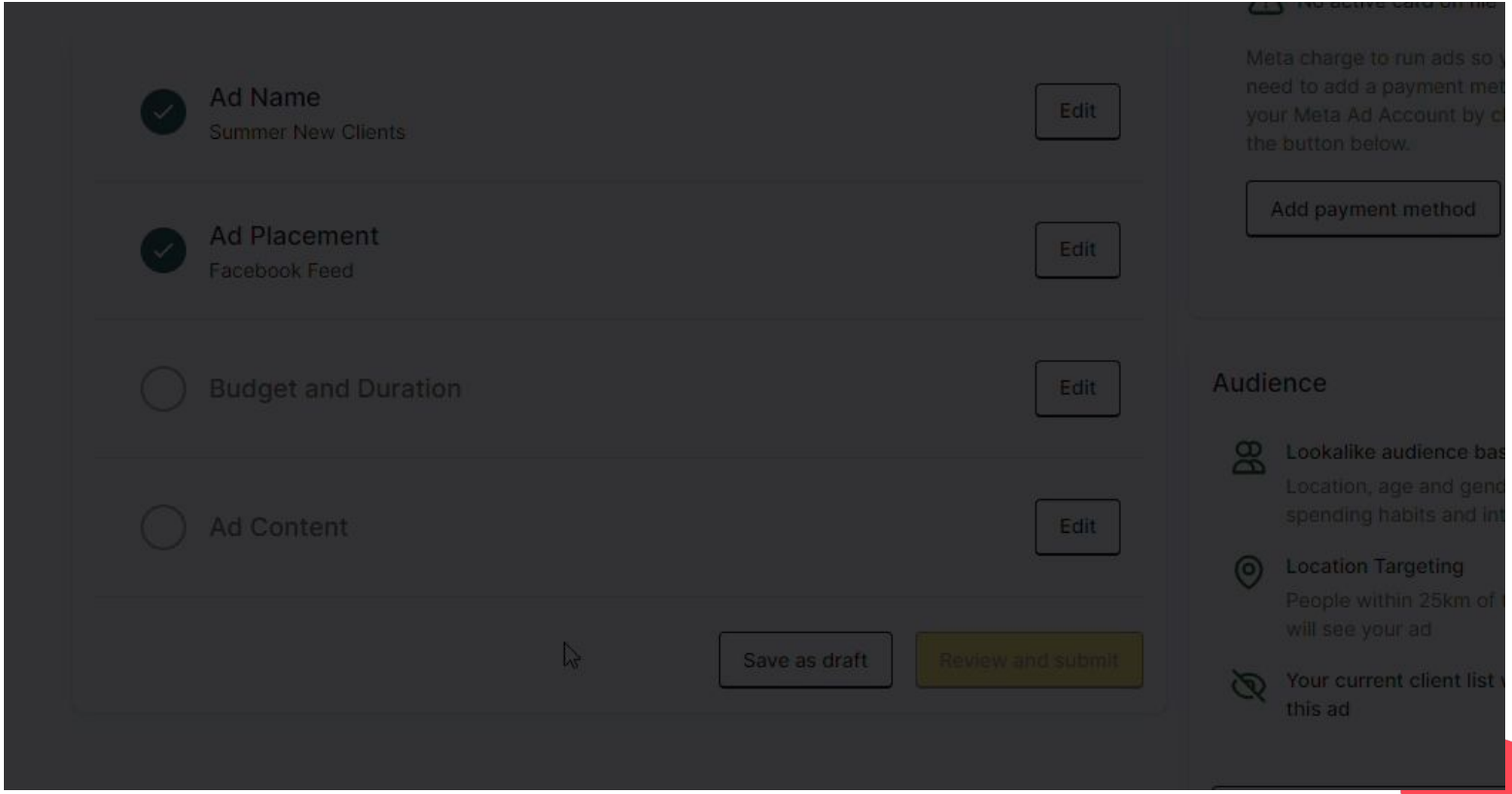
- **Feed** posts - it's a page that a client will go to when they log into Facebook and Instagram
- It's where they will see their posts from friends and brands that they follow.

- **Stories** are temporary, 24 hour videos or images often used by friends for quick highlights of their day or week and often used by brands for casual updates

- **Reels** are short form videos, that are curated by the platform for the user based on the users likes, interests and interactions. This is a neverending content stream designed to keep a person scrolling.

You can select one or all of these options, *there is no right or wrong.*

You will learn what your audience responds to with time.



Budget: The budget is the amount you are willing to spend each day your ad is running. Your ad will never cost you more per day than the daily budget you set.
Note: The budget spend goes to Meta and does not go to Phorest.

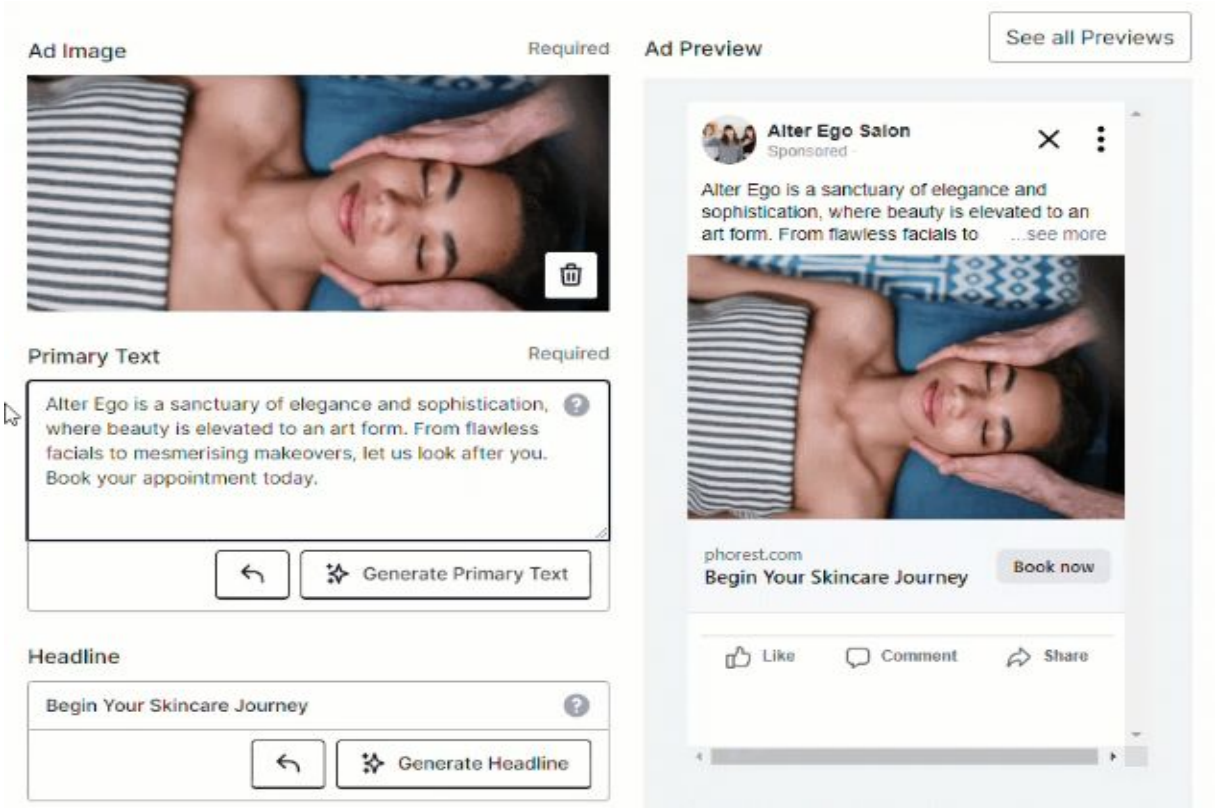
Finding new clients or leads through ads is expensive because potential clients are unfamiliar with your brand and lack trust, and they require multiple Ad views before they consider clicking.

Ads operate as a bid system where you compete against competitors and larger brands to appear on users' feeds, stories, or reels. More competitive markets result in higher bids.

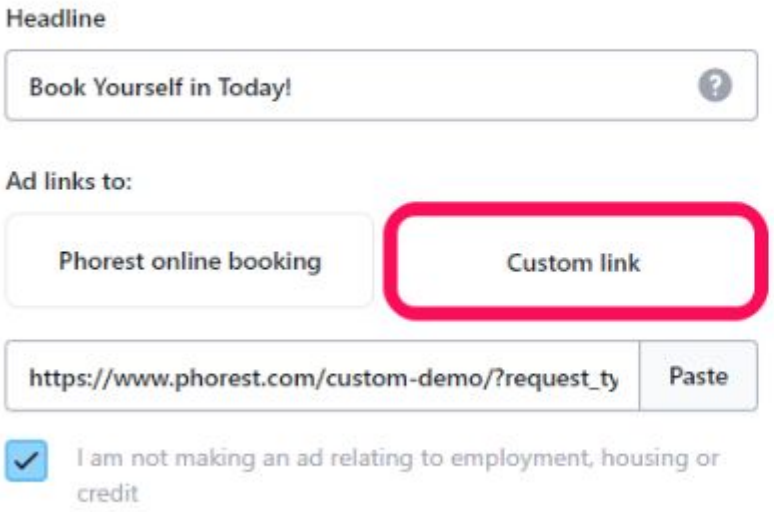
The cost and success of a campaign are influenced by your local area, potential audience size, and the number of clients we aim to match you with. For example, $10 a day is effective in a town of 100 people but insufficient in a town of 1 million.

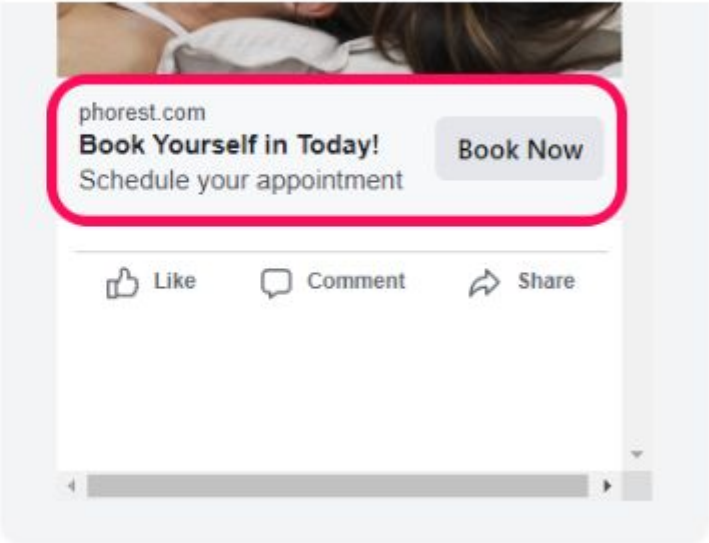
We recommend a minimum daily spend of between $15 to $30 and a minimum run time of 10 days. It can take up to 7 views of an ad before a prospect is convinced to click.

Tip consider running run a continuous ad

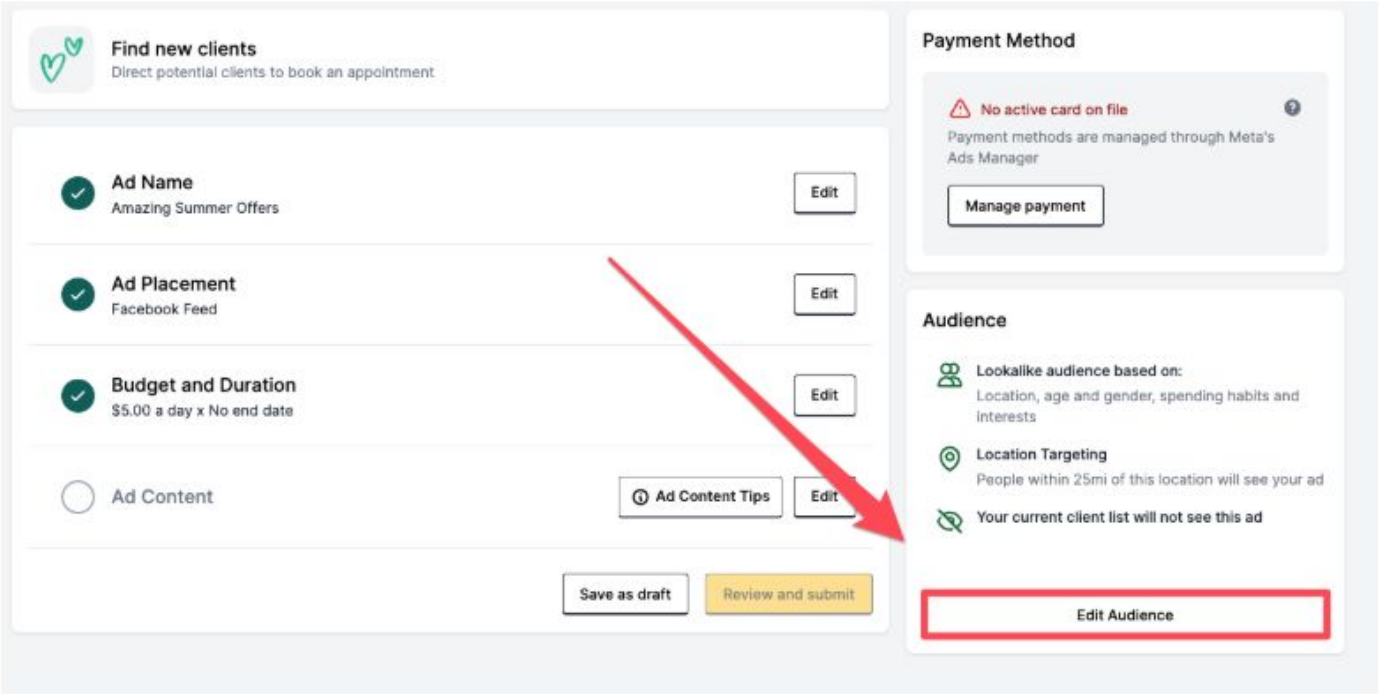


Finally, create your Ad Content by uploading an image or video, then add your Primary Text and Headline.

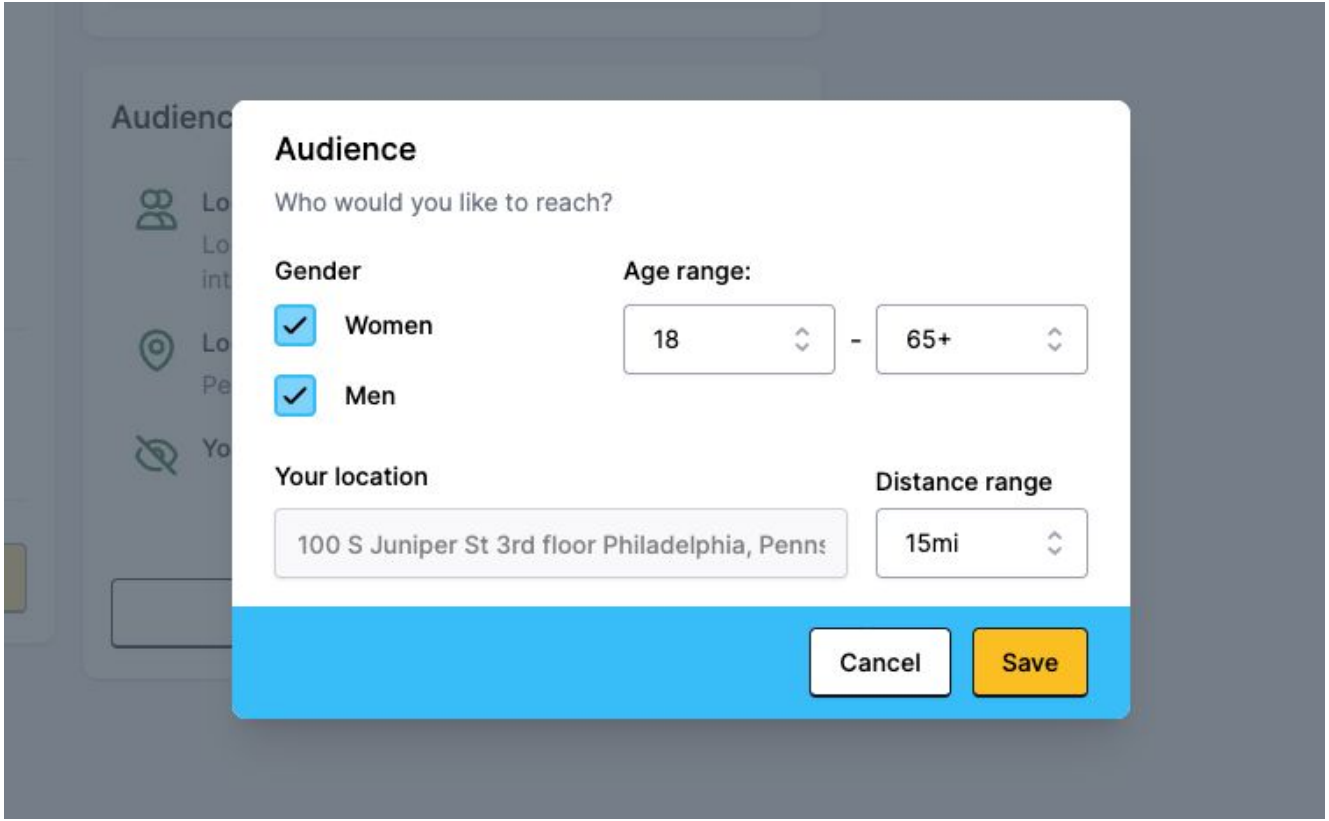




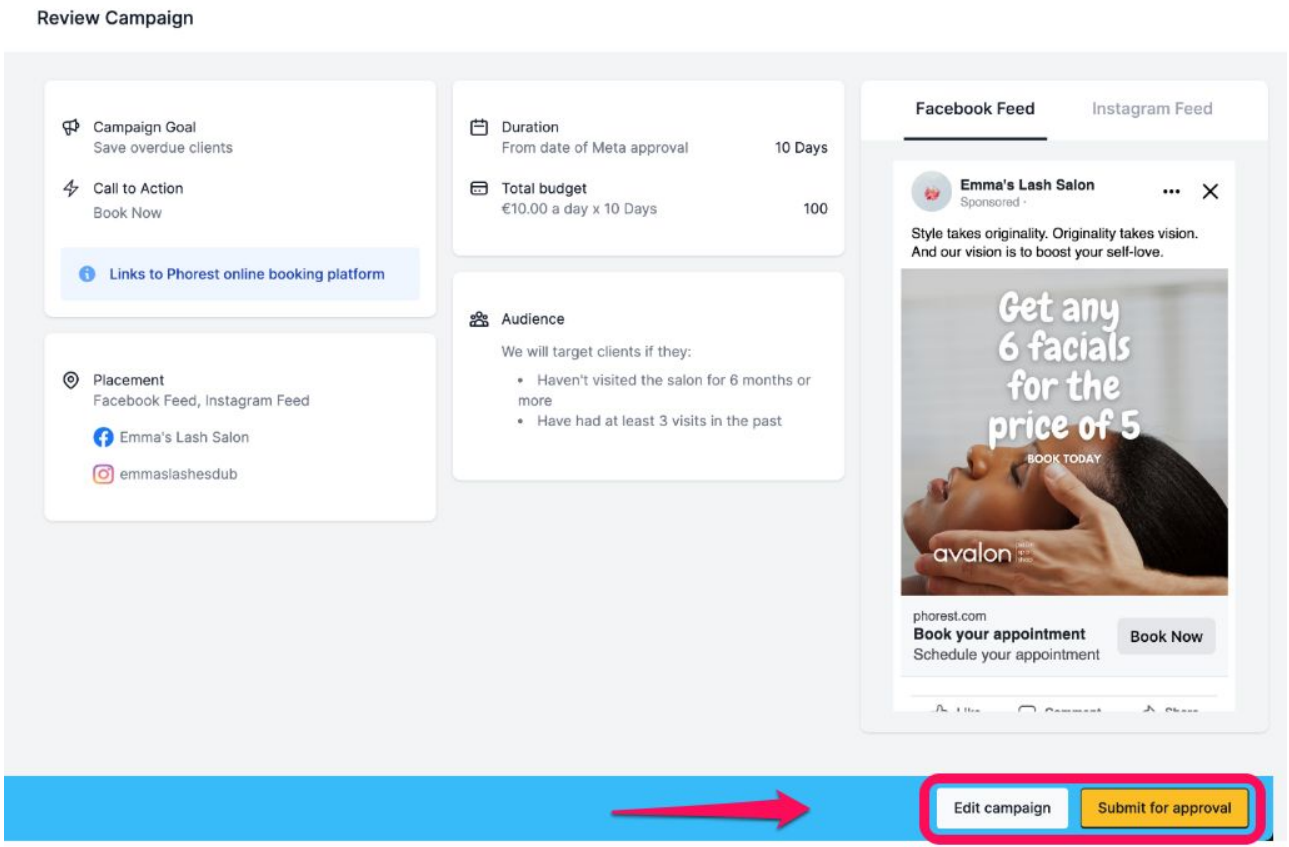
Call to Action button: add in a Headline and select either the Phorest online booking or Custom Link option as your call to action button.



Next, Edit your **Audience:**



Select your target Gender, Age range, and Distance range. The Distance range allows you to focus on an audience near your business.



After submitting, your Ad will be sent to Meta for approval. Once it has been approved, Meta will send an email notification to the email address associated with your Facebook business account. According to Meta, most Ads are approved in 24 hours

How are Bookings Tracked?

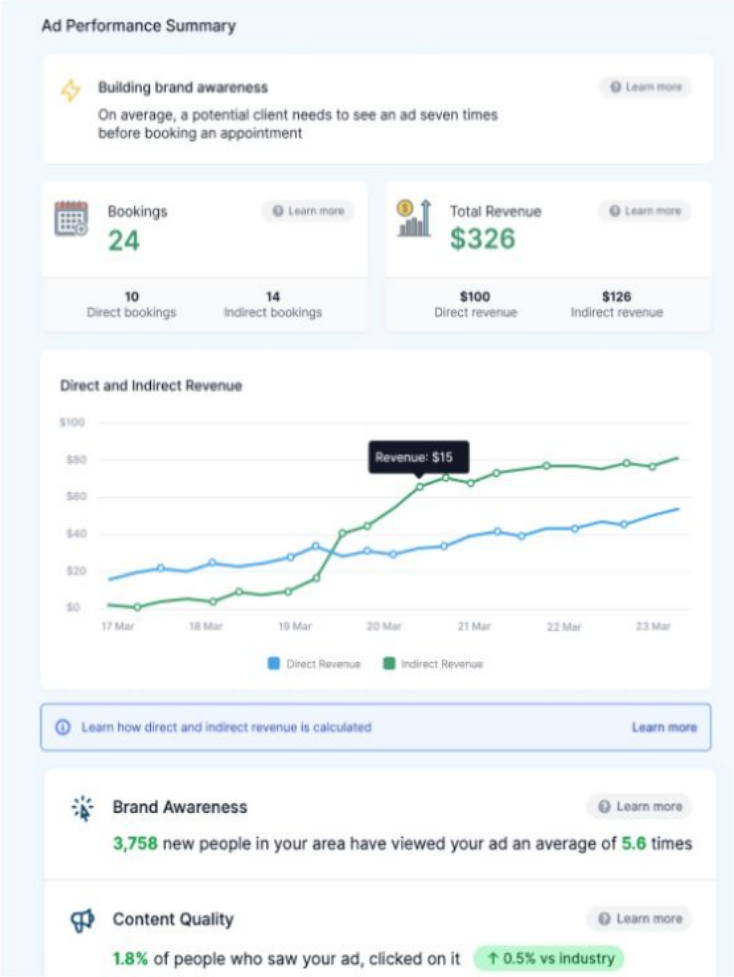
Bookings refer to the total number of services booked by clients who viewed the ad and subsequently booked an appointment, either online or in person.

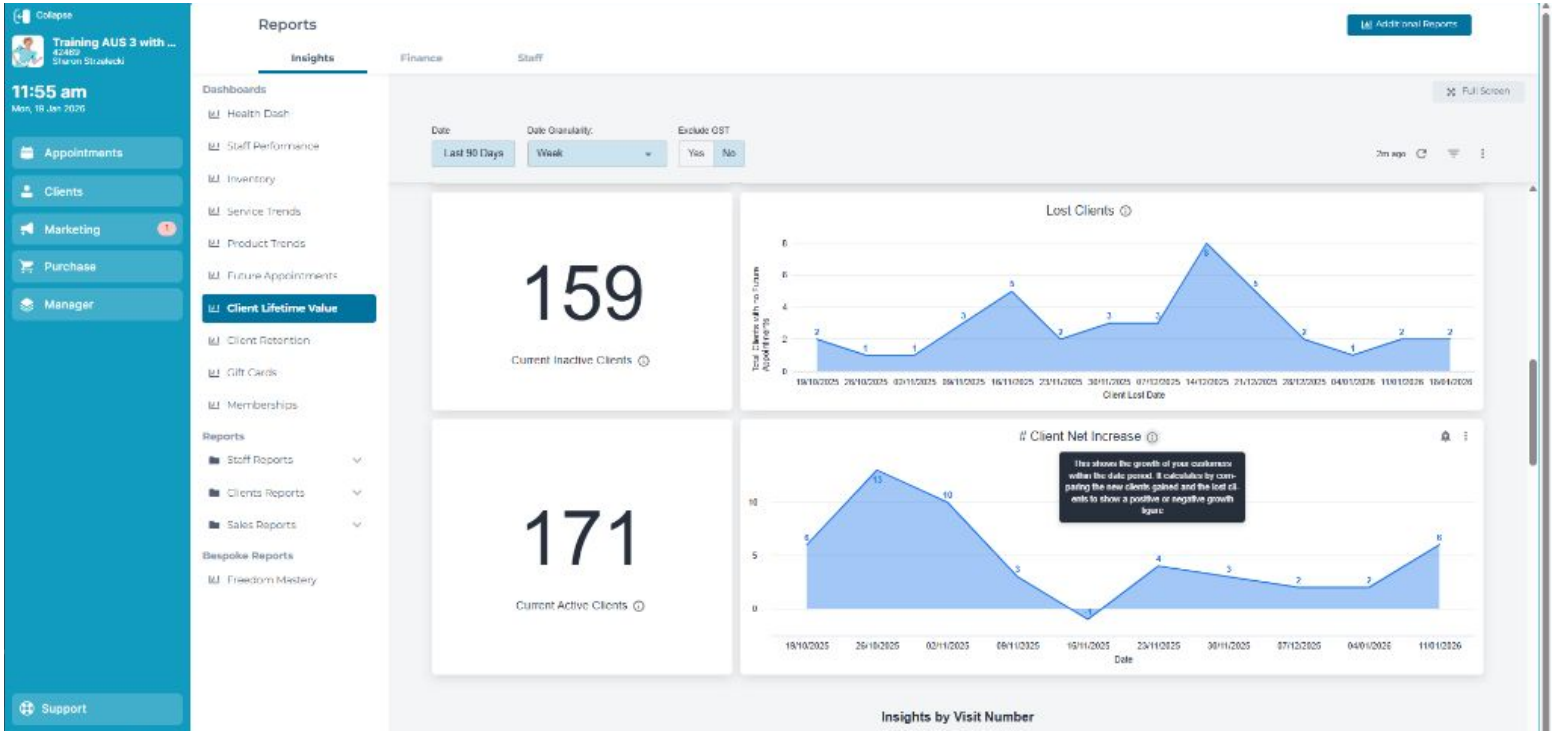
In order for the appointment to be attributed to the ad, the booking needs to be made within a certain time window after the client has viewed the ad. This time window differs depending on what type of campaign you have launched. The time windows are:

Find new clients: 28 Days

Reach existing clients: 7 Days

Save overdue clients: 28 Days





How can you tell if your business is growing:
View the #Client Net Increase from your Client Lifetime Value report.

This shows the growth of your customers within the date period. It calculates by comparing the new clients gained and the lost clients to show a positive or negative growth figure. In this screen we want to see an upwards trend.

Phorest

Missing Features ?

Click Here

Phorest GYM Homepage

Click Here