



Phorest

**Create EOFY offers
that drive revenue**

Create an offer with intent



Why EOFY?

It's a chance to capitalize on people actively looking for deals, even if our services aren't typically tax-deductible for clients.

Check Yourself:

Before creating an offer, always ask: "How does this benefit my business long-term?"

The Goal:

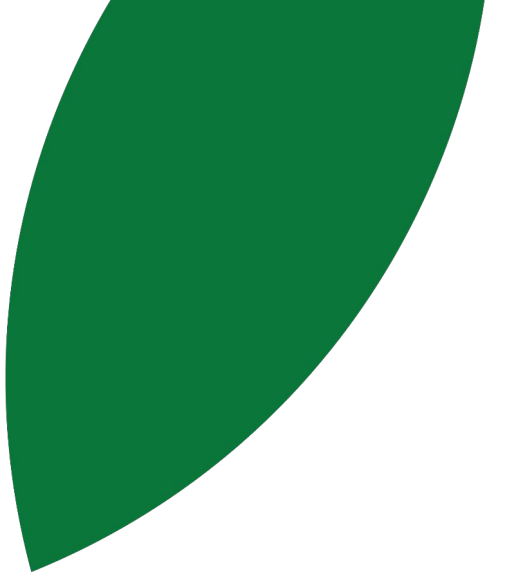
Discounts reduce profit, so your mission is to turn this low-profit sale into recurring revenue that boosts your client's average spend later.

What to Push:

Introduce clients to something new or a "luxury" add-on, not just essential services.



Part One:



1. Define your strategy
 2. Educate the team
 3. Create a special EOFY Category
 4. Create a special EOFY Add On
 5. Marketing your EOFY Offer via SMS; Email and Meta Ad
- 

Define your strategy



The Strategy: Value First.

Focus on educating clients on solutions that solve their problems. This builds trust and naturally drives higher customer retention and revenue.

Team Knowledge is Power:

Before the sale starts, make sure your team knows the features, benefits, and aftercare for the product/service so they can confidently advise clients. (It's essential to make the client feel it's a *necessity*, not a luxury!) Get this info from your product house and share it in a quick meeting.

Reinforce the Value:

After the service, follow up with an email, SMS, or call to check in and remind the client of the benefits. Use automations for this post-service reinforcement!

Incentives that Work:

Use your staff goals feature to create an **average bill goal**. This encourages the team to increase long-term client spend instead of chasing short-term, discount-driven sales.

Educate the team, to educate the clients

The offer might get clients through the door, but it's you who will keep them coming back.

Now is a great time to ensure the team have the knowledge they need to educate the client on the additional service they have received.

Ensure the team know the service:

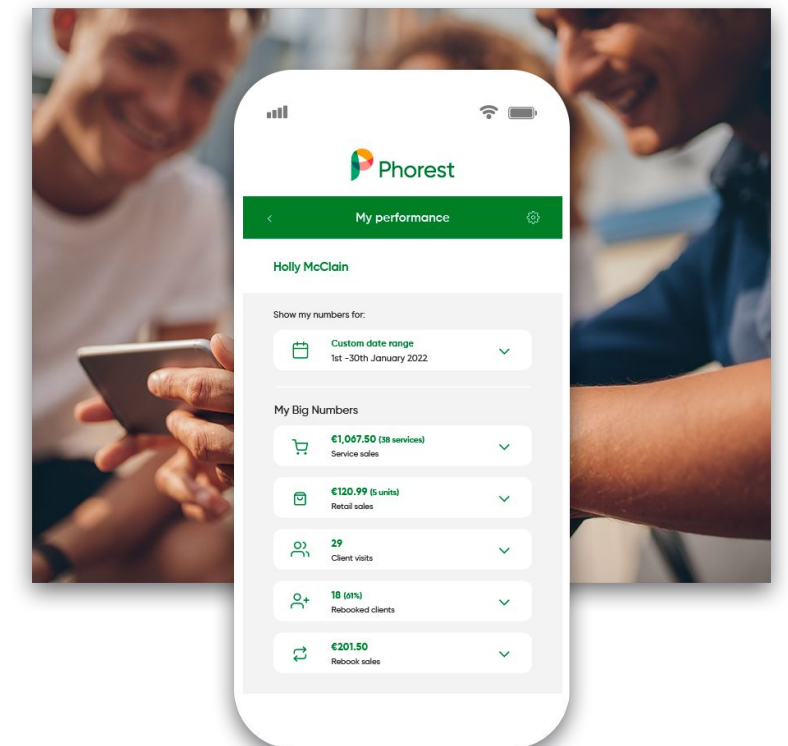
- Features
- Benefits
- After care

Take the opportunity to educate the client on why this service is essential, not just a one off luxury.

Ensure that additional service is offered again upon rebooking so we can turn this service combination into a habit.

Also ensure your team understand the impact they could have on the business targets.

1 extra \$50 service a day (5 days a week), over a year (48 weeks) is an additional \$12,000 in revenue !



Create a category

Start by creating a Service category for your EOFY offers.
Doing this will help with reporting and marketing

Categories > Service categories

Search Show **Active** Archived

☐ Name	Colour	Description
☐ Body Treatments		
☐ Bridal		All bridal & bridesmaid hair treatments
☐ Brow Bar		
☐ CACI Non Surgical Facelift and Skin Rejuvenation		
☐ Colour		
☐ Cut & Style		This is for all cutting and styling services.
☐ Cutting		

34 Categories

[Back](#) [Add](#)

Go to Manager > Categories > Service Categories.

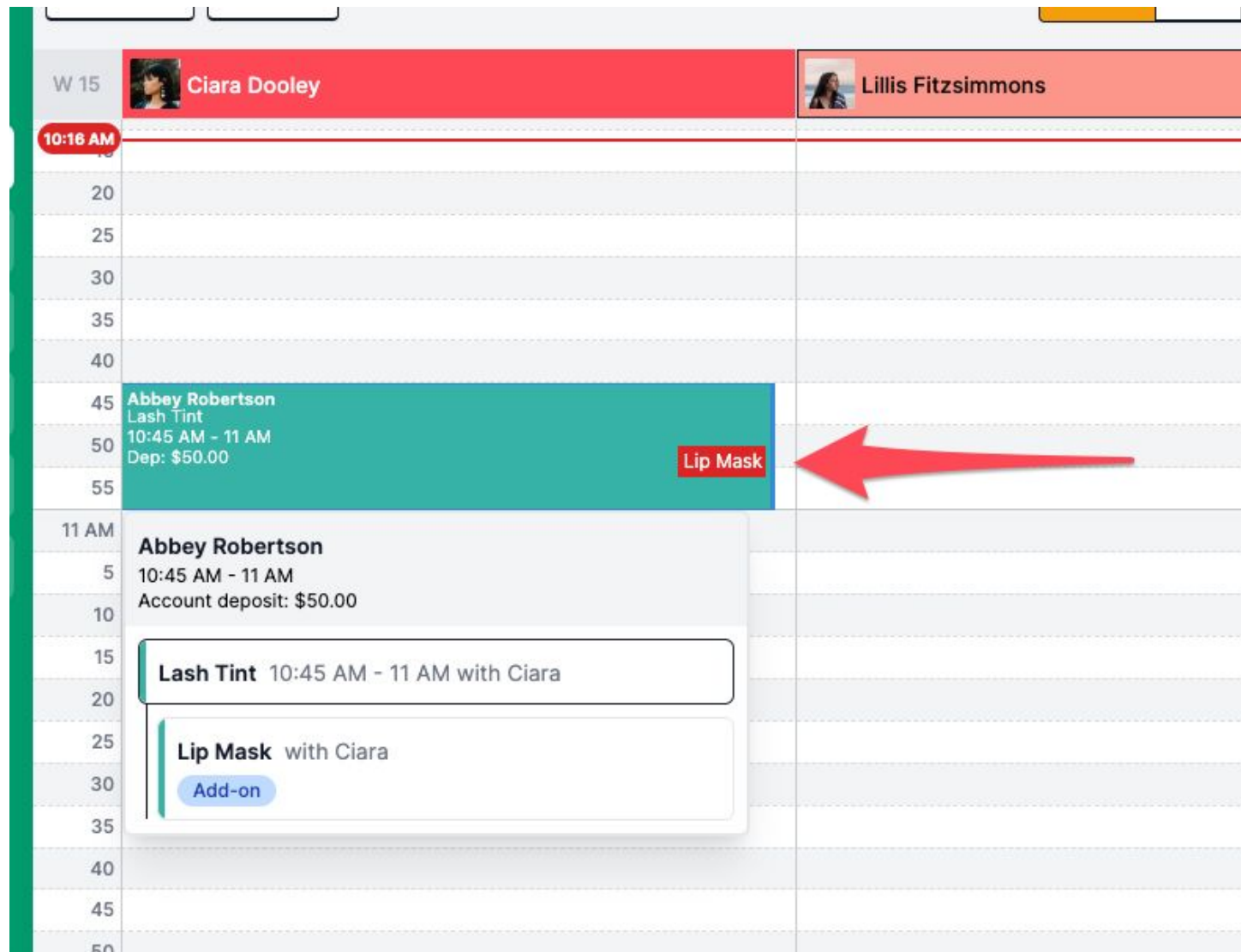
Here, you will see a list of your existing Service Categories.
Click Add to create a new one.

[Click here for a help sheet](#)

What are Add Ons?

Add-on services are optional extras linked to a main (primary) service. They let clients personalize their booking by adding enhancements, such as a conditioning treatment or a lip mask.

Add ons can organically boost the revenue coming through your door and increase your client average spend



The screenshot shows a booking calendar for a salon. At the top, there are two tabs for 'Ciara Dooley' and 'Lillis Fitzsimmons'. The calendar grid shows time slots from 10:16 AM to 11:50 AM. A teal-colored booking is scheduled for 10:45 AM - 11 AM, labeled 'Abbey Robertson Lash Tint' with a deposit of \$50.00. A red arrow points to a red 'Lip Mask' add-on button located at the end of this booking. A pop-up window is open, showing the details of the booking: 'Lash Tint 10:45 AM - 11 AM with Ciara' and 'Lip Mask with Ciara' with an 'Add-on' button.

Time	Service	Client
10:16 AM		
20		
25		
30		
35		
40		
45	Abbey Robertson Lash Tint	Ciara Dooley
50	10:45 AM - 11 AM	
55	Dep: \$50.00	
11 AM		
5	Abbey Robertson	
10	10:45 AM - 11 AM	
15	Account deposit: \$50.00	
20	Lash Tint 10:45 AM - 11 AM with Ciara	
25	Lip Mask with Ciara	
30	Add-on	
35		
40		
45		
50		

Types of Add on Services

A standalone service

This can be booked by itself as a service or can be used as an add on

An add on only service

This cannot be booked by itself, it must accompany another booked service,

Can be 0 mins in length

[Click here for help sheet](#)

Setting up Add Ons:

Let's set up 2 examples

**EOFY 50% off K18
Add On Hair Treatment
was \$50**

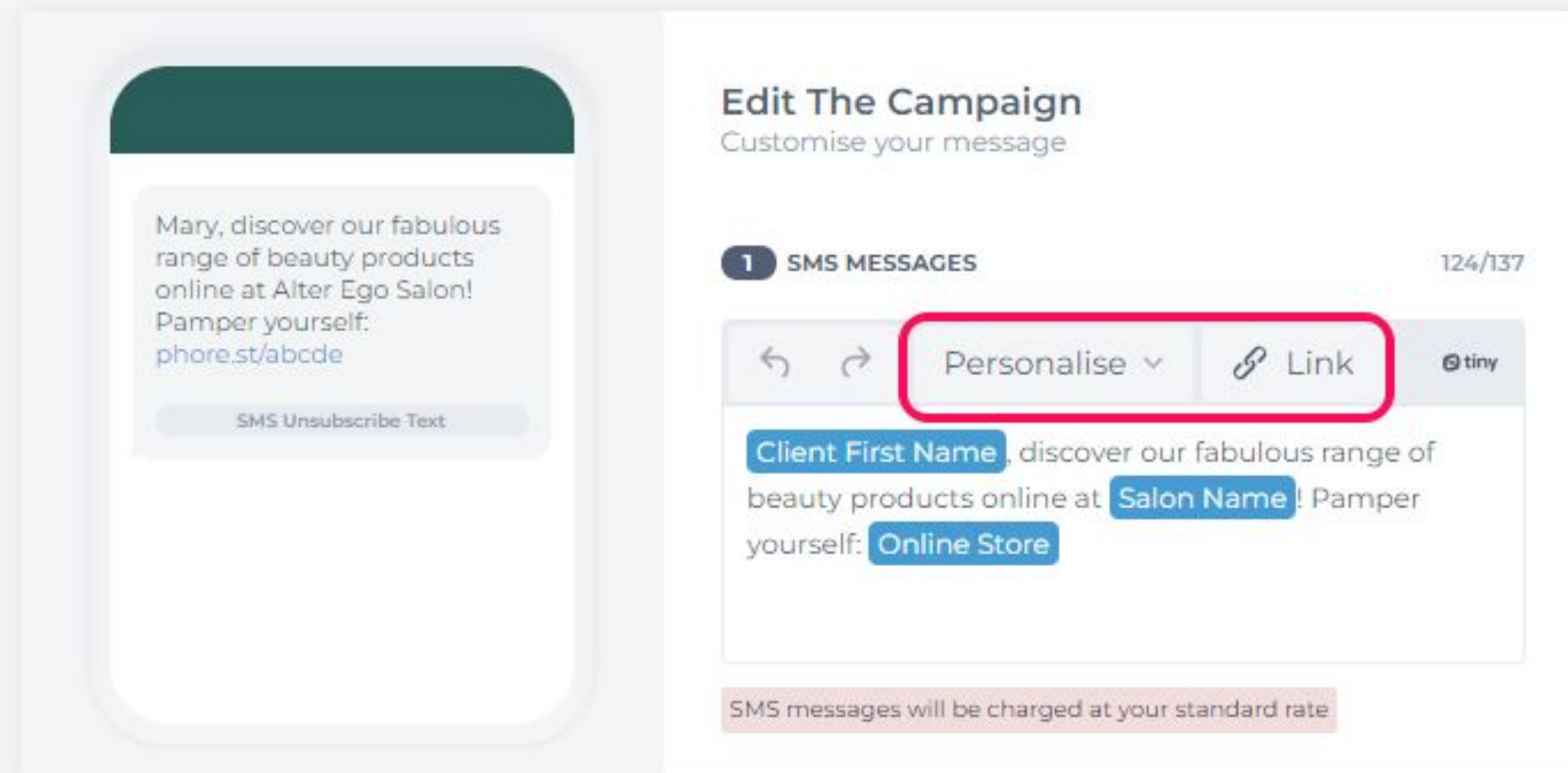
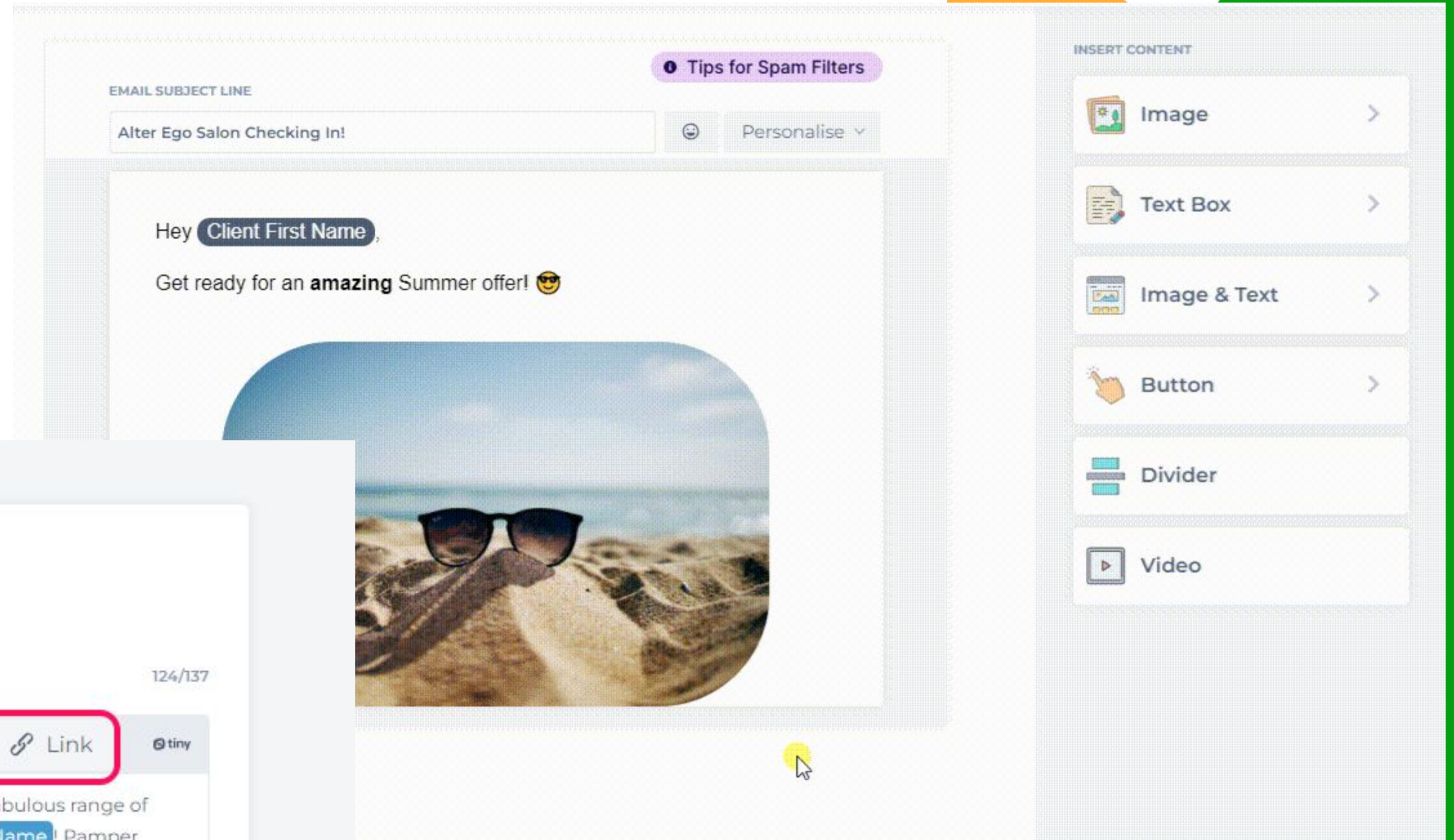
- \$25
- 0 min
- Is an add on to any Cut & Blow dry
- Is an add on only

**EOFY 50% off LED
Add On Service
was \$75**

- \$37.50
- 15 min
- Is an add to a Blueberry Peel
- Is an add on only

Promotion

Let people know via an SMS or Email campaign



SMS & Email

Don't forget your links

Ensure you add links behind images, buttons and highlighted text. We need to make this easy for clients to grab these offers so make it obvious what to do next.

Timing

Timing is everything. Early morning, lunch and early evening are best.

Email vs SMS

SMS have a 93% open rate but are limited in characters and are best if you are promoting a single offer.

Emails have a much lower open rate but you can include multiple offers, build your brand through great visuals and are a zero cost option.

Use your own images

Stay away from stock images if you can, using your own images keeps it real and personal. You can edit images within Phorest or use a tool like Canva and import them in.

Follow Up

As the big day approaches, this is the perfect time to follow up clients who may have forgotten. Schedule a campaign to go out the evening before the event to catch the last minute rush.

Check the results

Once the campaign has completed, don't forget to go back and view the results. Open rates, direct and indirect purchases are all tracked in the marketing suite. Your campaign history will help you build better marketing campaigns in the future.

[Click here for the marketing help sheets](#)



Create an Ad

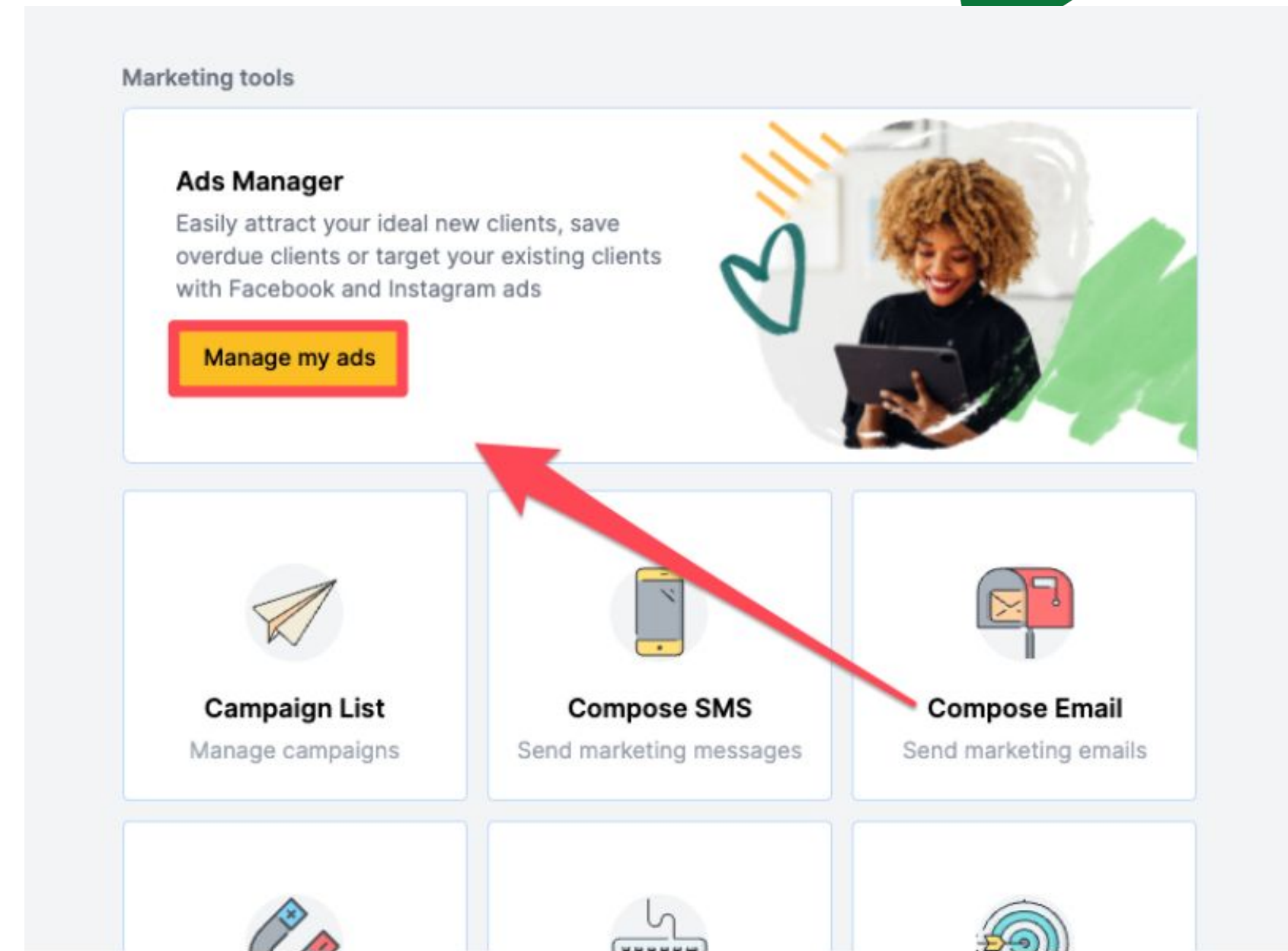
Meta Ad Manager

Utilise the power of social media by creating Facebook and Instagram Ad's

Use your existing client database to target:

- **New clients** (lookalike audience) with your EOFY offers

[Click here for our
Ads Manager help
sheet](#)



Example Ads

Ad Content

Ad Media ⓘ

Copy of Phorest Ads Manager - All Templates.png

1080×1080 ⓘ

Required

Primary Text

EOFY 50% off our K18 Service. Offer ends 1st July. Click Book now to claim your end of financial year offer now xo ⓘ

↩

Generate Primary Text

Headline

EOFY 50% off our K18 Service| ⓘ

↩

Generate Headline

Ad destination:

Phorest online booking

Custom Link

ⓘ

We recommend using a specific service landing page in your ads to accurately track direct and indirect revenue sources.

Select where to direct clients:

☐ Online booking homepage

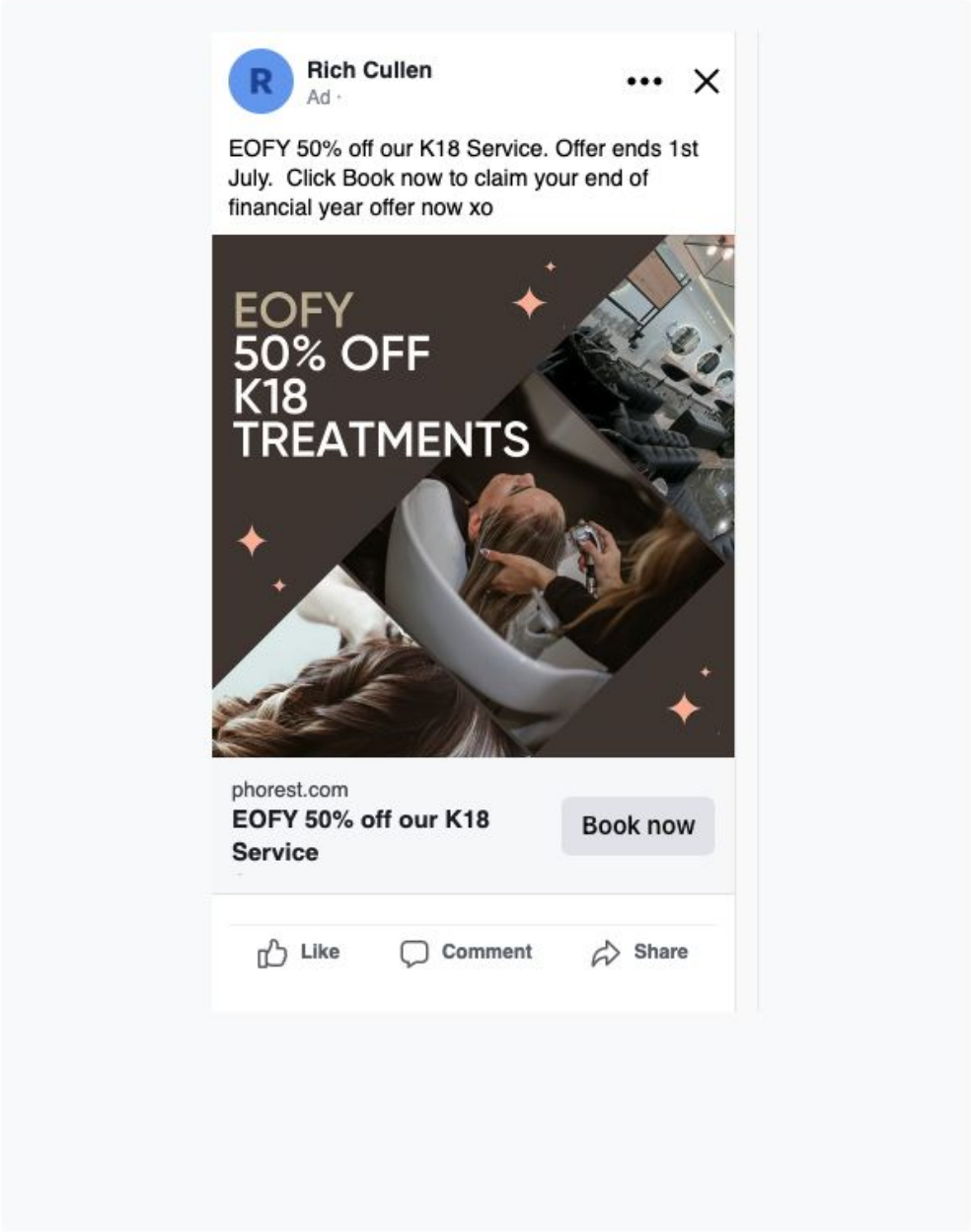
☒ Specific service

Classic Wash & Blowdry

▼

Ad Preview

See all Previews



Cancel

Save

Example Ads

Ad Media ⓘ

Copy of Phorest Ads Manager - All Templates (1).png

1080×1080 ?

Required

Explore Our New Canva Templates

Try Now in Canva

Primary Text

EOFY 50% off our LED Add On Service. Offer ends 1st July. Click Book now to claim your end of financial year offer now xo

?

←

Generate Primary Text

Headline

EOFY 50% off our LED Add On Service

?

←

Generate Headline

Ad destination:

Phorest online booking

Custom Link

i

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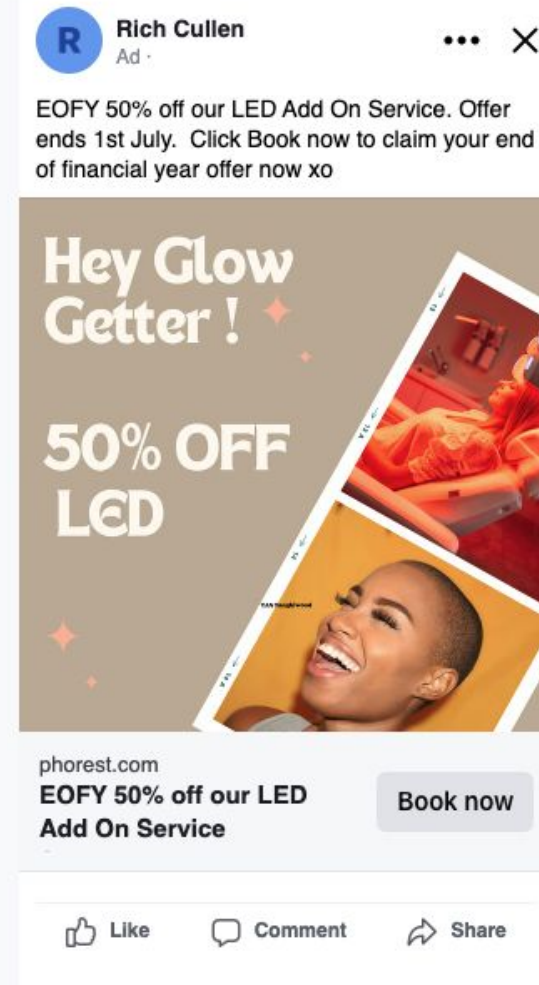
☐ Online booking homepage

☒ Specific service

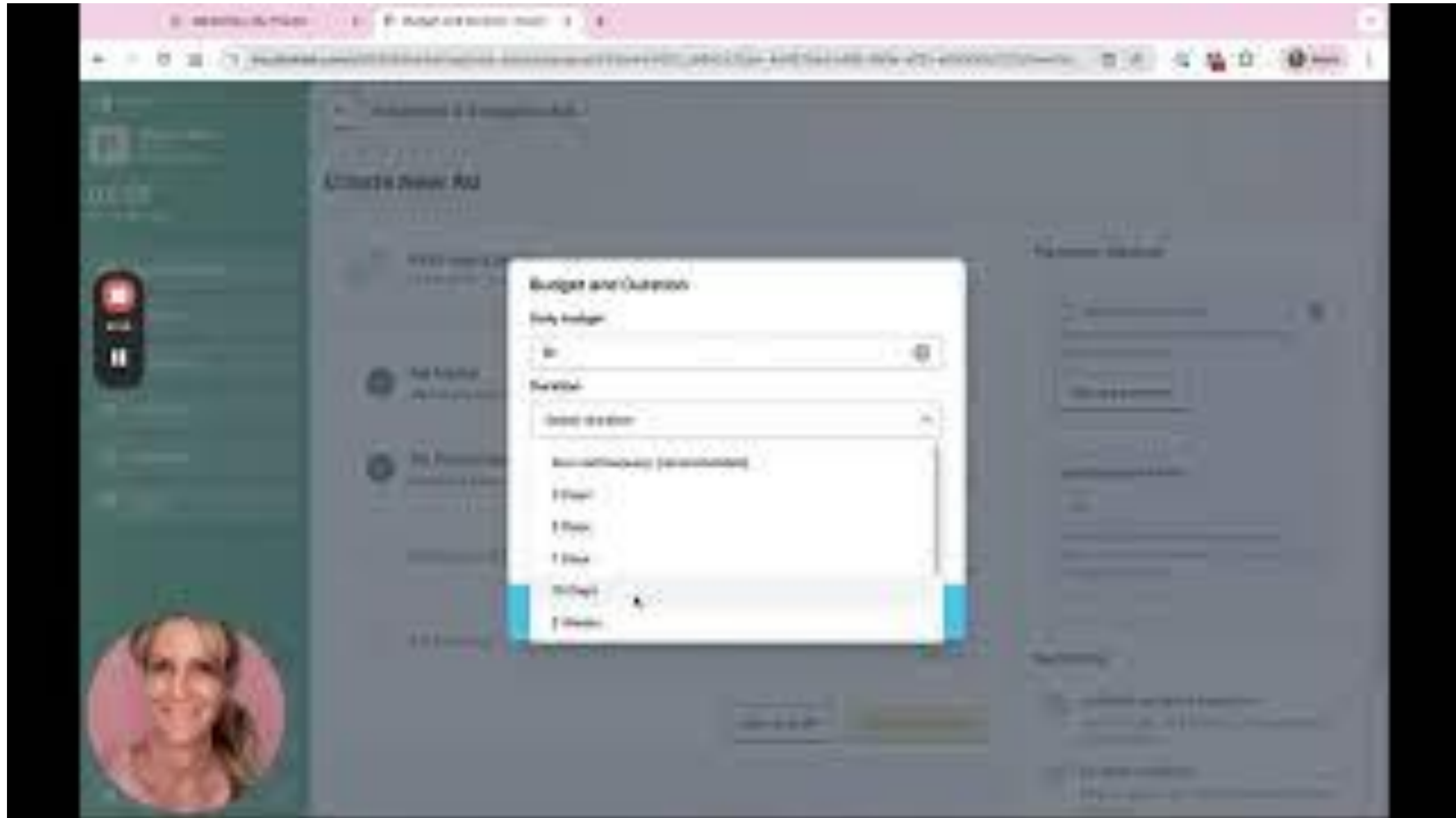
Classic Facial

▼

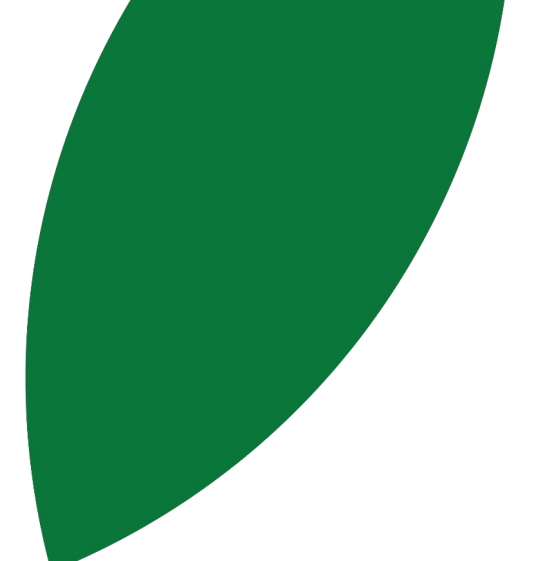
Ad Preview

[See all Previews](#)[Cancel](#)[Save](#)

Walkthrough example of creating an Ad



Part Two:

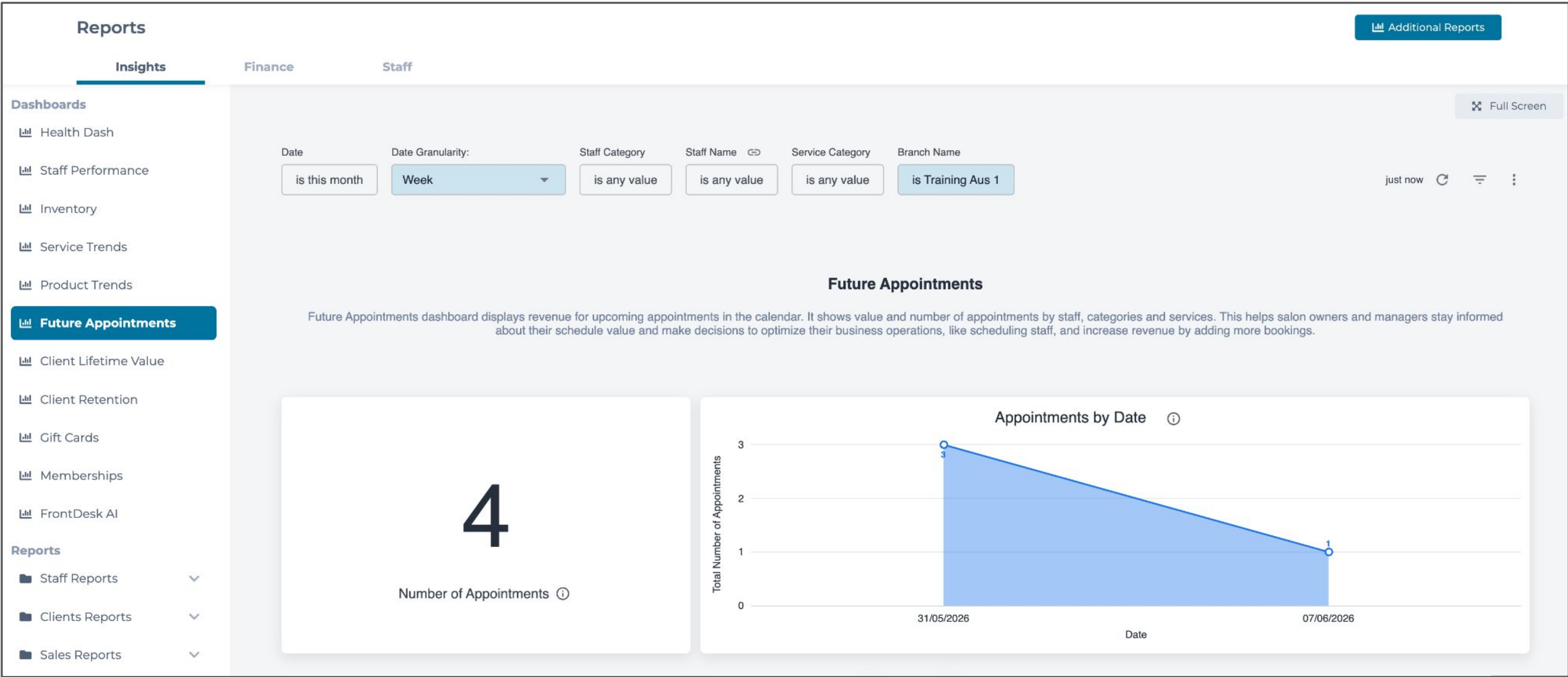


1. Report on future bookings
 2. Goal check in - keep the team motivated
 3. Educate your clients - keep the momentum going!
- 

Reporting on Add On Bookings

Future Appointments:

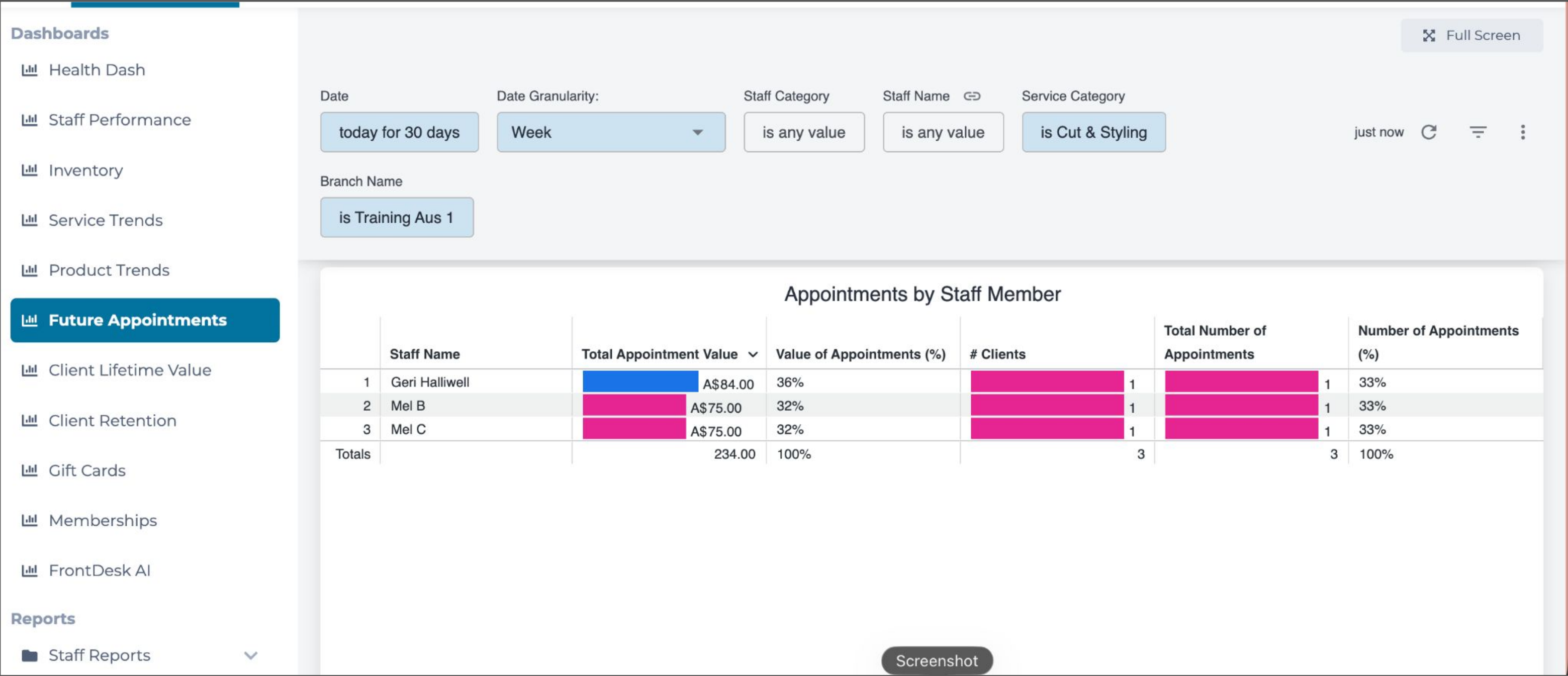
Run the **Future appointments report** looking at this month, filter by the Service Category. This will show you how many bookings your offer has generated



Team Motivation

Future Appointments:

Run the **Future appointments report** looking at this month, filter by the Service Category. Scroll down to **Appointments by staff member**. This will show you how many bookings your offer has generated, broken down per team member



Part Three:

Follow up campaign:

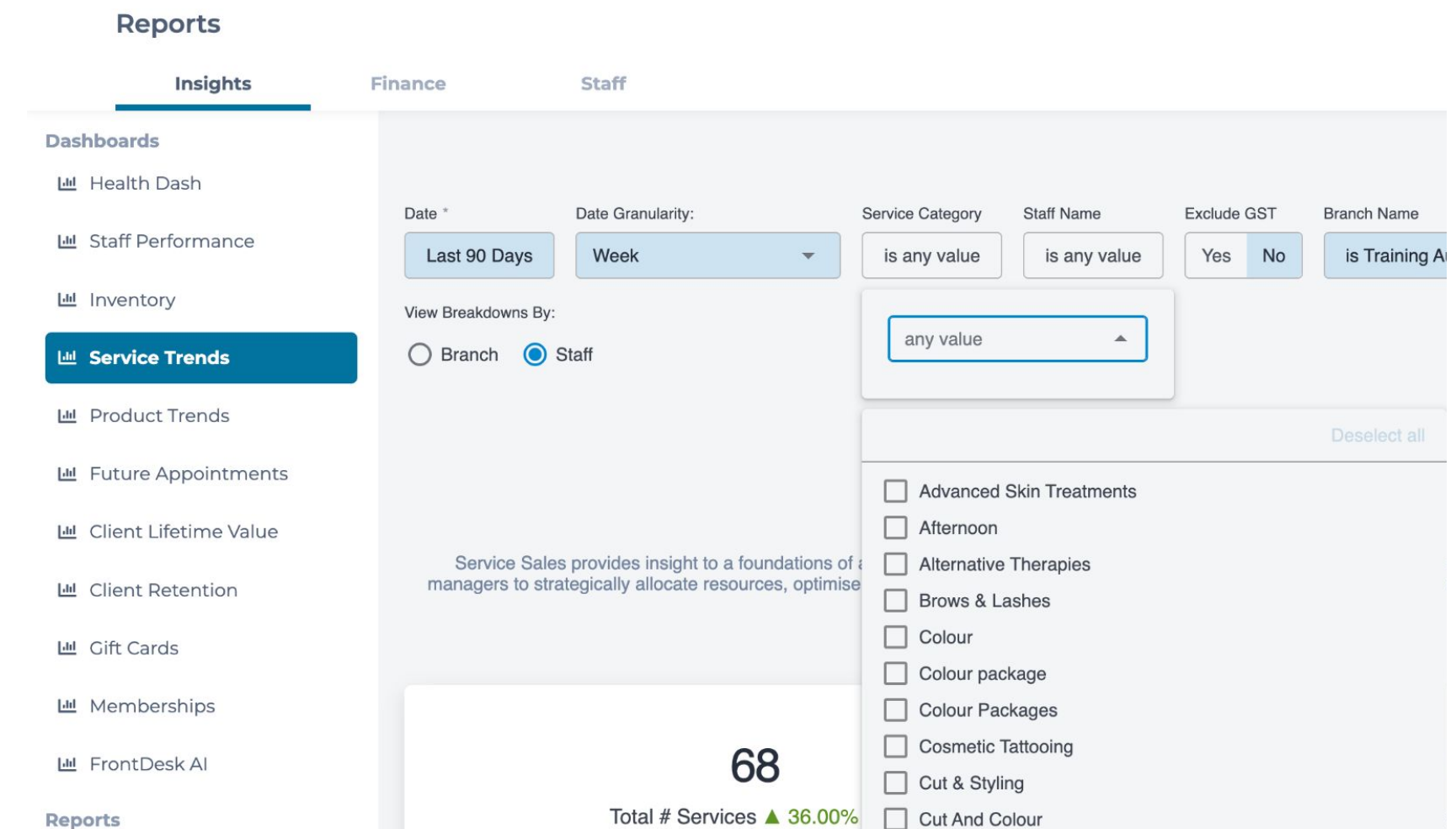
- On the 1st July create a campaign that targets clients who purchased the 50% EOFY offer.

EOFY add ons - online booking

- Remove your EOFY Add ons from your Online Booking
- Re link any full priced Add ons again

View Results

- Use the **Service Trends report** and filter by service category to see how your EOFY offer performed



Post event email / sms

Use your 'service category' filters to find your clients that took part of your EOFY offer.

Sell the benefits of the service they received, don't forget to include products or other services that compliment the treatment they received.

CAMPAIGN RECIPIENTS

STEP 2 OF 4

Filter Clients

Match All Filters

Match Any Filters

Upcoming Visits

Products

Spend

Visit History

Staff

Birthday

Course Remaining

Package Category

Service History

Client Category

TreatCard

No SMS Sent

Memberships

FILTER OPTIONS

AND will filter clients who match **all** of the filters you have set and will give you a more **specific** list of clients

Service History

Only target certain clients based on their service history

Note: You can select up to 5 filters only

Has had

Service Category

Select Service Category

AND

Search

Advanced Skin Treatments

Alternative Therapies

Brows & Lashes

Colour

Colour Packages

Cut & Styling

Advanced Skin Treatments

Alternative Therapies

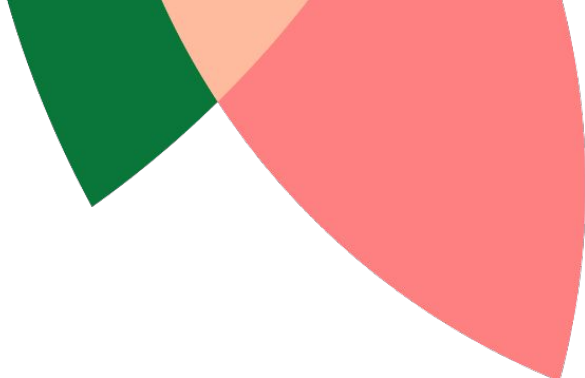
Brows & Lashes

Colour

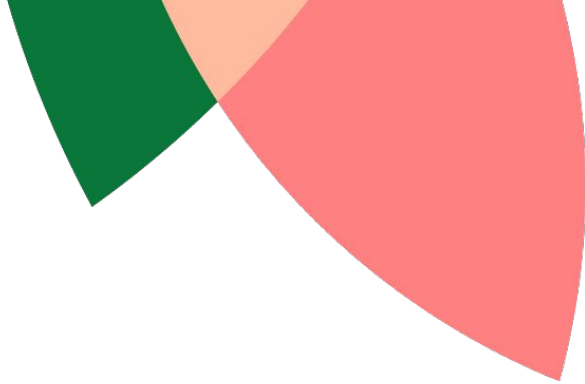
Colour Packages

Cut & Styling

Checklist



- ☐ Define your strategy
- ☐ Educate the team
- ☐ Create a special EOFY Category
- ☐ Create a special EOFY Add Ons - unlink any current K18 or LED add ons
- ☐ Marketing your EOFY Offer via SMS; Email and Meta Ad
- ☐ Report on future bookings
- ☐ Goal checkin - keep the team motivated
- ☐ Educate your clients - keep the momentum going!
- ☐ Create a follow up campaign for clients who purchased the offer
- ☐ Remove the EOFY add ons from your Online Booking
- ☐ Rellink any full priced K18 Treatments or LED add ons
- ☐ Keep the conversation going with your clients after the event



Special Offers & Gift Voucher promotion



If you're looking for how to do a Special Offer or a Gift Voucher promotion - click [here](#) for the link to our previous session in Feb "Share the Love"

Missing Features?

[Click here](#)

Phorest Grow Homepage

[Click Here](#)