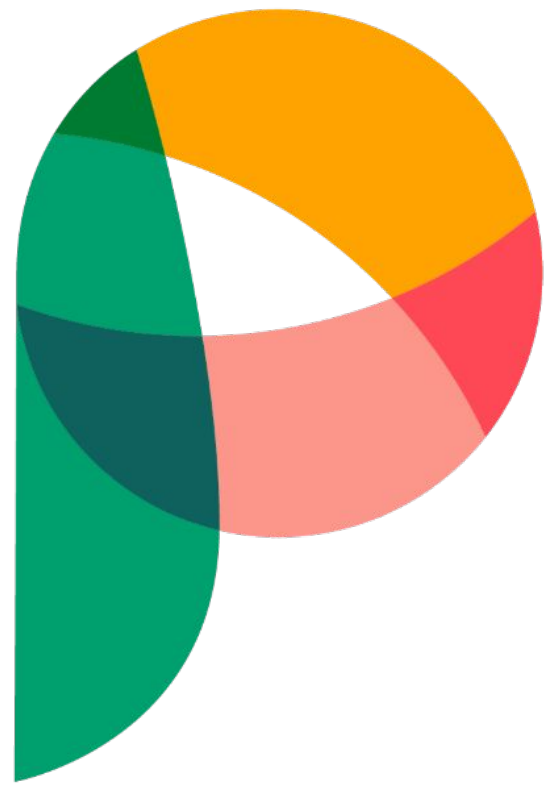




Phorest

Winter Energiser

Winter

Energiser

Winter is the perfect time to nurture your community.

In this session we're diving into specific topics to look at the client journey through their eyes to make sure they feel supported and valued before, during and after their visit.

These steps will help elevate the client experience and also help you boost efficiency.



Consultation Forms

We'll look at automating your Consultation forms to be sent out the second a client books so that they can fill them out bundled on the couch.



Pre and Aftercare Instructions

Make sure client still feels looked after and cared for with instructions before and after their appointment



Cheat Sheet

Hands-free Tech! Next time a client walks in, you glance at the cheat sheet and instantly view a clear summary of a client's key information.



Expert Recommendations

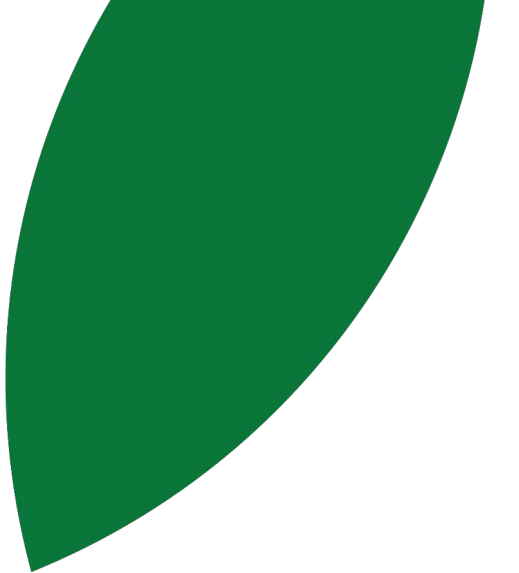
Recommend products that will keep them looking and feeling amazing till their next visit



Speech to Text Notes

Allows you to take detailed notes much quicker.

Consultation Forms



Why use Consultation Forms?

Implementing consultation forms elevates the client experience by transforming a standard appointment into a highly personalized, luxury service.

By gathering details about a client's visit history, lifestyle, and goals beforehand, stylists and therapists can skip the guesswork and walk into the appointment with a tailored game plan.

This proactive approach not only makes clients feel deeply heard and valued, but it also establishes a foundation of professional trust before the appointment begins.

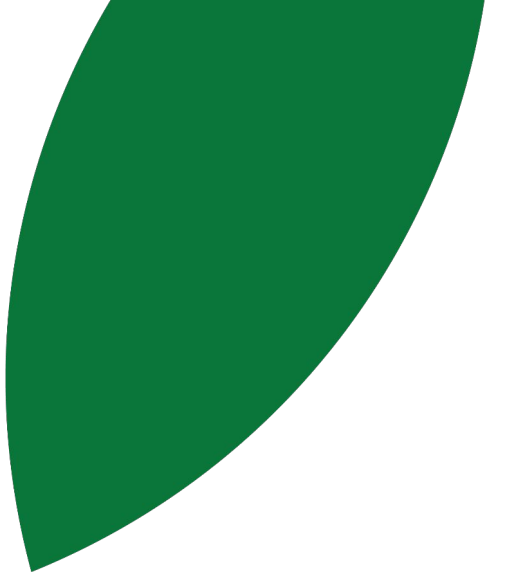


Helpsheets:

[How to create Consultation Forms](#) and [How to send and review Consultation Forms](#)



Consultation Forms



How and when are you sending your Consultation Forms?

When appointment is booked or a few days prior?

Are you sending the Consultation Form reminder message?

Automatically set the consultation form to be sent 24hrs before the visit if the client has not completed the form

Is the Consultation form incomplete when they arrive?

Resend as a text message to their phone

Adding Client Value

With the questions you ask on the form, you're capturing their main hair or skin concerns and share their inspirational images with you

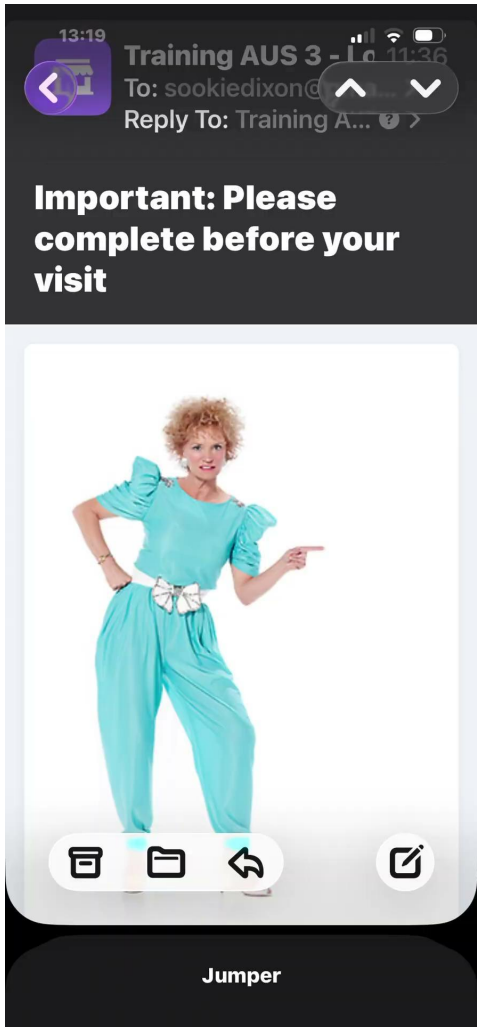
Update your record cards automatically

The consultation form will update their name, contact details and birthday automatically

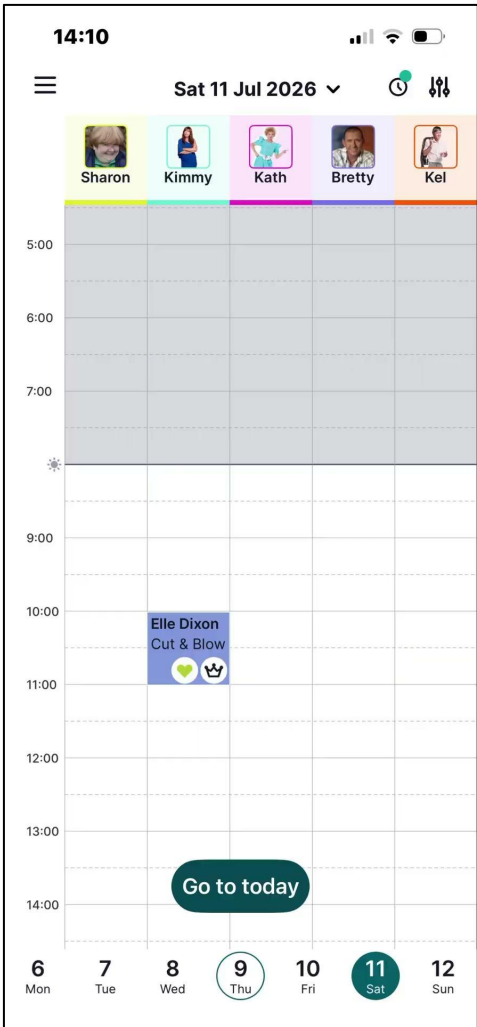


Consultation Forms

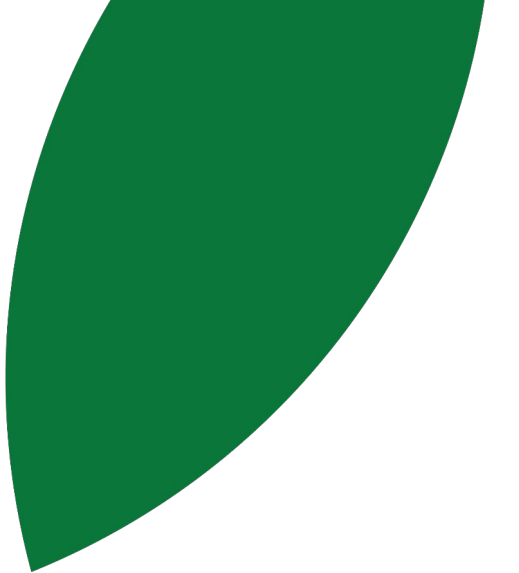
Click to watch:
Completing a consultation form as a client:



Click to watch:
Reviewing a consultation form as an employee:



Consultation Forms

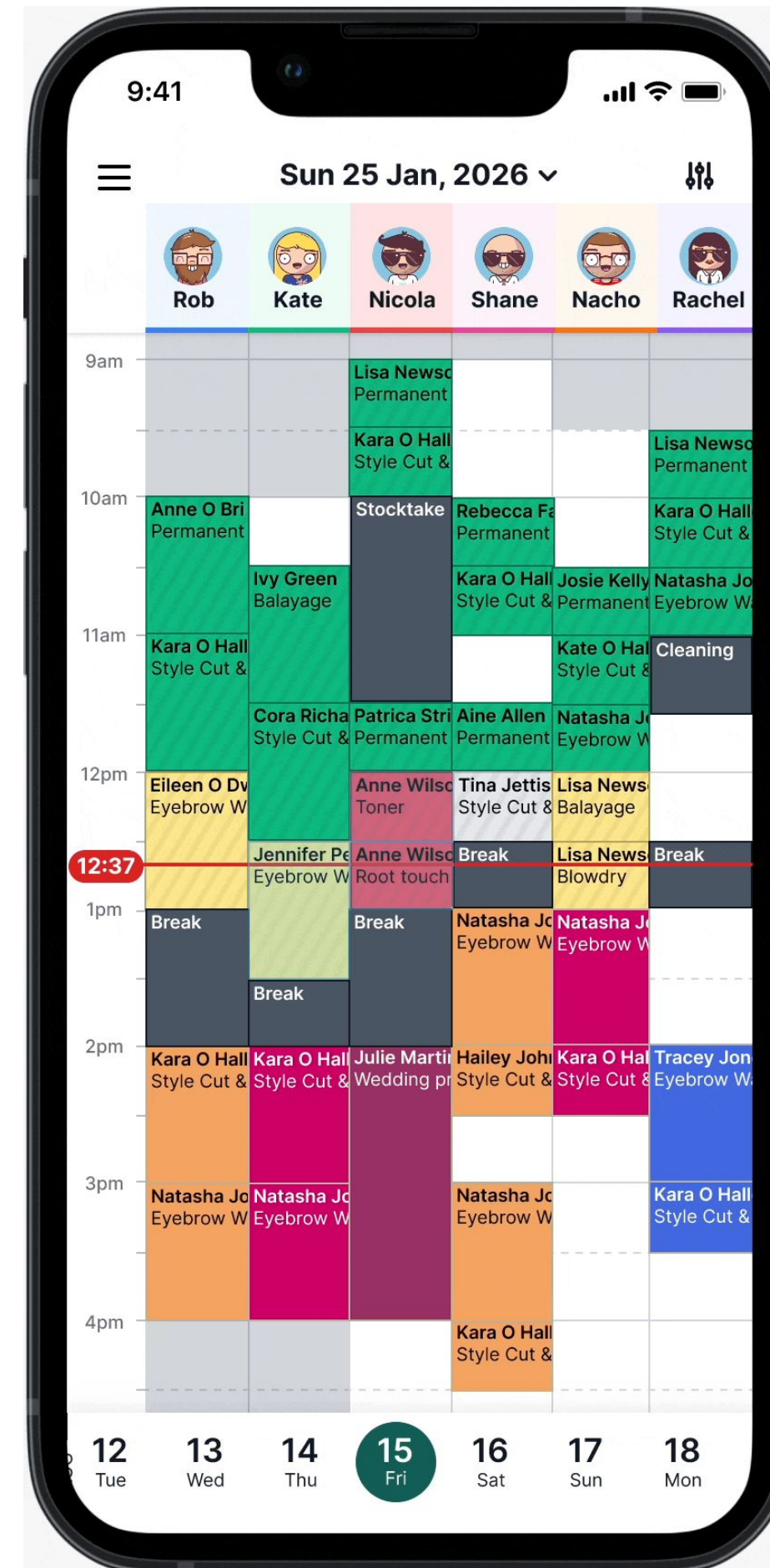


Consultation forms are far from a performative ritual; they are a vital tool for understanding our clients.

Ultimately, we use them to ensure every client feels heard, valued, and understood, while capturing what truly matters to them.

Ai Cheat Sheet

Let's look at how
we can use the Ai
Cheat Sheet to
form part of the
client experience



Ai Cheat Sheet: what you need to know.

Cost

\$159 +GST per month - per location and includes Front Desk Ai

Interactions

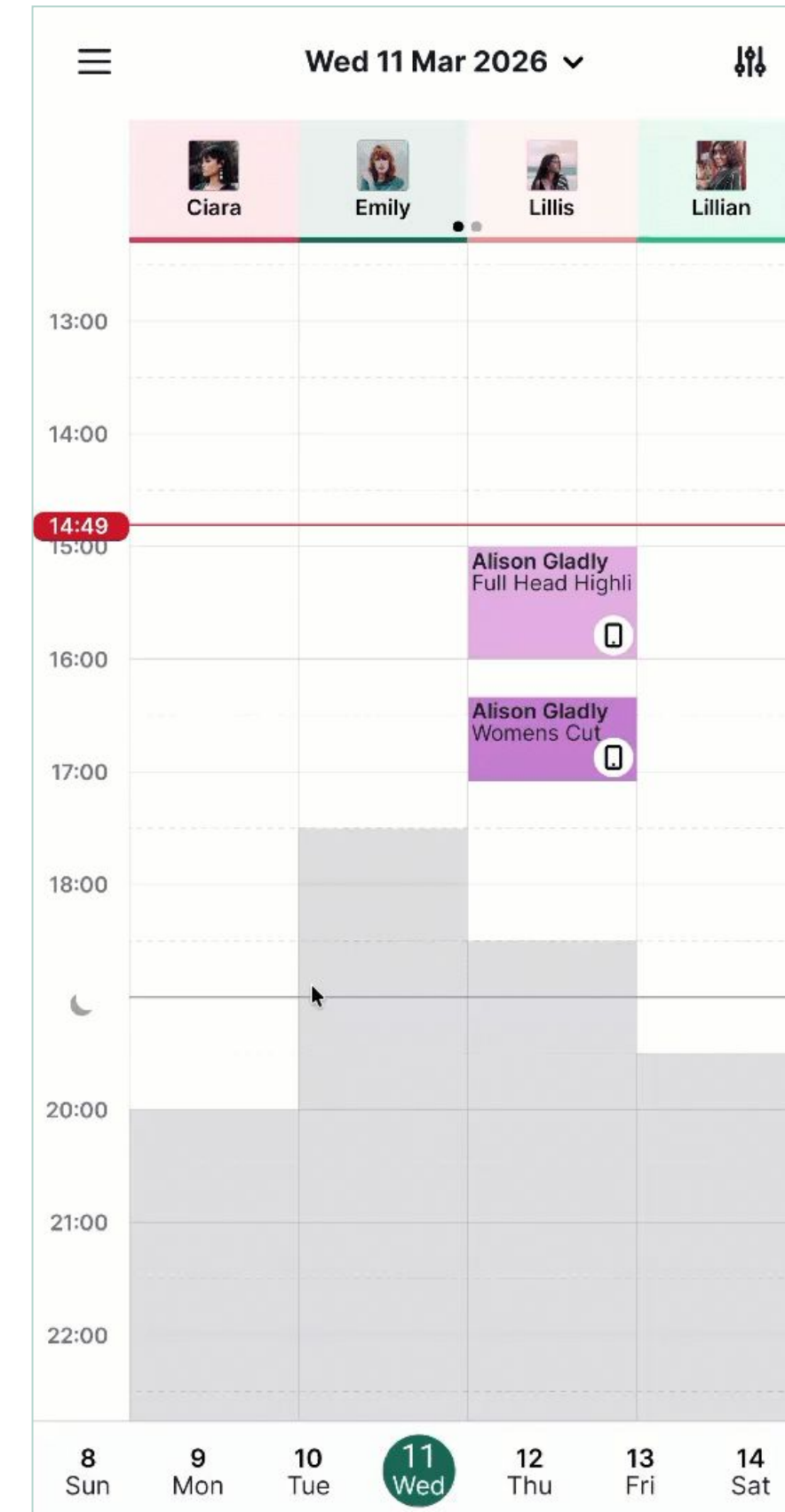
Fair use policy of 1,000 per month AI interactions across Cheat Sheet and front desk AI

Cheat Sheet Access

Is only available on PhorestGo

History

Cheat sheet uses the last 30 events of a client or last 3 years, whichever is greater



Why use Cheat Sheet

You are enhancing the client visit by using a tool that will quickly highlight what matters most.

Cheat Sheet AI is a feature in PhorestGo that creates a clear, at-a-glance summary of a client's key information.

It brings together important details from past appointments, notes, services, and purchases so staff can quickly understand a client before or during their visit.

The Cheat Sheet may include:

- Past services and appointment history
- Notes added by staff
- Products purchased
- Courses/Series or packages purchased
- Relevant preferences or considerations



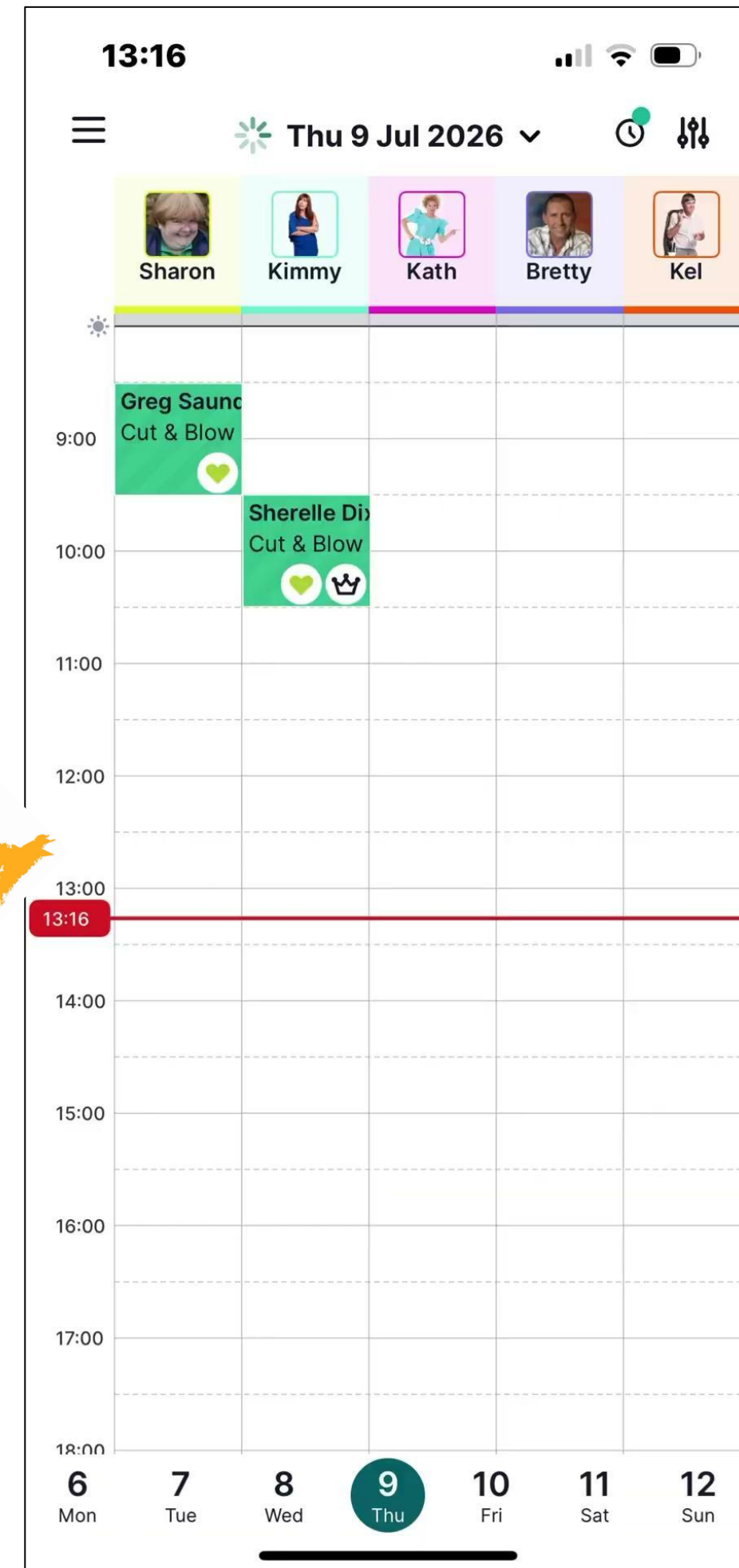
How it works

1. In PhorestGo,
2. Click on a client's appointment
3. Press '**Cheat Sheet**'.

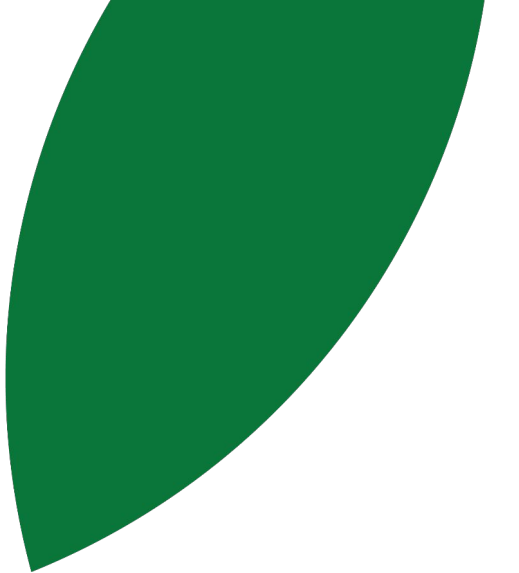
It's that simple.

Click the video to watch how it works

Helpsheet: [How to generate an AI Cheat Sheet](#)



Speech to text notes



If typing out long notes feels tedious, try speech-to-text! It lets you dictate your thoughts naturally and handles the spelling for you, saving you time and energy.

Great client notes make great cheat sheets. The more detail you capture now, the better you can elevate your next client interaction.

Think of your client and appointment notes as an investment: the more insight you put into them, the more accurate your cheat sheet becomes, helping us deliver a truly standout experience for our clients and promotes genuine confidence in you as a therapist and or stylist.

There are a lot of businesses that won't be doing this, so it's an easy way to get you to stand out from other places.



Speech to text notes

How to use speech to text on PhorestGo:

Click to add Appointment Note

×

30 Jun 2026
Tuesday

Paid

Edit client note

History

Services

12:45 - 13:15

Hot towel shave • \$60

30 mins with Sharon Strzelecki

⋮

Add another service

⚙️ This appointment ends at 13:15

Appointment note

There is no note for this appointment

Add appointment note

Photos

View all photos

Options

Click the microphone to record your voice to text, click Done to save them.

×

Appointment...

ⓘ

Done

Client requested close shave today also would like to purchase some more wax product on his next visit

×

30 Jun 2026
Tuesday

Paid

Edit client note

History

Services

12:45 - 13:15

Hot towel shave • \$60

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Appointment note

Client requested close shave today also would like to purchase some more wax product on his next visit

Edit appointment note

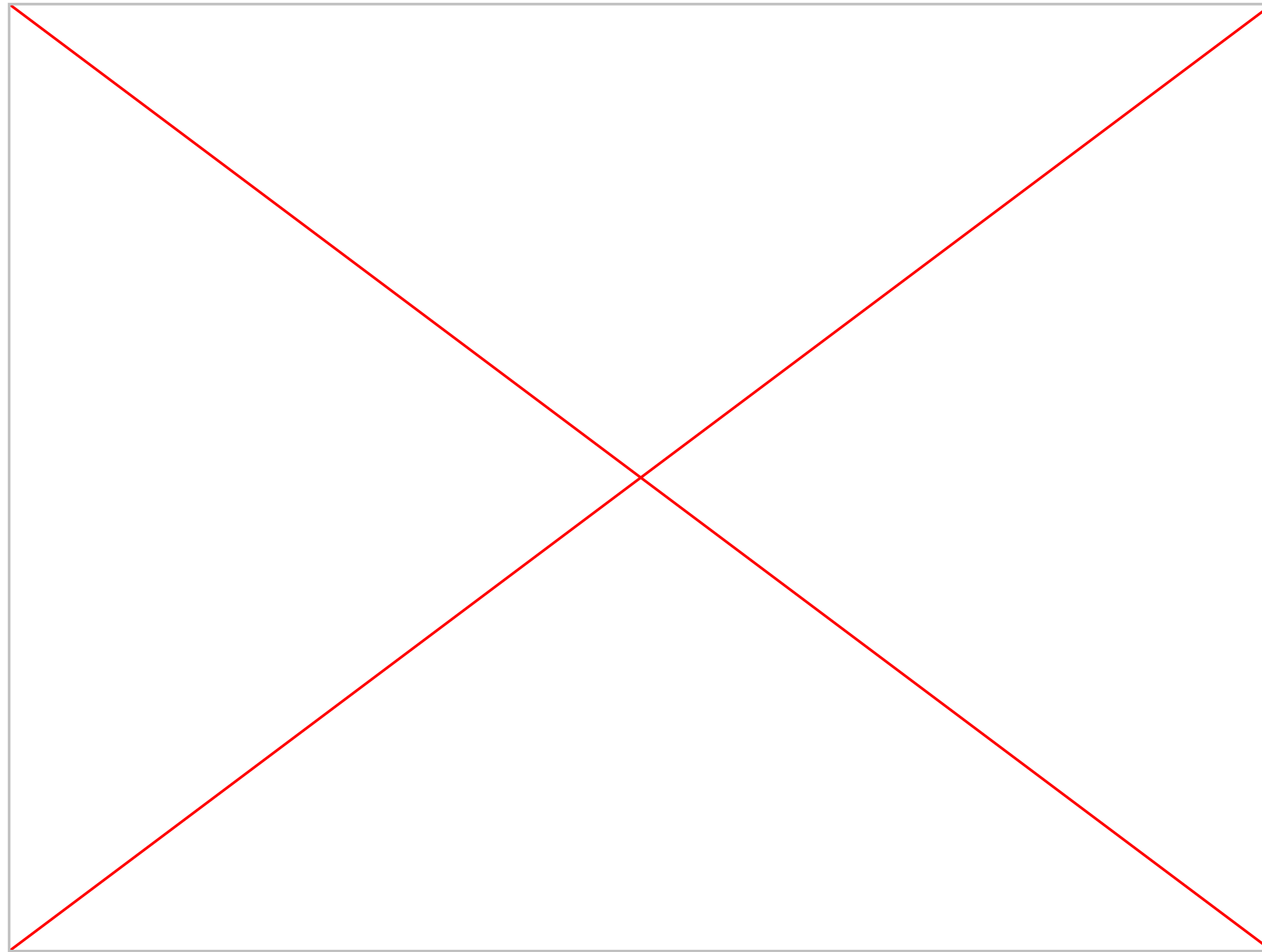
Photos

View all photos

Options

Speech to text notes

Click to watch the video:

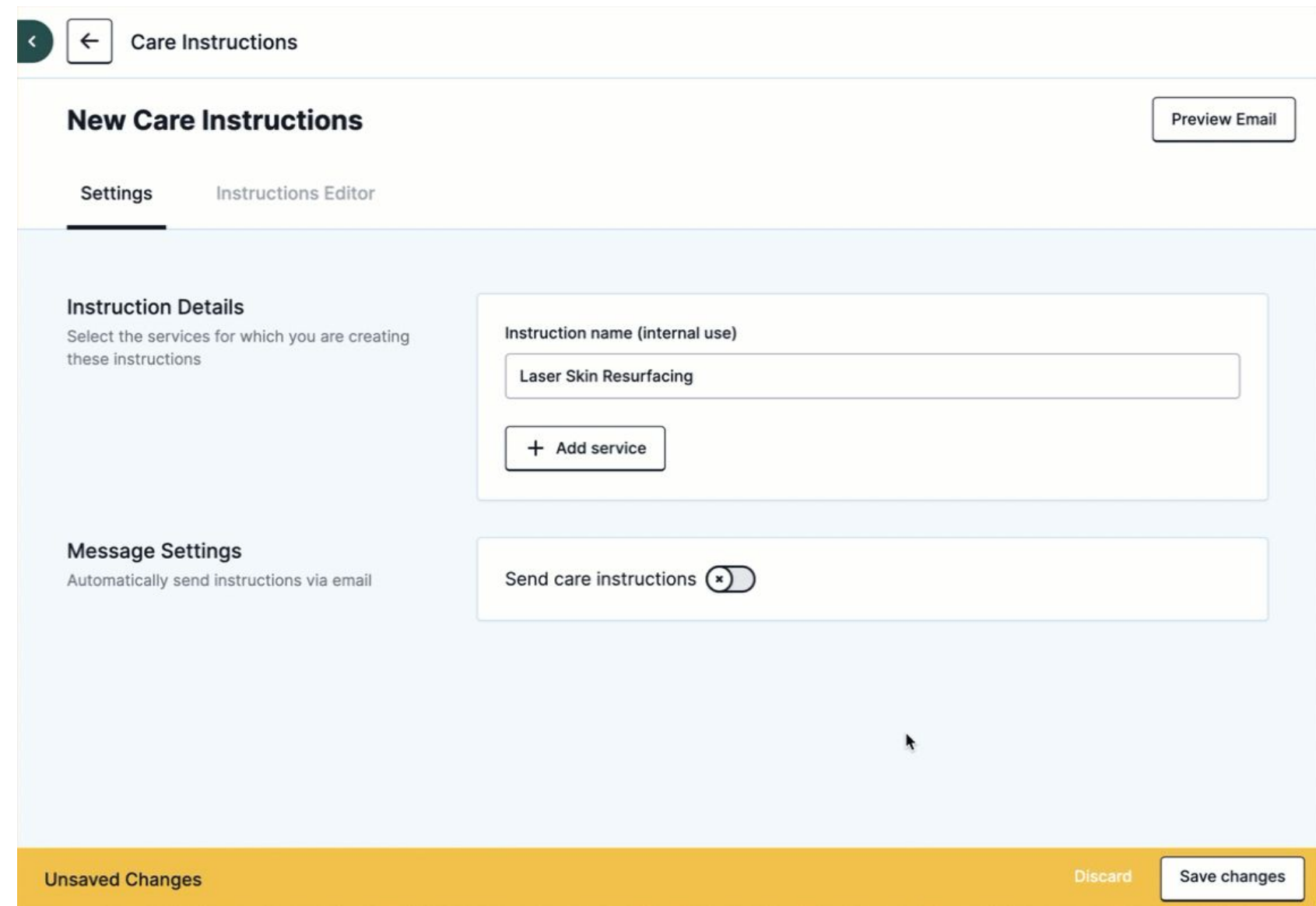


Automatic Pre and Aftercare Instructions

Why send Pre and Aftercare Instructions?

Sending these instructions in all seasons streamlines communication and takes the guesswork out of the client experience.

Supporting your clients outside the salon bridges the gap between visits and builds long-term loyalty.



The screenshot shows a web interface for creating care instructions. At the top, there's a navigation bar with a back arrow and the text 'Care Instructions'. Below this, the main heading is 'New Care Instructions' with a 'Preview Email' button on the right. The interface has two tabs: 'Settings' (active) and 'Instructions Editor'. The 'Settings' tab is divided into two sections: 'Instruction Details' and 'Message Settings'. 'Instruction Details' includes a sub-header 'Select the services for which you are creating these instructions' and a text input field containing 'Laser Skin Resurfacing', with an '+ Add service' button below it. 'Message Settings' includes a sub-header 'Automatically send instructions via email' and a toggle switch labeled 'Send care instructions' which is currently turned on. At the bottom of the form, there's a yellow bar with the text 'Unsaved Changes' on the left and 'Discard' and 'Save changes' buttons on the right.

Automatic Pre and Aftercare Instructions

1. Browse to Manager > Client Notifications > Care Instructions
2. Select the services and add in the pre and aftercare instructions
3. Add in the pre and aftercare instructions. If you're only doing aftercare only add in the instructions to only the aftercare field
4. Choose when to Send

The message(s) will be sent approximately 30 minutes after the appointment is booked for pre care and/or 15 minutes after the appointment is completed for aftercare. The message is Transactional, so clients do not need to opt in for marketing messages to receive it.

The screenshot shows a web interface for creating care instructions. At the top, there's a breadcrumb trail: < < Care Instructions. Below this is a header for 'New Care Instructions' with a 'Preview Email' button on the right. Two tabs are visible: 'Settings' (active) and 'Instructions Editor'. The main content area is divided into two sections. The 'Instruction Details' section on the left has the subtext 'Select the services for which you are creating these instructions'. The 'Message Settings' section on the left has the subtext 'Automatically send instructions via email'. On the right, there's a text input field for 'Instruction name (internal use)' containing 'Laser Skin Resurfacing', with an '+ Add service' button below it. At the bottom right, there's a toggle switch for 'Send care instructions' which is currently turned on. A yellow bar at the very bottom contains the text 'Unsaved Changes' and two buttons: 'Discard' and 'Save changes'.

Helpsheet: [How to automatically send Pre and Aftercare Instructions](#)

Expert Recommendations

What are Expert Recommendations:

It's super important that the client is aware of the prescribed products they need to solve the issues they've highlighted on their consultation form.

Sometimes, clients may not be ready to purchase a recommended product during their appointment. Expert Recommendations enables staff members to send personalized retail product recommendations to clients via SMS, allowing clients to purchase the product(s) later in your Phorest Online Store.

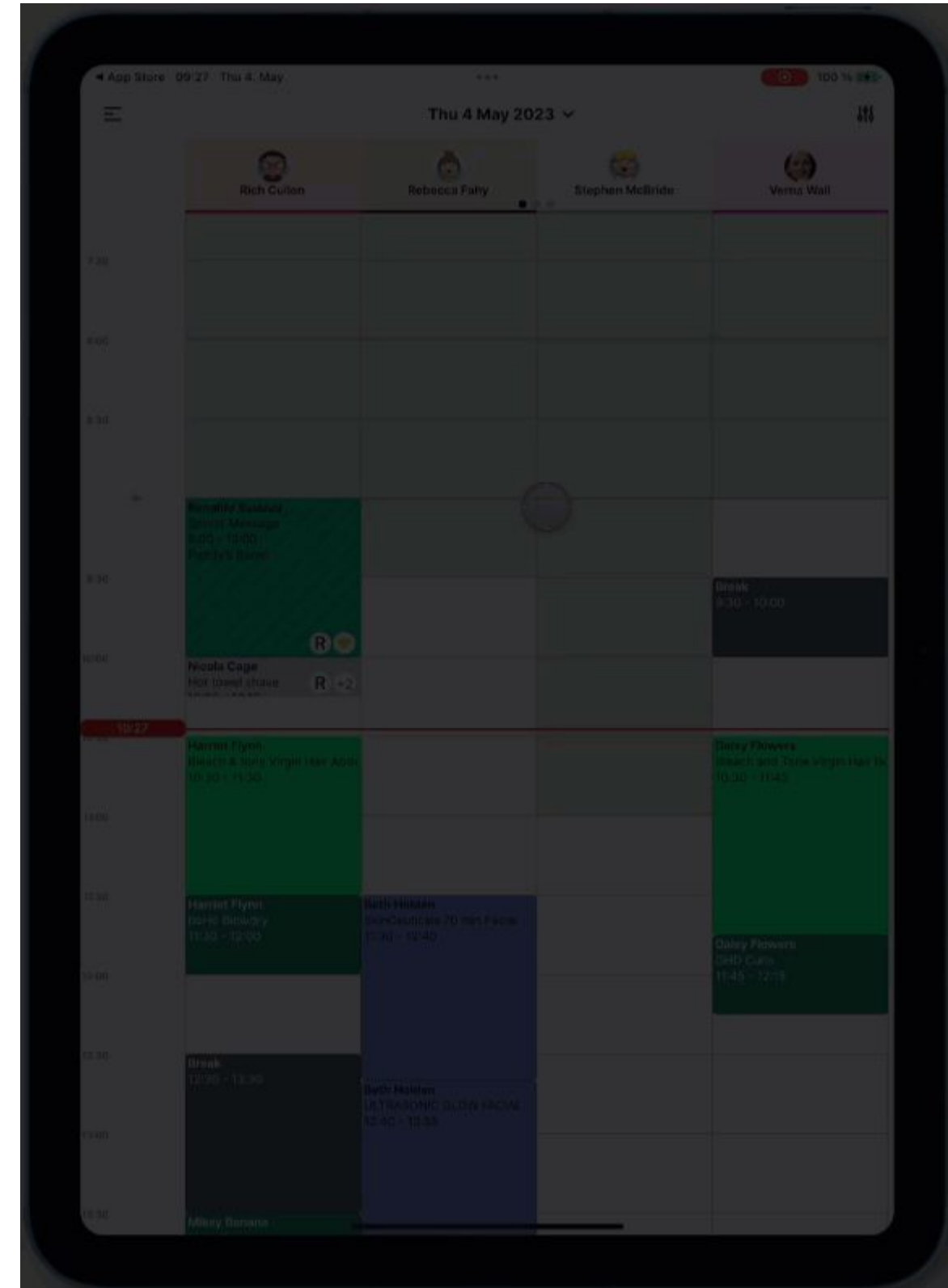
We want clients to feel like they're getting support when they leave. We're not just selling products for the sake of selling products, they're genuinely prescribed by you the expert!

Online Store

As mentioned above, expert recommendations requires you to have an active Online Store in Phorest

PhorestGo

Expert recommendations are only available on PhorestGo and is only available 24 hours post appt

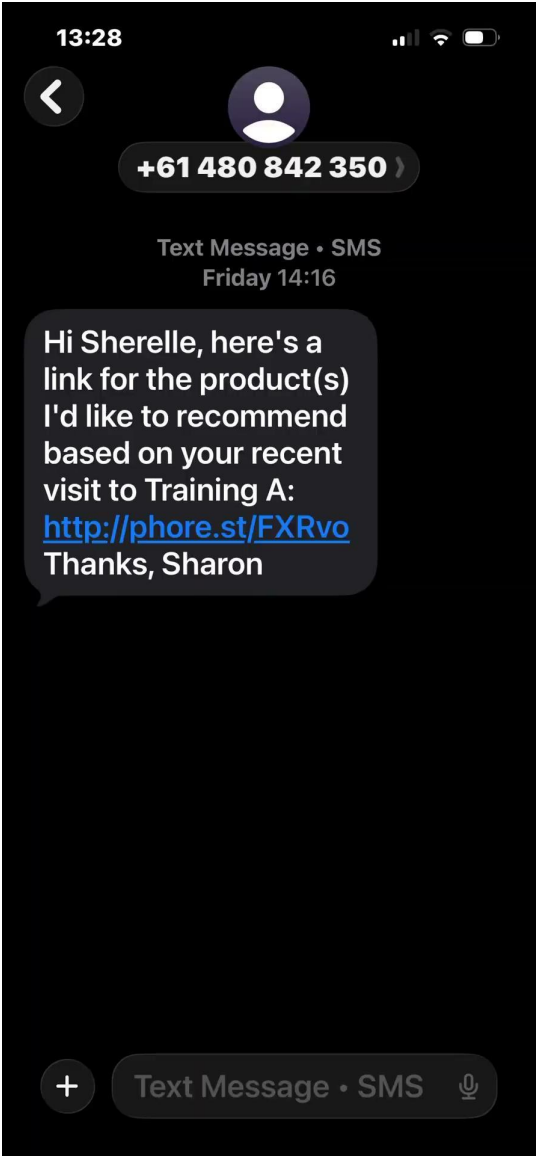


Expert Recommendations

Click to watch:
How to send an expert recommendation



Click to watch:
Purchasing a recommended product from a
client's perspective



Expert Recommendation reporting:



Expert Recommendation sales for the business:

These can be accessed from the main reports dashboard under the **Finance** tab and expand the Sales figures



Expert Recommendation sales for each staff member:

You can view your entire team's individual performance with Expert Recommendations from the main reports dashboard under the **Staff** tab.

Expand on the Commission section to find the commission earned by each staff member through Expert Recommendations (*provided you use Commission in Phorest*).



Expert Recommendation sales on PhorestGo:

Staff members can see how many sales they've made through Expert Recommendations in the My Numbers section of My Performance.

Helpsheets: [Expert Recommendations reporting](#) and [How to use Expert Recommendations](#)

Timeline

In relation to what we've covered, here is a timeline of the communications a client will receive before and after their appointment:

Initial Consultation Form

Sent upon booking or up to 5 days prior

Consultation Form Reminder

Sent 24 hours prior if the form has not been completed

Expert recommendations

Sent 24hrs after the appointment is completed

Pre and aftercare instructions

Sent 30 minutes after the appointment is **booked**

Pre and aftercare instructions

Sent 15 minutes after the appointment is **completed**

Quick Recap...

Everything that we've mentioned here relates to trust.

We're building that trust with our clients, not just providing a service.

We're taking the extra steps to record everything, recommending products to address their concern and building that trust that will create that client loyalty.

Winter is the perfect time to nurture your community and review your current processes.

We hope these tools we've covered today will help you elevate your client experience and keep that momentum going all season long.

Help Sheets

[How to create Consultation Forms](#)

[How to view a completed Consultation Forms](#)

[How to generate a client Cheat Sheet](#)

[How to automatically send Pre and Aftercare Instructions](#)

[How to setup Online Store](#)

[How to use Expert Recommendations](#)

Phorest Academy

[Consultation Forms](#)

[Ai Front Desk & Cheat Sheet - Phorest Academy course](#)

[Expert Recommendations](#)

Missing Features?

[Click here](#)

Phorest Grow Homepage

[Click Here](#)