Auditdata Manage

Standard Discover Reports

Sales count	Sales Units	Revenue	Binaur rate	ral Average	Average			Н	CP Perfor	manco o	
- 12	-	5 21,777	0.09	<i>Price</i> % 1,604	Private 7,234	Public 7,287	New private Count	appointments Conversion	Week: New public a Count	20/07/2020 to 2 Ppointments s	26
9	36	42,620 42,566 (2,081)	0.0% 100.0%	787 481	4,334 4,605 25,785	- 2,720 27,909 38,607	-	0.0%	2 -	0.0%	P
5 1 2 32	20 2 2 85	40,995 (10,733) 1 5,190	100.0% 00.0% 0.0%	680 (1,832)	6,141 355 9,793	3,338 6,150 29,747	\mathbf{A}^{1}		tda	^{200.0%}	

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1 Introduction

Standard Discover reports are available in Manage. These will support you in understanding where (and how) to improve your business. This introduction provides you with an overview of which reports are available and gives you tips and tricks on how to optimize each KPI. Hopefully, together with the performance measures from your shops, this will enable you to implement good initiatives to improve your business.

As with all reporting, only the data which has been correctly inserted in the Manage system, will be shown in the reports. It is, therefore, important that your service providers insert the required master data per client.

There are four standard reports available, designed to provide an overview of key areas of your business. The reports are standardized and have some fixed definitions of each KPI. You can find all the definitions in this document. It is possible to filter the data in the reports by region, shop, service provider, and time.

1) New client conversion report

displays how well new leads are converting into buying customers.

2) Marketing report

shows how different marketing campaigns/referral sources are generating leads and how well these are converting into buying customers. **Note:** In Manage you must link leads / client to a campaign/referral source to get value from this report.

3) Sales trend report

provides an overview of the sales trends across the year compared to previous year and an overview of conversion, HA on trial, and overall performance.

4) Service provider hourly report

outlines how the staff working hours are allocated in the schedule. This gives a good indication of where to optimize in the shops and potentially move staff around to maximize productivity and other key outcomes.

These reports provide important insights about how profitable and efficient your business is, helping you to better understand how well your business is converting marketing campaigns and new customers into buying customers. This is important information for you to consider so you can run a more efficient operation and get the most out of your invested resources.

All reports are printable and can easily be filtered by time, location, and service provider.

How to read this guide

This guide will walk you through how to read, interpret, and use each of the four reports. For each report, you will find an introduction, as well as which parameters can be selected to filter the report (e.g., time, region, location, service provider, etc.) Each report also provides a definition of the relevant KPI's and recommendations for optimizations.

2 How to navigate the reports

General controls are available for all reports. Each report is paginated which allows users to check and print each page separately or work with the whole report at once.

It is possible to either View or View and Edit reports, depending on a user role.

Upper Toolbar

	1 of 3		00	_	Page Width	the second s	<u></u> _	- the second sec	0	F7
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	First Page	Return to the first page				
•	Previous Page	Return to the previous page				
2 of 5	Page Count	Check which report page is shown				
	Next Page	Go to the next page				
	Last Page	Go to the last page				
80	Toggle Multipage Mode	Switch between single-page and multiple-page views				
Page Width	Page Size Controls	Adjust the page size with Zoom in (+) or Zoom out (–). Alternatively, click on Page Width to adjust the size.				
₽ b	Print	Send to printer				
B	Print Page	Print the current page				
	Export To	Export to a selected format: PDF, XLS, XLSX, RTF, DOCX, MHT, HTML, TEXT, CSV, IMAGE (PNG).				
Q	Search	Search in the current report				
53	Full Screen	Switch to the full screen mode				

Right Toolbar

			>
PREVIEW PARAMETER	S		Ŷ
Select report date:	7/26/2020, 12:00 AM		\$
Select report peri	Week		٥
Show return rate:	No		
	RESET	SUBMIT	

9	Parameters	Filter your data by <i>report date, period, region, location, service provider.</i> Depending on the report type, you may have a different set of filters.						
		Note: The <i>date range</i> is always based on chosen report date. This means the report will process periods (week/month/quarter/year) that include the selected date.						
		Example: Report date = 22.12.2021 and Period = month. This means the report will show data for December 2021.						
\$	Export Options	Configure export settings (export mode, layout and appearance, etc.)						
Q	Search	Search in the current report. Refine your query with match case or match whole word options.						

3 Report types

3.1 New client conversion report

The new client conversion report can help you understand the outcome of your efforts towards recruiting new clients. It is important that you differentiate between new and existing client conversion to accurately measure key metrics, including the staff performance.

This report shows you the performance of both your marketing efforts and your hearing care professionals. The conversion (and sub-conversion) rates add up to the result.

Motivate your team to do their part in improving hearing care conversion rates. Each person in your shop plays a vital role, which are all equally important to the outcome. To get further inspired, you can read about conversion rates here: <u>4 crucial conversion rates to improve in hearing care</u>

Preview parameters (filters)

- Period (year, month)
- Region
- Location
- Service provider

Region	Location	Service provider	Clients booked	Clients showed up	Clients with HL	Clients on trial	Trial no purchase	Clients who puchased	HA units sold*	HA units returned	ASP	TOTAL Conversion
Aflath	YMA Test	Oleksandr Tsvilii	60	48	34	20	2	17	2/	4	580	28,3
	YMA Test TOTAL		60	48	34	20	2	17	2	4 -	580	28,3
AFLATH TOTAL			60	48	34	20	2	17	24	4 -	580	28,3
	Council Olivera	Dr. Lovejoy	24	19	13	8	1	7	10	0 2	2 350	29,2
	Polesi Sibre	Mary M. Schaff	12	10	7	4	1	3		5 1	2 800	25,0
-ieran	Forest Store TOTAL		36	29	20	12	2	10	1	5 3	2 575	27,8
	Harrods Store	Dr. Lovejoy	12	10	7	4	-	3		4	2 850	25,0
	Harrods Store TOTAL		12	10	7	4	-	3	4	4 -	2 850	25,0
IERAN TOTAL			48	39	27	16	2	13	11	9 3	2 667	27,1
		Dr. Lovejoy	36	29	20	12	1	10	14	4	1 490	27,8
(anapp	Screener Store	Harley Q	24	19	13	8	1	7	1	1 1	3 932	29,2
		Oleksandr Tsvilii	12	10	7	4	1	3		3		25,0
	Screener Store TOTAL		72	58	40	24	3	20	21	8 1	3 118	27,8
KANAPP TOTAL			72	58	40	24	3	20	21	8 1	3 118	27,8
	BublStore	Molly Cruz	12	10	7	4		3		3		28,6
Sumife	BubIStore TOTAL		12	10	7	4		3	4	3 -		25,0
	East Store	Carl Stevenson	36	29	20	12	2	10	15	5 2	1 000	28,6
	East Store TOTAL		36	29	20	12	2	10	1:	5 2	1 000	27,8
SUMIFE TOTAL			48	39	27	16	2	13	11	8 2	1 000	27,1
Tiphol	EyesOnPrice	Dr. Lovejoy	24	19	13	8	1	7	10	D	3 998	28,6
	EyesOnPrice TOTAL		24	19	13	8	1	7	10	o -	3 998	29,2
TIPHOL TOTAL			24	19	13	8	1	7	10	o -	3 998	29,2
TOTAL			252	203	141	84	10	70	95	9 6	2 351	27,

* NB: Please mind trials and sales are checked within the rolling year after selected period.

Definitions and calculations

Definition of KPI	Recommendation for optimization					
M	ARKETING KPIs					
Clients booked The total number of new clients booked for a first appointment within a defined time period.	These three measure points should be the responsibility of the marketing staff. They should not only be measured on quantity but on the quality of the new clients they book for appointments.					
Clients showed up The number of clients showing up for their first booked appointment.	 TIP: ✓ A good show-up rate is above 90% ✓ A good hearing loss rate is above 80% 					
Clients with HL The number of clients showing up having a treatable hearing loss.	To improve these two KPIs, make sure to qualify the leads prior to booking and remind each customer about their upcoming appointment in the days leading up to it. Get inspired on how to do measure marketing here: <u>blog.</u>					
SEI	RVICE PROVIDER KPIs					
Clients on trial The number of clients with a hearing loss convinced to try a hearing aid solution for a specific time period.	These are the measure points for the service providers' ability to sell-in the idea of testing a hearing aid, understanding that a good trial period often leads to an actual sale.					
Trial no purchase The number of clients deciding <u>not</u> to buy a hearing solution after the trial period.	To make sure that your service providers do not oversell to your clients, they should be rewarded on the trial rate minus the return trial rate. This will ensure that they on-board the clients to the right solution and that they follow a proper fitting and trial					
Clients who purchased The number of clients who purchased a hearing solution.	 process. Keep in mind that you will not be able to measure the actual performance until 2-3 months after the lead was booked due to trial periods, waiting times, etc. TIP: ✓ A good "leads on trial" rate is around 70%. Make sure that your staff has a clear interview and sales process to support them ✓ A good purchase rate from trial is 80%. To boost the sales rate, offer a fixed trial process where the clients are supported in the start-up and onboarding ✓ Learn how to increase your in-shop conversion rate in our Guide 					

HA units sold This is the total number of hearing aids sold to your clients. This will also show you the binaural rate of your clients.	The binaural rate varies globally, but from an audiological perspective, around 90% of all hearing- impaired clients benefit from a binaural solution. It is powerful to demonstrate binaural hearing for the client so they can experience the hearing improvements for themselves.
HA units returned The number of hearing aid units returned in the period of six months post-sale. This will show you the real performance of your entire staff.	
ASP The Average Sales Price per client. This includes: hearing aids, services and accessories, and represents the total spend per client buying.	
END	-TO-END CONVERSION
Total conversion The conversion rate in percent (number of leads buying/leads booked*100).	A good number here is around 40% when the end-to- end funnel is optimized. Learn how to optimize the end-to-end journey from our <u>Retail Guide 2.0</u>

3.2 Marketing report

The marketing report is set up for you to be able to measure the outcome of your marketing efforts.

Your leads likely come from multiple channels, and you will see that each campaign has a different outcome and ROI (return on investment). Get marketing advice and tips on which campaigns to run, as well as overall branding of your shops, in our <u>Marketing guideline</u>

To balance your marketing spend, it is important that you understand these dynamics. For instance, attracting existing clients to rebuy is cheaper and easier than attracting new leads, however, you cannot grow your business by simply focusing on existing clients alone. This is why you should understand how you are performing. For the report to be useful, **you must link leads / client to a campaign/referral source in Manage.**

Preview parameters (filters)

- Report date (identifies exact period)
- Period (week, month, quarter, year)
- Region
- Location
- Service provider
- Display by (campaign, referral source, referral physician)
- Campaign/referrals (values based on Display by selection)

By campaign:

Au	ditda	ita									Monthly	Marketin	g Report
											Month:	1.12.2021 to 31	.12.2021
Campaign	Region	Location	Service provider	Clients booked	Clients showed up	Clients with HL	Clients on trial	Trial no purchase	Clients who puchased	HA Units sold*	HA units returned	ASP	TOTAL Conversion
Google 2019				57	46	32	20	5	16	25	3	1 780	28,1%
		YMA Test TOTAL		17	14	10	6	3	5	9	1		28,6%
	Aflath	YMA Test	Oleksandr Tsvilii	17	14	10	6	3	5	9	1		28,6%
	AFLATH TOTAL			17	14	10	6	3	5	9	1		28,6%
		Harrods Store TO	TAL	15	12	8	6	1	4	5	1	2 850	29,4%
	Fieran	Harrods Store	Dr. Lovejoy	15	12	8	6	1	4	5	1	2 850	29,4%
	FIERAN TOTAL			15	12	8	6	1	4	5	1	2 850	29,4%
		Screener Store TO	TAL	5	4	3	1		1	2		1 490	20,0%
	Kanapp	Screener Store	Dr. Lovejoy	5	4	3	1		1	2		1 490	20,0%
	KANAPP TOTAL			5	4	3	1		1	2		1 490	20,0%
	East Store TOTAL			20	16	11	7	1	6	9	1	1 000	28,6%
	Sumife	East Store	Carl Stevenson	20	16	11	7	1	6	9	1	1 000	28,6%
	SUMIFE TOTAL			20	16	11	7	1	6	9	1	1 000	28,6%
HoHoCamp				13	11	5	3		1	6	1	2 600	9,1%
		YMA Test TOTAL		1	1								0,0%

By referral source:

Auditdata Monthly Marketing Report													
Referral source	Region	Location	Service provider	Clients booked	Clients showed up	Clients with HL	Clients on trial	Trial no purchase	Clients who puchased	HA Units sold*	Quarter: HA units returned	1.10.2021 to 3	TOTAL Conversion
Fritsch, Andrew	ritsch, Andrew		1	1	1	-	-		-			0,0%	
		YMA Test TOTA	L.	1	1	1	-			-	-		0,0%
		YMA Test	Yuliia Makukha	1	1	1	÷	12					
	AFLATH TOTAL			1	1	1			•	-			0,0%
Newspaper	Aflath			3	3	3	3	1	2	9	-	4 019	66,7%
		West Store TOT	AL	1	1	1	1	1	1	7	-	4 848	100,0%
		West Store	Bernard Sho	1	1	1	1	1	1	7		4 848	100,0%
	AFLATH TOTAL	TH TOTAL		1	1	1	1	1	1	7		4 848	100,0%
		Forest Store TO	TAL	1	1	1	1		1	2		3 190	100,0%
	Fieran	Forest Store	Carl Stevenson	1	1	1	1		1	2		3 190	100,0%
	FIERAN TOTAL			1	1	1	1		1	2		3 190	100,0%

Definitions and calculations

Definition of KPI	Recommendation for optimization
M	ARKETING KPIs
Clients booked The total number of new clients booked for a first appointment within a defined time period.	These three measure points should be the responsibility of the marketing staff. They should not only be measured on quantity but on the quality of the leads they book for appointments.
Clients showed up The number of clients showing up for their first booked appointment.	 TIP: ✓ A good show-up rate is above 90% ✓ A good hearing loss rate is above 80%
Clients with HL The number of clients showing up with a treatable hearing loss.	To improve these two KPIs, make sure to qualify the leads prior to booking, and remind each client about the appointment in the days leading up to it.
SE	RVICE PROVIDER KPIs
Clients on trial The number of clients convinced to try a hearing aid solution for a specific period of time.	These are the measure points for the service providers' ability to sell-in the idea of testing a hearing aid, knowing that a good trial period often leads to an actual sale.
Trial no purchase The number of clients deciding not_to buy a hearing solution after the trial period.	To make sure that your service providers do not oversell to your clients, they should be rewarded on the trial rate minus the return trial rate. This will ensure that they on-board the clients to the right
Clients who purchased The number of clients who purchased a hearing solution.	solution and that they follow a proper fitting and trial process.
	actual performance until 2-3 months after the lead was booked, due to trial periods, waiting times, etc.

	 ✓ A good "leads on trial" rate is around 70%. Make sure that your staff has a clear interview and sales process to support them ✓ A good purchase rate from trial is 80%. To boost the sales rate, have a fixed trial process where the clients are supported in the start-up and onboarding 		
HA units sold This is the total number of hearing aids sold to your clients. This will also show you the binaural rate of your clients.	The binaural rate varies globally, but from an audiological perspective, around 90% of all hearing- impaired clients benefit from a binaural solution		
HA units returned This is the number of hearing aid units returned in the 6 months post-sales period. This will show you the real performance of your entire staff.			
ASP The Average Sales Price per client. This includes: hearing aids, services and accessories, and represents the total spend per client buying.			
END-TO-END CONVERSION			
Total conversion The conversion rate in percent (number of leads buying/leads booked*100).	A good number here is around 40% when the end-to- end funnel is optimized.		

3.3 Sales trend report

The sales trends report enables managers to keep a finger on the pulse of the shop performance. It helps monitor the performance of sales teams, plan sales strategies, forecast sales and, most importantly, reduce the length of the sales cycle.

The report splits up opportunities into different groups so that you can see where your revenue streams stem from and how many open loans you have. This makes it possible to establish sales patterns, making it easier to set future budgets/targets.

Preview parameters (filters)

- Report date (identifies exact period)
- Period (month, quarter, year)
- Region
- Location
- Service provider



Definitions and calculations

Definition of KPI	Recommendation for optimization
Total revenue The total revenue from the selected filters.	This is a sum-up of your entire customer journey. It is recommended to assess one initiative at a time. Depending on your performance in your shop, take the poorest performing KPI and start there.
HA sold This is the total number of hearing aids sold to your clients. This will also show you the binaural rate of your clients.	There are two ways of selling more hearing aids: fit more clients and increase your binaural rate. The binaural rate varies globally, but from an audiological perspective, around 90% of all hearing-impaired clients benefit from a binaural solution.
ASP The Average Sales Price per client. This includes: hearing aids, services and accessories, and represents the total spend per client.	Make sure to measure your service providers on this KPI. This means that you get the best outcome from each client.
Binaural rate The average number of hearing aids sold per client buying.	
Conversion rate The conversion rate end to end from booking to buying measured in percent (calculation: number of leads buying/leads booked*100).	A good number here is around 40% when the end-to- end funnel is optimized. Get inspired in our <u>Conversion guide</u>
Open trials This relates to the number of open trials (or clients in trial) you have. Comparing this to your average conversion rate from trial → buy will give you an idea of your pipeline.	You can never estimate the full value here until two months after the first visit.
Return rate for hearing aids on trial for rolling year The number of trials returned in the rolling year.	
Clients buying This is your split of new vs existing clients buying from your shops. Often, staff who has been in a shop for multiple years, will	If you have a shop that is more than five years old, you should aim for a figure around 33% of your clients repurchasing. If it is lower than that, work on activating your client database. If it is higher, you do not grow your business enough.

benefit from their relations to existing clients.	
Total revenue (chart) This is your split of new vs existing clients total revenue from your shops.	The reason to show this figure is to see where you generate the most profit from and be able to track performance both on a service provider level and shop-level. Usually, you will see a higher average spend from existing clients.
Top 5 total revenues by location If you run multiple shops, you might want to compare overall performance of these. This chart will enable you to benchmark and understand what works to mirror that in other shops.	The total revenue, is a pointer to where you are performing the best, but mind that it is not only up to the staff performance, but there could also be multiple reasons for this: location, size, age of shop etc. You should therefore only use this parameter as a beacon of the shops' performance.
Top 5 total revenues by service provider If you have multiple service providers, this chart shows the top 5 revenue generating providers.	The chart is very generic in what it shows, to deep dive into the service providers 1-1 performance, we recommend using the New client conversion report and the data from that report.
Units sold The total number of hearing aid units sold in the selected shops in the selected period.	

3.4 Service provider hourly report

Optimizing your schedule and using your staff efficiently is one of the most important areas to focus on in a shop.

By doing it right, you can:

- ✓ Earn more revenue with existing resources by delivering a detailed overview of the schedule, activities, and available resources across all centers of your practice
- ✓ Maximize revenue and decrease waiting time for new clients by using a scheduling blocking system
- ✓ Forecast busy or slow periods for marketing purposes and rostering staff

To support your efforts, we have set up a service provider hourly allocation report. This gives you a complete overview of the way the time is spent in the shops and can help you optimize schedules by planning, blocking, and prioritizing time. Within Manage, you can oversee staff centrally across different shops. This enables your business to automate vacation, sick leave, or other time off, which can support the outcome and stability of your shops.

Preview parameters (filters)

- Report date (identifies exact period)
- Period (week, month, quarter, year)
- Region
- Location
- Service provider



Definitions and calculations

Definition of KPI	Recommendation for optimization
Total hours available The total number of hours your selected staff is available in the shops.	This is a sum-up of your entire customer journey. It is recommended to assess one initiative at a time. Depending on your performance in your shop, take the poorest performing KPI and start there.
Number of clients seen The total number of clients that your selected staff has seen in.	You should always aim for a high number here. Your staff should spend as much time as possible with your clients.
Client show-up rate The number of clients showing up for their booked appointment.	This is an area which in some shops is very low. You should work to remind them about the appointment. Moreover, when clients fail to show, the clinicians' time should be spent wisely on administrative tasks.
 Hourly allocation: This means in the given period, how much time has: 1) not been allocated 2) been with clients 3) spent on administrative duties Not allocated – empty hours, not allocated to any appointment Client facing hours – those marked as 'productive' in Manage config settings Admin hours – hours not marked as 'productive' 	 This is a marker for the business owner. TIP: ✓ If there are many available timeslots, spend more money on marketing. OR look if your other shops might need assistance and reallocate staff accordingly. ✓ If there is no space available, find out how you can help the HCPs spend as much time as possible with the clients. If the service providers spend too much time on administrative tasks, figure out if your front-desk staff can take over smaller assignments, like cleaning equipment, prequalifying leads, or other duties.
New vs existing clients This is your split between new vs existing clients buying from your shops.	 Look at your staff. How much time do they spend with new customers? Is there a trend that some of the more experienced staff always get the existing clients? Do you spend too much time on existing clients? TIP: ✓ Consider how many times the same customers come in. ✓ Are they fitted correctly? ✓ Can the front desk staff take care of some of these tasks (e.g., prequalifying their needs when they book)

To get the right data points into the report, make sure to tag your appointments correctly in Manage. Please follow the below instruction to make sure that you do it correctly.

To find setup for hours you need to:

1. Click on **Profile** and select **Environment** settings in Manage.

	C	0
My profile		<
Company settings		- 1
Environment * Analytics	•	
Environment settings		
SIGN OUT		

2. Select Configure System Settings.

Environment settings
Surveys
Configure System Settings
Tasks
Active Classic Sessions

3. Go to Scheduling and open Appointment Reasons settings.

Patient	Specialists
Scheduling	Specialists:
Accounting (AR/AP)	Specialist Roster:
Inventory	Appointments And Recalls
System	Recall Reasons: Appointment Types:
	Appointment Reasons:
	Appointment Status Codes:
	Outcome Codes:
	Appointment Resources:

4. Define whether an appointment reason belongs to Productive hours or not.

Appointment Reasons								
X [Image: Second state + Image: Second state ave Cancel Add Change Delete	Exp/Con						
Seq	Appointment Reason	Length Out	come Color	No Notifications	Validate	Resources	Productive	Ina
1	Hearing Aid Check	30 -	:	:			Yes	-
2	Hearing Aid Fitting	60					Yes	
3	Hearing Aid Followup	30					No	
4	Hearing Test	60					Yes	
5	Impressions	30					No	
6	Programming Adjustment	30					Not Applicable	
7	Repair	30					No	
8	Screening Test	15					Not Applicable	
9	Tubing Change	30					Not Applicable	