

Hub Check



A Checklist for Hubbox Success

Daily

- Follow up on new client leads
 - Convert leads and fulfill rewards
 - Delete old leads

Weekly

- Ensure clients are consistently receiving points
 - Points Awarded History* report
- Publish reviews and schedule posts to social media
 - Encourage Google reviews from fan base
- Check orders and fulfill in-house prizes

Monthly

- Verify that messages are being sent to clients
 - Communication Manager sent/scheduled
- Keep clients engaged with contests
 - Select winner, fulfill prize
 - Ensure new contest has started
 - Print/post flyers
 - Review social media for post
 - Confirm message sent through CM
- Add to the fun with surveys
 - Close survey
 - Share results (if applicable)
 - Publish new survey
 - Visit your Support Center for survey ideas
 - Review social media for post

- Review Social Media Calendar
 - Modify and schedule content as needed
- Keep team member profiles up to date
- Update your marketing plan
 - Reward Item Popularity* report
 - Referral Manager* report
- Share feedback and successes with your team
 - Percentage of clients receiving in-office points
 - Reviews, social media follows, and referrals
 - Results from last promotion
 - Upcoming promotions, contests, and surveys
- Schedule tasks in the Hub for monthly reminders

Quarterly

- Schedule seasonal referral campaigns
 - Promote through email/mobile notifications, flyers, and social media

Bi-Annually

- Meet with your PracticeGenius Customer Success Advisor for a free review and new tips and tricks for a successful rewards program

Need Help?

Support Center

- How-to articles
- Scripting ideas
- Live and on-demand webinars
- Submit a ticket

Your PracticeGenius Customer Success team
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