



• Patient Experience Analysis •

Services (please check each that you want performed):

___ Phone Skills Analysis Package of Three (3) Recorded Calls: \$400

___ Phone Skills Analysis Package of Six (6) Un-recorded Calls: \$500

___ Onsite Consultation Package of Two (2) Complete in-person Consultations: \$1,200

___ Combination of Three (3) Recorded Calls Plus One (1) in-person Consultation: \$1,000 **(Recommended)**

Please complete:

Practice Name: _____

Website Address: _____

Street Address: _____

City, State, Zip: _____

Phone Number We Are Calling: _____

Time Zone: _____

How May We Contact You (Direct Line or Email): _____

Hours & Days of Operation: _____

Please advise if you want us to approach your practice for LASIK, Premium IOLs, or both:

Upon receipt and approval of this form, we will send you an invoice for the amount due, payable immediately by check. We will schedule the calls/visits once your check is received.

I have read and agree with the Service Agreement, Privacy Policy and am making payment (your signature indicates you have read this agreement and accept all terms for this service):

Signature

Date

(Please fill out form completely and fax to (925) 249-9902)



• Patient Experience Analysis •

Do you know what is happening at your front desk? Are you losing patients before they even come through your door? Let SM2 Strategic discover the answers for you. We provide you with an independent analysis of how patients view their experience with your practice. We are different than traditional “mystery shopping” services in that we also evaluate the *emotional and cognitive* aspects of the experience. Our assessment tools are based upon recent findings in neuroscience research, which show that emotions significantly affect how people make decisions.

Our goal is to help you uncover areas of weakness that negatively influence patients’ decision making. The *Phone Skills Analysis* will give an unbiased evaluation of your callers’ first impression, covering a detailed **37-point** checklist. The *Onsite Analysis* will evaluate a patient visit to your practice for a consultation, covering **133 aspects** of an in-person experience. The evaluation begins at your website and continues through the end of a consultation. Our mystery patients are experts, trained specifically to assess the intricacies of a refractive practice. With both Analysis programs, we provide a comprehensive narrative designed to identify specific areas for training and to ultimately help your business grow.

Call reports are emailed to the address provided on Page 2 within 2-3 business days after completion of service. They are sent in a PDF format and stored securely in our database. Call recordings (if ordered) are sent to you at the same time as the report.

SM2 Strategic recommends you share with your employees your decision to participate in a *Patient Experience Analysis*. Telephone and in-person mystery shopping should not be perceived as a threatening process. It is about your desire to provide a flawless first impression and show the community you care enough to measure their level of satisfaction. It is also a means to encourage, praise and reward employees.

SPECIAL INSTRUCTIONS: We cannot ask for anyone specifically. We cannot guarantee a specific time of day; however, you can specify a certain day of the week (please specify in ‘Special Instructions’).

Recorded Phone Shopping Requires up to 4 Weeks to Complete: We generally place 1 call per week over a 3 week timeframe following 1 week lead time required to set up your location in our system. To expedite, you may specify in the ‘Special Instructions’ box that you would like ‘2 calls the first week and the 3rd call the following week’ or ‘all 3 calls the 1st week’ for a 3-week turnaround.

Onsite Visits, Consultations or Walk-Ins: Please allow up to 6 weeks from the order date. Restrictions could apply depending on office location and doctor’s availability.

Please read all information, Service Agreement, Privacy Policy, and fill out Page 1 completely and fax to (925) 249-9902. If you would like more information please call (925) 425-9900 or email info@SM2Strategic.com.

SERVICE AGREEMENT

SM2 Strategic recommends that you inform your employees of this process.

This Service Agreement herein referred to as "Agreement" is made and entered into as of the date certified by the purchase of services by and between **SM2 Strategic, Inc.**, a California corporation, herein referred to as the **(the Company)** and the person(s) or entity acting as employer who has requested the services herein referred to as "**Client**" or "**Clients**").

Services. The Company agrees to provide independent mystery shopping services to the Client for the purpose of evaluating Client telephone and/or office consultation services. The Company will perform a series of mystery shopping calls randomly to the telephone number provided by Client and/or one or more mystery office visits, as specified on Page 1 of the Agreement. The completed skills evaluation forms will be provided via email to address provided by Client. All forms will be sent securely in a PDF format within 2-3 business days of each call. If the Client would like to increase the number or frequency of mystery shopping services, they may do so at any time through written confirmation and payment to Company.

Sole Remedy Against the Company. Client agrees and acknowledges that its sole remedy against the Company for any dispute Client may have about the service or how the Company performed that service is limited to, at most, a refund of the fee paid by Client for the service. The Company provides no express or implied warranty of merchantability or fitness for purpose, and the Company is not responsible for any consequential or other damages incurred by Client because of this service.

Binding Effect. The terms, conditions, covenants, and agreements herein contained shall inure to the benefit of and be binding upon the parties hereto and their respective heirs, successors, assigns, and legal representatives.

Attorney's Fees and Costs. If any action at law or in equity is necessary to enforce or interpret the terms of this Agreement, the prevailing party shall be entitled to attorney's fees, costs, and necessary disbursements in addition to any other relief to which that party may be entitled. This provision shall be construed as applicable to the entire contract. In the event of any litigation or arbitration by Client or Client's employees as a result of the Company's services, the prevailing party in any such action shall be entitled to reimbursement of reasonable attorney fees, court costs and such other charges incurred because of the litigation or arbitration. Venue for any litigation or arbitration shall be in the County of Alameda, State of California. In the event of any dispute between the Company, Client and Client's employees, all parties agree to submit such dispute to final, binding and judicially enforceable arbitration before an arbiter mutually agreed to by the parties pursuant to the rules applicable to such arbiter, or as otherwise agreed by the parties.

Severability. The invalidity or unenforceability of any provision of this Agreement, or any terms thereof, shall not affect the validity of this Agreement as a whole, which shall at all times remain in full force and effect.

Entire Agreement. This Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the relationship between the Client and the Company and contains all of the covenants and agreements between the parties with respect to their relationship in any manner whatsoever. Each party to this Agreement acknowledges that no representation,

inducements, promises, or agreements, orally or otherwise, have been made by any party, or anyone acting on behalf of any parties, which are not embodied herein, and that no other agreement, statement, or promise not contained in this Agreement shall be valid or binding on either party.

Modifications. Any modification of this Agreement will be effective only if it is in writing and signed by the party to be charged.

Amendment. No amendment, alteration, modification, change, addition, or waiver of any of the terms, covenants, or conditions hereof shall be effective unless reduced to writing by the parties.

Copyright Information. All Forms provided by the Company to Client are copyrighted and may not be used without the express written consent of SM2 Strategic, Inc.

Term and Termination. This agreement commences on the date first authorized by the Client when selecting and paying for this service and will continue until the completion of the services requested. Client may terminate this agreement prior to the full completion of the service upon the Company's receipt of written notice of the Client's desire to terminate. Client's request of early termination should be sent to the Company at 555 Peters Ave., Suite 100, Pleasanton, CA 94566. The notice of termination will be effective immediately upon company's receipt of written notice.

PRIVACY POLICY

Introduction

SM2 Strategic, Inc. a California corporation are committed to protecting any data that we collect concerning you. By using our services you agree to the use of the data that we collect in accordance with this Privacy Policy.

We are committed to protecting your privacy

We collect the minimum amount of information about you that is commensurate with providing you with a satisfactory service. This Policy indicates the type of processes that may result in data being collected about you. Your use of this website gives us the right to collect that information.

Information Collected

We may collect any or all of the information that you give us depending on the type of transaction you enter into, including your name, address, telephone number, fax number and email address, together with data about your use of the website. Other information may be needed from time to time to process a request.

[Data in relation to credit card payments is processed by Authorize.net on a secure website linked to ours and they have their own privacy policy.]

Information Use

We use the information collected primarily to process the task which you have requested. All reasonable precautions are taken to prevent unauthorized access to this information.

Disclosing Information

We do not disclose any personal information obtained about you from this website to third parties except when we need to do so in order to complete the transaction – e.g. when arranging for a courier company to deliver goods that you have ordered. We may also use the information to keep in contact with you and inform you of developments associated with our business. You will be given the opportunity to remove yourself from any mailing list or similar device. If at any time in the future we should wish to disclose information collected on this website to any third party, it would only be with your knowledge and consent.

We may from time to time provide information of a general nature to third parties - for example, the number of individuals using our services, completing a registration form, or general mystery shopping statistics but we will not use any information that could identify those individuals.

Changes to this Policy

Any changes to our Privacy Policy will be placed here and will supersede this version of our Policy. We will take reasonable steps to draw your attention to any changes in our Policy.

Contacting Us

If you have any questions about our Privacy Policy, or if you want to know what information we have collected about you, please email us at info@SM2Strategic.com. You can also correct any factual errors in that information or require us to remove your details from any list under our control.