

Coastal AI Consultancy — Monthly Client Results Dashboard

[CLINIC NAME] — AI Performance Report Reporting Period: [Month Year] Prepared by: Michelle | Coastal AI Consultancy michelle@coastalaiconsultancy.com

Executive Summary

This report summarises the performance of your AI systems for the month of [Month Year]. All metrics are compared against your baseline (pre-AI implementation) where available.

***This month's headline result:** [Insert 1-2 sentence summary of the most impressive result, e.g., "Your AI Voice Agent answered 47 after-hours calls this month, recovering an estimated \$16,450 in bookings that would otherwise have been lost."]*

1. AI Voice Agent Performance

Metric	This Month	Last Month	Baseline (Pre-AI)	Change
Total calls handled by AI			N/A	—
After-hours calls answered			0	+ [X]%
Appointments booked via AI			0	+ [X]%
Estimated revenue recovered			\$0	+\$ [X]
Average response time			[X] hours	- [X] hours
Missed call rate			[X]%	- [X]%

Notes: [Add any observations, e.g., peak call times, common patient questions, suggested script updates.]

2. Patient Reactivation Campaign

Metric	This Month	Last Month	Cumulative
Dormant patients contacted			
Reactivation rate			
Patients who rebooked			
Revenue from reactivated patients			
Average time since last visit (reactivated)			

Campaign sent: [Date] | **Subject line:** [Subject used]

Notes: [Add observations, e.g., which patient segment responded best, recommended next campaign focus.]

3. CRM & Marketing Automation

Metric	This Month	Last Month	Baseline
Emails sent			
Open rate			[X]%
Click-through rate			[X]%
Appointments booked from email			
Revenue attributed to email campaigns			
Unsubscribe rate			

Top performing campaign this month: [Campaign name and result]

Notes: [Add observations about what content resonated, what to test next month.]

4. AI Skin Analysis & Virtual Consultations

Metric	This Month	Last Month	Baseline
Website visitors who used skin analysis			N/A
Consultations booked via AI tool			
Consultation-to-booking conversion rate			[X]%
Most popular treatment simulated			

Notes: [Add observations about user behaviour, popular treatments, suggested improvements.]

5. Reputation Management & Reviews

Metric	This Month	Last Month	Baseline
New Google reviews collected			
Average Google rating			[X.X] stars
Total Google reviews (cumulative)			
Review requests sent			
Review request conversion rate			
Negative reviews flagged			
Google Maps ranking (local search)			

Notes: [Add observations, e.g., common themes in positive reviews, any negative reviews addressed.]

6. Overall Revenue Impact

Revenue Metric	This Month	Last Month	Change
Estimated revenue recovered (Voice Agent)			
Revenue from reactivated patients			
Revenue attributed to email campaigns			
Revenue from AI consultation bookings			
Total estimated AI-attributed revenue			
Coastal AI monthly investment			
Return on Investment (ROI)			

7. Key Wins This Month

1. [Win #1 — specific, quantified result]
 2. [Win #2 — specific, quantified result]
 3. [Win #3 — specific, quantified result]
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8. Recommendations for Next Month

1. [**Recommendation #1**] — [Brief explanation and expected impact]
 2. [**Recommendation #2**] — [Brief explanation and expected impact]
 3. [**Recommendation #3**] — [Brief explanation and expected impact]
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9. Action Items

Action	Owner	Due Date
[Action item]	Michelle / [Clinic Name]	[Date]
[Action item]	Michelle / [Clinic Name]	[Date]

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Note: Revenue figures are estimates based on industry-standard booking conversion rates and your clinic's average appointment value. Actual revenue may vary.