

# The Med Spa Consultation Follow-Through System

A self-guided operating workbook for your practice's prospective-client consultations—from booking through a visible next decision.

## 45 minutes

Map the current process with scheduling and communication owners.

## Every loop owned

Define confirmations, no-shows, handoffs, and undecided follow-up.

## One status + date

Every open consultation leaves with an owner and next action.

START WITH THE ACTUAL PROCESS • 8 MINUTES

# What happens after the appointment is booked?

Score the process you can verify today. Use **0 = absent**, **1 = informal or inconsistent**, and **2 = documented and measured**.

**Use boundary:** this workbook is for operational planning. Keep clinical screening, medical history, treatment recommendations, and patient records inside the practice's approved secure clinical system.

| CONTROL                                                                 | 0                        | 1                        | 2                        | EVIDENCE / OWNER |
|-------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|------------------|
| Booking confirmation has one owner and a backup.                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| Reminder and rescheduling paths are visible and consistently used.      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| The secure-intake boundary is understood by scheduling staff.           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| The provider receives approved, relevant pre-visit context.             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| Every consultation outcome is recorded in one visible status.           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| No-shows and reschedule requests have dated next actions.               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| Every undecided prospect has an owner, due date, and stop condition.    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| Contact permission, channel preference, and opt-out status are honored. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| Clinical questions are routed to an authorized professional.            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |
| Management reviews open loops and outcomes every week.                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  |

TOTAL / 20

LOWEST-CONTROL HANDOFF

NAMED CORRECTION OWNER

**Worksheet scale—not an industry benchmark:** 0–7 unstable; 8–13 person-dependent; 14–17 controlled; 18–20 measured.

BUILD THE BASELINE · 8 MINUTES

# Count the decisions, not just the appointments.

Use the last 30–50 booked consultations, or a longer period if volume is low. Use aggregate figures only and define each category before counting.

| OPERATIONAL OUTCOME              | COUNT | SOURCE / CONFIDENCE |
|----------------------------------|-------|---------------------|
| Consultations booked             |       |                     |
| Practice-cancelled               |       |                     |
| Prospect-cancelled               |       |                     |
| Rescheduled and later attended   |       |                     |
| No-showed                        |       |                     |
| Attended                         |       |                     |
| Chose a next step the same day   |       |                     |
| Chose a next step within 30 days |       |                     |
| Open with a dated next action    |       |                     |
| Open with no dated next action   |       |                     |

### Show rate

$$\text{Attended} \div (\text{Booked} - \text{practice-cancelled}) \times 100$$

YOUR RESULT

### Reschedule recovery

$$\text{Later attended} \div \text{rescheduled} \times 100$$

YOUR RESULT

### 30-day decision rate

$$\text{Decisions within 30 days} \div \text{attended} \times 100$$

YOUR RESULT

### Open-loop rate

$$\text{No dated next action} \div \text{attended} \times 100$$

YOUR RESULT

DESIGN THE HANDOFFS · 8 MINUTES

# Make arrival readiness visible to the right people.

| STAGE            | TRIGGER | REQUIRED INFORMATION | SYSTEM OF RECORD | OWNER / BACKUP | TIMING | ESCALATION |
|------------------|---------|----------------------|------------------|----------------|--------|------------|
| Booking          |         |                      |                  |                |        |            |
| Confirmation     |         |                      |                  |                |        |            |
| Secure intake    |         |                      |                  |                |        |            |
| Reminder         |         |                      |                  |                |        |            |
| Reschedule       |         |                      |                  |                |        |            |
| Provider handoff |         |                      |                  |                |        |            |

### Ordinary-message boundary

List the information your approved confirmation/reminder process may contain.

### Secure-system boundary

List what must remain in approved clinical/intake systems.

**Do not duplicate the clinical record here.** This page defines operational routing only. The practice determines what information may travel through each channel.

CREATE A REUSABLE BLANK TEMPLATE

# Give the team context without creating a shadow medical record.

Design the fields below as placeholders for your approved system. Do not complete this sample with a real person's information.

|                                           |                                  |
|-------------------------------------------|----------------------------------|
| SERVICE CATEGORY OR STATED INTEREST       | ORIGINAL INQUIRY SOURCE          |
| <div></div>                               | <div></div>                      |
| PROSPECT'S STATED NON-CLINICAL QUESTION   | INFORMATION ALREADY PROVIDED     |
| <div></div>                               | <div></div>                      |
| APPROVED FORMS / TASKS COMPLETED          | SCHEDULING OR ACCESS CONSTRAINTS |
| <div></div>                               | <div></div>                      |
| QUESTIONS REQUIRING PROFESSIONAL HANDLING | INTERNAL OWNER AND NEXT ACTION   |
| <div></div>                               | <div></div>                      |

WHERE THIS TEMPLATE LIVES

WHO MAY VIEW IT

WHO APPROVES FIELDS

**Design test:** each field must either help the next authorized person act or be removed. "Might be useful someday" is how duplicate, uncontrolled records are born.

CLOSE EVERY LOOP • 8 MINUTES

# One outcome, one owner, one dated next action.

| OUTCOME                      | AUTHORIZED OWNER | OPERATIONAL NEXT ACTION | DUE DATE RULE | PERMITTED CHANNEL | STOP CONDITION |
|------------------------------|------------------|-------------------------|---------------|-------------------|----------------|
| Next step chosen             |                  |                         |               |                   |                |
| Needs time                   |                  |                         |               |                   |                |
| Pricing / financing question |                  |                         |               |                   |                |
| Requires clinical follow-up  |                  |                         |               |                   |                |
| No-show                      |                  |                         |               |                   |                |
| Rescheduled                  |                  |                         |               |                   |                |
| Declined / closed            |                  |                         |               |                   |                |
| No response                  |                  |                         |               |                   |                |

### Universal stop conditions

- ☐ Opt-out or do-not-contact request
- ☐ Contact permission cannot be verified
- ☐ Issue becomes clinical, urgent, or privacy-sensitive
- ☐ Complaint or dispute requires manager handling
- ☐ Practice-defined attempt limit is reached

### Your attempt limit

MAXIMUM ATTEMPTS / PERIOD

WHO APPROVES EXCEPTIONS?

HOW CLOSURE IS RECORDED

BUILD APPROVED STRUCTURES—NOT IMPROVISATION

# Every message needs context, value, and one clear next step.

Use these cards to define message components for approval. Your practice supplies the actual wording, timing, consent rules, and professional review.

| MESSAGE TYPE         | CONTEXT TO INCLUDE | USEFUL INFORMATION | ONE NEXT STEP | APPROVED SENDER | WORDS / CLAIMS PROHIBITED |
|----------------------|--------------------|--------------------|---------------|-----------------|---------------------------|
| Booking confirmation |                    |                    |               |                 |                           |
| Reminder             |                    |                    |               |                 |                           |
| Reschedule           |                    |                    |               |                 |                           |
| No-show recovery     |                    |                    |               |                 |                           |
| Undecided follow-up  |                    |                    |               |                 |                           |
| Close-the-loop       |                    |                    |               |                 |                           |

### Approval gate

- ☐ Identity and sender are clear
- ☐ Only approved non-clinical information appears
- ☐ Terms and availability are accurate
- ☐ No result, candidacy, or safety promise is implied
- ☐ Consent and opt-out rules are satisfied

### Reply ownership

PRIMARY / BACKUP

REPLY DEADLINE

CLINICAL ESCALATION ROUTE

COMMIT THE OPERATING SYSTEM

# Install one visible workflow in seven steps.

- 1 Map the current path from booking through closure without fixing it mid-map.
- 2 Remove duplicate steps and define the secure-information boundary.
- 3 Assign primary and backup owners at every handoff.
- 4 Approve statuses, next-action fields, message structures, and stop conditions.
- 5 Test five blank scenarios: booked, rescheduled, no-show, undecided, and clinical escalation.
- 6 Run a daily 10-minute open-loop check for seven business days.
- 7 Review outcomes, lock the SOP, and schedule a 20-minute weekly control review.

### Priority breakdown

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CORRECTION / OWNER / DUE DATE

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### Weekly dashboard

- ☐ Booked, confirmed, arrived
- ☐ Rescheduled and no-showed
- ☐ Open with dated next action
- ☐ Open without next action
- ☐ On-time follow-up completion
- ☐ Opt-outs and exceptions

OPERATING OWNER / INITIALS

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AUTHORIZED APPROVAL / DATE

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## Your practice owns the prospective-client journey. Advancing AI can own the content production line.

See how approved expertise becomes managed short-form video—produced, packaged, and published without making your staff run a content department.

[advancingai.net/med-spas](https://advancingai.net/med-spas)

**Use boundary:** This self-guided educational workbook is for internal practice use. Nothing is submitted to Advancing AI. Advancing AI does not review, customize, implement, monitor, or operate this workflow. Do not enter patient-identifying or protected health information. This is not medical, legal, privacy, financial, or regulatory advice.