

The Med Spa Inquiry-to-Booking Control System

A self-guided workbook for tracking every inquiry, assigning ownership, and fixing the handoffs where prospects disappear.

45 minutes

Complete with your practice manager and front-desk lead.

One clear SOP

Leave with owners, statuses, escalation rules, and deadlines.

7-day test

Correct one measurable breakdown before changing everything.

START HERE · 8 MINUTES

Can your manager see every open inquiry without asking the team?

Complete this from what is actually visible today—not what the process is supposed to be. Mark **Unknown** whenever the answer cannot be verified. An unknown is a control gap, not a failure.

Privacy boundary: use aggregate counts and blank process examples only. Do not write patient names, contact details, treatment history, clinical information, or other identifying data anywhere in this workbook.

CONTROL QUESTION	YES	NO	UNKNOWN	OWNER
Phone, web-form, social, text, referral, and walk-in inquiries enter a visible queue.	☐	☐	☐	
Every inquiry has one named owner and one backup owner.	☐	☐	☐	
Every open inquiry has a status, next action, and due time.	☐	☐	☐	
A manager can identify overdue inquiries in under two minutes.	☐	☐	☐	
Clinical questions have an approved escalation route and response owner.	☐	☐	☐	
Contact permissions and opt-outs are visible and immediately honored.	☐	☐	☐	
Each inquiry's final operational outcome is recorded.	☐	☐	☐	
Management reviews inquiry performance on a fixed weekly cadence.	☐	☐	☐	

YES TOTAL

NO TOTAL

UNKNOWN TOTAL

Interpretation: 7–8 Yes = controlled; 4–6 Yes = inconsistent; 0–3 Yes = invisible. Any Unknown involving ownership, consent, or clinical escalation becomes a first-priority correction.

MEASURE REALITY • 10 MINUTES

Build the smallest useful baseline.

Use the last seven complete business days. Estimate only when necessary, label the estimate, and assign someone to make the number observable next week.

INQUIRY SOURCE	TOTAL	FIRST RESPONSES	TWO-WAY CONVERSATIONS	BOOKINGS	UNREACHED	UNKNOWN OUTCOME
Phone / voicemail						
Website / booking form						
Instagram / Facebook						
Text / chat						
Referral / other						
Total						

Response coverage

First responses ÷ total inquiries × 100

_____ ÷ _____ × 100 = _____%

Conversation rate

Two-way conversations ÷ total inquiries × 100

_____ ÷ _____ × 100 = _____%

Booking rate

Bookings ÷ two-way conversations × 100

_____ ÷ _____ × 100 = _____%

Unknown-outcome rate

Unknown outcomes ÷ total inquiries × 100

_____ ÷ _____ × 100 = _____%

Management rule: improve observability before debating performance. If outcomes are unknown, the first fix is status discipline—not another marketing campaign.

ASSIGN THE HANDOFFS • 8 MINUTES

Give every channel an owner, backup, clock, and finish line.

A queue is controlled only when the team knows who acts, by when, what status comes next, and when the item is truly complete.

TRIGGER / CHANNEL	WHERE IT ARRIVES	PRIMARY OWNER	BACKUP	TARGET WINDOW	NEXT STATUS	COMPLETE WHEN...
Missed call						
Voicemail						
Web form						
Social DM						
Text / chat						
Referral						

Your universal status set

Use the fewest statuses that still make the next action obvious.

- ☐ New / unassigned
- ☐ Assigned / response due
- ☐ Waiting for prospect
- ☐ Clinical or manager review
- ☐ Booked
- ☐ Closed / reason recorded

After-hours rule

WHAT RECEIVES AN ACKNOWLEDGEMENT?

WHO OWNS THE NEXT OPENING?

WHAT MUST NEVER BE HANDLED BY AUTOMATION?

Clinical boundary: front-desk and automated responses should not diagnose, assess candidacy, interpret symptoms, or promise outcomes. Route clinical questions to the practice's authorized professional using its approved process.

DEFINE THE OPERATING RULES • 8 MINUTES

Decide the next action before the next inquiry arrives.

Write process instructions—not marketing copy. Each row should tell a trained team member what to do, where to record it, and when to escalate.

SITUATION	REQUIRED ACTION	STATUS TO RECORD	OWNER / BACKUP	DUE BY	ESCALATE WHEN...
New inquiry					
Duplicate inquiry					
Clinical question					
Price-only question					
Unable to reach					
Ready to book					
Not ready					
Opt-out / do not contact					

WHERE IS THIS SOP STORED?

WHO APPROVES CHANGES?

Definition of done: every open item has either a dated next action or a documented closure reason. "We replied once" is not a completed process.

PROTECT THE TEAM AND THE PROSPECT • 5 MINUTES

Make “I need help” an operational route—not a dead end.

SITUATION	FRONT DESK MAY ANSWER?	MUST ROUTE TO	DEADLINE	APPROVED CHANNEL	CLOSURE EVIDENCE
Medical / candidacy question					
Adverse reaction or urgent concern					
Pricing exception / refund					
Complaint or negative experience					
Privacy / records request					
Influencer / partnership request					

Stop conditions

The workflow stops normal follow-up and routes immediately when:

- ☐ A person reports urgent symptoms or harm
- ☐ Identity or consent is uncertain
- ☐ A privacy concern is raised
- ☐ An opt-out is received
- ☐ Staff is asked to exceed its authority

Practice-specific stop rules

APPROVED BY / DATE

This workbook does not define emergency, clinical, legal, privacy, or regulatory procedures. Insert the practice's approved policies and professional guidance here.

RUN THE TEST • 7 DAYS

Track the control—not just the bookings.

At the same time each day, record the counts below. Keep the review under five minutes and assign one correction when a breakdown repeats.

DAY / DATE	NEW INQUIRIES	OVERDUE NOW	UNKNOWN OUTCOME	BOOKINGS	BREAKDOWN OBSERVED	CORRECTION + OWNER
1 /						
2 /						
3 /						
4 /						
5 /						
6 /						
7 /						

STARTING OVERDUE COUNT

ENDING OVERDUE COUNT

UNKNOWN OUTCOMES REMOVED

WHAT BECAME EASIER FOR THE TEAM?

WHAT STILL DEPENDS ON MEMORY, HEROICS, OR ONE PERSON?

TURN THE WORKSHEET INTO A HABIT

Choose one correction and lock the weekly rhythm.

Priority correction

BREAKDOWN WE ARE FIXING

OWNER / BACKUP

SUCCESS WILL BE VISIBLE WHEN...

Weekly control meeting

DAY / TIME / ATTENDEES

☐ Count new and overdue inquiries

☐ Review unknown outcomes

☐ Inspect one failed handoff

☐ Assign one correction

☐ Confirm SOP or template changes

Seven-day rollout

- 1

Agree on one status set and one visible queue.
- 2

Assign a primary and backup owner for every channel.
- 3

Publish the response SOP and escalation matrix where the team works.
- 4

Run one test inquiry through every channel.
- 5

Track the seven-day control sheet at a fixed daily time.
- 6

Review repeated exceptions; change the process, not the story.
- 7

Approve the final operating rule and schedule the weekly review.

OPERATING OWNER / INITIALS

MANAGER APPROVAL / DATE

Your team owns the inquiry journey. Advancing AI can own the video production line.

See the managed medical-spa video system—production, approval, packaging, and publishing—without adding a content department to your payroll.

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.