OPERATIONS, MODULE 4

# Rules and automations

A clinic that runs on rules does the same thing every time without anyone remembering to. After this module you know the fourteen automations every medspa should have, what each one is for, which tool runs it, and the three things that should never be automated.

## The principle

Automate what is the same every time: the reminder, the recall, the bank rule, the review request. Keep a person on what is different every time: the consult, the complaint, the judgment call, the number over the threshold. The test for any automation is whether it would be embarrassing if it fired at the wrong moment. If yes, it suggests and a person confirms. If no, it runs.

## In the books

| Automation | What it does | Rule of thumb |
|---|---|---|
| **Bank rules** (Finance 3) | Codes recurring transactions by vendor: software, rent, payroll fees, utilities | Match on the description, not the amount. Auto post only the fixed monthly charges; everything else suggests. |
| **Review threshold** | Any bank line above a set amount waits for a person | $2,500, the same line as the capitalization threshold |
| **Recurring entries** | Templates for depreciation, the deferred revenue roll, amortization, and any monthly intercompany invoice | Set to remind, not schedule, so a person confirms the amount |
| **Receipt capture** | Photographed or forwarded receipts read and matched to the bank line | The habit is yours; the matching is automatic |
| **Booking system to books** | Daily sales, deposits and deferred revenue posted from the booking platform | Match, never categorize, the processor deposit (Finance 3) |
| **Books locked after close** | The closing date moves forward after every close so a finished month cannot drift | Set by your bookkeeper, every month, without exception |

## With patients

| Automation | What it does | Rule of thumb |
|---|---|---|
| **Missed call text back** | A text within two minutes of a missed call, with a booking link | The single highest return automation in the clinic (Operations 1) |
| **After hours reply** | Forms and messages get an immediate reply with a booking link and "a person will follow up at 9am" | A person follows up at 9am. The automation buys time; it does not replace the reply. |
| **Consent forms by text** | Sent at booking, completed before arrival | Cuts arrival time and keeps the chart complete (Operations 5) |
| **48 hour reminder** | Asks for a reply to confirm; a non reply triggers a call from the desk | Confirmation requests halve no-shows; one way reminders do not |
| **After visit text** | Aftercare and a review link the same evening, from the provider's name | Only after visits marked complete without a complaint flag |
| **Recall** | Neurotoxin at day 75, filler at nine months, skin at six weeks, for patients with no future appointment | Two automated touches, then a personal message from the provider (Operations 7) |
| **Failed membership payment** | A text the same day with a link to update the card; a second in three days; then the desk calls | Most failed payments are expired cards, not cancellations (Operations 6) |
| **Birthday and anniversary** | A small credit or a member perk, sent automatically | Cheap, and patients remember it |

## Three things that should never be automated

1. **The reply to a complaint or a bad review.** A person, within the day, briefly and kindly.
2. **A journal entry, a merge, or a delete in the books.** A person with the reason written in the memo (Finance 3).
3. **Anything that leaves the building with patient information in it.** Every automation that texts or emails a patient runs through a tool that signs a business associate agreement and keeps clinical detail out of the message (Operations 5). "Your appointment is Tuesday at 2" is fine. "Your neurotoxin follow up" in a text is not.

## The audit, once a quarter

List every automation, what triggers it, what it sends, and when it last fired. Send yourself a test of each one. Automations rot: a template changes, a tool updates, a staff member turns one off to fix a one time problem and never turns it back on. The recall text that quietly stopped in March costs you patients until someone notices in September.

> **Where Benchmark comes in.** The bank rules, thresholds and recurring entries are built in the sprint and maintained every month. The patient facing automations are set up as a monthly initiative and as the AI and automation service, with the quarterly audit on the calendar so nothing rots. Operations 9 covers what AI adds on top.

# Try it yourself

- [ ] Call your own clinic from a number it does not know, hang up, and time the text back. If there is no text, that is automation one.
- [ ] Book yourself a fake appointment. Check what arrives at 48 hours and whether it asks for a reply.
- [ ] List every automation you believe is running. Ask the desk which ones actually are.

### Check yourself: Operations 4

**A bank rule should match on**

- The amount
- The description or vendor name
- The date

Amounts change. The description catches every month's charge.

**The 48 hour reminder should**

- Just inform
- Ask for a reply, with a non reply triggering a call
- Be sent a week ahead

Confirmation requests halve no-shows; one way reminders do not.

**A text that says "your neurotoxin follow up is due" is**

- Helpful
- Clinical detail in an unsecured message; keep it out
- Required

Automations that reach patients must keep clinical detail out and run through a tool with a business associate agreement.

**A bad review should be answered by**

An automated template

A person, within the day, briefly and kindly

Nobody

Every future patient reads the reply.

**Automations should be audited**

Never, they run themselves

Quarterly, with a test of each one

Only when something breaks

They rot quietly. The one that stopped in March costs you until someone notices.

**Pick an answer for each question.**

## Want this done, not just explained?

The 10-Day Sprint finds the leaks for $1,000, one time. After that, on the plan, the scorecard keeps coming and at least one growth initiative is executed with you every month. Plans from $2,299 a month. Everything in this module is part of that work.

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