OPERATIONS, MODULE 1

The patient's visit, start to finish

Every number on the scorecard is produced by what happens between a patient's first call and the moment she walks out. After this module you know the eight moments that matter, what the desk and the provider say at each, and which scorecard number each moment moves.

The eight moments

Moment	What good looks like	Number it moves
1. The inquiry (call, form, DM)	Answered inside five minutes during hours; a text reply inside five minutes after hours with a booking link. A missed call gets a text back, not voicemail.	Leads that book a consult
2. The booking	Card on file, the late cancellation policy stated once, consent forms sent by text to complete before the visit, a 48 hour reminder that asks for a reply.	No-show rate
3. Arrival	Greeted by name, forms already done, waiting under five minutes. The desk mentions the membership once, lightly: "Ask Ava about the membership if you're planning to come regularly."	Reviews, membership
4. The consult	Listen first, then a plan with a price, then the same day offer: "We can do the first area now if you'd like." Photos taken. Everything charted, including units.	Consults that book a treatment, units per patient
5. The treatment	The provider names the return date in the room: "See you in twelve weeks; they'll set it up at the desk." Aftercare explained and sent by text. Product used recorded before the next patient.	Rebook, inventory variance
6. Checkout	Before payment, in this order: the next appointment with two specific times; the one product the provider recommended; the membership if she is a repeat patient. Then the payment.	Rebook, retail attach, membership adds
7. After the visit	A text the same evening: how are you feeling, here is the aftercare again, and a review link if the visit went well. The provider's name on it.	New reviews

8. Recall	If she did not rebook: a text at day 75 for neurotoxin, nine months for filler, six weeks for skin. Then a personal message from the provider if there is no reply.	Back within 90 days, lapsed patients

> **The order at checkout matters.** Ask for the rebook before the payment, while the patient is still seated and the provider's words are fresh. Rebook first, retail second, membership third, payment last. Clinics that reverse the order lose ten to twenty points of rebook.

Scripts that work

Not a script that sounds like one. Three sentences the whole team knows, in the team's own words.

Moment	Say	Do not say
Rebook	"Your next visit should be around March 12. I have Tuesday the 11th at 2 or Thursday the 13th at 5:30. Which is better?"	"Would you like to book your next appointment?"
Retail	"Ava recommended the sunscreen for the next two weeks. I'll add it, and it's 10% off for members."	"Do you need any products today?"
Membership	"You're in every three months for this anyway. Members bank it monthly, save about $15 a visit, and get first pick of the schedule. Want me to set that up?"	"We have a membership program, here's a brochure."
Review	"If today went well, this link takes thirty seconds and it means a lot to Ava." (by text, that evening)	"Leave us a review!" (on a sign)
Missed call	Text within two minutes: "Hi, this is Harbor Aesthetics, sorry we missed you. What can we help with? You can also book here: [link]."	Voicemail

Speed to lead

Of every stage in the funnel, the one most often fixed by a process change rather than money is the first reply. Leads answered within five minutes book at several times the rate of leads answered in an hour. Practical setup: every form and DM routes to one shared inbox the desk watches; after hours, an automatic text reply with a booking link (Operations 4) and a human follow up in the morning. Test it yourself: send a form at 8pm and time the response.

The consult that converts

1. **Ask what she wants to change**, and let her finish.
2. **Show, do not tell.** A mirror, a photo, a marker. "This area, this many units, this is what it will look like in two weeks."

3. **One plan, one price**, said plainly. "Forty units, $560, about thirty minutes."
4. **The same day offer.** "We can do it now if you'd like." Most patients who came for a consult came to be treated.
5. **Book the follow up before she leaves the room**, even if she does not treat today.

Charting and recording product

Units, syringes, lot numbers and photos recorded before the next patient walks in. This is a compliance requirement (Operations 5), the source of units per patient and the inventory count (Operations 3), and the evidence a buyer's team asks for (Advanced 6). The provider who charts at the end of the day is the provider with the biggest variance.

> **Where Benchmark comes in.** The scripts, the checkout order and the after visit text are written for your team as a monthly initiative and as part of a website or marketing build. Every one of the numbers in the table is on your scorecard, by provider, so you can see which moment is working and which is not. A sales training day with your team is a service we quote.

Try it yourself

- [ ] Send a form through your own website at 8pm. Time the reply.
- [ ] Sit at the desk for one afternoon. Count how many checkouts include the rebook question before payment.
- [ ] Write the three sentences (rebook, retail, membership) in your team's words. Tape them under the desk monitor.

Check yourself: Operations 1

The right order at checkout is

- Payment, then rebook
- Rebook, retail, membership, then payment
- Membership first

Before the transaction closes, while the provider's words are fresh.

A lead answered in five minutes versus an hour

- Books at about the same rate
- Books at several times the rate
- Is less likely to book

Speed to lead is the cheapest fix in the funnel.

The rebook is set up best by

- The desk, cold
- The provider naming the date in the room, then the desk offering two times
- An email the next day

The provider's sentence in the room does most of the work.

Units and lot numbers should be recorded

- At the end of the day
- Before the next patient
- At month end

Compliance, inventory and the scorecard all depend on it, and end of day charting is where variance comes from.

A missed call should get

- Voicemail
- A text within two minutes with a booking link
- A call back tomorrow

Most callers who reach voicemail call the next clinic.

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.

See the sprint and pricing | Text Nate

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