

Med Spa Consultation Booking Playbook

FREE INDUSTRY PLAYBOOK | OCTOBER 2026

A practical resource for business owners. Adapt message templates to your staff, customers, availability and applicable laws.

1. Keep scheduling separate from clinical advice

Marketing inquiries should ask for a callback or consultation scheduling preference, not diagnoses, clinical details or treatment decisions. Route patient safety and treatment questions to appropriately qualified clinicians.

- New administrative inquiry
- Staff contacted and consultation process explained
- Consultation offered, then confirmed with actual calendar availability
- Consultation attended or rescheduled
- Follow-up only where permission and applicable rules allow

2. Clear first reply and reminders

- First reply: Thank you for contacting [practice]. Our team can help schedule a consultation. Would you prefer available times or a call from the front desk?
- Confirmation: Your consultation is scheduled for [day/time]. For directions or a change, contact [approved practice channel].
- Reschedule: We noticed you requested a change. Please tell us which days generally work and staff will confirm an available appointment.

3. Practical weekly metrics

- Time to first administrative reply during actual staffed hours
- Consultation requests received and confirmed appointments
- Consultation attendance rate = consultations attended / confirmed consultations 100
- Unanswered inquiries awaiting staff action, without sending sensitive customer details to analytics

4. Safeguards and staff review

Review every automated text with the practice and its compliance team. Follow applicable privacy, healthcare advertising and messaging rules, including HIPAA where it applies. Do not promise clinical results, use unverified before-and-after claims or store sensitive patient information in a marketing-only CRM.

YOUR NEXT STEP

Identify one lead follow-up bottleneck this week and assign a staff owner. If you want a written review of your current intake and booking process, visit:

www.upskillzsolutions.com/contact

More free resources: www.upskillzsolutions.com/resources

Educational material only. No guaranteed increase in leads, appointments or revenue.