

1 HOUR CONSULTATION PLAN

	<u>Action Items to Complete</u>	<u>Who</u>	<u>Due Date</u>	<u>Status</u>
1	Map our your consultation format and format in writing			
2	Have a team meeting agreeing on consultation format			
3	Practice your consultation roles with the entire team			
4	Allow one hour on your schedule per consultation			
5	Train reception team on lead conversion to consultation			
6	Practice explaining the consultation process			
7	Script and practice explaining consult benefit to patients			
8	Set up weekly meetings to get consultation format in place			
9	Keep consultant in room from start to closing and payment			
10	Practice consultations with team and Provider			
11	Practice credentialing your providers!			
12	Also, practice your 30 second credentialing of yourself!			
13	What makes our practice special or unique			
14	Share your personal experiences of getting services if you can			
15	Practice building rapport and open-ended questions			
16	Use your tracking log to track consultation ratios and quantities			
17	Track closed consults per month - 70% is the goal			
18	Practice soft closing statements and transition in consultation			
19	Practice educating clients on why they should want the proper credentialed provider and the downsides of potential bad outcomes			
20	Make patient credit available during consultation			
21	Be able to offer procedure times at consultation			
22	Prepare to process deposit with a one consult close			
23	Review your benefit selling scripts for all services weekly			
24	Review and update your quote forms - new services			
25	Confirm process for office for pre-procedure and post appointment schedule			
26	Deposits at the consultation range from 50% to \$500 to payment in full. Know your policy!			
27	Unclosed consultation follow up: thank you note			
28	Implement using your Incoming Call Tracker			
29	Utilize your upselling tracking spreadsheet			
30	Review results monthly and adjust process quarterly			
31	Set clear goal for number of consults per week			
32	Revise menu with all ancillary treatments: Injectables, Microneedling...			
33	List all the service to upsell, add on or bundle			
34	Be up to date on current promotions, contests and events			
35	Report of top RX skin care product sales			
36	Narrow down to best sellers and reduce overlap			
37	Review Package Bundling to create			
38	Implement Buy 2 get 1/2 off the 3rd as a standard for product sales			
39	Create full patient plan quote form for consultations			
40	Create follow up call log and turn in weekly for unclosed consults weekly			
41	Start a Patient Rewards System			
42	Implement a patient referral reward system			
43	Run monthly sales contests for staff			
	PROVEN SYSTEMS CREATE PROVEN RESULTS!			