Customer Service:

How to answer the phone:
"Good (morning/afternoon/evening) Massage Studio how can I help you?"

How to end the phone call:
Thank the client for calling and tell them to have a wonderful day. Do your very best to never leave a client with a "no" answer. If we don't have an appointment time available that they have requested, offer them other days/times.

How to book an appointment:
- Make sure you are on the "appointments" tab in mind body
- search for the specific day/time the client is asking for
- if not available continue to try to get them to book by offering them other days/times
- If the client is specific about a day/time they want to book-even if it is same day try to add them to the wait list and let them know that we will notify them if their desired day/time becomes available.

Add a client to the wait list:
- Make sure you are on the "appointments" tab in mind body
- choose the magnifying glass icon (search icon) from the bottom left
- Search for the unavailable time that the client wants to be wait listed for
- Choose "add to wait list" button from upper right
- enter client info and save

Add an appointment from the wait list:
- Choose the envelope icon from the bottom left of the screen in the appointments tab from mind body
- Choose "show appointment requests"
- Choose "book appointment" from the right side of the client info sentence.

For more instructions on using mind body click here

For more on Trouble shooting client questions click here

Front Desk/Therapists how to greet a client:
- Acknowledge the client as best you can as soon as they enter even if you are on the phone or with another client
- As soon as you are available show the client where they can sit, offer them water or tea and show them where the restroom is. Ask the client if they have been in before and if not provide them with the appropriate paper work: massage intake form for new clients not using insurance or for new insurance clients: hippa, financial agreement and intake form.

- If this is a new insurance client you will also need to make 2 copies of their photo id and insurance card (also claim and adjuster number for MVA/workers comp). Put one copy in “new insurance file” in A-G filing cabinet and one copy in client file. You will also need to put their credit card information on file in Mind Body in the client profile section.
- Give the intake form to the therapist and let them know their client is ready for them. Let the client know the therapist will be right with them.

How to check in a new client: [Click HERE for instructions]

Therapist how to do an effective intake with clients:

- Take a minute to read through client intake form if they are new or client notes/intake (prior to arrival) if they are returning. If returning, pay attention to special alerts or requests by clients, remember to look at client requests for pressure, music and chatting in client index (under client profile).
- Great the client by introducing yourself and letting them know you will be their therapist today, ask if they need more water and/or the restroom before you head into the treatment room. Lead the client to the treatment room and show them where they can sit and put their things. Allow time to chat with the client, ask about their day and what types of issues they are having with their body. Ask what, if anything they would like to focus on in the session. Ask if they would like heat on the table. Repeat to the client what your treatment plan for the day is as well as the type of appointment/duration they have signed up for to make sure you are on the same page. Remind the client that they can tell you at any time if there is something you are doing that doesn’t work for them or that they would like changed. Direct clients on how they should orient themselves on the table and instruct them on dress/draping. Ask if they have any questions and let them know you will give them a few minutes and knock upon returning.

Therapist end of appointment protocol:

- At the end of the session place the pillow case or a hand towel on the ground in front of the chair for the client to step on and a hot washcloth on the hook by the mirror for the client to wash off extra oil.
- Let the client know the session has ended, that you have left the above items for them, that they can take their time getting up and that you will meet them outside when they are ready.
- When a client comes out, be ready and wait for them with water if appropriate or if they have their glass, offer them more water if needed. Ask the client how they are feeling and offer some insight on what you noticed about their body during the massage. If appropriate offer some at home treatment ideas such as stretches, hot packs, salt baths etc.. Instruct the client on a massage treatment plan that you recommend for them and let them know how it would benefit them in the long run. Thank them for coming and let them know that you hope to see them again. Direct them to the front desk to check out (or continue into front desk check out procedures if no one is working the front desk).

Front desk **check out procedures:**

- Ask the client if they enjoyed their treatment
- Check out the client in mind/body as needed and ask the client if they would like to include a tip and if they would like a receipt emailed to them.
- Ask the client if they would like to rebook at this time and let them know about our membership, packages and any specials we have at the moment.
- Let the client know that they are welcome to relax on the rooftop or enjoy a cup of tea before they head out for the day (if the availability/schedule allows).
- Thank them for coming and hand them a business card, let them know that we hope to see them again soon.

Front desk after check out procedures:

For new clients:

1. If they have given permission to be contacted via email add their name and email to the monthly newsletter list here:
2. Add the clients information to their profile in Mind Body. (birthday, referral source/how they found us, address)
3. Indicate how the client found us in the marketing tracker.
4. Create a contact log under the client's profile for them to be contacted via email the day after their appointment about how they are feeling. set the follow up date
5. File client's folder

For return clients:

1. Create a contact log under the client's profile for them to be contacted via email the day after their appointment about how they are feeling. set the follow up date and
2. If the client signed up for VIP please add their email to the Happy hour list here:
3. File client's folder

Therapist After check out procedure

- For non-insurance: Go to client profile-Formula Notes and write what client said, what you observed, the type of massage you did and any other notes
- For Insurance: Complete paper SOAP Note, make a copy and put in insurance file in "A-G" file cabinet. Put original in client file. Make notes about any allergies or preferences in client profile-Allergies and Formula Notes
- For new clients,new insurance or returning client that you have discussed a new treatment plan with: Use a note card to write client a suggested treatment plan and put it in the clients file for receptionist to mail. Use a post it note in file for any notes the receptionist should read when following up with client.
- Put client file in the bottom drawer of the white cabinet for receptionists to complete

Front Desk Follow ups with Contact Logs

- When you are logged into Mind Body you will see a small box with an arrow pointing down icon located in the upper right hand corner of the page.

- Click on the icon and you will be able to access the log and see what clients you need to contact each shift.
- Follow up with clients via phone or email to make sure they enjoyed their service.

Front Desk Follow ups with Treatment Plan Mailers for new clients, new insurance or returning clients with new treatment plan

- Look in each file before shelving it to see if the therapist has included a treatment plan card or notes for you
- Prepare mailer: Get a thank you card and envelope from drawer and write the following:
    - (client name), Thank you so much for your visit on (insert day/date). We hope you are feeling wonderful after your (massage/acupuncture/sauna) and that we will get to see you again soon! We are writing to send you a copy of your recommended treatment plan provided by your therapist. We are here to support your goals to achieve balance in your body by offering a guide to help you reach optimal health. If you have any questions about it please don't hesitate to give us a call at 503-473-8515. We have included a couple of business cards for you to pass along to friends, we love your referrals AND we are happy to give you 30 minutes free for each person you send our way! Thank you so much for your business and have a wonderful day,
      -The Massage Studio Team
- Add 3 business cards+the treatment plan card to the thank you card, seal, address to client and place in black basket for Manager to send.
- Go to client profile on mind body and make a note under contact log of what the treatment plan is and when it was sent

Front Desk How to answer Emails:

- Always use a positive and very friendly voice starting with something like "I am happy to help you with booking a massage appointment...." for example. It is best to never directly say no but to offer a solution instead such as: "unfortunately we don't have any appointments available for tuesday evening but we do have openings with Julie on Wednesday at 4:30, 6 or 7:30 if you are interested?"
- If you aren't sure what the client is asking don't hesitate to ask for clarification so that you can answer the question appropriately.
- For common questions you can check the pre-written/canned responses. To access them "reply" to the email or compose a new one. In the bottom right hand corner of the response there will be a tiny down arrow (next to trash can icon). Click it and you will see a link to "canned responses". Click it and from there you can choose from common issues and customize for a particular question from there.
- If it is too complicated for you to answer please text Manager at phone number to get help