

The Growth-Proof Med Spa Playbook

A practical 90-day reset for building a med spa that protects margin, creates a consistent client experience, and does not depend on one provider staying forever.

INSPIRED BY THE BUSINESS OF AESTHETICS CONVERSATION WITH CARLA PEARSON AND MARY FORD

Use this workbook to identify the one system your practice needs to strengthen first.

THE CORE IDEA

A practice should compound as talent grows

When a top injector leaves, does your practice lose its experience, client relationships, and momentum - or can the business keep serving clients with the same standards?

YOUR FAST DIAGNOSTIC

Where is your practice most exposed today?

- ☐ A provider holds too much of the client relationship.
- ☐ Standards and client experience change from room to room.
- ☐ Pricing or discounting is driven by fear instead of a plan.
- ☐ Compliance and quality live in people's heads, not repeatable systems.
- ☐ The owner is still the bottleneck for routine decisions.

YOUR 90-DAY INTENTION

If one system improved, which would change the business

01 / TALENT

Build a model people want to stay connected to

The goal is not to eliminate loyalty to an injector. It is to make the practice experience, operating standards, and client relationships strong enough that growth does not create fragility.

1

Make the value visible

Document the support that lets providers do their best work: training, clinical standards, quality oversight, marketing support, scheduling and business tools.

2

Set honest expectations

Clarify responsibilities, content expectations, performance standards, communication norms and what success looks like before surprises create disengagement.

3

Plan for continuity

Treat hiring plans, client handoffs, provider coverage and role documentation as continuity infrastructure - not an emergency response.

PRACTICE PROMPT

What would a provider say is difficult to replace about your practice?

02 / FOUNDATION

Make quality and compliance a system

Multi-location or multi-state growth requires more than a medical-director name on a document. Create a visible, repeatable way to keep standards current and to show how oversight actually happens.

The scale-before-you-scale checklist

- ☐ State-specific requirements and role responsibilities are assigned and reviewed on a defined cadence.
- ☐ Clinical, consent, chart-review, and escalation workflows are documented and accessible.
- ☐ A named owner is responsible for quality follow-up, audit results, and corrective action.
- ☐ Medical direction and provider coverage match the actual operating model in each jurisdiction.
- ☐ Your team knows when to stop and consult a qualified legal or clinical professional.

Choose one control to strengthen this month

Control / review cadence: _____

Accountable owner: _____

Evidence it is working: _____

03 / MARGIN

Protect margin without racing to the bottom

Discounting can feel like the fastest response to pressure. A more durable move is to review your pricing discipline, client conversations, and care-plan experience together.

1

Price with intention

Set a scheduled review. Make price decisions based on your cost structure, positioning, clinical standards, and capacity - not the loudest competitor.

2

Reduce reflex discounting

Identify the offers that train clients to wait, then define a clear boundary for when promotions are used and why.

3

Improve the consultation

Give providers a simple way to explore goals, options, budget, and a broader plan in an ethical, non-pressured conversation.

TEAM CONVERSATION

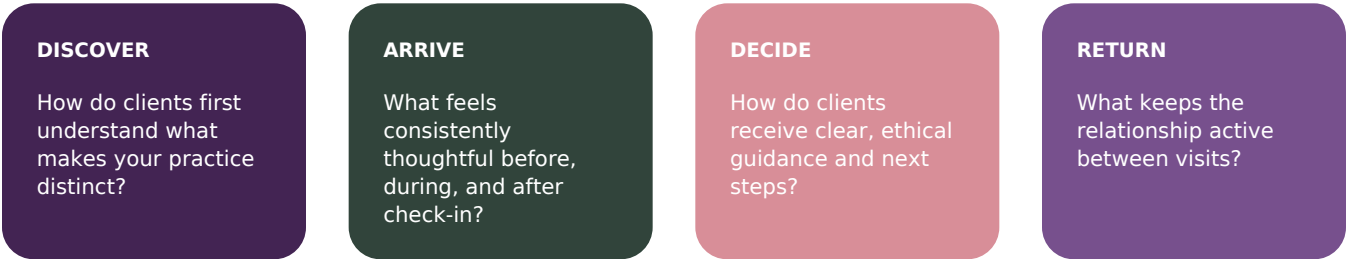
What should every consultation consistently uncover?

- ☐ The client's real goal and decision criteria
- ☐ Relevant options and tradeoffs within the provider's scope
- ☐ A clear next step - including when no treatment is the right next step

04 / EXPERIENCE

Create an experience that is bigger than one provider

Clients may love a particular injector. The practice still needs a recognizable experience across the entire journey - so quality and trust remain when staffing changes.



Your retention infrastructure

- ☐ Shared client notes and handoff standards that protect continuity.
- ☐ Membership, loyalty, education, and follow-up designed around real client value.
- ☐ A documented recovery process when a client feels uncertain, disappointed, or disconnected.

ONE EXPERIMENT TO TEST

05 / AI

Use AI to remove administrative drag

The most useful applications are often behind the scenes: repeatable admin work, draft creation, workflow support, system research, and controlled process improvement. It is not “set it and forget it.”

GOOD PLACES TO EXPERIMENT

- ☐ Drafting internal SOPs and checklists
- ☐ Organizing routine operations work
- ☐ Supporting finance or website tasks with human review
- ☐ Preparing marketing workflow drafts

NON-NEGOTIABLE GUARDRAILS

- ☐ Human review and accountability
- ☐ Approved privacy and security controls
- ☐ No sensitive information in unapproved tools
- ☐ Documented limits and escalation paths

Pick a low-risk workflow first

Start where the work is repetitive, reviewable, and does not require sensitive client information.

Workflow I will test:

Human reviewer:

Success metric (time, errors, cost, or turnaround):

90 DAY RESET

Turn insight into a weekly operating rhythm

You do not need to rebuild everything at once. Choose one target per phase, name the owner, and make the proof visible.

DAYS 1-30

Diagnose

WHAT HAPPENS

Map where provider dependency, quality risk, margin pressure, and owner bottlenecks show up. Pick one priority.

PROOF A one-page baseline and named owner

DAYS 31-60

Build

WHAT HAPPENS

Document the workflow, train the team, and run it in a limited, controlled setting.

PROOF A usable SOP plus team feedback

DAYS 61-90

Prove

WHAT HAPPENS

Review results, adjust the process, and decide whether to standardize, stop, or improve it.

PROOF A decision backed by measurable evidence

MY FIRST MOVE _____

YOUR SCORECARD

Choose the system that deserves your attention

Rate each statement from 1 (not true today) to 5 (consistently true). Your lowest score is often the best place to start.

Talent continuity

We can protect client experience through a provider transition.

1

2

3

4

5

Quality system

Our key clinical and compliance processes have an owner and review rhythm.

1

2

3

4

5

Margin discipline

We make pricing and promotion choices from a deliberate strategy.

1

2

3

4

5

Client experience

The client journey is consistently valuable beyond one provider.

1

2

3

4

5

AI governance

We can test low-risk AI workflows with clear safeguards and human review.

1

2

3

4

5

MY 90-DAY FOCUS

The system I will strengthen first:

WHY THIS MATTERS NOW

Your growth plan needs a patient-acquisition engine.

Build the operational model you want - then make sure the right clients can find it. Claim a complimentary 60-minute Marketing Strategy Meeting to map a realistic 12-month roadmap for attracting high-value patients.

BOOK YOUR COMPLIMENTARY MSM

businessofaesthetics.org/msm/



SCAN TO BOOK