

Protocol for a First Time Client

Scheduling a first time client

- Name
- Phone number
- Email address
- Why are you seeking massage?
- Determine length or type of session
- Confirm the appointment time and date
- Inform of cancellation policy
- Send confirmation email with appointment time and date directions to office, cancellation policy, link to intake forms

Pre-assemble client files with everything you need

- Manilla folder
- Intake form
- Treatment note blank
- Thank you note
- Thank you to referral source

At the first massage

- Intake forms
- Health history form
- Permission to thank referral source
- Acknowledgement of cancellation policy
- Permission to send emails

After the massage

- Discuss treatment and any self-care
- Take payment
- Schedule next appointment (or make offer to connect at a point in the future to do so)
- Treatment notes and record of payment
- Assemble file, noting any special precautions/allergies
- Add all info to scheduling system, email program, any other database
- Schedule a reminder to make a follow up call or email 1-2 days later
- Write thank you notes to client and referral source