



Business Growth Fundamentals for a Medical Aesthetics Clinic & Collaboration opportunities with UpMyBusiness





Active Doctors in Medical Aesthetics are no longer supposed to think and act only as health experts...





They also need to think and act as businesspeople and build a successful and profitable business model



&





UpMyBusiness with more than 20 years solid of experience in the field of Medical Aesthetics can be your ally for your practice's growth



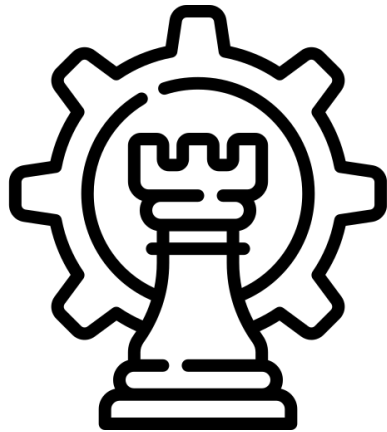
This presentation contains all the business fundamentals that consist a sustainable and profitable private practice in Medical Aesthetics as well as the collaboration opportunities with the team of UpMyBusiness experts

# Topics



- ✓ Business Strategy.....Slide 6
- ✓ Pricing .....Slide 18
- ✓ Service Packages - Treatment Plans.....Slide 22
- ✓ Patient Monitoring Tools (CRM).....Slide 30
- ✓ Marketing Strategy.....Slide 34
- ✓ Patient's journey inside the clinic.....Slide 40
- ✓ Staff Training.....Slide 45
- ✓ Tasks management and SOPs.....Slide 51
- ✓ Business Performance Assessment Tool (Check Up My Business).....Slide 58

# Business Strategy



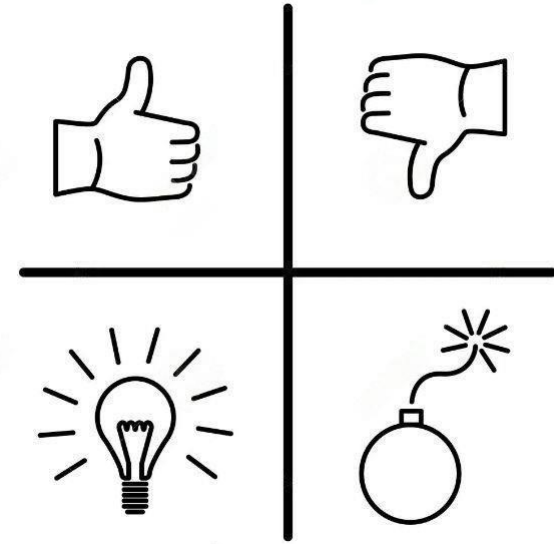
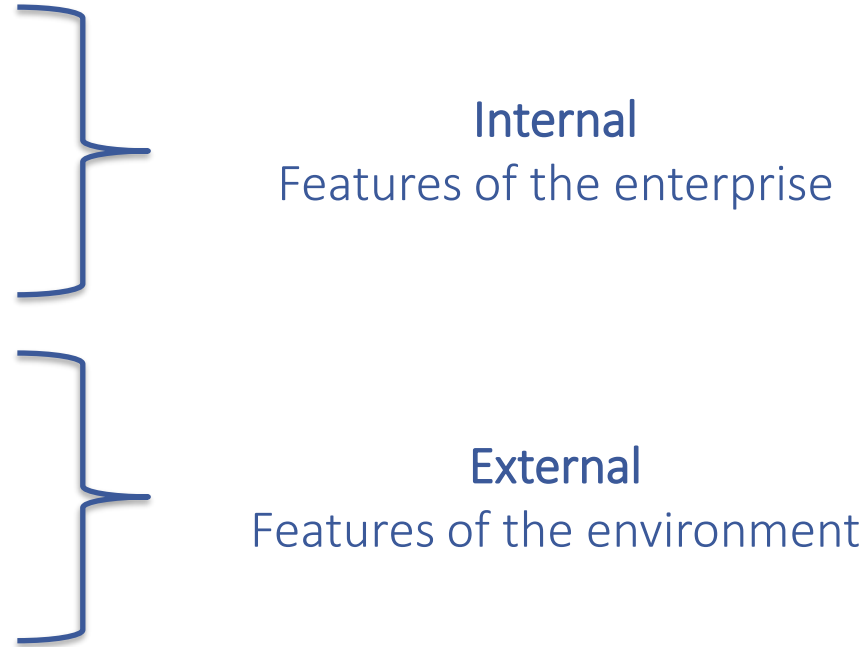
Crafting the optimal strategy requires a sequence of actions ...

# Swot Analysis

The first and most important driving force behind every business decision is the SWOT analysis

We identify:

- ✓ Strengths
- ✓ Weaknesses
- ✓ Opportunities
- ✓ Threats



This analysis helps us determine our position in the market and form the path to the overall growth of the practice.

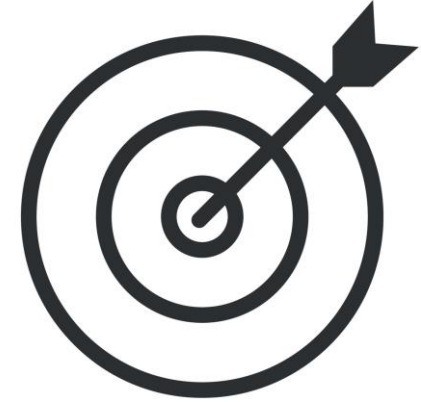
# Targeting (General Business Goals)

The process of goal setting begins with the creation of the general business goals.

- Not more than 2-3
- Relevant to the overall strategy
- Prioritized

Examples of general goals:

- ✓ Increase of the total turnover
- ✓ Incremental growth via loyal and returning patients (repeat business )
- ✓ Recruitment of new patients (new business)
- ✓ Set-up of a call-back mechanism for inactive patients
- ✓ Excellence in team performance





# Targeting (S.M.A.R.T. Targets)

Following the general goals, we need to setup the aligned objectives and make sure that...

- ✓ They should be **specific**
- ✓ They should be **measurable**
- ✓ They should be **attainable**
- ✓ They should be **realistic**
- ✓ They should be **time-framed**



Let's see an example to better understand...

# Example of S.M.A.R.T. Targets

General Business Goal: Increase of the total turnover

Respective S.M.A.R.T. Target could look something like this:

**Specific** - (i.e., a 20% increase in patients getting injected with BOTOX...)

**Measurable** - (... that will offer an additional 10.000K€ turnover per year...)

**Achievable** - (...with an increase in the returning rate from every 8 months on average to 6 month...)

**Realistic** - (...by applying a recall strategy to those who received the treatment and cross sell with fillers...)

**Time-bound** - (... Within the next 12 months)

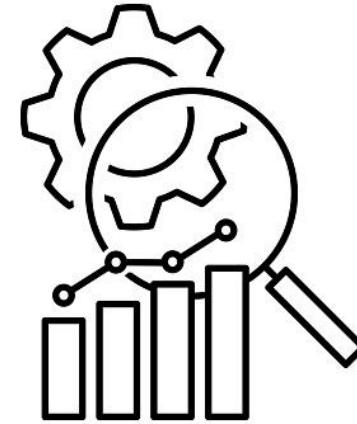


# KPIs (Key Performance Indicators)

KPIs provide us with quantitative data linked to our S.M.A.R.T. targets and allow us to constantly evaluate our performance and make timely changes to our strategy.

## Examples of KPIs:

- ✓ Comparing the turnover of BOTOX treatment month by month
- ✓ Annual rate of repetition of treatments
- ✓ Number of injection areas per patient
- ✓ Growth opportunities with a Cross– Selling scenario
- ✓ Monthly monitoring of new patients



# Monitoring business performance

Monitoring your business' performance is fundamental to understanding where it's really heading.

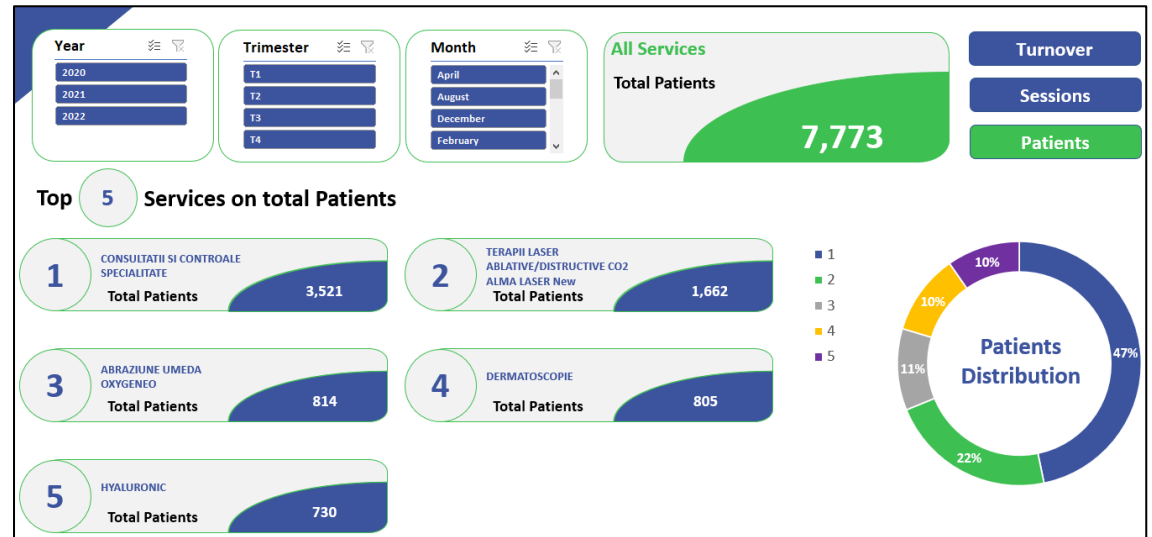
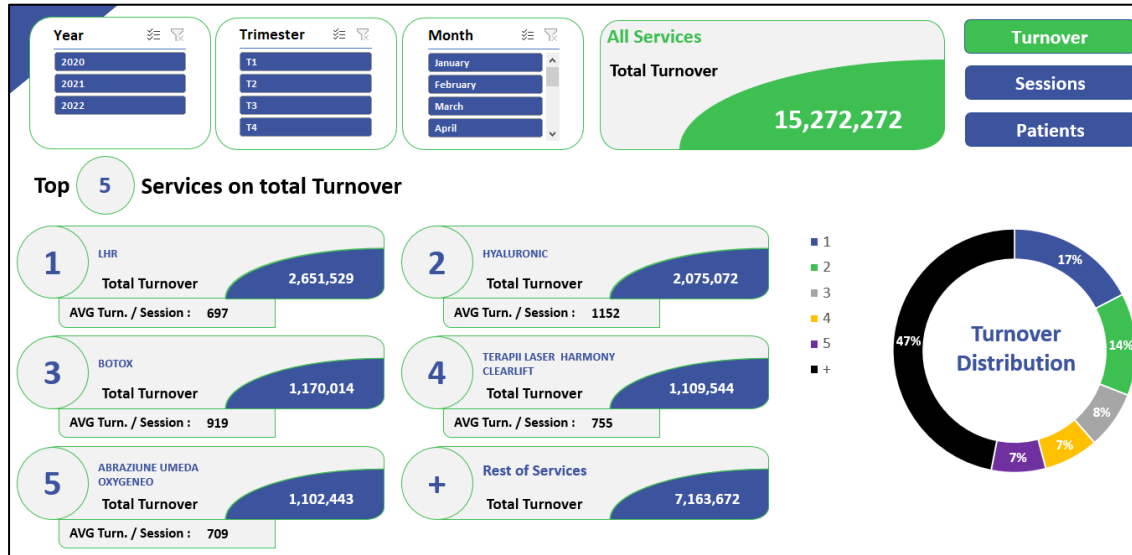
With a monthly standard process of reporting, you can easily export data to get insights on:

- ✓ The total turnover's analysis
- ✓ The turnover of your top services
- ✓ The growth rate of your top services
- ✓ Your most profitable services
- ✓ The gross profit per session for each service
- ✓ The conversion rate of consultations into treatments
- ✓ The expenses
- ✓ Your present performance vs the past



# Business Dashboard

Processing of monthly reports can be simple with an analytic business dashboard.



Necessary elements to use:

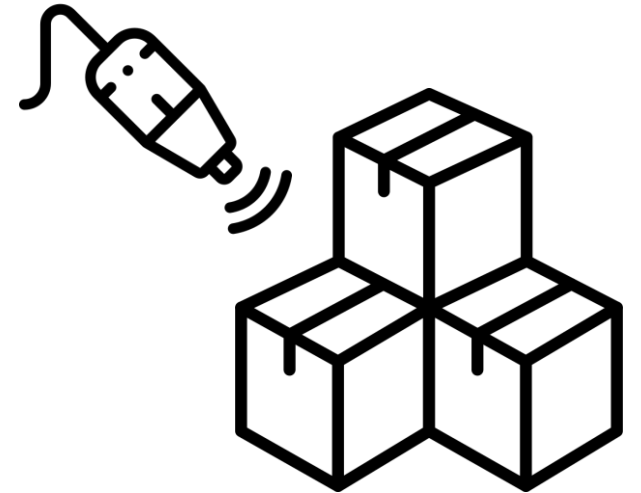
- ✓ Date
- ✓ Patient
- ✓ Therapy
- ✓ Turnover

# Inventory and equipment management processes

Inventory and equipment management system can optimize inventory control, increase patient safety, reduce costs and increase efficiency.

Main required features to monitor:

- ✓ Establishment of Safe Stocks
- ✓ Regular stock and equipment monitoring to identify deficiencies or faults
- ✓ Procedure for ordering materials that are under their established safe stock
- ✓ Procedure for ordering and changing any problematic equipment
- ✓ Designation of people responsible for the implementation of the above actions
- ✓ Stock monitoring tool



# Example of an inventory tracking tool



Calendar						
Day	Moith	Year	Action	Product	Units	
3	11	2022	Reduce	Product 3	300	
5	9	2023	Increase	Product 4	500	



Product	Current Stock Units	Stock Value	Units untill Safety Stock
Product 1	500	1,000 €	200
Product 2	500	1,000 €	200
Product 3	200	400 €	Update your Stock
Product 4	1000	2,000 €	700



Finally, the 2 things that you should always remember when formulating your strategy are:

- ✓ Every business plan is dynamic and adaptable
- ✓ Time milestones are necessary to link with scheduled actions





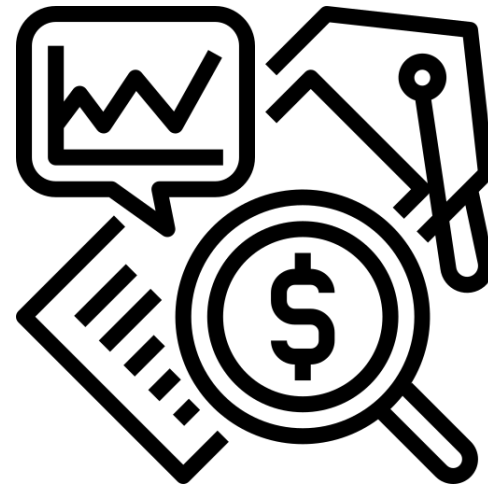


## What to expect from UpMyBusiness:

- ✓ We can build together the SWOT Analysis for your practice
- ✓ We can set specific goals based on the priorities of your business
- ✓ We can decide on key performance indicators (KPIs) to monitor the business performance
- ✓ We can build a business Dashboard, tailor-made for your practice
- ✓ We can build a simple and useful stock management tool
- ✓ We can assess the business results and propose adjustments and deviations from the initial strategic plan



# Pricing



# Pricing strategy for offered services

To determine prices, we need to consider several criteria such as:

## Total Cost

Total expenses influence the final price and include the payroll, operating expenses and consumable's costs



## Branding value

The reputation and expertise of the doctor / medical team can affect pricing. Practices with a strong brand name usually charge higher prices for their services.



## Competitors' prices

Market dynamics and competitor prices should also be considered to keep the prices in a competitive level and not "margin" the practice.



## Geographical Location

In certain cities or even in specific areas, prices may be higher due to demand, high rents, local conditions, or demographic characteristics.





As already mentioned, service pricing is crucial, and many factors need to be considered.  
For the correct setting of prices, the following are required:

Experience, adequate information and good understanding of the industry...





### Axes of cooperation with UpMyBusiness

- ✓ Recording of competition in the same and similar cities
- ✓ Market research on service pricing policies
- ✓ Suggested prices per treatment / package of treatments
- ✓ Revenue forecasting with profitability scenarios



# Service Packages - Treatment Plans



# Service packages and treatment plans

Let's see in detail the basic actions involved in the package creation process:

## Creation of a cross-selling board

We start by compiling a specialized panorama of services to match each of our possible services to the unique concerns of our patients.

## Creation of Plans / Packages

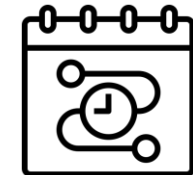
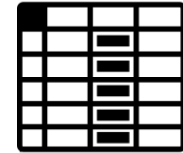
We formulate customized treatment plans and packages that fully meet all possible needs and "concerns" of our patients.

## Time-Scheduling

Once the combination that is suitable for each patient is decided, it is reflected in a specially designed schedule so that the patient knows exactly what to do and when. And most importantly, when he leaves the clinic, he has booked his next appointment.

## Plan Pricing

By creating an effective pricing system for packages and plans, we ensure full transparency and accuracy in the billing of our services. Also, through such a system it becomes much easier for us to offer discounts as well as options of financially flexible plans.





## What to expect from UpMyBusiness:

- ✓ Creation of a Service Matrix (Matching available services to potential concerns)
- ✓ Proper arrangement of all available plans – packages
- ✓ Create final packages and create subpackages (Tiered fee)
- ✓ Implement a dedicated calendar for each treatment plan to engage patients and encourage them to return to your practice
- ✓ Proper service pricing

See some examples...



# Services Matrix



Cross Selling Opportunities	BOTOX	Hyaluronic Acid	Skinbooster	Cleansing	Mesotherapy	Microneedeling	Chemical peeling	PRP	Liposuction injections	Led
Pigmentation					1		1	1		
Acnee				1			1			1
Acnee Body				1			1			
Neck Rejuvenation	1	1	1		1	1		1	1	
Decollete Neckline		1			1	1	1	1		
Hands Antiaging					1	1	1	1		
After Surgery Scars		1	1		1					
Double Chin			1		1				1	
Face Rejuvenation		1		1	1	1		1		
Face Hydration				1	1	1	1	1		1
Brown Spots				1	1		1	1		

# Presentation of all available Plans – Packages



Pigmentation	Acnee	Acnee Body	Neck Rejuvenation	Decollete Neckline	Hands Antiaging
Mesotherapy	Cleansing	Cleansing	BOTOX	Hyaluronic Acid	Mesotherapy
Chemical peeling	Chemical peeling	Chemical peeling	Hyaluronic Acid	Mesotherapy	Microneedeling
PRP	Led		Skinbooster	Microneedeling	Chemical peeling
			Mesotherapy	Chemical peeling	PRP
			Microneedeling	PRP	
			PRP		
			Liposuction injections		

After Surgery Scars	Double Chin	Face Rejuvenation	Face Hydration	Brown Spots
Hyaluronic Acid	Skinbooster	Hyaluronic Acid	Cleansing	Cleansing
Skinbooster	Mesotherapy	Cleansing	Mesotherapy	Mesotherapy
Mesotherapy	Liposuction injections	Mesotherapy	Microneedeling	Chemical peeling
		Microneedeling	Chemical peeling	PRP
		PRP	PRP	
			Led	

# Packages Creation



## Premium

Neck Rejuvenation
BOTOX
CO2 laser
Microneedeling
Needle Shaping
PRP
ResurFX Fractional
Liposuction Injections
Mesotherapy
Hyaluronic Acid

1500 €

## Full

Neck Rejuvenation
BOTOX
CO2 laser
PRP
Liposuction Injections
Mesotherapy
Hyaluronic Acid

1000 €

## Basic

Neck Rejuvenation
BOTOX
PRP
Mesotherapy
Hyaluronic Acid

700 €

# Creation of a specialized Treatment-plan Sheet



**TREATMENT PLANNER**

Practitioner: \_\_\_\_\_ Date: \_\_\_\_\_  
 Patient name: \_\_\_\_\_  
 Date of birth: \_\_\_\_\_

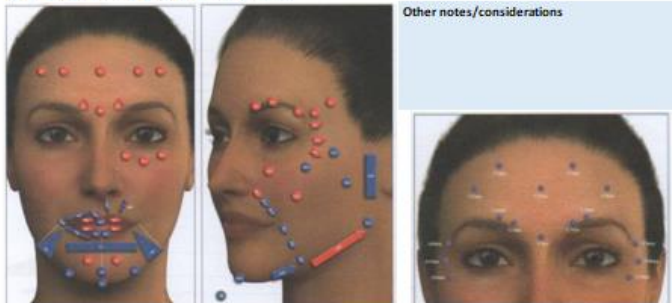
**1. ASSESSMENT**  
 Which areas or features are you most concerned about? Please describe a maximum of three:

1 \_\_\_\_\_  
 2 \_\_\_\_\_  
 3 \_\_\_\_\_

Which statements best reflect what you would like to achieve with this treatment? Please rank the top three.

	Patient	Expert opinion	Agreed priorities
I want to look less tired			
I want to look less angry			
I want to look less sad			
I want to look less saggy			
I want to look younger			
I want to look more attractive			
I want to look slimmer/more contoured			
I want to look more feminine			

**2. TREATMENT PLAN**  
 Circle or mark the recommended treatment areas.



Other notes/considerations

**TREATMENT PLAN BY SESSION**


	Session#1	Session#2	Session#3	Session#4
Session #1				
Session #2				
Session #3				
Session #4				

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Session #1												
Session #2												
Session #3												
Session #4												

**Session #1** Date: \_\_\_\_\_

Treatment	Volume/Dosage	Comments/notes

Notes: \_\_\_\_\_




Mark the treatment areas

**Session #2** Date: \_\_\_\_\_

Treatment	Volume/Dosage	Comments/notes

Notes: \_\_\_\_\_




Mark the treatment areas

**Session #3** Date: \_\_\_\_\_

Treatment	Volume/Dosage	Comments/notes

Notes: \_\_\_\_\_




Mark the treatment areas

**Session #4** Date: \_\_\_\_\_

Treatment	Volume/Dosage	Comments/notes

Notes: \_\_\_\_\_



Mark the treatment areas

Adverse events should be reported to your local regulatory authority

# Creation of a specialized Treatment-plan Calendar



## 2022

Acne Scar  
Treatment Plan

Mrs. X

Treatment List

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

JAN

CO2 laser + PRP

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

FEB

DyeVL + ClearSkin

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

MAR

CO2 laser + PRP

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JUL

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

AUG

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

SEP

ClearLift + DyeVL

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Mrs. X

APR

Skin Booster

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

MAY

DyeVL + ClearSkin  
Skin Booster

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

JUN

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

OCT

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

NOV

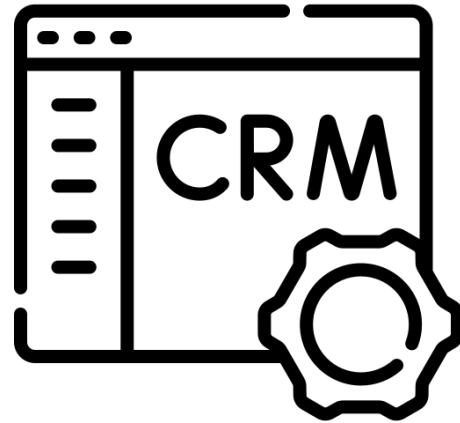
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

DEC

DyeVL or 1540 nm, depending on the needs  
CO2 laser resurfacing  
PRP  
Clear Skin  
Skin Booster



# Patient Monitoring Tools (CRM)



# Patient Monitoring Tools (CRM)

Choosing the right CRM for your business is needed based on the following steps:

## Available CRM programs

We start by exploring the available CRM systems in the market.

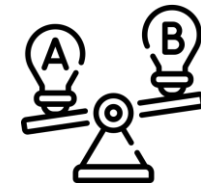
## Features analysis

Following step, the analysis of the characteristics of each CRM software. Each solution will have its own advantages and limitations so important features for each CRM will be examined such as:

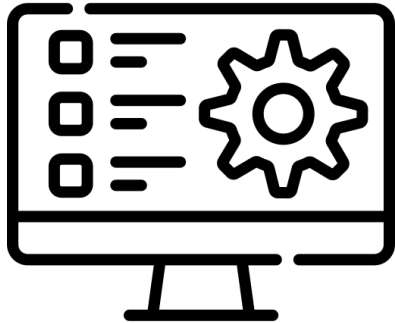
- Customization options
- Ease of use
- Cost
- Compatibility

## Comparison and selection

Final step to compare the available CRM systems and choose the one that best meets the needs of the practice and patients. The final criteria for selecting the right system will have characteristics such as: total cost, easy integration with existing systems, expandability for future needs and more.



By choosing **the right CRM** for patient tracking, you can:



1. **Improve the quality of services** you offer
2. **Avoid unpleasant situations** (eg missing GDPR forms)
3. **Increase the efficiency** of your practice by properly managing your patients
4. **Extract data** on your practice's performance and make sound strategic decisions on your next steps.

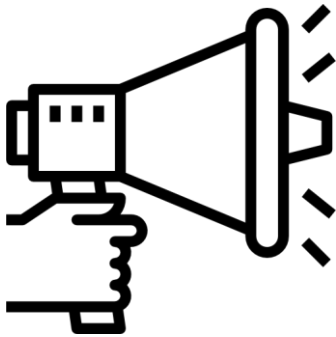




### What to expect from UpMyBusiness:

- ✓ Recording business needs for the required CRM
- ✓ Comparison or features for the available CRM programs
- ✓ Support in the final CRM selection based on the needs of the practice
- ✓ Collaboration with the software provider to build the necessary reporting tools for your business performance

# Marketing



Marketing in Medical Aesthetics focuses on 3 main fields:

- ✓ Branding
- ✓ In-Clinic Marketing
- ✓ Digital Marketing

# Branding

The goal is to build a strong corporate identity for the practice.

Important actions to take:

1. Craft a corporate identity based on your promises to patients and the characteristics that differentiate you from your competitors.
2. Decide on a logo and customize all marketing materials as well as your stationery.
3. Promote the brand and strengthen the presence of the practice to its audience through your frequent and active interaction with patients on social.



# In-Clinic Marketing

The goal is to promote our services within the practice.

Important actions to take:

1. Transform the waiting area to an informational room for all the available services that your practice is offering.
2. Creation of a professionally designed space that creates a positive impression on patients in a “feel like home” setup.
3. Implementation of a referral system that can significantly help increase customers.

**Remember: Happy patients can become the best ambassadors of the practice, and their recommendations to friends and acquaintances can be the best advertisement.**

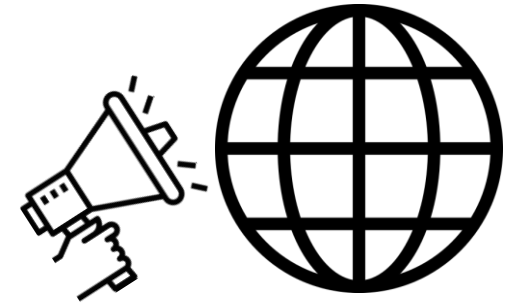


# Digital Marketing

The aim is to promote our services via the internet.

Important actions to take:

1. A professional website to promote all services. The website should be user friendly, informative and easily accessible.
2. Enhance the presence on social networks, such as Facebook and Instagram. Thus, build a community of customers and share content that interests our world.
3. Build a Google Business profile. Increase the visibility in every patient's search by providing them with key information and reviews from your existing patient database.





Building a strong brand is fundamental for a successful marketing strategy for your practice.

Then the promotional synergy in your clinic along with the digital world is necessary for your business growth.





## What to expect from UpMyBusiness:

- ✓ Corporate identity (logo, branded stationary)
- ✓ Guidance and consultation for a successful website
- ✓ Social Media strategic imperatives
- ✓ Google Business Profile rules and suggested actions
- ✓ In-Clinic marketing setup to cater your patient's needs (waiting area, treatment rooms)



## Patient journey



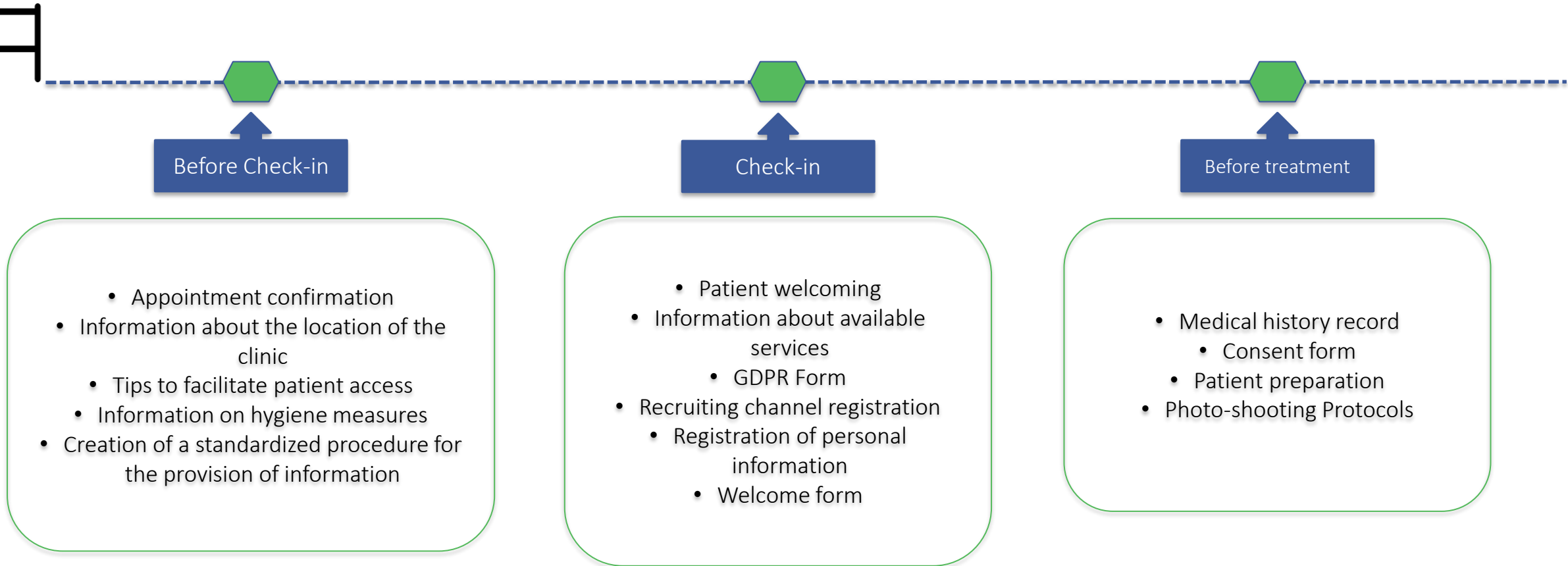
The perfect design on the patient's journey within the clinic is very important for offering a holistic "experience".

The excellent design of each stage in the journey creates a **safe, effective** and **pleasant** patient experience.



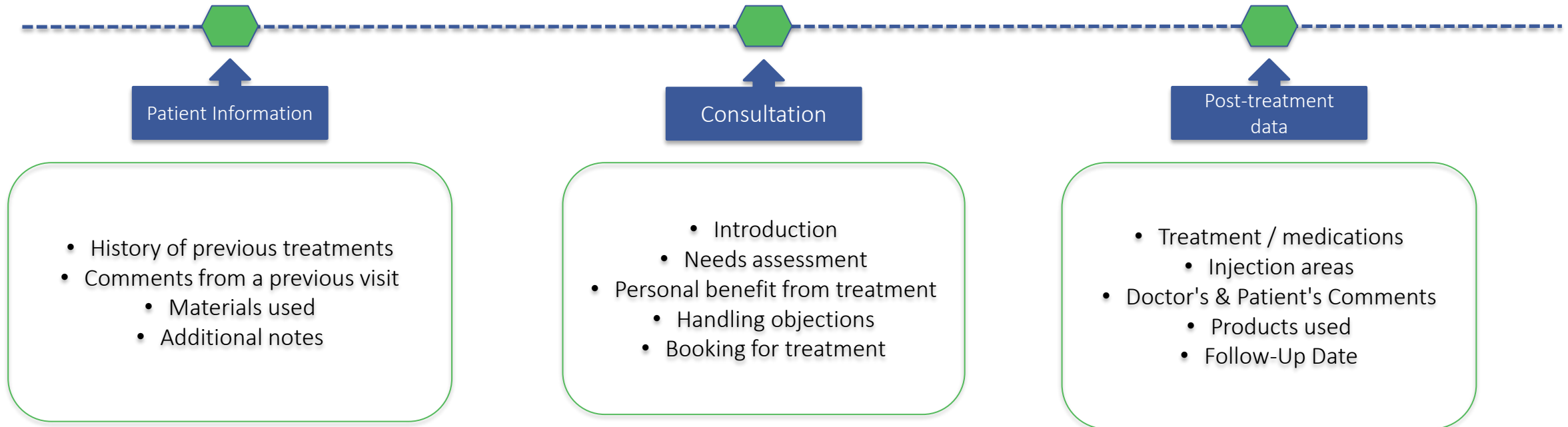


# Necessary elements of each stage in the patient's journey

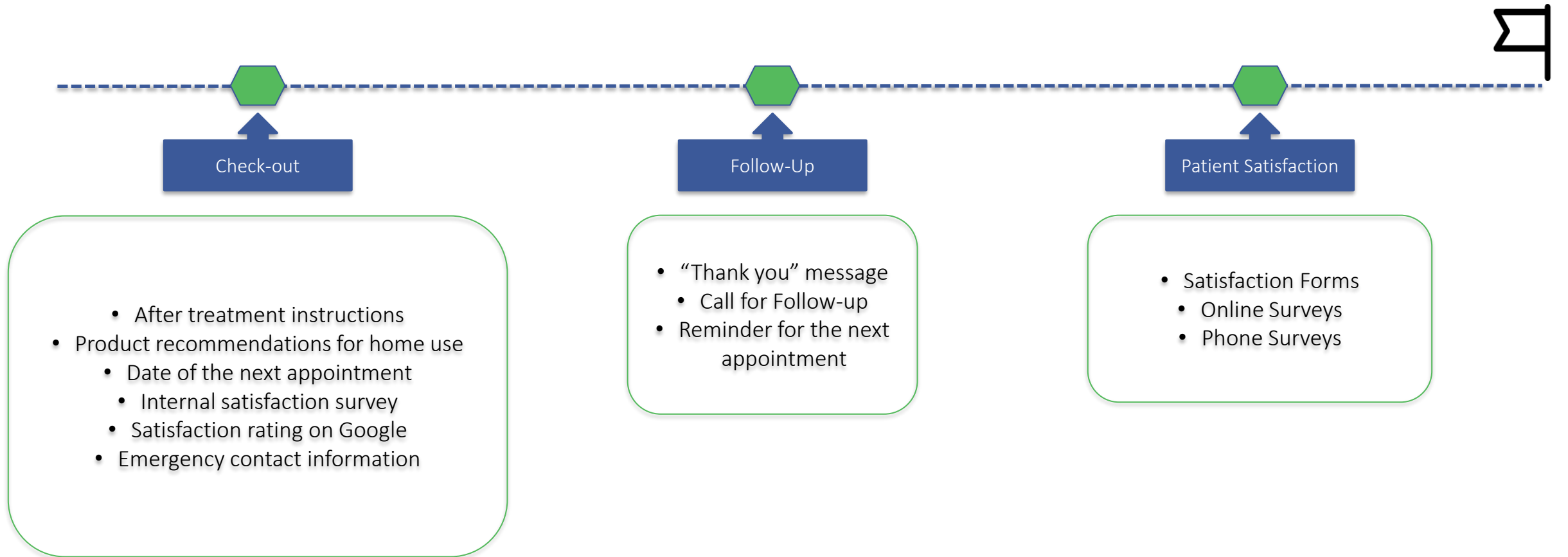




# Necessary elements of each stage in the patient's journey



# Necessary elements of each stage in the patient's journey





## What to expect from UpMyBusiness:

- ✓ Careful and optimal planning for each stage of the patient's visit within the office (creation of an "experience")
- ✓ Timeframe for each service to create the optimal time-slots for each treatment
- ✓ Creation of automated appointment confirmations as well as “thank you” messages
- ✓ Training of the clinic staff (if any) for optimal operation in procedures / ways of action / emergencies
- ✓ Training to perform with excellence during the consultation process with patients
- ✓ Patient satisfaction surveys and follow-up on patient’s comments



# Staff Training



*“The biggest asset for every business is its people”*

# Phone contact



It is the most frequent first point of contact with patients.

## Through the phone:

- ✓ Most of your appointments are booked
- ✓ Patients get familiar with basic information about the treatments you offer
- ✓ The first impression of your practice is largely formed

It is therefore important to define rules and procedures such as:

- ✓ Call answering scenarios
- ✓ Call and hold management
- ✓ Shorten long lasting calls



So that every call becomes a successful "sell" opportunity

# Training in sales techniques



Your team is selling the treatments and the products you offer

Elements included in sales training are:

- ✓ Full knowledge and understanding of all available services and products
- ✓ Sales techniques
- ✓ Role play to better consolidate the role of each team member
- ✓ Analysis on past Case Studies



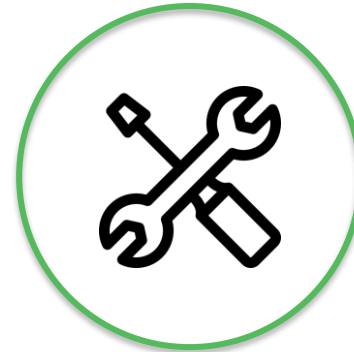
# Don't forget that...

It is equally important to train your staff on:

✓ The new procedures



✓ The new tools



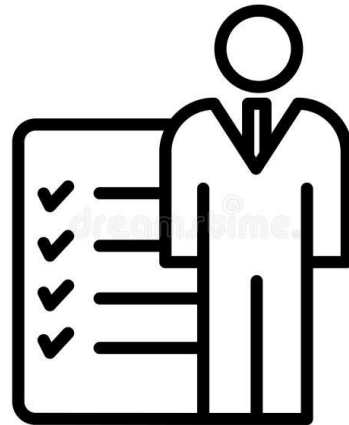
And of course, we must not forget to reward the team for its performance



### What to expect from UpMyBusiness:

- ✓ Call management
- ✓ Services' Selling Techniques
- ✓ Optimal approach to each patient's needs
- ✓ Managing concerns and objections
- ✓ In-Clinic marketing strategies to present available services
- ✓ In-Clinic products selling
- ✓ Increase revenue by cross-selling services and products
- ✓ Create bonus system scenarios to increase team productivity

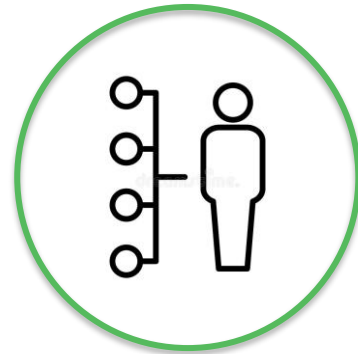
# Definition of tasks and ways of operation



The smooth operation of each clinic is greatly affected by the proper distribution of tasks to the team's members

## Each member of the team should:

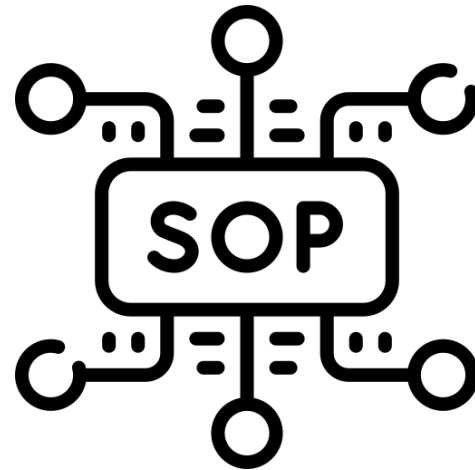
- ✓ Be aware of his/her responsibilities
- ✓ Act based on his/her responsibilities without spending valuable time on questions



Elements that can affect the functionality and effectiveness of the practice:

- Creation of a proper organization chart
- Clear distribution of tasks to all team members
- The creation of a manual that includes the description of the responsibilities of each position

# Standard Operational Procedures (SOPs)



All actions should be properly planned and executed in a standardized way to avoid misunderstandings and mistakes from the team

## Examples of SOPs

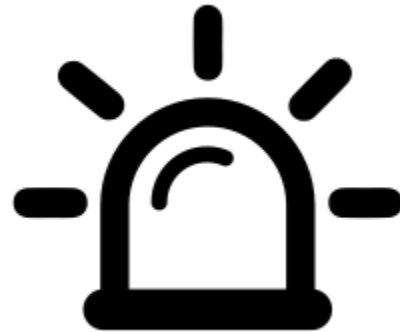
- ✓ Procedure of correctly filling in the details of a new patient in the system
- ✓ Proper stock management for the doctor's office consumables
- ✓ Scheduled payments of suppliers



SOPs can save you significant time and allow your team to be more effective in the daily management of all procedures and especially not to create friction and tension



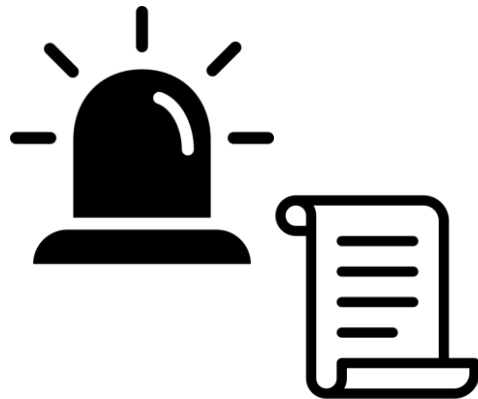
# Emergency scenarios



They are another important element to pay attention to when defining your team's tasks and ways of operation



## Emergency scenarios



They ensure the effective reaction of the team in circumstances requiring immediate intervention such as:

- ✓ Handling allergic reactions.
- ✓ Treatment of unwanted complications from a procedure.
- ✓ The immediate response to medical emergencies.

All team members should be familiar with the emergency scenarios and trained regularly to ensure their effective response.



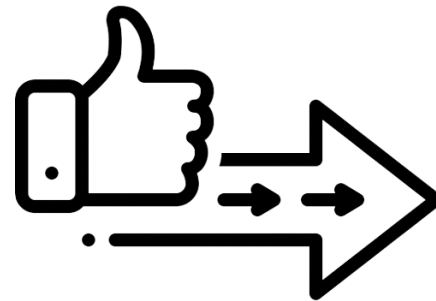


### What to expect from UpMyBusiness:

- ✓ Recommended organization chart
- ✓ Create detailed job descriptions of each role within the practice (job descriptions per position)
- ✓ Planning and training of the clinic's team in procedures (SOPs) for the smooth daily operation of the clinic
- ✓ Create emergency scenarios and steps to manage them



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