

FIRST CONTACT SHEET

A CUSTOMER'S ROADMAP TO BECOMING MY VALUED CLIENT

NAME:

Occupation:

Address:

AGE:

Reason for appt. (problem, referral, gift card, promotion): "...okay, did you have a particular issue you needed work on or did you just want a relaxation massage or needing to redeem a gift card?" List here:

Booking

- **Date/Time** (quote 15-20 min earlier than actual appt.)
- **Service/Price/gift card #?**

Questions (Okay, let me just get some information from you")

- "Are you **under a doctor's care** for any reason or on any **medication currently?**" - Answer the WHY? (certain illnesses/medications mean that massage could make your condition worse like blood clots, Kidney infections, recent surgeries, steroids or just starting an antibiotic, etc.)
- "We can get more detailed information on your **intake forms** @ _____ (appt. time) when you get here or you can fill them out ahead of time by printing them off from our website. "Would you like me to email that link to you with a confirmation of your appointment?"

Email address:

- "We also suggest that you **not eat 2 hours prior** to your massage and that you **exfoliate** in a hot bath or shower before you arrive." Answer the WHY? (exfoliation allows for better absorption of our quality-therapeutic products and the hot water prepares your muscles to relax even more)
- **Repeat:** "Alright we will see you Oct 7th at 10am with Ryan for a 70 min relaxation massage. That is \$80 We prefer **cash or check but can accept credit cards as well** and if you need to adjust that appointment for any reason, give us **24 hours notice** at _____ (ph#)"
- "May I get your **CELL Phone #** _____ to **TEXT** you a confirmation?"
Home phone# if not text-able cell:

Prior to Appointment

Welcome packet mailed - emailed - downloaded?
Confirmation call - text made?

Date

Staff Initials

Details

First Appointment

Forms Completed? (Intake/Health Hx/Polices)
Obtained Physician Referral?
Special Pricing or GC Today?
Future Discount?

LMT Action

Samples or Educational Materials Given?
Referral Made?

_____ What?
_____ To whom?

Next Appointment Made

_____ **When?**

Checked back w/client in 48hours (email/text/call)

_____ **How?**

Thank you note to new client? (2 for 15%)

Thank you note to referral? (25% next)

_____ **Who referred?**

Inquiry Only Action(circle): sent info via mail sent info via text sent info via email added to database