

BOULEVARD

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Five Secrets to Running a MedSpa:

A Manager's
Guide to Success

With Jade Alexander & Skya Jones





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Introduction

When most clients picture a spa, they typically envision the relaxing massages and treatments of a day spa. MedSpas have those benefits, but they also offer non-invasive medical procedures from trained, experienced, and qualified providers under the general supervision of a licensed physician. As a result, MedSpas are subject to a host of additional demands and legal requirements — expectations for training are higher, regulations are more stringent, and product purchases are far more specialized.

Now imagine being the manager who must keep everything organized with the same resources as a traditional day spa! Some days, you'll probably need a little help.

This guide is for MedSpa managers who want to build a strong work culture or realize business goals but could use industry-specific advice. To that end, we reached out to Boulevard's Jade Alexander and Skya Jones. Jade is a multi-state medical aesthetician who previously worked as a provider and manager in the MedSpa space. Skya came up in the beauty space and served as manager and department lead at top MedSpas in the country. Together, they assembled this collection of tips, tricks, and techniques for dealing with any challenge — clinical or otherwise — that a MedSpa sends your way.

Building a great work culture

"Your best people may not stick around forever. Building processes — not people — is the key to a scalable culture."

JADE ALEXANDER

Building a strong work culture is important to many businesses, but it's downright essential for MedSpas. Our field makes up a small portion of the self-care market, so we're less likely to find new hires with preferred expertise, and we lose organizational knowledge every time someone gives their notice. With a positive work culture, you can retain providers, develop their skills, and provide better services to clients.

So how do you build a strong work culture? In almost every case, it comes down to trust and respect. Managers can't force a healthy work culture onto their team, but they can set an example that employees can appreciate and follow. Here are a few strategies to keep in mind:



Build a shared vision

As a manager, you'll likely have goals for your MedSpa. Share that vision with your team! In practical terms, this could take the form of a vision statement, 5-year plan, or simply agreeing upon what success looks like.



Be transparent

If you're open and honest with your team, they are far more likely to be open and honest with you. That's why transparency is vital as a leader, not just in terms of the company's bottom line but also in policy changes, expansion plans, challenges, and more.



Encourage open communication

MedSpa employees are not individual providers or technicians; they are essential parts of a connected team. That's why MedSpa managers should give them a chance to voice their opinions and actively listen to any concerns they raise.



When problems arise, collaborate

If you're trying to build a team, everyone needs to work together instead of working alone in the same building. Give everyone a chance to collaborate on tough challenges. You may find they have ideas and solutions you'd never have considered.

REMEMBER :

Build transparency by sharing data!

Management platforms like Boulevard use custom reports to identify challenges and track progress towards your goals. These details can build transparency by ensuring your entire team is on the same page — a great starting point to build future plans.

Staff Performance

<div> Customize Report Filter Report </div>			
Staff ↑	Utilization %	Rebooked %	Hours
Brenda Mendez	11.76%	17.00%	
Sarah Delmonico	36.54%	64.31%	
Frank Davis	50.65%	88.56%	
Julie Morgan	84.35%	96.40%	
Deborah So	20.64%	84.91%	
Jamie Kulkin	66.14%	47.59%	

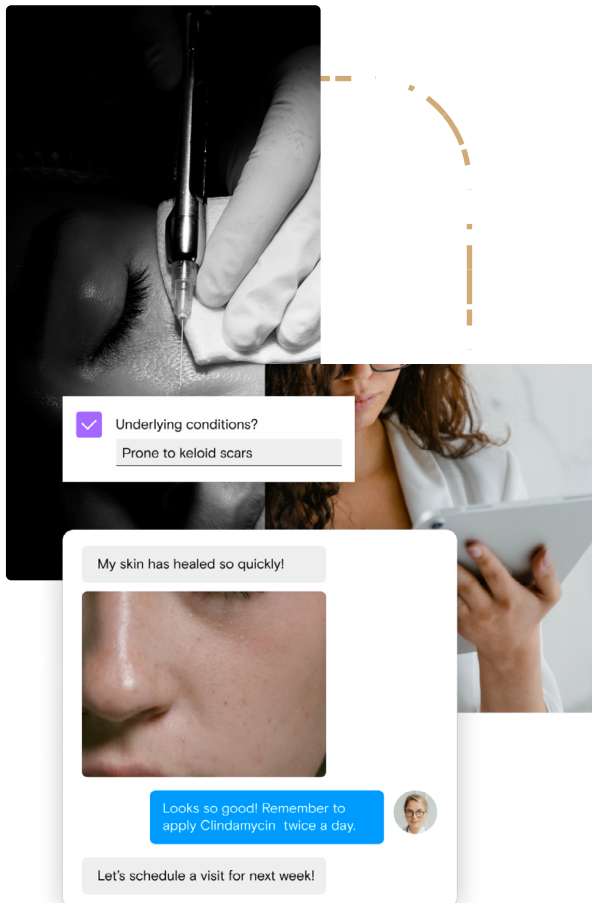


Getting HIPAA with employee training

"HIPAA should be the foundation of all staff training in the MedSpa environment. Beyond regulations, privacy is key to the client experience."

SKYA JONES

What's the difference between MedSpas and traditional spas, anyway?



For a start, MedSpas have far more expectations when it comes to staff training and meeting state compliance standards.

Take an issue like data privacy. While all spas and salons must take steps to protect client records, MedSpas fall under HIPAA regulations. That means the moment a client requests a medical service, extra considerations come into play:

- 1 Any booking software that manages client information must be HIPAA compliant.
- 2 Medical information, such as test results, can only be communicated to clients by certified medical providers.
- 3 Staff must encrypt all client data stored on their internal systems.
- 4 MedSpas must create regular backups of internal systems for data loss prevention. (And they need to encrypt those backups.)

If your MedSpa intends to purchase or upgrade its software, there will be several additional layers of regulations to deal with.

The good news is that MedSpas can usually handle these complexities by adjusting how they train and organize staff.

The main points to remember are:

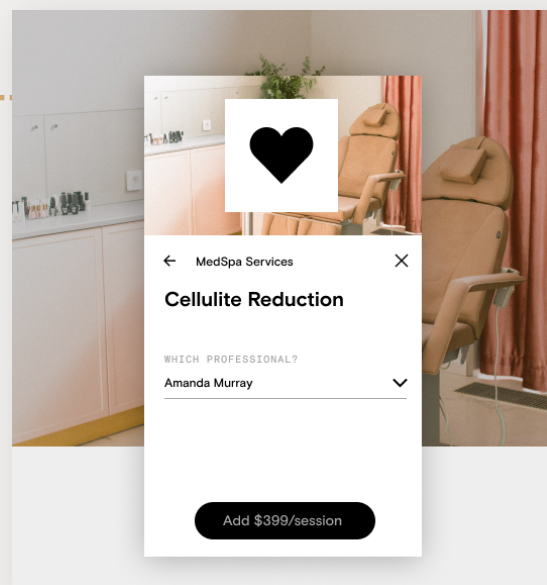
- 1** HIPAA compliance training should occur immediately after hiring. Staff will also need to retrain on the most up-to-date regulations each year.
- 2** When possible, work closely with medical product brands to train staff. These companies can provide invaluable assistance at scale, such as sales or script training, while teaching employees exactly how their products are used.
- 3** If you have team members who are not HIPAA-trained, there are many client services they cannot complete. MedSpas need to rely on specialized medical providers who can fill this role.

REMEMBER :

Don't text your patients!

Under HIPAA, MedSpas cannot text confidential information to clients. If they insist on receiving text messages, you'll need a signed consent form before sending a single notification.

Choosing the right booking software



As you might imagine from reading the previous pages, MedSpas are traditionally underserved when it comes to scheduling software. MedSpas have specialized needs that aren't accounted for in traditional software. These limitations make it difficult to create accurate service estimates, and COVID is only making things worse — transition and cleaning times are taking longer, which further eats into available business hours.

That's why schedule optimization is a big deal for MedSpa managers. Knowing how to provide a high-quality service while maximizing overall efficiency can make the difference between a growing MedSpa and one just getting by.

So what can be done? MedSpas should look for solutions that can optimize bookings while also offering industry-specific tools. Here are some non-negotiable features:



Self-booking

Client-facing self-booking tools can help by analyzing staff schedules and recommending a series of optimal service times.

“My favorite software feature is client notes. In a MedSpa, you may be dealing with sensitive medical conditions and it’s crucial that all service providers are aware of a client’s history.”

JADE ALEXANDER



Service optimizations

Does a client need laser treatments and dermal fillers? Modern scheduling software can estimate optimal timeslots, service orders, and session lengths that meet all requests. And don’t forget to find a platform that includes cleaning times in those estimates!



Client notes

At a busy MedSpa, there will be dozens of details about each client that providers must juggle on a given day. Client management tools make it far easier to keep track of specific needs and medical histories to review before each session. Look for platforms that can analyze past appointments or provide custom notes that bring all relevant providers up to speed.



Equipment booking

Appointments don’t just need a medical provider and an empty room — there’s also specialized equipment, machinery, and product inventory to consider. Modern MedSpa scheduling software can account for these resources.

REMEMBER :

Double-booking can maximize occupancy!

Double-booking complementary services within a single time slot can be an effective scheduling trick. Simply prepare two rooms at once — along with machinery and equipment — so the client can move between them as required. This approach lets you efficiently utilize space while maximizing bookings and revenue.

Managing (and surpassing) your financial goals

“As a MedSpa manager, I learned a lot about motivating a team to hit financial goals. It starts with being upfront about compensation.”

SKYA JONES



As a MedSpa manager, your job isn't just about managing and motivating your team but also helping the business achieve growth and revenue goals. Unfortunately, this step isn't always easy — while there are many techniques managers can use to improve their bottom line, medical practitioners need to handle finances a little differently.

Take commissions as an example. This compensation practice is a standard industry model for most spas and salons but has risks in MedSpas. Most states require payments for medical services to be directed to a physician or a physician-owned company. Commissions that operate within that system might be “fee-splitting,” an illegal practice that could cost providers their license.

MedSpas need a different way to compensate providers competitively to avoid this outcome. For example, performance bonuses are an excellent alternative that rewards team members for their hard work throughout the year. Another option is to maintain wages and salaries in relation to medical services but apply commissions to staff handling retail products and non-medical services.

Thankfully, there are still many methods managers can use outside of commissions to influence staff earnings:



Upselling

Managers should encourage providers to offer low-priced products and services to clients, then suggest additional deals to increase the appointment value. Wherever possible, highlight these recommendations in your booking software.



Memberships and loyalty programs

If you want to retain clientele, reward them for being loyal! MedSpa memberships help clients feel connected to your team while unlocking offers or reward points for long-term membership.



Gift cards and prepaid appointments

MedSpas may have a medical focus, but they can also offer traditional comforts. Standard services can make for excellent gift opportunities during holidays or special occasions, bringing in extra revenue and new potential customers.

REMEMBER :

Clients need help finding solutions!

The average client typically has multiple concerns at any given time and might not be aware of how a MedSpa can help. Always lean on the expertise of your providers to deliver solutions that Google cannot.

Filing the reports your MedSpa actually needs

“Reports provide critical business insights to analyze and evaluate what processes are working. If you’re not measuring, you’re not improving!”

JADE ALEXANDER

Every MedSpa manager must track multiple laundry lists’ worth of information, including the average cost of goods sold, inventory status, net profit, revenue per hour, marketing ROI, and much more. Keeping up with these details lets managers identify operational problems, streamline work tasks, and implement more effective workplace policies. That’s why high-quality reporting is essential — but sometimes, it’s challenging to know which reports are right for your business.

In our collective MedSpa experience, there are a few reports that always need to be top of mind, including:

1

Profit and loss statements

The bottom line for any business, and the top report for every MedSpa. Profit and loss statements provide a big picture view of whether your business is growing, shrinking, or treading water, which is the first step to making necessary changes.

2

Average cost of units sold

MedSpas are known for specialized services, but they also manage high volumes of products, from retail cosmetics to Botox and fillers. Managers will need to analyze their purchasing costs to ensure each item is earning revenue.

3

Utilization reports

Every MedSpa must “book” its available resources for each appointment, such as machinery, rooms, or even service providers. Utilization reports summarize how often clients need each resource, which can help managers decide whether they need to buy extra equipment or hire more estheticians.

4

Total appointments by service

Do you know which of your MedSpa’s services is the most popular? A total appointments by service report can tell you what clients need most and which offerings aren’t getting any traction.

REMEMBER :

Booking software is also reporting software!

Any scheduling platform worth its price tag should include robust reporting tools. Look for software that can assign MedSpa-specific fields and custom reports so you don’t need to waste time writing everything out manually.

In closing

Every MedSpa strikes a balance between a traditional spa and a medical clinic, often doubling the manager's responsibilities. Remember that you're not alone — managers of all experience levels faced these challenges before you. That means we're now familiar with several reliable strategies that will make your management style — and the MedSpa itself — far more effective.

Here are the most important lessons to keep in mind:

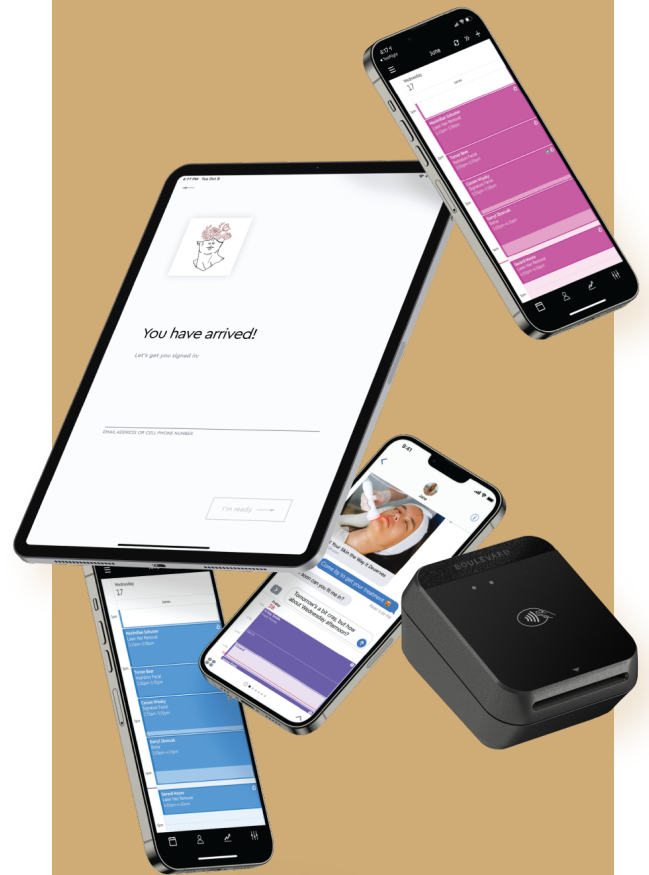
Build a strong work culture by collaborating with your team. If you prioritize transparency, openness, and communication, your employees will follow your lead.

Organize all MedSpa operations, employee training, and software purchases around HIPAA. Your lawyers will thank you.

Choose a scheduling platform that meets the unique requirements of the MedSpa industry. No, a Google calendar isn't good enough!

Remember that while MedSpas handle finances differently from other self-care businesses, strategies like upselling and gift card sales can still maximize revenue.

Keep track of metrics like cost of units sold, resource utilization, and total appointments by service when measuring your MedSpa's performance.



Looking for a platform to help you do it all? Boulevard was purpose-built to help you manage, market, and grow your wellness business.

[Book a demo](#) now to see it in action!

BOOK A DEMO

About the authors

Skya Jones

EDUCATION MANAGER,
MEDSPA, AT BOULEVARD



Skya Jones has devoted her career to medical aesthetics. Beginning in a service provider role at VitaNovu Anti-Aging Medicine and transitioning into a practice manager role, she developed a passion for leadership and education. She then took on a role as Department lead at Bobbi Bullock Medical Esthetics, growing her department to the top 1% of all US Accounts, and was nominated as an Allergan Medical Institute Trainer. Today, she serves as one of two MedSpa Education Managers at Boulevard, where she helps customers achieve the best software experience for their business.

Jade Alexander

EDUCATION MANAGER,
MEDSPA, AT BOULEVARD



Jade Alexander knows MedSpa businesses back-to-front. She launched her career as a Social Media Manager at Affinity Day Spa prior to receiving her medical esthetics license. Jade served as both the Lead Medical Aesthetician and Assistant Spa Manager over her five-year tenure at Sofer Medical Spa. She then launched her own aesthetic consulting business focusing on practice development. Today she works at Boulevard, as an Education Manager, where she consults on software with MedSpa owners and managers.

About Boulevard



Boulevard offers the first and only client experience platform purpose-built for appointment-based, self-care businesses.

Boulevard empowers business owners and professionals alike to deliver personable, enjoyable experiences to their clients through online appointment scheduling, messaging, and payments that are simple, elegant, and reliable. A privately held company founded in 2016, Boulevard has earned the trust of thousands of salons and spas across the nation by delivering the world-class technology and genuine, human, personable service they deserve.

Self-care businesses powered by Boulevard typically enjoy:

16%

MORE SERVICES
BOOKED

71%

FEWER NO-SHOWS
& LATE CANCELS

18%

MORE RETAIL
VALUE

24%

MORE GRATUITY
FROM CLIENTS

* Average impact T+90 days after switching to Boulevard