

# MEDICAL SPA

## STRATEGIC PLAN & MANAGEMENT SERVICES

2007



An Acara Partners Company

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## EXECUTIVE SUMMARY

The program begins with a Launch Meeting to review the scope of work for the initial phase, identify roles and responsibilities of all team members and define the timeline.

To support the collaborative efforts between Acara, ownership and the MedSpa team we establish an Acara MedSpas Intranet Site where together we post documents, project timetables and contact information.

The services included within this proposal will allow the MedSpa to streamline its operations and marketing management functions. Research, development and marketing strategy would be provided by Acara.

Acara's corporate team offers a turnkey management solution. The MedSpa is supported with high-level marketing, operations, information technology, facility management, research and development. The MedSpa's manager reports directly to our Director of MedSpa Operations who has extensive experience in the day-to-day operations of MedSpas.

In addition to management oversight the Acara program includes access to Acara MedSpas Preferred Vendor Program. The included vendors offer Acara MedSpas clients discounts and special service opportunities.



Once you have reviewed the attached information, we can set a time to meet to discuss the details with the Acara executive team. We are ready to provide you with management and marketing services that will bring your Med Spa to success.



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## PHASE I: STRATEGIC PLAN DEVELOPMENT

### A. Management Support & Training

#### a. Teleconference Support & Training

The MedSpa Manager and their team receives the support of a corporate medical spa team of experts with experience in operations, sales, marketing, information technology, finance/accounting, facility management, human resources and research & development.

Specifically, the following support and training is offered:

- i. Weekly MedSpa Manager coaching session to review sales & operations, monitor goals & objectives and troubleshoot concerns and issues.
- ii. The MedSpa Manager joining the Weekly MedSpa Manager teleconference with all Acara MedSpa Managers with an agenda that includes recognition, training and best-practice sharing
- iii. Monthly sales & marketing teleconference calls with an agenda that includes: recognition, sharing of marketing successes, review of upcoming promotions, and training.
- iv. Monthly MedSpa Owner teleconference updates.
- v. Quarterly MedSpa Owner meetings to review financial statements, operating and marketing plans.

#### b. Onsite Operating Support

A monthly onsite visit is provided. During this time the following functional areas of the business are reviewed with management and the operating team:

- i. Front Desk Operations
- ii. Sales & Marketing
- iii. Human Resources
- iv. Reservations and Appointment Book Management
- v. Facility Management
- vi. Customer Service and Client Experience Creation
- vii. Service Operations
- viii. Retail Management



#### c. Vendor Trainings

As needed, vendor training is arranged for the staff to insure that all standards of care as identified in the Service Protocols are being met. This may include but not be limited to:

- i. On-site retail product and service training
- ii. On-site training for each laser purchased.
- iii. IT solution training- electronic / telephonic

Injectibles training (Botox & Restylane – client bears any costs) Training may be scheduled to take place at your location or at an off-site facility.

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## B. Initial Assessment

### a. Define Market Area

Identify the Defined Market Area (DMA) based on proximity to consumer.

### b. Identify Consumer Profiles

Review and document the various consumer profiles that are within the DMA. This includes gender, age, household income as well as consumer buying behavior.

### c. Competitive Analysis

Identify a competitive set and conduct site visits to each competitor to review their facility, rates, service offerings and amenities. If necessary, secret shopping may be suggested.

## C. Operations Review

Review of all functional areas of the business including: operations, human resources, information technology, sales & marketing, accounting & finance and the facility.

This will allow Acara's team to fully understand the existing business model and company organization in order to provide it the redirection necessary to achieve the ultimate goal of profitability.

### a. Operations

#### i. Front Desk

Evaluate check-in/check-out processes, telephone procedures, tracking of marketing, staff communication, and appointment book management.

#### ii. Staff Reengineering

Conduct a Staff Reengineering initiative to include: identifying the market demand by day and day-part, creating a graphic master schedule based on market demand analysis. Re-staff the organization according to the market demand.

#### iii. Services

Review current services offered as it relates to competition, profitability and technology currently available at the facility.

#### iv. Retail

Review of current retail offerings as it relates to the business's market position, service offerings, size of operation, and dedicated square footage for display. Review of current retail sales program, merchandising techniques and retail promotions.

#### v. Medical Operations

Identify that the Medical Protocols for all medical services are currently established; HIPAA and other regulatory compliance programs are in place. Review of physician coverage to insure standards of care are being met.

### b. Human Resources

#### i. Organizational Structure

Review the current Organizational Structure, job descriptions, certification & licensing requirements for each position, evaluation forms and credentialing process.

#### ii. Training

Review the current training programs for each position identified on the organizational chart. Review the overall training programs for clinical procedures, management, customer service, sales, general, and company culture.

#### iii. Staff Evaluation

Evaluate the current team conducting interviews to determine if all employees meet company standards for experience, credentials, affordability and culture.

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c. **Information Technology**

i. Software

Review the current software being utilized for Point-of-Sale, Reservations, Accounting and Online data capture then identify the best software applications to increase the efficiency of record keeping, operations management and reporting.

ii. Hardware & Connectivity

Review current hardware as it relates to software recommendations including connectivity speed and effectiveness.

iii. Telephone, Voice Mail & On-Hold Messaging

Review telephone system's capacity for existing and future business including effectiveness of voice mail and on-hold messaging.

d. **Sales & Marketing**

i. Market Analysis

Review the current marketing program and determine if it is aligned with the market based upon the Market Assessment.

ii. Competitive Analysis

Conduct pricing analysis to benchmark against competition by service offering.

iii. Marketing Plan

Review current marketing and promotions programs.

iv. Internet

Review existing website and Internet marketing programs.

v. Promotions Plan

Review current promotions plan.

vi. Signage

Evaluate current signage including: directional, building, in-store and in-room.

vii. Advertising

Review current advertising including: print, radio, outdoor, TV, flyers, and newsletters.

viii. PR & Strategic Alliances

Review current public relations program including: press kit, editorial relations, past press coverage, past media and in-store events, and non-profit/charity relationships. Review list of current strategic company alliances and relationships being utilized for cross promotions and referrals.

ix. Sales

Review current consultation process, lead capture, closure rates, sales person productivity, follow-up process, cross sales program, and referral program.

e. **Accounting & Finance**

i. Profit/Loss Review

Review the Profit & Loss statement to identify appropriate ratios and margins for all areas of the business.

ii. Deferred Revenue Review

Review pre-paid service policy, current amount of pre-paid and sold versus redeemed analysis.

f. **Facility**

i. Design

Review the current design for guest flow, staff usability, appropriate lighting, retail space allocation, and service space allocation

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ii. Housekeeping/Maintenance

Review current housekeeping and maintenance programs including cleaning schedules, laundry facilitation, facility maintenance and medical waste removal.

iii. Facility Licensing

Identify that the location has all appropriate facility and business licenses and they are current.

iv. Security

Review the current security systems including: webcam systems, locked storage, alarm system for theft/fire, employee security, and key controls.

v. Storage

Review current storage of all supplies and equipment for safety and security as well as functionality.

vi. Subletting

Identify any subletting or space sharing opportunities for the business.

#### **D. Financial Pro Forma**

a. **Pro forma Financial Statements**

Develop one year financial projections that include a pro forma Income Statement.

b. **Financial Assumptions**

Document the assumptions to support the financial pro forma and to provide an understanding of the business model.

#### **E. Strategy and Action Plan**

At the completion of the Market Assessment, Operations Review and Financial Pro forma we will establish sales, operating and financial goals.

Acara will create a strategy to execute the necessary changes to the business to achieve these goals. In addition, a detailed action plan with task assignments and timeline will be formulated.

## MANAGEMENT SERVICES

### A. Services, Retail and Merchandising

#### a. **Menu of Services**

On a bi-annual basis provide updates to the menu of services.

#### b. **Equipment, Supplies & Inventory Specifications**

Identify all equipment, supplies and inventory necessary to support the new services. Opening order quantities and ongoing operating par-levels are provided to successfully facilitate purchasing.

#### c. **Product Lines**

Continually research leading medical skin care line(s) and make recommendations that will increase revenue and profits.

#### d. **Merchandising**

Provide merchandising recommendations including: retail display units, lighting, display headers, shelf-talkers and product placement for newly implemented product lines.



### B. Marketing, Promotion & Advertising

#### a. **Marketing Plan & Budget**

Work with the Medical Spa Manager to develop an annual marketing plan.

This plan includes the identification of the advertising and public relations efforts necessary to support each bi-monthly promotion.

#### b. **Promotions Plan**

Provide 6 promotions packages per year (1 every 2 months) plus gift certificate promotions for Christmas/Hanukah, Valentines Day and Mother's Day and up to 3 additional special promotion packages (i.e. botox event, bridal event, etc...)

#### c. **Graphic Design Package**

The following graphic design templates are available with each Promotion in the Promotion Plan.

- i. Direct mail postcards
- ii. Gift cards
- iii. One (1) each B & W and color advertisements
- iv. Promotional coupons
- v. Counter cards

#### d. **Online Marketing**

The following Online Marketing applications are available with each Promotion.

- i. Website updates
- ii. E-mail Broadcast template

#### e. **Other Marketing Materials**

The following additional marketing applications templates are available with each Promotion.

- i. Message on hold script updates
- ii. Radio scripts

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f. **Public Relations**

A press kit template is provided and assistance with the development of the press kit is available. The templates include:

- i. Company Backgrounder
- ii. Fact Sheet
- iii. Team Bios
- iv. Launch Announcement

**C. Medical & Service Technology**

a. **Medical Equipment**

Continually review new technology and provide recommendations for all medical equipment. This includes lasers, microdermabrasion, diagnostic and all other equipment to support the marketing plan and operate efficiently and cost effectively.

b. **Service Protocols**

Provide clinical protocols for any recommended equipment (vendor provided).

**D. Management Systems & Information Technology**

a. **Service Protocols**

Provide Service Protocols & Client Forms for all services identified on the Service Menu. The protocols identify step-by-step procedures, product, supplies and equipment needed to facilitate the service, contraindications, and certification necessary to perform the service.

b. **Standard Operating Procedures**

Operating procedures for all functional areas of the business including:

- i. Front Desk
- ii. Customer Service
- iii. Human Resources
- iv. Accounting/Finance
- v. Facility Management
- vi. Service Program
- vii. Sales & Marketing



c. **Template Employee Handbook**

This handbook reviews all Human Resources related employee concerns from benefits to FMLA. (Acara recommends that client's attorney review and modify based client's needs and state specific labor laws). Included as part of this program are Human Resource Forms needed to implement the Employee Handbook

d. **Medical Spa Software**

Acara has identified and co-branded Medical Spa software that we recommend. The software support is included in the Acara Management Program. (initial purchase is not included)

- i. Reservations/Appointment Book



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- ii. Point-of-Sale Operations
  - iii. Retail Management
  - iv. Employee Time clock & Commissions
  - v. QuickBooks Interface

## **E. National Vendor Relationships**

### **a. Preferred Vendors**

Acara negotiates national agreements with a variety of well qualified national providers of goods and services.

### **b. Preferred Pricing**

Negotiated preferred pricing and discounts are all passed on directly to our client.

Acara's national presence has offered it the opportunity to negotiate discounted pricing similar to what national multi-site operations are able to secure.

Included in this Proposal is access to Acara's Preferred Vendors and the discounts and special service offerings they provide.

## **F. Recruitment**

### **a. Job descriptions**

Job descriptions for each position within the organization are provided. This includes detailed descriptions as well as summary descriptions.

### **b. Interview Materials**

Interview questions, tests and practical evaluation tools to support the interview process

### **c. Classified Advertising**

Sample recruitment advertisements and advice on ad placement.

### **d. Interview Support**

Telephone interviews of all top clinical and management candidates

## TIMELINE

Description of Work	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9 - up
<b>Plan Development</b>									
Market Assessment									
Operations Review & Financial Pro Forma									
Strategic Plan									
<b>Ongoing Operations</b>									

## CONTACT US

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