100 THINGS HALO AESTHETIC AGENCY CAN DO FOR YOU

TICK WHICH TASKS WE CAN TAKE OFF YOUR HANDS!

CLIENT COMMUNICATION & APPOINTMENT BOOK MANAGEMENT (YOUR VIRTUAL RECEPTION TEAM)

- ☐ Manage your phone line (inbound & outbound calls)
- ☐ Respond to all Instagram, Facebook & website enquiries
- ☐ Manage your inbox (email triage + replies)
- ☐ Book appointments directly into your system
- ☐ Reschedule, cancel & manage appointment changes
- ☐ Follow up missed calls & enquiries
- ☐ Send deposit links & secure bookings
- ☐ Manage waitlists & fill last-minute gaps
- ☐ Confirm upcoming appointments
- ☐ Reduce no-shows with proactive follow-up
- ☐ Rebook clients post-treatment
- ☐ Handle client questions about treatments & pricing
- ☐ Guide new clients through booking options
- ☐ Recommend treatments based on client goals (within scope)
- ☐ Manage client concerns & feedback professionally
- ☐ Escalate clinical or sensitive queries appropriately
- ☐ Maintain a consistent brand tone in all communication
- ☐ Create & refine client communication scripts
- ☐ Support multi-location appointment coordination
- ☐ Manage multiple practitioners' schedules seamlessly

MARKETING & BRAND PRESENCE

- ☐ Develop your overall marketing strategy
- ☐ Plan monthly campaigns aligned with business goals
- ☐ Create high-converting EDM campaigns
- ☐ Write email sequences that nurture & convert
- ☐ Align social media with promotions & launches
- ☐ Build "know, like & trust" content strategies
- ☐ Support content planning for your team
- ☐ Develop launch campaigns for new treatments/products
- ☐ Refine your brand voice & messaging
- ☐ Create offers that actually convert
- ☐ Plan event marketing (in-clinic or external)
- ☐ Build database growth strategies
- ☐ Create promotional calendars
- ☐ Align your online & in-clinic messaging
- ☐ Ensure all marketing is cohesive & on-brand

CLIENT JOURNEY , RETENTION & EXPERIENCE

- ☐ Build seamless client journeys from enquiry to rebooking
- ☐ Create consultation pathways that convert
- ☐ Design new client onboarding flows
- ☐ Implement automated follow-up sequences
- ☐ Improve client retention strategies
- ☐ Increase rebooking rates
- ☐ Build loyalty & membership journeys
- ☐ Create post-treatment follow-up systems
- ☐ Develop client nurturing email/SMS flows
- ☐ Map out high-end client experiences
- ☐ Identify drop-off points in your client journey
- ☐ Improve your consultation-to-treatment conversion
- ☐ Design VIP client experiences
- ☐ Create client education touchpoints
- ☐ Align your in-clinic experience with your brand

SYSTEMS, SOFTWARE & OPERATIONS

- ☐ Audit your current systems & identify gaps
- ☐ Optimise your booking system (Timely, Phorest, Jane, etc.)
- ☐ Set up services, pricing & treatment categories
- ☐ Implement automations (confirmations, reminders, follow-ups)
- ☐ Streamline internal workflows
- ☐ Build efficient day-to-day operational systems
- ☐ Create SOPs for your team
- ☐ Document your processes for scalability
- ☐ Improve team efficiency & reduce admin overwhelm
- ☐ Set up reporting dashboards
- ☐ Optimise deposits, cancellation policies & flows
- ☐ Build packages & memberships inside your system
- ☐ Clean up messy or outdated systems
- ☐ Integrate your systems (Stripe, Xero, CRM, etc.)
- ☐ Ensure your business is set up to scale

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BUSINESS DEVELOPMENT & GROWTH

- ☐ Create clear business growth strategies
- ☐ Identify revenue opportunities within your clinic
- ☐ Support new service or treatment launches
- ☐ Develop pricing strategies
- ☐ Analyse competitor positioning
- ☐ Identify gaps in your current offering
- ☐ Plan expansion (team, rooms, locations)
- ☐ Support hiring strategy & role clarity
- ☐ Build scalable business models
- ☐ Identify new income streams (memberships, online, retail)
- ☐ Support event planning & execution
- ☐ Build partnership & collaboration opportunities
- ☐ Guide you through business transitions or restructures
- ☐ Help you step out of the treatment room (if desired)
- ☐ Act as your ongoing "business bestie" & strategic support

DIGITAL INFRASTRUCTURE & ONLINE PRESENCE

- ☐ Audit and refine your website
- ☐ Improve your online booking experience
- ☐ Create high-converting landing pages
- ☐ Build hidden promo pages for campaigns/events
- ☐ Optimise your CRM (Go High Level, Zoho, etc.)
- ☐ Design automated client journeys within your CRM
- ☐ Improve lead capture on your website
- ☐ Align your website with your brand positioning
- ☐ Support e-commerce setup & optimisation
- ☐ Ensure your digital presence reflects a premium brand

COMPLIANCE, STRUCTURE & FOUNDATIONS

- ☐ Create consultation & consent form frameworks
- ☐ Support AHPRA/TGA-conscious marketing approaches
- ☐ Build treatment protocols & documentation
- ☐ Create policies (cancellation, deposits, memberships)
- ☐ Ensure your business is operating professionally & consistently

THE HALO DIFFERENCE (THE THINGS YOU DIDN'T KNOW YOU NEEDED)

- ☐ A team of experienced women behind you in your business. Not one employee but a whole team.
- ☐ Monday - Friday 9am-5pm service
- ☐ No paid leave, no insurances needed. No lunch break covers
- ☐ Act as an extension of your team (not an external agency)
- ☐ Help you build a business that actually supports your life

NOTES FOR YOUR STRATEGY SESSION

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