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# massage & bodywork

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## NEW YEAR, NEW CLIENTS

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# 3 Keys to Successfully Rebook Clients

*By Irene Diamond*

## How Ethics Can Be a Driver Toward Profitability

### ■ KEY POINTS

- To achieve repeat bookings, practitioners must (1) understand client goals, (2) deliver value for clients, and (3) design effective treatment plans.
- Understanding clients' clinical goals keeps the focus on the client, not profits, to ethically fill the appointment calendar.

The spas and clinics I consult with have big goals. They most often want to accomplish rapid growth by increasing the number of appointments scheduled each month.

Growing a volume-based practice by filling the service provider's schedule is one common approach to generating more income. The more appointments booked, the more fees collected. To keep those appointments coming in, businesses must learn effective client management.

Here are my three Rs of client management:

1. Recruit (new clients)
2. Retain (current clients)
3. Reactivate (past clients)

Most practices focus on the first R—spending money and energy to attract new clients. This is the most time-consuming and costly. Knowing how to retain current clients through an effective, ethical rebooking approach will provide much more value for a practice.

### **ETHICAL = SUCCESSFUL**

The financial goal of a for-profit business is to make a profit. But hopefully, the business also puts people before profits by taking care of their team, service providers, and clients. It is absolutely possible to create a wonderful triple-win scenario where the clients, the staff, and the business all thrive.

Clients must receive an amazing experience that meets their needs. The clinic's team and service providers are happy when clients are appreciative and fun to work with, show up for their appointments on time, and are eager to return.

This triple win is created when clients are rescheduled only when the clinic knows they can truly serve them.

### 3 KEYS TO REPEAT BOOKINGS

To successfully retain clients, a therapist must:

1. Believe 100 percent in the value they can deliver through their services
2. Evaluate clients to know their clinical goals and how to accomplish them
3. Design effective therapy plans or programs

Let's look more closely at each.

#### 1. Deliver Value for Clients

Ethical rebookings are based on truth. It's important for a therapist to have complete confidence in their professional skills. To encourage clients to return for additional sessions, therapists must know they can serve clients by delivering results. If they're uncertain about if or how their services actually provide benefits to their clientele, it is difficult to honestly suggest return visits. (Improve your skills if you're not 100 percent confident in your clinical ability.)

#### 2. Understand Client Goals

The therapist must understand the reason the client came to see them in the first place. Many therapists are unaware that every person who seeks any type of therapeutic intervention has either a problem they want to *relieve* or a goal they want to *achieve*.

It is critically important for the therapist to conduct a proper assessment to evaluate not only the client's orthopedic and neuromuscular presentation but also their emotional and psychological goals.

For example, your pregnant client may have a goal to *achieve* preparedness for a healthy labor and delivery of their child. Your client who is a high school long-

distance runner may want to *relieve* three months of shin splints, while continuing to train for their next event.

It's often obvious what the client's clinical goals are if they have physical pain or limited movement. But even the client who comes in "just" to redeem a gift certificate will have some predetermined goal for their session. (No one will spend an hour or more of their time just for the heck of it. Stress relief or a mini escape from work or the kids is a solid clinical goal.)

#### 3. Design Effective Treatment Plans

The ability to create therapy plans based on clinical reasoning is often the most misunderstood concept in the massage profession. Other providers such as hairstylists, chiropractors, dentists, estheticians, and physical therapists are taught to create plans of care for clients. Massage and bodywork therapists need to do the same.

For example, a dental practice commonly recommends a twice-a-year cleaning and exam for their general population to keep their teeth and gums healthy. If someone has a complicated dental situation, the recommended therapeutic plan of care will be more comprehensive. Hairstylists advise rebooking every 4–6 weeks to keep the shape, reduce split ends, and look good.



### RESPONSIBILITY

Suggesting to a client when and how often they should return for more sessions is a tremendous responsibility. The provider is not only asking a person to spend money and time, but, often more importantly, they're asking the client to invest their hope that the therapist can indeed support them. I implore you to treat this leadership role as a serious matter—because it is.

The most ethical rebooking suggestions only happen when they are formulated on all three keys. The provider must be 100 percent certain they can address the client's needs (based on their training and experience), they must know precisely what the client wants to achieve or relieve (both short, intermediate, and long-term), and they must be absolutely confident they can help them reach or exceed their goals. Anything else, in my opinion, is unethical.

### TOO TIMID?

Many therapists don't want to appear pushy, so they feel conflicted when it comes to rebooking clients. They strive to create a warm, supportive experience—so *selling* or *convincing* is the last thing they want to do.

This fear of coming across as sales-y causes many therapists to avoid discussing with clients their need to return for another session or to follow a suggested therapy plan or program. Instead of directly stating their recommended plan of care, many therapists secretly hope the client will eagerly ask for advice on when to return. Leaving the choice up to clients to determine the frequency of treatments requires the client to make clinical decisions they may not be qualified to make.

A practice owner who is afraid to rebook or “ask for the sale,” as it's referred to in business, does a disservice to everyone.

### DON'T LET CLIENTS DOWN

When clients are in pain, under stress, or in need of additional therapy, do not let them leave your clinic without having future appointments scheduled, or at least a clear suggested game plan to reach their clinical goals. If there is no discussion of next steps and what might be best for the client, they may go looking for another provider who is willing to step up and provide a more comprehensive solution. In the worst-case scenario, the client may feel their situation is hopeless and they must “live with it.”

Consider the poor client who could benefit greatly from the therapist's expertise, but because the therapist is too nervous or embarrassed to suggest rebooking, the client continues to search for a solution, or remains unhappy.

### TOO AGGRESSIVE?

An alternative “too aggressive” approach is when a therapist takes the view that every client is a potential paycheck. They eagerly ask the client to schedule future appointments without any clinical

justification as to if or why a client should return. Unethically, this suggestion to rebook is only intended to fill openings in their appointment calendar, or to generate income to reach a financial goal.

When the client doesn't see the therapeutic value of why they should receive additional sessions, they usually fumble around, muttering, “I'll check my calendar and call you,” leaving both parties disappointed. When the client feels the therapist is asking for a rebooking just for the money, they may never return at all, even if they need continued care.

### WHAT TO DO?

How can we ethically serve clients while filling our calendar and bank account without being pushy or pouncing on every client? The answer is to treat everyone as if they were our beloved grandmother. How would we want our loved one to feel and be treated if they were seeing a new therapist?

Of course, we would want grandma to receive the very best therapeutic care, in a warm, welcoming environment, from the most skilled, knowledgeable, attentive service provider we could find. We must believe the provider and trust they're not just carelessly rescheduling grandma for the money.

### QUESTIONS

Prior to scheduling a client's first session, it's important to discover why the client wants an appointment, and determine whether you can effectively serve them by asking these questions:

- How long have you had the problem or goal?
- What else have you tried?
- Are there any other issues we need to address?
- How does your problem or goal impact your life or work?

With this information, you can create an effective therapy plan to support the client's clinical outcome. (Note: The purpose of scheduling a series of visits is not to save the client money, as most clinics believe—it is because multiple clinical sessions are suggested to reach the client's goals. Take

the focus off the money and replace it with providing solid clinical results.)

Help the client understand the benefit they will get from future sessions. For example, “Sam, I suggest you return for two more sessions within the next 5–7 days to reduce the tightness in your right shoulder.”

### WHY CLIENTS SAY NO

Aside from truly not having the financial ability to afford a service or product, the harsh truth for why people say no comes down to trust. For clients to confidently rebook, they need to feel everything is congruent and trustworthy. They have to trust your knowledge, skills, and ability, and trust that your therapeutic approach will be effective. With that in place, there is never a need for hard-pressure *sales* or *convincing*. The responsible, ethical therapist or clinic owner will ensure they only book and rebook clients who are a good fit.

When your practice chooses to only work with clients who have clinical goals you are confident you can support (therefore providing your best work), those clients are happy to pay you because they trust you to make ethical, clinical decisions regarding their care and trust that you can deliver on it. When you ethically rebook clients, you are taking excellent care of not only them but also your business. **m&b**

**G** Irene Diamond consults globally on client recruitment, retention, and reactivation. She developed Active Modulation Therapy—The Diamond Method, and is a Massage Therapy Hall of Fame inductee. Diamond provides continuing education and is the author of *Design Your Dream Practice*.