



Biz Hack #2 For The Newbie Praccie – Issue Client History Form With Appointment

So, you're recently qualified and probably feeling a combination of excitement together with possible frustration that the clients aren't pounding down your door begging for appointments. Questioning yourself on what's next or how to fix this situation?

It's likely you had to create a client history form for your practice management modules in your course. Dig that out and **ensure that every new client receives this before they attend your initial consultation**. Clients don't want to spend half of their first appointment with you talking and outlining their contact details and some of their story so far.

The client has chosen you and they want to see you in action. The new client wants results, and they are choosing to invest their hard earned dollars with you. So make your first impression count!

Looking for inspiration on a client history form? There are the mandatory details required to be acquired and maintained in a confidential manner such as client name, address and contact details. Always be sure to capture the date of birth! I learnt that one the hard way when I dealt with three generations of Mr Smith! But also be sure that you capture the agreed disclaimer and consent.

The rest of what you choose to include in your case history will vary for your modality and your ability to capture detailed case history notes. I utilise my case history to capture the historical story, and each session is the present chapter of their journey path.

There's a second element to a client history form, and that's the contract to agree to keep the appointment. I always pair up my client history form together with my client confirmation policy. Since I utilise an online booking system, whenever a new client books their session, they receive a link to both my client history form AND my client confirmation policy. It's not rocket science, and

does give me the legal right to charge a 'no show' fee or 'late cancellation' if I can't back fill a session from someone on my waiting list.

This creates a very clear contractual arrangement with both the client and the universe that I expect the following:

- That clients will confirm they want to keep the appointment via text (so I know which file to get ready);
- That the clients will agree pay on the day of service;
- That the clients will arrive on time for appointment (which is important when operating on back to back appointment schedules); and
- That clients will be courteous and provide 24 hours notice of cancellation. Include a disclaimer that you understand gastro doesn't always strike at the ideal time and clients can keep their cooties to themselves, and you utilise the time to catchup on admin!

Need some help? Grab yourself a #bizbuddy, mentor or business coach to kick start your learning and fast track laying the proper foundations to living your dream life and dream job!



My soul purpose is to support people to 'bloom from within'. How they decide to do that is up to them, I'm just the CHANGE FACILITATOR!

Want to get to know my vibe? Follow me on Facebook -
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Want to book a chat visit www.karenhumphries.net.au/bookings