TheraCRM.pro



A SOUTH FLORIDA INTAKE PLAYBOOK

The Med Spa Intake Playbook

Fifteen plays for turning a late-night inquiry into a booked consult and a scheduled treatment. Written for South Florida med spas, in English and Spanish, and inside the rules your medical director answers to.

15	3	12	1
PLAYS	NUMBERS	MONTHS	PAGE OF RULES

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ADAY INTERACTIVE, INC. · CORAL GABLES, FL

START HERE

Most lost patients never reached the chair.

> They wrote at 11:40 PM, waited, and booked somewhere that answered first. Or they came to the consult and nobody followed up on the plan.
>
> **Both leaks sit in intake, and both are cheaper to fix than buying more leads.**

A med spa inquiry is a quick decision. Someone sees a friend's result, opens three websites, and writes to all three. The practice that replies first, in the language the person wrote in, with a real time on the calendar, usually gets the consult.

The second leak is quieter. A free consult gets booked, the patient comes in, hears a plan, and goes home to think. Without a follow-up that someone owns, the plan sits in a drawer and the treatment never happens.

This playbook turns both into fifteen plays. Each fits on a page: why it works, what to say or set up, the rule that applies, three things to do on Monday, and the number that tells you it is working.

A med spa is a medical practice. HIPAA, the Florida Board of Medicine, the FDA, the FTC, and Florida's texting law all touch intake. Where a play meets one of them, the page says so in plain words. Whether your practice is a covered entity is a question for your counsel, and every play holds up either way.

The TheraCRM.pro team at Aday Interactive, Inc., Coral Gables

WHO THIS IS FOR

Owners and medical directors

Deciding who answers which question, and where the next hire or dollar goes.

Practice managers

Responsible for the calendar, the follow-up, and the numbers on the wall.

Front desk and coordinators

Where every one of these plays happens, one message at a time.

What this is not: an ad strategy, a pricing guide, or medical advice. Nothing here needs a bigger budget. Who may recommend, order, and perform each treatment is your medical director's call under Florida rules, and every play assumes that.

Not legal or medical advice. TheraCRM.pro is an intake and follow-up system operated by Aday Interactive, Inc. It is not a healthcare provider or a law firm, and nothing in this playbook is medical, clinical, or legal advice. Whether your practice is a covered entity, and how a rule applies to you, is a question for your counsel and your compliance lead. Check every rule before you act on it.

WHAT'S INSIDE

01 · KNOW YOUR NUMBERS

01 Count inquiries, not just consults

02 Track the three numbers that predict the month

02 · THE FIRST REPLY

03 Answer inside a minute, every hour

04 Make after-hours a real shift

05 Answer in the language they wrote in

06 Price questions, answered without a quote

03 · BY SPECIALTY

07 Injectables: book the injector, not a guess

08 Laser and skin: the series, and the season

09 Body contouring: quote the process, not the outcome

10 Weight loss and wellness: evaluation first

04 · FOLLOW-UP THAT STOPS

11 From consult booked to treatment scheduled

12 Reminders that respect the night

13 Bring patients back on the provider's interval

05 · RULES AND TRUST

14 Consent, quiet hours, and STOP in two languages

15 Reviews that never confirm care

THEN

. Twelve months of intake

. Tape this to the front desk

. Your first thirty days

. The rules on one page

. How TheraCRM.pro helps

YOUR INTAKE MAP

Know where your inquiries actually come in.

Before any play, count last month's inquiries by the door they used. The map is the page every other play points back to.

Most practices know how many consults they booked. Few know how many people asked. The gap between the two is where the month was lost, and it is rarely spread evenly. Usually one door leaks: the voicemail after 7 PM, or the website chat nobody watches on Saturday.

Fill in last month next to each source. Circle the two with the most inquiries and the fewest booked consults. That is your plan.

INQUIRY SOURCE	WHAT USUALLY MOVES IT	LAST MONTH
Website form	A reply with a real time in it, sent within a minute	
Website chat	Someone, or something, answering after hours and on weekends	
Phone and voicemail	A text back when a call is missed, and a Spanish greeting	
Text messages	One inbox, so a text is not lost on a personal phone	
Patient referrals	A same-day thank-you and an easy way to book	
Event inquiries	Recording the event date so the plan fits the timeline	
Return patients	A reminder on the interval the provider set	

Pull this from your phone system, your website forms, and your booking tool. If you cannot count inquiries by source today, that is the first fix, before any marketing.

01 · KNOW YOUR NUMBERS

01 Count inquiries, not just consults

Booked consults tell you what worked. Inquiries tell you what you missed. You need both to see the leak.

WHY IT WORKS

If thirty people wrote last month and nine booked, the question is what happened to the other twenty-one. Some were never answered. Some got an answer in the morning, after they had booked elsewhere. Some asked about price and heard nothing useful.

Counting inquiries by source shows which door leaks. The fix for a silent voicemail is different from the fix for a slow website form.

IF THIS SOURCE LEAKS	LOOK HERE FIRST
After-hours calls	Whether missed calls get a text back, and how fast
Website form	Time to first reply, and whether the reply offers a time
Website chat	Who watches it at night and on weekends
Spanish inquiries	Whether the reply, the form, and the reminders stay in Spanish
Price questions	Whether the reply explains how pricing works and offers the consult

DO THIS MONDAY

1
Count last month's inquiries by source. Use the intake map.

2
Count how many of each became a booked consult.

3
Circle the source with the biggest gap. That is this month's work.

> **Watch:** inquiries and booked consults by source, every month.

01 · KNOW YOUR NUMBERS

02 Track the three numbers that predict the month

Revenue is the last number to move. These three move first, and they all live in intake.

WHY IT WORKS

Speed to first reply decides whether you get the conversation. Consult show rate decides whether the conversation turns into a visit. Consult to treatment decides whether the visit turns into care. Move any one and the month follows.

Write them down monthly where the team can see them. Pick one to move this quarter. Only one.

Speed

TIME TO FIRST REPLY

Minutes from inquiry to a real answer, measured across every door, day and night.

Show rate

CONSULTS THAT HAPPEN

The share of booked consults where the person actually comes in.

Conversion

CONSULT TO TREATMENT

The share of completed consults that become a scheduled treatment.

DO THIS MONDAY

1
Measure all three for last month. It is a baseline, not a grade.

2
Split each one by English and Spanish if you can. Most practices have never seen that split.

3
Pick one number to move this quarter.

> **Watch:** the three numbers, monthly, with the English and Spanish split beside them.

02 · THE FIRST REPLY

03 Answer inside a minute, every hour

Aesthetic decisions are made late at night and on lunch breaks. The practice that answers first usually gets the consult.

WHY IT WORKS

A person writing to three med spas at 11:40 PM is not waiting until 9 AM. By morning the impulse has cooled, or someone else has already offered a time. A reply set up to go out within a minute keeps you in the conversation.

The reply does not need to be long. It needs to be warm, in their language, and to offer a real time. Your team approves the wording before anything sends.

LOSES THE CONSULT

Thanks for reaching out. Someone will get back to you during business hours.

No time, no next step, and it arrives while they are still shopping.

BOOKS THE CONSULT

Thanks for writing, [Name]. We have a consult Thursday at 6:30 PM or Saturday at 10 AM. Which works?

Two real times. A clinical question waits for the provider.

Illustrative examples. Bracketed names are placeholders, not real people.

STAY INSIDE THE RULES

An automated reply is still a message from your practice. It may offer times and logistics. It may not answer a clinical question, promise a result, or quote a treatment plan. Those belong to a licensed provider, as your medical director defines it.

DO THIS MONDAY

1. Write one first reply in English and one in Spanish. Have your medical director approve both.
2. Make sure every door (form, chat, missed call, text) triggers it.
3. Send yourself a test inquiry at 11 PM and time the answer.

> **Watch:** median time to first reply, after hours and on weekends separately.

02 · THE FIRST REPLY

04 Make after-hours a real shift

The busiest hours for aesthetic inquiries are often the hours your front desk is closed.

WHY IT WORKS

Brickell and Coral Gables are awake from 8 PM to midnight. If the voicemail picks up and nothing else happens, that inquiry is gone. A text back on a missed call, an answer in the chat, and a booking link with real times cover the night without staffing it.

Night replies are answers to someone who wrote first. Scheduled marketing still waits for the morning.

WHEN IT COMES IN	WHAT SHOULD HAPPEN
Missed call, any hour	A text back in their language, with a booking link
Website chat at night	An answer that offers times and takes logistics only
Form at 11 PM	The first reply right away, a person follows up at opening
Reminder due after 8 PM	Held until 8 AM. Scheduled sends wait for daytime

STAY INSIDE THE RULES

Replies to someone who just wrote are fine at night. Scheduled marketing and reminders are held between 8 PM and 8 AM, and Florida caps messages on the same subject at three in 24 hours (Fla. Stat. 501.616(6)). Consent to text is stored before any automated text goes out.

DO THIS MONDAY

1
Call your own number after hours and see what happens.

2
Turn on missed-call text back, in English and Spanish.

3
Check that scheduled reminders cannot send after 8 PM.

> **Watch:** after-hours inquiries answered within a minute, as a share of all after-hours inquiries.

02 · THE FIRST REPLY

05 Answer in the language they wrote in

75.3% of Miami-Dade County residents age 5 and older speak a language other than English at home. Most practices answer in English anyway.

WHY IT WORKS

Price questions, aftercare, and pre-treatment instructions all have to land in the language the person thinks in. Aftercare most of all: a misunderstood instruction is a clinical problem, not a service one.

The break is rarely the form. It is the automated reply, the reminder, or the voicemail greeting that stayed in English after the person wrote in Spanish.

Form

LANGUAGE CHOSEN ONCE

The person picks English or Spanish, and that choice follows every message after.

Replies

SPANISH STAYS SPANISH

The first reply, reminders, and follow-up all go out in the language they picked.

Desk

ROUTING

Spanish inquiries go to the coordinator or provider who can hold the conversation.

STAY INSIDE THE RULES

Consent to text and the privacy notice are shown in the language of the form. Store the language with the consent record, so you can show what the person agreed to and in which language.

DO THIS MONDAY

1. Send a test inquiry in Spanish and follow every message it triggers.
2. Record a Spanish voicemail greeting.
3. Translate the first reply, the reminders, and aftercare templates, then have a fluent staff member read them aloud.

> **Watch:** consult show rate for Spanish inquiries next to English ones.

02 · THE FIRST REPLY

06 Price questions, answered without a quote

The most common first question is how much. Silence or a dodge loses the inquiry. A clinical quote by text is the wrong answer too.

WHY IT WORKS

People ask about price because they want to know if they belong in your practice. You can answer how pricing works (per unit, per area, per session, by series) and that the provider sets the plan at the consult.

If your practice publishes a price list, the reply can share the approved one. Otherwise, it explains the structure and offers the consult.

DODGES IT

Pricing depends. Please call during business hours.

Feels evasive, and they keep shopping.

ANSWERS IT

It is priced per unit, and your provider sets the plan at a free consult. I can book you Friday at 5 PM.

Honest structure, no clinical quote, a real time.

Illustrative examples. Bracketed names are placeholders, not real people.

STAY INSIDE THE RULES

Never promise a result or a number of units by text. Price structure and a published, approved price list are fine. A specific plan comes from the provider who saw the patient.

DO THIS MONDAY

1. Write one approved answer for each price question you get most.
2. Decide whether your price list is published. If not, the reply explains structure only.
3. Add the consult offer to every price answer.

> **Watch:** price inquiries that become booked consults.

03 · BY SPECIALTY

07 Injectables: book the injector, not a guess

Injectable inquiries are fast and specific. Record what they ask for, book the injector, and leave every clinical question to the provider.

WHY IT WORKS

People ask about a brand name, a first-time visit, a touch-up, or an event coming up. Intake records the interest and any event date, then offers the injector's next openings. Whether a treatment fits is the provider's call.

Name the product you actually use. Calling every neurotoxin by one brand is inaccurate and uses another company's trademark. More on this specialty at theracrm.pro/industries/med-spas/injectables/.

THEY ASK	INTAKE DOES
First time, nervous	Books a consult with time for questions, records first visit
Event in three weeks	Records the event date and flags it for the provider
Touch-up after two weeks	Routes to the injector who treated them
Pregnant or nursing	Takes no detail and hands it to the provider

STAY INSIDE THE RULES

Neurotoxins and fillers are prescription products. Who may assess and inject is set by Florida rules and your medical director. Intake never says a treatment is safe for someone or what result to expect.

DO THIS MONDAY

1. List the product names you use and fix any page that calls them by another brand.
2. Add an event date field to the injectables form.
3. Write the hand-off reply for clinical questions.

> **Watch:** injectable consults booked within a day of inquiry.

03 · BY SPECIALTY

08 Laser and skin: the series, and the season

Laser inquiries are about timing as much as treatment. Sun, events, and a series of visits all shape the plan.

WHY IT WORKS

In South Florida, sun exposure affects when some laser treatments make sense. Intake records the treatment area and the timing the person has in mind, then books the assessment. The provider decides the plan and the schedule.

Series work loses people between visits. Booking the next session before they leave keeps the series on track. See theracrm.pro/industries/med-spas/laser-skin/.

THEY ASK	INTAKE DOES
Dark spots or redness	Records the treatment area, books an assessment
Hair removal series	Explains sessions are planned by the provider, books the first
Can I send a photo?	Explains photos are taken at the visit, not by text
Reaction after treatment	Routes to a person on the clinical team right away

STAY INSIDE THE RULES

Never ask for photos of skin by text or chat, and never assess a concern in writing. A reaction after treatment goes to a person, not to automation.

DO THIS MONDAY

1. Add a series stage to your laser pipeline so drop-offs are visible.
2. Write the reply for photo requests.
3. Make sure a reaction keyword stops automation and alerts a person.

> **Watch:** laser series completed, as a share of series started.

03 · BY SPECIALTY

09 Body contouring: quote the process, not the outcome

Body contouring is a considered purchase. The inquiry needs patience, privacy, and no promises.

WHY IT WORKS

People often research for weeks. They ask how many sessions, whether it hurts, and what results look like. Intake explains that the provider plans the series at the consult, records the area of interest in general terms, and books it.

Privacy matters here more than most. Previews and subject lines name the practice and a time, never the body area. See theracrm.pro/industries/med-spas/body-contouring/.

THEY ASK	INTAKE DOES
How many sessions?	Explains the provider plans the series, books the consult
Will it work for me?	Books the consult, never predicts a result
Financing	Shares only practice-approved financing terms
Can I send pictures?	Explains images are taken at the consult

STAY INSIDE THE RULES

No before-and-after claims, no typical-result numbers, and no body photos by text or chat. Results claims need evidence and must reflect typical results under FTC rules. Florida regulates who may perform and supervise these treatments.

DO THIS MONDAY

1. Remove any result promise from your contouring replies.
2. Check that message previews never name a body area.
3. Write a follow-up for people who are still deciding after the consult.

> **Watch:** contouring consults that become a scheduled series.

03 · BY SPECIALTY

10 Weight loss and wellness: evaluation first

Weight-loss inquiries often ask for a medication by name. Intake books an evaluation. It never promises a drug or a result.

WHY IT WORKS

Medication for weight loss is prescribed only after a licensed provider evaluates the patient. Intake records the interest, any program questions, and availability, then books that evaluation. It names no drug and promises no number on the scale.

Some messages carry distress, like not eating or feeling hopeless. Those stop the automation and go to a person, with no program offer. See theracrm.pro/industries/med-spas/weight-loss-wellness/.

THEY ASK	INTAKE DOES
Do you have the shot?	Explains a provider evaluation comes first, books it
How much will I lose?	Never predicts, books the evaluation
Vitamin or IV drips	Records the interest, the provider decides fit
Side effect on medication	Routes to the clinical team right away

STAY INSIDE THE RULES

Never present a compounded drug as the brand-name product or as FDA-approved. Health claims need evidence under FTC rules. Ad platforms restrict ads that name prescription drugs or imply a health condition.

DO THIS MONDAY

1
Rewrite any reply that names a weight-loss drug before evaluation.

2
Add distress keywords that stop automation and alert a person.

3
Make side-effect messages go straight to the clinical team.

> **Watch:** evaluations booked from weight-loss inquiries.

04 · FOLLOW-UP THAT STOPS

11 From consult booked to treatment scheduled

A free consult is not the goal. A scheduled treatment is. Most practices track the first and lose the second.

WHY IT WORKS

After the consult, the patient goes home with a plan and a lot to think about. A short follow-up a day later, then a few days later, answers questions and offers a time. It stops the moment they book or say no.

Put the stages on a board the team can see. The stage that piles up is the one to fix.

STAGE	WHAT MOVES IT FORWARD
Inquiry	A reply within a minute with real times
Consult booked	Reminders at 24 hours and 1 hour
Consult completed	A follow-up the next day, in their language
Treatment scheduled	Pre-treatment instructions from the provider
Treatment completed	Aftercare, then the next visit on the provider's interval

DO THIS MONDAY

1. Set up these five stages and move every open consult into one.
2. Write the day-after follow-up, approved by the provider.
3. Name one person who owns the consult-completed stage.

> **Watch:** consult to treatment, monthly.

04 · FOLLOW-UP THAT STOPS

12 Reminders that respect the night

Reminders cut no-shows. Reminders at 10 PM cut trust.

WHY IT WORKS

A reminder 24 hours before and another an hour before gives the person time to confirm or reschedule. A reschedule link in the reminder saves the slot instead of losing it.

Every scheduled message follows the same clock. Hold them for daytime and keep to the daily cap.

MESSAGE	WHEN IT GOES
Consult confirmation	Right after booking, any hour, because they just asked
Reminder	24 hours before, held to daytime
Same-day reminder	1 hour before
No-show follow-up	Next morning, one message, a reschedule link

STAY INSIDE THE RULES

Scheduled sends hold between 8 PM and 8 AM. No more than three messages on the same subject in 24 hours (Fla. Stat. 501.616(6)). STOP, ALTO, and PARE end every sequence at once.

DO THIS MONDAY

1. Check every reminder for its send time.
2. Add a reschedule link to each one.
3. Test STOP, ALTO, and PARE on your own phone.

> **Watch:** consult show rate, before and after the reminder change.

04 · FOLLOW-UP THAT STOPS

13 Bring patients back on the provider's interval

The easiest next visit is the one a past patient already wants. Most of them just need to be asked at the right time.

WHY IT WORKS

Injectables, skin, and maintenance treatments come back on intervals the provider sets. A reminder at that point, in the patient's language, books the visit before they drift to another practice.

Reactivation goes only to patients who agreed to hear from you, and it stops the moment they reply.

Interval

SET BY THE PROVIDER

Each patient's next-visit timing comes from their provider, not a blanket schedule.

Consent

ON FILE FIRST

Only patients who agreed to messages get them. Store when and how they agreed.

Stop

ON ANY REPLY

A reply, a booking, or STOP ends the sequence right away.

STAY INSIDE THE RULES

Reactivation is marketing, so it needs consent on file and follows quiet hours and the daily cap. It never names the treatment in a preview.

DO THIS MONDAY

1. Pull patients past their provider's interval with consent on file.
2. Write one warm message in English and one in Spanish.
3. Send in small batches so the desk can answer replies.

> **Watch:** past patients who book within thirty days of the message.

05 · RULES AND TRUST

14 Consent, quiet hours, and STOP in two languages

Florida's texting law carries damages per message. The fix is a few settings and one checkbox.

WHY IT WORKS

Consent to text is its own unchecked box on the form, in the form's language, stored with the time, the wording, and the language. It is not the same as acknowledging your privacy notice.

Opt-outs work in either language and in plain words. A patient who writes ALTO is as opted out as one who writes STOP.

SETTING	WHAT GOOD LOOKS LIKE
Consent	Separate unchecked box, stored with time and language
Quiet hours	Scheduled sends hold 8 PM to 8 AM
Daily cap	Three messages on one subject in 24 hours
Opt-out	STOP, ALTO, PARE, and plain words, honored everywhere

STAY INSIDE THE RULES

The Florida Telephone Solicitation Act (Fla. Stat. 501.059) and the federal TCPA both apply. The burden of proving consent is on the sender. No advertising pixels or session recording on the intake path.

DO THIS MONDAY

1
Check your form for a separate, unchecked consent box.

2
Confirm the consent record stores time, wording, and language.

3
Text ALTO to your own number and confirm every sequence stops.

> **Watch:** opt-outs honored within one message, checked monthly.

05 · RULES AND TRUST

15 Reviews that never confirm care

Ask everyone for a review the same way. Reply to all of them without confirming anyone was a patient.

WHY IT WORKS

Reviews help people choose, and asking every patient the same way is fair and allowed. Asking only the happy ones is not.

The reply is where practices get hurt. Naming the treatment or confirming the visit discloses health information, even when the patient named it first.

DISCLOSES

So glad you loved your filler, [Name]. See you in six months.

Confirms care and names the treatment.

SAFE

Thank you for taking the time to share this. We are glad to hear it.

Warm, and confirms nothing.

Illustrative examples. Bracketed names are placeholders, not real people.

STAY INSIDE THE RULES

The FTC rule on consumer reviews (16 CFR Part 465) bans fake reviews and suppressing negative ones. Google prohibits asking only satisfied customers. Where HIPAA applies, a reply may not confirm someone was a patient.

DO THIS MONDAY

1. Write one safe reply for positive reviews and one for negative ones.
2. Ask every patient the same way, in their language.
3. Check last month's replies for anything that confirms care.

> **Watch:** reviews per month, and replies that confirm care (the goal is zero).

TWELVE MONTHS OF INTAKE

A year of inquiries, South Florida style.

Inquiry volume follows the seasons here, not a national template. Use the calendar to staff the replies and prepare the follow-up before the rush.

JANUARY

New year, new plan

Inquiries spike. Make sure after-hours replies are on before the first week.

FEBRUARY

Gifts and pairs

Gift card buyers become new patients. Book their consults quickly.

MARCH

Event season

Weddings and galas. Record event dates so plans fit the timeline.

APRIL

Before summer

Body series inquiries rise. Book consults early enough to finish the series.

MAY

Gift season

Gift recipients write in. Welcome them in their language.

JUNE

Summer and storms

Hurricane season starts. Send your reschedule policy and test the reschedule link.

THE RULE THAT MAKES THE CALENDAR WORK

Every busy month starts with replies that answer within a minute and reminders that respect quiet hours. Seasonal messages go only to patients with consent on file.

TWELVE MONTHS OF INTAKE

The second half sets up the season.

JULY

Mid-year check

Review the three numbers. Fix the stage that piles up.

AUGUST

Back to routine

Parents and teachers return to schedules. Reminders matter most now.

SEPTEMBER

Laser season opens

Less sun, more laser inquiries. Hispanic Heritage Month starts the 15th: check every Spanish template.

OCTOBER

Seasonal residents return

Inquiries from patients home for the winter. Bring them back on their interval.

NOVEMBER

Holiday planning

Package inquiries rise. Prepare replies and staff the chat.

DECEMBER

Party season

Event touch-ups. After-hours replies carry the month.

GIFT CARDS AND MEMBERSHIPS

Florida generally bars expiration dates and post-sale fees on gift cards (Fla. Stat. 501.95), and auto-renewing memberships need clear terms and a way to cancel (501.165). When intake answers a gift card or membership question, it shares only the practice-approved terms.

TAPE THIS TO THE FRONT DESK

Fifteen plays, eight habits.

If your team does these every shift, most of this playbook is already running.

Answer within a minute

Every door triggers a reply with real times. A named person owns new inquiries each shift.

Offer a time

Every reply ends with two real times, not a request to call back.

Hand off clinical questions

Contraindications, results, and side effects go to the provider, never to automation.

Follow up the consult

The day after, in their language, until they book or say no.

Hold the night

Scheduled sends wait until 8 AM. Replies to new messages do not.

No photos by text

Images are taken at the visit, never collected in chat or messages.

Reply without confirming

Thank every reviewer. Never confirm care or name a treatment.

Hablamos español

Spanish at the desk, on the phone, and in every template.

IMPLEMENTATION

Your first thirty days.

Do not run fifteen plays at once. One week at a time, in this order.

WEEK 1	Get your baseline	Fill in the intake map. Measure the three numbers, split by English and Spanish. Send yourself a test inquiry after hours and time the answer. Change nothing yet.
WEEK 2	The first reply	Write the first reply in both languages and have your medical director approve it. Turn on missed-call text back. Record a Spanish voicemail greeting.
WEEK 3	Consult to treatment	Set up the five pipeline stages. Write the day-after follow-up. Add reminders with a reschedule link, held to daytime.
WEEK 4	Rules and return	Check consent records and opt-outs in both languages. Write safe review replies. Pull past patients due on their interval and reach out.

THE RULES ON ONE PAGE

The rules, in one place.

Every play that touches a rule says so on its page. Here they are together, so your manager, your medical director, and your counsel can check them in one read.

HIPAA	A cash-pay cosmetic practice may not be a covered entity. Billing insurance, working under a medical practice that does, or handling medical histories can change that. Your counsel decides. Where HIPAA applies, review replies may not confirm care, and vendors handling patient data sign a business associate agreement.
FLORIDA TEXTING	The federal TCPA and the Florida Telephone Solicitation Act (Fla. Stat. 501.059): consent on file for automated texts, and opt-outs honored at once in any language. Scheduled sends held at night, no more than three on one subject in 24 hours (501.616(6)).
FLORIDA MEDICINE	Who may recommend, order, perform, and supervise each treatment is set by the Florida Board of Medicine and Board of Nursing, and by your medical director. Intake never answers a clinical question.
FTC CLAIMS	Results claims need evidence and must reflect typical results. Endorsements and influencer posts need clear disclosure (16 CFR Part 255).
FTC REVIEWS	16 CFR Part 465 bans fake reviews, buying reviews with conditions, and suppressing negative ones. Ask everyone the same way.
FDA AND NAMING	Neurotoxins and fillers are prescription products. Name the product you use. Never present a compounded weight-loss drug as the brand-name product or as FDA-approved.
FLORIDA CONSUMER	Gift cards: generally no expiration dates or post-sale fees (501.95). Auto-renewing memberships: clear terms and a way to cancel (501.165).

Names, quotes, and scripts in this playbook are illustrative examples written for teaching, not real patients, providers, or practices. This playbook is general information, and rules change. Check each practice against the current rules with your medical director and a healthcare attorney before you rely on it.

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HOW THERACRM.PRO HELPS

TheraCRM.pro runs the intake behind these plays.

Every play here works with the team you have. TheraCRM.pro is the system that makes them stick: built in Coral Gables, bilingual by default, and configured before you log in.

Every door, one inbox	Web chat, SMS, email, and phone in one thread per person, so no inquiry sits on a personal phone.
Reply within a minute	Set up to answer every inquiry within a minute, day or night, in the language the person wrote in.
Consult to treatment	A pipeline with the stages in play 11, reminders held to daytime, and follow-up that stops when they book.
Voice agent	On Practice and Group, an AI voice agent that books and reschedules. Scheduling only, never health details.
HIPAA add-on	Where your practice is a covered entity, the HIPAA-enabled configuration and BAA is a $100 a month add-on on Practice and Group, signed before first login.

NEXT STEP

See your intake answer an 11:40 PM inquiry.

Book a 30-minute demo. We send a test inquiry to a med spa setup like yours, in English and Spanish, and show you every message that follows. If the answer is that you do not need this, that is what you will hear.

BOOK A DEMO

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