

TIP OFF

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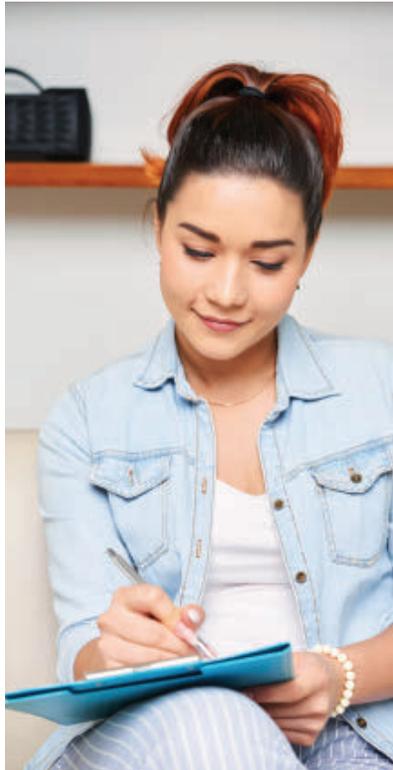
Client 411

While welcoming new clients to your salon is an exciting time, it can also be filled with uncertainty. To better understand the customer sitting across from you, consider utilizing a new client intake form, which includes information about health/medical history and previously used professional salon products. We asked three industry experts how their salons make use of these forms, and they can be used to build a lasting relationship with a client.

Michelle Saunders, owner of Saunders & James Nail Care in Oakland, California, gives each client an intake form either digitally (via email) or before her appointment to fill out manually. Saunders urges salon owners to use these forms, especially now during the pandemic. "A client intake form can answer the questions team members need before any service is performed. Questions can range from asking if clients have had any COVID-19 symptoms, if they have any allergies to nail products or simply asking their favorite nail color. The more information you have upfront allows the salon to give the best service to the client."

"A client intake form can be used to personalize a service or ask clients important questions you need to know before proceeding with a service, and to convey policies you need your client to acknowledge and agree to," says Carla Hatler, owner and founder of Austin, Texas-based nail studio Lacquer. "Right now, intake forms are so important because of COVID-19. We use ours to ensure customers understand and agree to our COVID-19 policies," Hatler says. "We have also used intake forms to help personalize the service and keep us informed of any conditions that may prevent us from performing a service safely."

When creating your salon's intake form, knowledge of local laws and guidelines is the best place to start.



"It's critical that every salon is aware of what their state and local guidelines are, and that those are incorporated in whatever policies they adopt. Whatever you choose to do, make sure you are consistent with the enforcement of your policies," Hatler notes.

Despite the importance of these forms, some clients may push back when asked for personal information. When such a situation occurs, Hatler's salon will not proceed with the appointment. "If a client isn't comfortable filling it out, then we will cancel her appointment. Really, the key is communication: Make sure your policies are everywhere (on your website, on your menu, in appointment confirmations, etc.), so a client's expectations are set from the beginning. Nowadays, most clients are booking appointments in advance and must provide their name and contact

info, so it's usually a non-issue. With all of this said, I can't stress enough how important it is to be intimately familiar with your state and local guidelines."

When it comes to updating the forms, Saunders suggests working on an as-needed basis. "It's a good idea to have a solid intake form with traditional questions, but you could update it every six months to add new questions if needed," she offers. "More and more the nail industry is taking hints from the medical field to protect the clients and staff. It's paramount now to be diligent with records, as it may protect you from liability."

Jaime Schrabek, manicurist and owner of Precision Nails in Carmel, California, takes a different approach to new client intake forms: She just sticks to the client's contact information. "In my salon, we work by appointment and screen potential clients before scheduling. Every client must provide their full name, email and phone number to reserve an appointment."

She cautions salon owners when dealing with medical information on such forms. "The collection, storage and use of additional information like medical histories and medication lists go beyond issues of any data privacy laws. When you ask questions, you're responsible for the answers, so we should be cautious about that which we're not trained or authorized to evaluate. Clients with serious health issues or allergies should take responsibility and volunteer that information before being scheduled for an appointment."

If you're on the fence about gathering sensitive client information, Saunders suggests reaching out to your insurance company, which can provide more specific guidance on best practices. Check with providers of general business and professional liability insurance.