

## FINAL REPORT ON CRISIS MANAGEMENT Case May 20,2022

The account was placed on crisis management last May 23, 2022 due to a disruption between practice management. We took the following steps to minimize impact and quickly return to standard operations.

### Implementation of Control Measures

- Due to patient safety concerns, the client was required to close three of their four MedSpa locations.

### Refund Control

The patients with prepaid service started requesting for refunds due to the following:

- Closure of three locations
- Negative exposure through social media platforms instructing them to request for a refund

Objective:

- Validate all refund requests
- Address all requests and work out a resolution with the patient

Obstacles and Solutions

1. Volume - there was a massive volume of phone calls from patients requesting a refund. In order to accommodate all requests the process required a bit of automation - submitting required documentation through a Google Form.
2. They were unable to recover access to certain applications to track and verify purchases. The patients were required to submit proof of payment in order to move forward with the refund request.
3. Cash flow - There were significant savings in determining a way to provide treatment to these patients rather than refunding the money.

Process:

1. Patients were proactively reached through email to give them an update that the practice remains open and everyone can submit a refund request with proper documentation by filling out a Google Form.
2. We reviewed all submissions. If a patient submitted proper documentation, we instead offered her to be seen so we can provide the service. If documentation is not sufficient, we request it again.
3. If the service they purchased is not available, we offered them practice credit to get another service or products from the office.
4. Total refund submissions - 1817. Total Valid Refunds - 1087. Invalid submissions - 730. Treatment provided 92.55%

	Number of Patients who submitted the Form	Number of Patients we emailed that we cannot do a refund and invited them to schedule	Number of Patients that needs to be informed about expiration date is 2/28/2023	Number of Patients converted and scheduled treatment (prepaid)	In Progress
June	1,142	648	875	91	503
July	413	261	280	95	273
August	180	114	113	51	112
September	41	21	27	80	27
October	19	14	10	107	10
November	5	5	0	118	0
December	6	24	0	203	326
January 2023	6	0	0	261	0
February 1-15 2023	5	0	0	0	0
<b>TOTALS</b>	<b>1,817</b>	<b>1,087</b>	<b>1,305</b>	<b>1,006</b>	<b>--</b>

### Promos

While taking inventory, we discovered that there were products in the office that were about to expire. Once the product has expired, it loses all value. They offered the following specials to patients so the products will not go to waste:

- We opened weekend slots to see more patients.
- We contacted patients who purchased Hydra facial and scheduled them once a provider was able to perform them.

Promos and Special Call Lists	Total Patient on the list	Number of Patient who scheduled	Added Back to the Call List
Weekend	560	234	326
Dysport \$6.50 per unit- buy one area, get one area free.	170		170
Alle and Botox Day	51	47	4
HydraFacial Call List	18	10	8
Ultherapy Call List	99	1	0
December Holiday Promo	All patients in the call list	19	0
January Promo	All patients in the call	7	0

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### New Consults, Post OP and Paid Consultations Tracking

The office phones were routed to Elite Med during lunch and after hours.

- Refund request - handled by Elite Med
- We took the patient's message and forwarded it to the practice.
- Scheduling concerns - handled by Elite Med

By scheduling paid service appointments and new consultations right away, Elite Med was able to send a total of 157 potential patients to the practice. We entered a credit card on file for no show appointments.

New Consults, Post OP and Paid Consultations				
	Prepaid Services	Paid Services	New Consult/POST OP	TOTAL
September	80	39	1	120
October	107	24	11	142
November	127	24	7	158
December	143	35	16	194
January	41	35	4	80
February	7	4	0	11
<b>Total</b>	<b>457</b>	<b>122</b>	<b>35</b>	<b>614</b>
Percentage	74.43%	19.87%	5.70%	100.00%

### Voicemail Return Calls

In every business, making sure that they answered phone calls is critical in patient care and acquisition. In the event that patients reach voicemail, we should return the calls urgently. Elite Med listened and called back all patients who left a voicemail to address their questions/concerns.

	Number of Voicemail worked	Number of patients scheduled same day they left a Voicemail
From September 9th	403	26
October	535	46
November	443	39
December	461	58

January 1-21 2023	213	22
February 1-15	V/M answered by PX	V/M answered by PX

## Front Desk Work - Phone Activity

### Calls

Month	Outbound Calls	Total Duration
06-Jun	28	0:40:15
07-Jul	39	1:51:50
08-Aug	336	16:55:53
09-Sep	857	17:25:28
10-Oct	1029	6:47:24
11-Nov	1225	8:14:25
12-Dec	228	6:15:40
<b>Grand Total</b>	<b>3742</b>	<b>10:10:55</b>

Month	Inbound Calls	Duration
06-Jun	154	14:52:33
07-Jul	654	1:19:14
08-Aug	753	8:00:32
09-Sep	731	4:24:06
10-Oct	726	17:05:48
11-Nov	634	10:25:59
12-Dec	103	7:16:11
<b>Grand Total</b>	<b>3755</b>	<b>15:24:23</b>

### Merchant Disputes Received from June 1, 2022, to February 14, 2022

Patients who requested a refund could also dispute the charge directly with their credit card provider. We must explain to patients that they prepaid the service and can not dispute the charge as we are prepared to schedule them for services. There were 2137 credit card disputes. We recovered 8% of the revenue as settled in our favor. The most effective strategy was the proactive approach to schedule these patients as quickly as possible.