



Moxie

# The Medspa Launch Guide

Prepare for a wrinkle-free launch with our comprehensive roadmap filled with all the guidance you need to sculpt your medspa's success.

SECOND EDITION

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# Introduction

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The decision to launch your own medspa is a big one, filled with both enormous excitement and daunting challenges. There's no denying the potential of the opportunity ahead of you: the aesthetic industry has skyrocketed into a \$17.5 billion market, projected to reach \$29.7 billion by 2027. In many ways, there's never been a better time for aspiring aesthetic entrepreneurs to carve out their niche and meet the growing demand.

Yet, entrepreneurship is tough. 45% of new businesses fail within the first five years due to unmet needs, insufficient financing, poor location, or bad business plans. And while the exact number of “false starts”—attempts to launch a medspa but a failure to get the business off the ground—are not well documented, we anecdotally hear these types of stories nearly everyday.

For the aesthetic entrepreneurs that have the passion, the commitment, the strategy, and—yes—the moxie to bring their dream of owning a medspa to life, the benefits can be enormous. From more time with your family to more money in your pocket, for those with the will, there is certainly a way to successfully launch, run, and grow your own medspa.

In this guide you'll find a detailed roadmap to help you navigate the intricacies of launching your medspa, ensuring a smooth start, plump profits, and sustained growth.

And if you ever find yourself wishing you had a partner guiding you at every step of the journey, [reach out to Moxie](#). We're always here to help.

Happy Reading!

The Moxie logo is a stylized, handwritten-style wordmark in a dark blue color. The letters are fluid and connected, with a prominent 'M' and a long, sweeping tail on the 'e'.

— Chapter 01

# Finding Your “Why”

Starting your own medspa is a major decision, and understanding your “why” is crucial to your success. Your “why” is the foundation for your entrepreneurial journey. It provides clarity and purpose, keeping you motivated through challenges and focused on your goals.

Understanding your “why” isn’t just motivational fluff—it’s the bedrock of a sustainable and fulfilling business. As Simon Sinek famously said, “People don’t buy what you do; they buy why you do it.” Your “why” will guide your decisions, inspire your future team, and connect deeply with your clients.

## Here are some reasons that might resonate with you:

**Financial Freedom:** Owning a medspa can provide a lucrative income, helping you achieve financial independence and long-term stability.

**Work-Life Balance:** Be your own boss and create a schedule that works for you. Spend more time with your family and prioritize what matters most.

**Autonomy:** Run your medspa your way. Implement your vision for better client experiences and innovative treatments.

**Passion for Aesthetics:** If you love the field of aesthetics, owning a medspa allows you to immerse yourself in work you are passionate about every day.

**Impact:** Make a positive difference in your clients' lives by boosting their confidence and well-being through top-notch aesthetic services.



# Real Stories for Real Inspiration

Hear from two medspa entrepreneurs who partnered with Moxie to successfully launch their own medspas. Their stories might inspire and guide you on your path to success, showing you the tangible benefits of staying true to your "why."



**Becca Churchwell**

Aesthetic Nurse Practitioner  
Founder + CEO of Churchwell Aesthetics

**Dr. Alexandra Palumbo,**  
DNP, APRN, FNP-C.  
Founder + CEO of Blonde Girl Aesthetics



**Jessica Cvetic, PA-C,**  
PA-C, BS, MPAS

Founder + CEO of Citrus Aesthetics



# Turning Your “Why” Into a Mission Statement

Shaping your “why” into a mission statement can help you stay focused on the end result as you do the hard work of taking your medspa from idea to reality. A clear mission can also help guide your brand and decisions moving forward.

A good mission statement articulates the purpose and values that guide your business. In it, you will define what your medspa will provide, to what audience, and how you will do it. Usually, it is a public-facing commitment and explanation of who you are at the core.

Here are three questions to ask when crafting a compelling mission statement:

- 01** | **What does your medspa provide?**  
Clearly state the primary purpose of your medspa. What needs does your business aim to fulfill? What services do you plan to offer?
- 02** | **Who does your medspa serve?**  
What type of person are you looking to serve? Who will your clients be? Speak to that audience.
- 03** | **What does this achieve?**  
Think through how you plan to improve the lives of your clients, or what the ultimate value and outcome of your services will be.

Your mission statement might look something like this:

“At [Medspa name], our mission is to empower individuals and enhance their overall confidence through personalized aesthetic treatments. We are committed to delivering excellent results with integrity and compassion, and we strive to provide a safe, nurturing environment where every client feels supported on their journey to radiant beauty.”

## — Chapter 02

# Education is the *Foundation of Success*



### **Save More with Moxie**

Providers that partner with Moxie can save on training, products, and more. [Book a free medspa strategy session](#) to learn more today.

Embarking on your medspa entrepreneurship journey begins with thorough training. Proper education is the foundation for success, equipping you with the necessary skills and knowledge to deliver exceptional services.

If you don't yet have experience in aesthetic medicine, start by enrolling in accredited programs that offer certifications in aesthetic procedures. Hands-on training with experienced professionals provides practical insights, improves patient outcomes, and builds confidence.

Generally with training we recommend looking for opportunities that offer bountiful opportunities for hands-on training and where the instructor/student ratio is low. With shadowing, we recommend someone who has a busy practice and a strong reputation such that you can learn more not just about injecting technique, but about effective consultations and working .

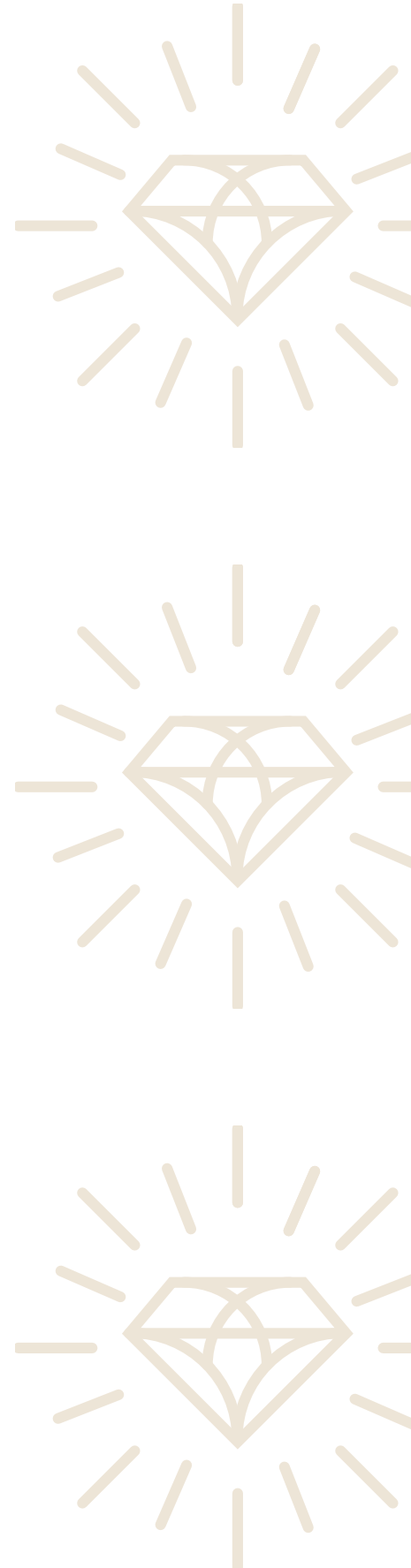
# Selecting the Right Training Course

According to the International Association for Physicians in Aesthetic Medicine (IAPAM), some of the questions you may want to ask when deciding which course to take include:

- Does the course have an extensive overview of facial anatomy and musculature?
- Will you be provided with ample hands-on training?
- Is the course curriculum based on the latest and best scientific resources?
- Is the course certified and will it provide you with CMEs?
- Does the training keep a report card from attendees?
- How long has the organization been providing training?
- Who is doing the training? Are they highly qualified injectors and board-certified dermatologists?
- Is there an opportunity to learn other Aesthetic Procedures at the same time?
- Is training available online or in-person?

## Never Stop Learning

Continuous learning through workshops, seminars, and online courses ensures you stay updated with the latest industry trends and techniques. Investing in comprehensive training not only enhances your expertise but also boosts client trust and satisfaction, setting your medspa on the path to success.



— Chapter 03

# *Understanding Your Market and Competitors*

Once you know your “why”, it’s time to start bringing your business plan to life. The best place to start: research.

To thrive in the competitive landscape of the medspa industry, you need a comprehensive understanding of the market you’re entering. By determining who your target clients are and conducting a thorough competitive analysis of other competing businesses in the area, you’ll have the necessary insights you need to determine a killer business strategy.

88%

of medspa patients  
are female

53%

are between the  
ages of 35-54





# Identifying Your Target Audience

Understanding your target audience allows you to tailor your services, messaging, and promotional strategies to resonate with their specific needs and preferences. After all, it's hard to appeal to future clients if you don't know who they are or what they're looking for.

You'll want to consider four main factors when identifying your target audience:

01

## **Demographics**

This includes things like their age, gender, occupation, and income level.

03

## **Psychographics**

Think through their values, desires, interests, and lifestyle choices.

02

## **Goals and pain points**

What are they hoping to get out of this?  
What challenges do they face or needs do they have?

04

## **Communication preference**

Does your audience prefer to receive communications via email, social media, or physical mail?



# Decoding the Competition

Evaluating other medspas in your local area will help you identify their strengths and weaknesses — and help you position yourself in relation to them. You'll want to research their service offerings, pricing, and marketing strategies to gain a competitive edge.

Once you've found areas of opportunity or gaps in the market, you can differentiate your services to fulfill those unmet needs. For example, maybe other medspas in your area don't offer chemical peels or body sculpting. Adding those services to your menu of options could bring in clients those medspas aren't reaching.

The SWOT (strengths, weaknesses, opportunities, and threats) analysis is a good place to start to better understand and position your medspa.

## Strengths

These are the factors that give your medspa a competitive advantage or unique selling proposition. Strengths could include things like pricing advantages, unique services offered, talented team members, or the latest technology.

## Weaknesses

These are factors that put your business at a disadvantage compared to competitors. Weaknesses might include lack of brand recognition, inexperienced team members, a small service menu, or outdated technology.

## Opportunities

These are external factors that your medspa could use to its advantage. Opportunities could arise from changes in the beauty market, emerging aesthetic trends, technological advancements, new customer segments, or gaps in the competition.

## Threats

These are external factors that could potentially harm your medspa business. Threats might include intense competition, economic downturns, regulatory changes, shifts in service preferences, or disruptive technologies.

## — Chapter 04

# Navigating the *Medspa Compliance Landscape*

Operating a medspa involves navigating a complex landscape of legal and regulatory requirements to ensure compliance and protect both your business and your clients.

The legal path to opening your own medspa is much simpler if you are a physician. If you're not, figuring out exactly how to become an owner and remain compliant with all rules and regulations can quickly become complicated.

While regulations vary by state, most medspas require a medical director to practice medicine, and you will certainly need various licenses and permits to carry out business. Not to mention the various compliance assessments you'll want to look into to ensure you're playing by the rules.

We'll cover the essential things you should look into before you open your doors.



**Nicole Strothman**

Moxie's general counsel

Nicole previously led the legal team for one of the nation's largest medspa chains. Watch this video to hear what she has to say about medspa compliance.

# Medspa Ownership Laws

State-by-state legislation surrounding who can open a medspa varies by professional licensure—with much of this revolving around the concept of the Corporate Practice of Medicine (CPOM). Think of CPOM as a set of rules for how medical businesses should be run. One way to ensure you can own and operate your own business, yet still remain compliant with regulations, is through a management service organization (MSO).

The CPOM rules make sure that only doctors and certain medically trained professionals are making important medical decisions—and not business people. This helps ensure that everything is done safely and correctly.

One of the common ways healthcare businesses—like medspas— are structured to comply with these CPOM laws is via something commonly referred to as an MSO/PC.

The Management Service Organization or MSO (typically an LLC) allows a non-physician-owned business to license a brand name and provide management and administrative services to the doctor's Practice Medical Entity (PC or PLLC) in exchange for fair market value. *Tip: Partnering with Moxie can help you navigate this complicated concept to launch a fully compliant medspa.*

## Pssst...if you still feel confused, you're not alone.

This is a tricky topic. To help distill it, check out our free mini course on the MSO/PC Structure.

*Since medspa ownership laws vary by state, it's important to research the requirements of your state to ensure your business adheres to all legal regulations. You can also partner with an expert like Moxie, who helps simplify the complexities of aesthetic medicine, and its surrounding laws and regulations.*



# Compliance Assessments

Looking to build a business in the medspa industry means navigating a world rife with legal requirements and red tape. The other piece of the legal puzzle depends greatly on local regulations. You will need to obtain various permits, licenses, and certifications to operate legally. Be sure to consult with legal professionals and the necessary regulatory agencies to ensure that you meet requirements and maintain compliance with relevant regulations.

Here are some key components to look into:

## **OSHA Compliance Training**

Is your medspa OSHA compliant? Have you conducted OSHA training? Are the correct posters or signs displayed?

## **Privacy Compliance**

Make sure you follow all privacy and security measures. Do you have the correct policies and practices in place to ensure the privacy and security of your client's information? Are all privacy practice notices posted? Are files kept in locked cabinets out of site from bystanders?

## **Scope of Practice**

Ensure you and your staff are performing procedures that are within your scope of practice as set by your licensing board.

## **Practice of Medicine**

Are you following state rules regarding the corporate practice of medicine? Do you need an MSO — and a skilled attorney or a partner like [Moxie](#) to set this up?

## **Consents**

Have you gathered all of the necessary consent forms from your clients for various services?

## **Marketing**

Many states regulate if and how you're able to market aesthetic medical treatments.

## **Supervision**

Are your physician assistants, nurses, and technicians being supervised by a physician or nurse practitioner? Do you have written protocols and procedures along with experience and training in the areas of supervision? Do you have any required signed collaborative or supervision agreements with your medical director?

## **Patient/Physician Relationship**

Before receiving treatment, patients must establish a physician/patient relationship to be prescribed treatments or services. Your medical director may delegate the forming of this relationship to a nurse practitioner or physician assistant based on state rules. Once this is established, or concurrently, the good faith exam can commence.

## **Consultation or Good Faith Exam (GFE)**

Are your clients receiving a good faith exam from a physician, physician assistant, or nurse practitioner? Is all information properly documented in their medical record and files? The good faith exam ("GFE") must happen before a patient receives treatment to assess their current condition, note their medical history, and ensure they are fit for the procedure via a diagnosis and treatment plan.



### **Standard of Care**

How are you ensuring the standard of care is followed for every single client who sits in your chair? Are protocols in place and compliant with all state laws?

### **Medical Services vs. Aesthetic Treatments**

Are you making it clear which services are medical procedures (like Botox) versus non-medical (like aesthetic facials)? Medical procedures can only be performed by a healthcare professional in accordance with their scope of practice.

### **Regulatory Compliance**

Does your medspa have all of the required licensure and meet all facility requirements? Have you incurred any fines or is there anything you need to fix?

### **Licenses and Training**

Are all practitioner's licenses in good standing? Are all employees receiving the necessary ongoing training required to keep their licenses?

### **Insurance Coverage**

You'll want to secure both professional liability and general liability insurance. No matter how skilled you are as a practitioner, lawsuits can still occur. Comprehensive insurance coverage is essential for risk mitigation.

Make sure your professional liability insurance covers both your medspa and the practitioners who work there. It's best to have a policy that covers up to \$3,000,000 per year. You may also want to consider these common forms of coverage: malpractice insurance, property insurance, general liability, worker's compensation insurance, business interruption insurance, practice overhead, cyber liability, and employee-related risks.

You can work with an insurance broker or work directly with an insurance company or agent. Obtain multiple insurance policy quotes to help you compare coverage and pricing before making a final decision. Your lease may also require certain insurance coverages and limits so be sure to check your landlord's requirements.



**As always it is best to consult a lawyer and tax advisor to ensure compliance, and we cannot provide legal/tax advice in any shape or form.**

— Chapter 05

# Finding a *Medical Director*



The medical director is a cornerstone of any successful medspa. This individual isn't just a figurehead; they play a critical role in overseeing clinical procedures, ensuring patient safety, and maintaining compliance with state and federal regulations. Essentially, a medical director bridges the gap between medical excellence and aesthetic innovation.

A medical director's primary responsibility is to provide clinical oversight. This means they supervise all medical treatments and procedures, ensuring they are performed correctly and safely. They're also responsible for developing and implementing protocols and policies—oftentimes in collaboration with midlevel provider owners where allowable—that align with best practices and legal requirements. This helps maintain a high standard of care, which is vital for your medspa's reputation and success. Medical directors also play a crucial role in the management of complications.



# Medical Director Responsibilities

## Clinical Supervision

The medical director oversees all clinical staff, ensuring they are qualified and perform their duties safely and effectively. This includes providing training and ongoing education to keep everyone up to date with the latest techniques and technologies.

## Compliance and Regulations

Medspas operate under strict regulations. The medical director ensures your medspa complies with all relevant laws and guidelines, reducing the risk of legal issues. This includes staying current with changes in legislation and adapting protocols accordingly.

## Quality Assurance

Implementing and maintaining quality assurance programs is another crucial responsibility. The medical director conducts regular audits and reviews to ensure that all procedures meet the highest standards of care.

## Patient Safety

They are responsible for ensuring all treatments and procedures are safe and effective. This involves evaluating new treatments and technologies before they are introduced to your menu, as well as aiding in the management of any complications that may arise.

## Consultation and Care

Medical directors help develop customized treatment plans that meet individual patient needs and ensure the desired outcomes.

**Having a competent and experienced medical director can significantly enhance your medspa's credibility.**

Patients are more likely to trust and choose a medspa that demonstrates a commitment to safety and high standards of care. Additionally, a strong medical director can help prevent legal issues and ensure that your medspa operates smoothly and efficiently.

## Necessary Qualifications

When selecting a medical director, it's essential to look for specific qualifications that ensure they are well-suited for the role. These qualifications typically include:

### Medical Degree

Your medical director should have a valid medical degree from a recognized institution. This ensures they have the foundational knowledge required for clinical oversight.

### Board Certification

Board certification in a relevant specialty, such as dermatology or plastic surgery, is crucial. This certification demonstrates that the medical director has undergone rigorous training and meets the high standards of their specialty.

### State Licensure

They must be licensed to practice medicine in your state. This is non-negotiable, as it is a legal requirement for providing medical oversight.



# Experience Matters

While qualifications are important, experience in the field of aesthetic medicine is equally vital. Even if your state doesn't explicitly require this component, an experienced medical director with in-depth training on the procedures you will be performing in your medspa brings a wealth of practical knowledge that can significantly benefit your medspa. Here's why experience matters:

## Clinical Expertise

An experienced medical director has likely performed a wide range of procedures and can provide invaluable insights into best practices. Their hands-on experience helps in developing protocols that ensure safety and efficacy.

## Problem-Solving Skills

With experience comes the ability to handle unexpected situations and complications effectively. A seasoned medical director can troubleshoot issues quickly, minimizing risk and ensuring smooth operations.

## Patient Interaction

Experience in aesthetic medicine also means they have a deeper understanding of patient expectations and concerns. This helps in delivering a higher level of patient care and satisfaction.

## Industry Knowledge

With experience comes the ability to handle unexpected situations and complications effectively. A seasoned medical director can troubleshoot issues quickly, minimizing risk and ensuring smooth operations.

## Reputation and Trust

Having a well-known and respected medical director can enhance your medspa's reputation. Patients are more likely to trust a medspa led by a reputable professional, which can drive more business your way.







## Miki Lager

Moxie's Head of Operations

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In this video, Miki shares her advice on finding a medical director for your medspa.

## Finding the right medical director can be a challenge

So if you're looking for help at this stage, reach out to our team. Moxie has a network of over 70 MDs licensed in all states that meet supervisor standards per each state's compliance requirements.



— Chapter 06

# Financial Planning and *Budgeting*

Navigating the financial aspects of launching and operating a medspa might feel like one of the more stressful parts of running your business.

Over 60% of medical practices can't accurately calculate their expenses, and 30% can't calculate their revenue. That lack of clarity can lead to long-term financial struggles.

Setting up clear financial and business plans will help you lay the foundation to stay profitable long-term.

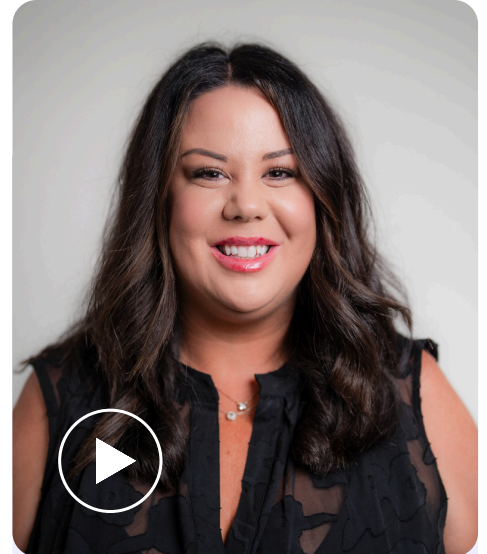
As you do your financial planning, you'll want to think through both your initial start-up costs and a long-term budget projection.

>60%

medical practices can't  
accurately calculate their  
expenses

30%

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revenue



**Stephanie Turner**  
Provider Success Team Lead

Watch to learn what Stephanie has to say about the importance of embracing the business side of aesthetic medicine.

# Startup Costs

One of the first steps in financial planning is estimating the initial investment required to launch your medspa. Estimating your startup costs accurately will help you secure the necessary funding and create a realistic financial plan for your medspa's launch. You'll want to consider the following factors when estimating your startup costs:

## Facility Costs

Calculate expenses related to leasing or purchasing a suitable location for your medspa, including rent, utilities, and renovations. Oftentimes the right place to start is a single room suite. Be certain any space you select meets local regulatory requirements.

## Software Costs

Are you using an electronic medical records system and/or point-of-sale system? What software will you use to schedule consultations and treatments? Will you use online accounting software to track monthly transactions?

## Equipment and Supplies

Determine the cost of acquiring essential equipment and supplies, such as treatment devices, furniture, skincare products, and medical supplies.

## Staffing Expenses

Budget for hiring and training staff members, including estheticians, nurses, receptionists, and administrative personnel. Start small before you go big here. You'd be surprised how far you can get as a team of one!

## Marketing and Advertising

Allocate funds for marketing and advertising initiatives to promote your Medspa's launch and attract clientele.

## Legal and Regulatory Fees

Factor in expenses associated with obtaining licenses, legal entities, permits, insurance coverage, and legal consultation.



**TIP:** By partnering with Moxie, providers keep more of what they earn by saving up to 55% on key products and devices, >\$10k on legal and compliance templates. You also save by bundling best in class services and key hires like marketing, EMR software, front desk staff, and more.

# Building Your Budget

Once you've identified your startup costs you can start to think through what your ongoing budget might look like – and find ways to optimize it. A good budget will help you make informed decisions and allocate your resources effectively.

Here are 4 key components to consider when building your budget:

## Operating Expenses

Estimate recurring expenses such as rent, utilities, insurance, payroll, supplies, maintenance, and marketing efforts.

## Contingency Planning

Set aside funds for unexpected expenses or emergencies to mitigate financial risks and ensure business continuity.

## Revenue Projections

Forecast potential revenue streams based on your pricing strategy, service offerings, and projected client volume. Consider factors such as seasonal fluctuations and industry trends when making revenue projections.

## Review and Adjust

Regularly review your budget and financial performance to identify areas for improvement and adjust your strategies accordingly.

You may want to identify areas where you can save on costs when you're starting out without sacrificing quality. Here are a few ideas of ways to keep costs down.

**01** | Purchase or lease lightly-used equipment for your medspa

**02** | Start with a small space or single-room suite

**03** | Negotiate supplier contracts to get bulk discounts to lower product cost

**04** | Monitor your inventory levels to avoid overstocking products that may expire

**05** | Keep overhead costs low by starting as a team of one

**06** | Harness the power of partnership: Working with a partner like Moxie can help you secure bulk discounts, and handle payments, processing, and your financial strategy to make this part of managing your medspa business much simpler

# Financial Projections

Financial projections serve as a roadmap for your business. They can help guide decision-making, facilitate strategic planning, and increase the likelihood of long-term success. You'll want to be as accurate as possible here — over or underestimating expenses and revenue can lead to a rocky financial path in the future.

Here are a few types of statements to help you make good financial projections:

## Income Statement

An income statement can help you assess the profitability of your medspa by calculating your gross service and retail sales (in comparison to the expenses). You can handle the calculations yourself, or use a bookkeeper, accountant, or software like Quickbooks to simplify the process and help you ensure all calculations are accurate. (Hot tip: If you currently partner with Moxie, don't forget to ask about our bookkeeping service.)

## Cash Flow Statement

A cash flow statement acts as a financial diary for your business. It tracks all of the money coming into, and going out of, your company over a specific period. It can help you assess the liquidity of your medspa, or how much cash you are generating, and thus your ability to meet short and long-term obligations — so you can get a pulse on the financial health of your medspa.

## Balance Sheet

Your balance sheet serves as a snapshot of your financial situation at a very specific moment in time. It can help you understand what you own (like your equipment or money paid by clients) versus what you owe (like a loan or bills) and thus how much of your company belongs to the owner.

Closely monitoring and following your budget and financial performance will help you make informed decisions down the road to optimize your medspa's profitability and long-term sustainability.

45-60  
DAYS

Average time to  
complete loan  
application  
process

## Obtaining a Loan:

The process of applying for a medspa loan will look different according to your unique situation. On average, the loan application process takes between 45-60 days to complete.

From there, the wait time can be up to 3-4 months to receive the funds. Talk with your bank or credit union to see what financing options are available to you. Before contracting into financing of any kind, make sure you understand the full scope of the terms, interest rates, and payback structure.



— Chapter 07

# Selecting a Location for *Your Medspa*

Finding and designing the right location for your medspa can play a huge role in your business's success.

In this section, we'll explore key considerations for selecting the perfect space to launch and grow your medspa, as well as what to consider when you're setting up.



**Ali Gludt**  
Medspa Launch  
Coach at Moxie



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In this video, Ali shares her advice for picking the perfect spot for your medspa.

# Location Factors to Consider

## Demographics

Analyze the demographics of the area, including age, income levels, lifestyle preferences, and beauty-related trends. Choose a location that aligns with your target audience and offers a sufficient client base to support your business.

## Competition

Research existing medspas and aesthetic clinics in the area to get a good gauge of market saturation and identify potential competition. Ideally, you want to choose a location that does not currently have a medspa down the street.

## Accessibility

While foot traffic and visibility play less of a role in success for a medical office compared to a food or retail business, you do want to secure a room that is easily accessible by car, public transportation, or foot traffic. You'll also want to consider parking availability nearby if you live in a rural or suburban area and the proximity to a major or known road.

## Legal Regulations

It is important to note that it is illegal in most states to rent a "booth" from a salon. So you'll want to make sure the space you choose complies with state regulations.



# Designing a Functional and Inviting Space for Your Clients

Once you've selected a location, it's time to let your creative juices flow and design a functional and inviting space for your medspa. This will help you create a positive client experience and foster a welcoming atmosphere.

## Layout and Design

Optimizing the layout and design of your space can help to maximize functionality, flow, and aesthetics. Ideally, your space is at least 13x13 and has a sink to increase efficiency without things feeling cramped. In many states, a sink is even legally required.

## Equipment and Technology

You may be tempted to run out of the gates offering every aesthetic service in existence. However, equipping your facility with every state-of-the-art laser and device is wildly costly. We recommend you start small and add on services based on demand. Another way to reduce costs is to rent an existing treatment room so you don't have to spend as much time and money building out the space to fit your needs.

## Aesthetic Appeal

Designing a room or medspa location that is both aesthetic and in line with your brand identity can help create a welcoming and fun environment — and your clients appreciate beauty! Using a cohesive color palate in line with your branding can also help build brand awareness.



— Chapter 08

# Crafting the *Perfect* Medspa Service Menu

Your medspa's service menu is more than just a list of treatments; it's a reflection of your brand, your expertise, and your commitment to client satisfaction. Crafting the perfect service menu requires careful consideration and strategic planning.

Much of it goes back to what we discussed in Chapter 2—understanding your market and your client base.

## Key Questions:

- Who is my ideal client?
- What are their primary concerns and goals?
- What treatments are they most likely to seek?

You'll also want to consider market trends. Research current trends in aesthetic treatments and technologies to determine which services are gaining popularity. However, be cautious not to jump on every trend; focus on those that align with your brand and expertise.

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## Key Considerations:

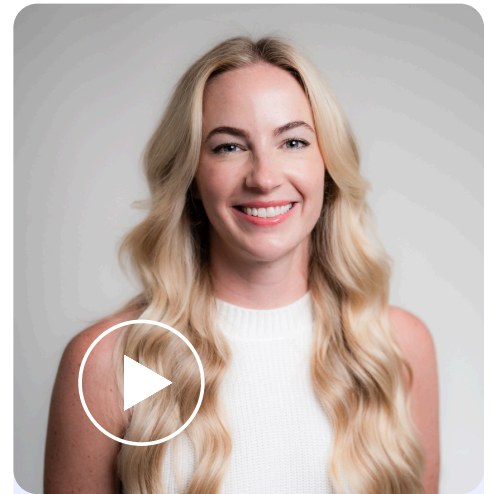
- Which treatments are trending in the industry?
  - Are there any emerging technologies that fit my medspa's vision?
  - How do these trends align with my target audience's needs AND my expertise?
- 

### Start with Core Services

When launching your medspa, it's wise to start with a core set of services that you can perform exceptionally well. These foundational treatments should address the most common concerns of your target audience. As your medspa grows and gains a loyal client base, you can gradually expand your menu to include more specialized services.

### Highlight Unique Offerings

Identify what sets your medspa apart from others and highlight these unique offerings on your menu. Whether it's a signature treatment, advanced technology, or a personalized approach, make sure your unique selling points are clearly communicated to potential clients.



## Mikyla Race

Provider Success Team  
Lead at Moxie

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In this video, Mikyla shares her advice for starting small before you go big with your service offerings.

— Chapter 09

# Building Your *Brand Identity*

Creating a strong brand identity is essential for setting your medspa apart in a competitive market. Your brand identity is more than just a logo or a color scheme; it's the overall impression you leave on your clients and how they perceive your business.

We've gathered up a few strategies to help you create your brand story and define key branding elements to help you differentiate your medspa so you stand out and resonate with your target audience.



**Kendra Waller**

Provider Success Manager

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Watch this video to hear Kendra's advice on building a brand that's a true representation of your values.



# Crafting Your Brand Story

Your brand story is the narrative that communicates the essence of your medspa, capturing its mission, values, and unique offerings. Crafting a compelling brand story can help you connect with future, and current, clients on a deeper level fostering trust and loyalty.

Consider the following four elements when crafting your brand story:

## Identify Your Purpose

Clarify the vision behind your medspa.  
Determine the driving force behind your business and the impact you aim to make in the lives of your clients.

## Highlight Your Values

Communicate the core values and principles that guide your Medspa's operations. You may want to emphasize things like integrity, professionalism, and a commitment to client satisfaction.

## Showcase Your Expertise

Highlight your expertise, qualifications, and unique selling points that set your medspa apart from competitors. Sharing before and after photos, testimonials, and reviews can help demonstrate the effectiveness of your treatments and services.

## Inject Personality

Infuse your brand story with personality and authenticity, reflecting the tone, voice, and character of your medspa. Whether you're aiming for sophistication, warmth, or authenticity, ensure that your brand story comes from your unique voice and let your personality shine through.



# Branding Essentials

Having a distinctive brand identity will ensure you create a lasting impression and resonate with your target audience. Once you've defined your brand story, it's time to bring your brand identity to life through visual elements.

Below are a few things to consider.

## **Name and Tagline**

Choose a memorable and relevant name for your medspa that reflects your brand's personality and positioning. Craft a catchy tagline that succinctly conveys your mission statement and resonates with your target audience.

## **Logo Design**

Every brand needs a logo. You can work with a professional designer, or create your own custom logo that captures the essence of your medspa. Your logo should be versatile, scalable, and instantly recognizable with elements that are related to your industry.

## **Color Palette**

Select a color palette that reflects your brand personality and evokes the desired emotions and associations. The colors should complement your logo and resonate with your target audience. You can use this color palette consistently across all branding materials like your Instagram, emails, website, and any printed marketing handouts or informational brochures for cohesion and brand recognition.

## **Typography**

Choose a font that conveys your brand's tone and personality to use across your brand. Is your business sleek and modern? Elegant? Fun? Make sure to check for readability across various communication channels.

## **Visual Assets**

Invest in high-quality imagery that showcases your medspa's facilities, treatments, and staff, conveying professionalism, expertise, and authenticity.

— Chapter 10

# Marketing Your Medspa

Far too often we see aesthetic entrepreneurs take an “If I build it, they will come” mentality. But the unfortunate truth is that building a thriving a medspa is really hard work.

Medspa marketing is an essential component for attracting and retaining clients in a competitive market.

This section explores powerful marketing strategies, from leveraging social media to optimizing your online presence, providing the tools and insights needed to help you woo, win, and keep more clients and build your very own medspa success story.



**Reyna Bovée, MBA**  
Marketing Director at Moxie

Reyna shares some tips to help you master medspa marketing.

# Medspa Marketing Tactics

## **Build a website you'd want to buy from**

Your website should showcase your services, team, and testimonials. Make sure your website represents you, your brand, and your mission statement and values. You'll want to include the following items: a homepage, an about page, a services page, results, reviews, contact information, and links to your social media platforms.

## **Expand your reach with social media**

Promoting your services and brand on social media can help you gain exposure. Upload photos and videos of your work, and team, and before/after photos to build brand awareness and show off your expertise. Before and after photos can help showcase your best work and make it easy for future clients to see what they are signing up for.

## **Set up communication channels and tools**

Make sure you have an efficient and effective way to communicate with clients regarding their appointments and any special promotions or offers you might want to share. Some of the must haves to remember include online appointment booking, automated appointment reminders, and digital intake forms.

## **Gather reviews**

Online reviews help build trust — ask happy clients to leave reviews on Google or Facebook. One easy way to start building up your review bank is to send clients a text after their appointment to thank them for stopping by and prompt them to leave a review to share their experience. You can even incentivize clients to leave a review by offering a discount on their next service.

## **Invest in paid ads**

Investing in paid ads can drive high lead volumes and ultimately increase booked appointments. Targeting specific personas with customized messaging or exclusive offers can be a huge driver of growth. (In fact, some of our med spa partners report paid digital as driving half of their business!)



# Medspa Promotional Tactics to Generate Buzz

Implementing promotional campaigns can help generate buzz and incentivize loyalty. Here are a few promotional ideas you can try:

## Loyalty Rewards

Implement a loyalty program to reward repeat clients for their patronage. Offer incentives such as points for every dollar spent, birthday discounts, or exclusive access to VIP events.

## Introductory Offers

Offer special discounts or promotions to encourage new clients to try your services. This could include discounted rates on popular treatments, package deals, or complimentary add-ons for their first visit.

## Limited Time Promotions

Create a sense of urgency by offering limited-time promotions or flash sales. This could include discounts on specific treatments or services for a short period, encouraging clients to take advantage of the offer before it expires.

## Social Media Contests and Giveaways

Engage your audience on social media by hosting contests, giveaways, or challenges related to your medspa services. Encourage participants to like, share, or tag friends for a chance to win prizes or discounted treatments.

## Referral Program

Word-of-mouth marketing can be a powerful tool for acquiring new clients. Encourage satisfied clients to refer their friends and family by offering rewards or discounts for successful referrals.

Keep in mind that if you decide to implement a referral program, you should consult with a legal advisor to set up the program properly because many states have laws around incentivizing medical services. You don't want to run afoul with fee splitting or improper incentives.



### Shane Stone

Head of Marketing Services at Moxie

In this video, Shane shares why driving marketing ROI requires an investment.

# Retention Marketing

Retention marketing is essential for medspas looking to sustain growth and build a loyal client base. While attracting new clients is important, retaining existing ones is crucial for long-term success.

Loyal clients provide a steady revenue stream and become ambassadors for your brand, offering valuable word-of-mouth referrals. This section explores a powerful retention marketing strategy for medspas: implementing memberships and beauty banks.

22%

higher revenue  
reported by medspas  
with membership  
models



“Retention is the new acquisition —don’t underestimate the power of word of mouth marketing and the importance of patient relationships.”

—Brittany Bureski, VIP Provider Success Manager at Moxie



# Implementing a Membership Program

Implementing membership programs at your medspa can help you produce steady income (medspas with membership models report 22% higher revenue), increase customer loyalty, and provide upselling opportunities.

Popular procedures, like Botox and Dysport, might be getting clients in the door, but what keeps them coming back in the three-month interim between sessions? A successful membership program can help you offer more value to your clients and stand out. Here are three popular membership types:

## Beauty Bank Membership

Clients deposit a fixed monthly amount into their account which they can use at any time for services at your medspa at a discounted price. Memberships typically require a 3-6 month minimum commitment with common deposit levels at \$99, \$150, and \$199. This model helps clients to distribute finances and avoid having to pay a large sum at once for treatments.

*New medspas but can be beneficial regardless of your size or service offerings.*

## Tiered Membership

These memberships offer different price tiers with different levels of benefits. This structure works best for services members might want to enjoy monthly (i.e., Hydrafacial or Dermaplaning). Cross-selling is a huge benefit as you can include desirable services within each tier and allow for accumulating credits. Pricing tiers typically range from \$99 to \$350 and encourage members to explore new treatments. As a result, your medspa will see more engagement and loyalty.

*Medspas generating over \$30k monthly with a larger range of service options.*

## Treatment Specific Membership

These memberships offer a recurring treatment for a specific price – often neurotoxin, weight loss, or IV therapy. There are three distinct membership styles: buying in discount, per area membership, and per-unit membership.

*Medspas generating over \$60K monthly, offering a full range of services.*

# Membership Program Best Practices

Simplicity is key when designing your membership program. You want it to be easy to understand your membership program and simple to share it with clients. You can introduce your membership offering at a consultation or at checkout to help them understand the savings.

Make sure you also have a dedicated page or section on your website going over all of the details with a way to sign up easily online.

Over time you can track conversion rates and other key metrics to determine ways to improve your offer.

90%

Of medspa memberships are purchased in person

So be sure to mention membership opportunities at client appointments and at checkout



## More on Memberships

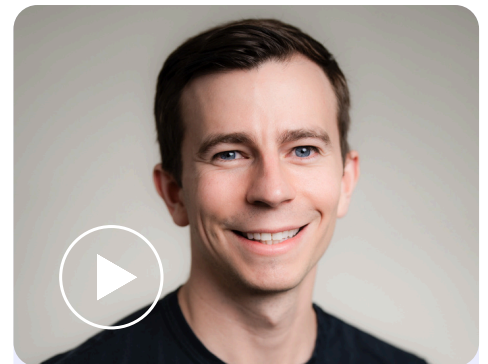
To learn more about setting up membership programs, [reach out to the Moxie team.](#)

— Chapter 11

# Setting Metrics for *Success*

Defining and measuring success are crucial for achieving sustainable growth, profitability, and client satisfaction at your medspa.

By focusing on the right metrics and understanding how to measure them effectively, you can optimize your operations and consistently enhance the quality of your services. In this chapter, we'll highlight the key metrics every aesthetic entrepreneur should monitor to ensure their medspa thrives.



**Dan Friedman**

Co-founder and CEO, Moxie

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Hear from Dan Friedman, as he shares one of the top metrics he recommends medspa owners monitor.

# Metrics to Measure Your Success

## Revenue

Maintaining sufficient cash on hand is crucial for the first year, ensuring the business thrives until it reaches the break-even point. Whereas most businesses aim to be profitable after 5 years, it's possible to achieve break-even within 9 months to 1 year and profitability by year 2 through careful attention to overhead expenses and minimizing startup costs.

## Average Order Value (AOV)

Your AOV is essentially your average revenue earned per appointment. Tracking how much you make for different services and appointment types can help you better understand which services are most lucrative for your medspa. That knowledge can help you focus your time, attention, and marketing dollars on the services that will help you grow financially.

## Revenue Per Working Hour

This number can help you understand how much you (or your employees) are making per hour so you can determine if you're using your time efficiently. It will reveal areas of growth, and areas you excel in so you can focus your training and learning to improve. If you have multiple employees, it can also help you make strategic decisions about who takes on different types of appointments to maximize revenue.

## Total Revenue by Service (and Provider)

Total production calculations can help you recognize patterns or trends based on market changes or seasonality so you know which services will be in high demand, and when. That way, you can better project your revenue and plan for fluctuations. Additionally, knowing which of your employees are excelling in terms of production or efficiency can help you recognize, and incentivize, high-performers.



## Abby Wiersma

Provider Success Manager at Moxie

Abby shares some ideas to help increase your medspa's Average Order Value in this quick video.

### **Return Client Rate**

How many of your clients are returning for more services? It costs much less to retain a customer than it does to find new ones. You can increase client retention by offering membership programs or implementing a rebooking strategy.

### **Average Monthly Leads**

Having an idea of how many leads you acquire in an average month will help you to identify abnormalities and marketing successes. Leads—whether from digital ads, social media, or word of mouth—should increase month over month. Find a tool to track leads and track how they move through your funnel. You could take a super simple and manual approach (like Google Sheets) or work with a tool that is more integrated into your workflow (like Moxie).

### **Gross Margin and Gross Profit**

Gross margin is the total sales minus the cost of goods sold (like the cost of pharmaceutical products you use in a treatment).

Profit also takes out the cost of overhead expenses—think fixed monthly expenses like rent, insurance, and more. Moxie's co-founder and CEO, Dan Friedman, breaks this concept down for you in this video.

### **Revenue Per Working Hour**

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### Customer Satisfaction

What do your Google, Yelp, or social media reviews say? It's important to build up positive reviews. They will help you grow organically and legitimize your business (and even SEO web rankings).

### Cost per lead (CPL)

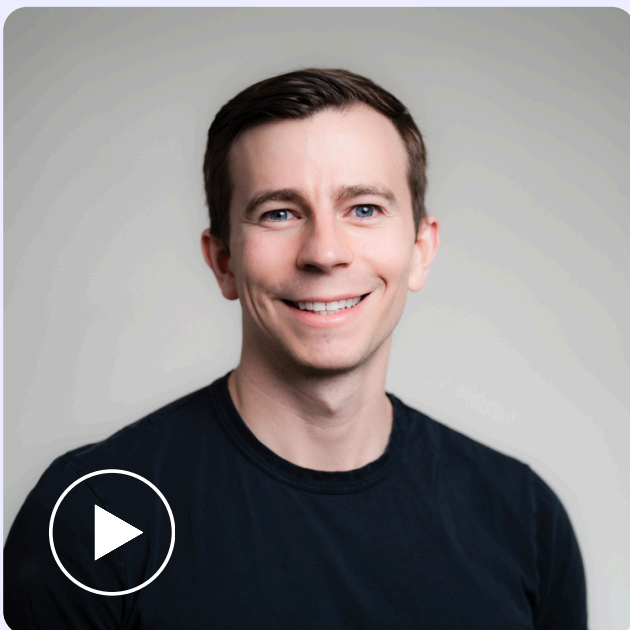
This metric can help you evaluate the efficiency and cost-effectiveness of different marketing campaigns and strategies. The lower the cost per lead, the more efficient the strategy. To calculate it, you'll take the total cost spent on a marketing campaign and divide it by the number of leads it generated. Once you figure out which strategies are most effective for your medspa, you can better allocate your resources and work on tweaking marketing efforts with a high CPL.

### ROI

Your ROI indicates the return you are seeing for your investment in marketing efforts. In other words, how much you're earning in revenue for every marketing dollar spent. Calculate your ROI by dividing your net profit by your total investment and multiplying it by 100. For example, if you spend \$100 on a marketing campaign that generates \$500 in profit, your ROI would be 500%.

### Customer Acquisition Cost (CAC)

Calculating your CAC will help you get a clear idea of how much it costs to acquire a new client at your medspa. To calculate it, you'll take the total cost of sales and marketing and divide it by the number of new customers you've acquired for a certain period of time. Then you can figure out what changes need to be made to improve profitability.



## Dan Friedman

Co-founder and CEO, Moxie

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Dan breaks down the difference between gross margin and profit margin and shares some of the typical gross and profit margins for medspas in this video



— Chapter 12

# Launch and *Beyond*

Now that you've got your business items squared away, it's time to bring your vision to life. You'll want to host a grand opening event or exclusive launch party to introduce your medspa to the community. You can use this opportunity to offer complimentary services, live demonstrations, or special discounts for attendees.

The goal is to make a big splash and create buzz around your new medspa so you can continue to bring clients in the door and grow your business.

Of course, the work doesn't stop with your launch. Sustaining momentum is essential to make sure you can scale and grow your medspa for years to come.



## Haley Husted

Provider Success Manager  
at Moxie

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Haley shares some of her tips for planning a winning launch party for your medspa

# Planning Your Launch Party

## **Double-check your website and email are ready for booking**

Make sure your website is up and running, your business phone number is ready to go, all of your booking links work, and your contact email is live.

## **Set goals for your event**

Your goals might look something like this: get 10 appointments booked, gather 7 new reviews, and get 50 Instagram followers.

## **Spread the word**

Create flyers, a Facebook event, and Instagram posts, and send out an email blast sharing the details of your event. Family and friends can also help spread the word and broaden your reach.

## **Get marketing materials printed**

You'll want to get business cards printed to hand out at your event along with brochures detailing your services. Leave your attendees with all of the information they need to get to know you and contact you to book an appointment as soon as they walk out the door.

## **Decide on a giveaway**

People love a deal, and a great launch promo will give customers a reason to try you and your business out. Try using one of the promotional tactics we shared above to generate more buzz around your event. You could raffle off skincare samples, free treatments like a free syringe or botox, or offer a coupon for a future treatment if they leave a review.

## **Secure food and beverage**

Make sure to provide food and beverages at your event. You could serve champagne or “bubbles” during the launch for a “botox and bubbles” party. You may even be able to partner with a local business to get discounted rates for the free promotion.

## **Send out RSVPs**

This helps make the event feel exclusive, plus gives you access to people's contact information where you can follow up with them. Be sure to send a reminder email or two before the event and mention the giveaways, food, and other opportunities to create some buzz.



# Growth Strategies Post Launch

Sustaining momentum post-launch is key for the long-term growth and success of your medspa. Here are 8 ways you can continue to grow and scale your business:

## Provide an exceptional customer experience

Prioritizing customer satisfaction will keep clients coming back, and by leveraging their voices you can win even more clients to fill your books. Gather feedback and reviews to continue fine-tuning your practice and improving the customer experience.

## Expand service offerings

Diversifying your services can help attract a broader customer base and increase revenue. Stay up to date on industry trends so you can identify the best new treatments to add to your growing service menu. Look for services that are on the rise and are in high demand. One way to expand your client base is to add non-invasive treatments like laser hair removal or microdermabrasion to attract a new type of clientele.

## Keep up with your online presence

Enhance your online presence by updating your website, adding new images and reviews, and optimizing for improved online visibility. Regularly share posts on Instagram about your team, new products, and before and after photos so potential clients can easily find and identify your brand.

## Foster partnerships & collaborations

Collaborating with other businesses in the aesthetics industry can lead to mutual growth. You can forge partnerships with complimentary businesses like hair salons or wellness centers to expand referral networks and tap into new customer segments.

Offer joint packages or discounts for customers who visit both of your businesses and host joint promotions, events, or demonstrations. You can also invest in a partner like Moxie to help kick-start your business and accelerate growth.

## Create loyalty & membership programs

Implement loyalty programs to reward repeat customers with discounts, exclusive offers, or VIP perks. Encourage customers to join a membership program to boost your business and their experience.

— Chapter 13

# Mastering the *Art of Moxie*

Entrepreneurship is a journey, not a sprint. As you build your medspa, it's important to understand that it's okay not to have all the answers right away.

Adopt a growth mindset and approach each day with patience, tenacity, and—yes—*moxie*.

Every challenge is a chance to learn and improve. Celebrate your small victories and view setbacks as valuable lessons. By focusing on steady progress and staying resilient, you'll gradually cultivate a successful and flourishing medspa.

Before you know it, you'll have sculpted your very own success story, with you at the helm as founder and CEO.



**Angie Wing**

Provider Success  
Manager, Moxie

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Angie shares why you don't have to have it all figured out just yet

# Here's to Your Success

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Launching a medspa is a significant undertaking. While the journey ahead may present challenges, your passion, determination, and expertise ensure you're well-equipped to navigate any obstacles.

If you'd like further guidance, insight, or resources, the Moxie team can help you every step of the way on your journey to medspa entrepreneurship. Reach out to our team to learn more about the ways we can help alleviate the challenges of opening a medspa on your own.

We're here for you every step of the way. Here's to your future success!

The Moxie logo is a stylized, handwritten-style script of the word "Moxie" in a dark blue color. The letters are fluid and connected, with a slight shadow or outline effect.



# About Moxie

[Join Moxie](#)

Moxie empowers entrepreneurs to launch, run, and grow their own aesthetic businesses.

Moxie empowers entrepreneurs to launch, run, and grow their own aesthetic businesses. Trusted by hundreds of medspas across the U.S., we give independent medspas the partner, the platform, and the pricing power they need to compete (and win) against even the biggest chains. We help them be in business for themselves, but not by themselves.



**No. 1**

Choice of Medspa  
Entrepreneurs



**250+**

Medspas Launched  
& Coached



**50%**

More Affordable to  
Launch + 3x Faster



**2x**

Faster Growth Than  
the National Average