

Time and money

How to manage bookings and payments with grace and ease

by Tracy Karkut-Law MARH LCHE



Tracy Karkut-Law graduated from the Centre for Homeopathic Education in 2007 and practises in East London. She is a tutor at the Southern College of Homeopathy and offers mentoring courses for homeopaths who want to build a thriving business.

As well as being a homeopath, she's a mother and a blues music DJ.

As homeopaths, we love to help people. Our client work is the focus of our business and we want to make sure that we provide a personal service. Whether we work from home or in a clinic, part of our work involves booking appointments and taking payments.

Take some time to think about services that *you* book and pay for. Are there systems in place that make it easy for you to do that? Has there ever been a time when you've experienced frustration or a misunderstanding around a booking or a payment? How has that made you feel?

There's one key factor that I know I look for when I'm a prospective customer, and that's convenience. There's a different factor when I'm the one offering the service, and that's commitment. I want to know that my clients will show up for their scheduled appointment, and

that there won't be any issues with payment. This is why I've taken time to create systems to ensure that this aspect of my practice works smoothly. This helps me feel free to focus on my homeopathy work.

Simplicity

Bookings and payments can be kept very, very simple with a paper diary together with cash or cheque payments on the day. If you have this system and it works well with your client base that's great. There's no need to change a thing.

However, if your clinic work feels secondary to the work of



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You may find a paper diary system has become too time-consuming

‘being your own receptionist’, you might be thinking it’s time for a review. Do you waste valuable time playing phone / email / text tag with clients who want to book or rearrange appointments? Are you frustrated by last-minute requests for rescheduling? How do you manage clients who turn up for appointments without cash or have forgotten their cheque book? How about your clients who have your bank details but are late sending the payment?

Emails with payment reminders need to be carefully worded. This is something else we have to find time

Booking systems can be kept very, very simple

for, when our ‘real work’ is homeopathy. The truth is, we are living in busy times. We are busy, and we know our clients are busy plus there are higher levels of distraction than ever before.

Busy versus organised

We love our clients who are busy but still manage to stay organised! They are the ones who turn up for appointments without reminders and remember to bring payment, or you know they’ll make a transfer on the day.

We might feel differently about our clients who are busy but

▷ disorganised. If they are distracted or they simply have too much on their plate, they may forget their appointment or their payment, or both.

How an online-booking system can help

An online booking system is more than just a digital calendar. It will send out an automatic booking confirmation email as soon as an appointment is made, plus a reminder to your clients without you having to do a thing.

That same booking system can also allow your client to rearrange their own appointment using a link in their appointment confirmation email. Plus, they don't have to call you to book if they prefer to book online when it's convenient for them.

Clients who book online can also pay when they book in a single, simple transaction, which is great for busy people. For others, it's more convenient because they can use a credit card.

Some booking systems may be used to send invoices for consultations, products, packages or just about anything else. Another handy function allows you to log when payment is received. It keeps track of who has paid so you can view a list of outstanding payments.

Overcoming resistance

It took me quite a long while to be convinced that a booking system was for me, but one month I had so many late cancellations / rearrangements and late payments that left me so frustrated, I decided to make the change.

It took a few months to get it properly set up and for my clients to become accustomed to the new system, but it's been in place for over three years and it saves me hours of time, plus a lot of frustration every month.

Booking systems to try

One popular booking system is *Acuity* and lots of people use other shared calendars such as *Google* or *Calendly*. I really like *GetTimely.com* as it has a lot of additional features that work well for me.

If you're already using a booking system you might become a convert to one of these. If you are not, then why not give it a try? You could be pleasantly surprised. It makes things easier for our clients and it boosts our confidence as it makes us feel more professional.

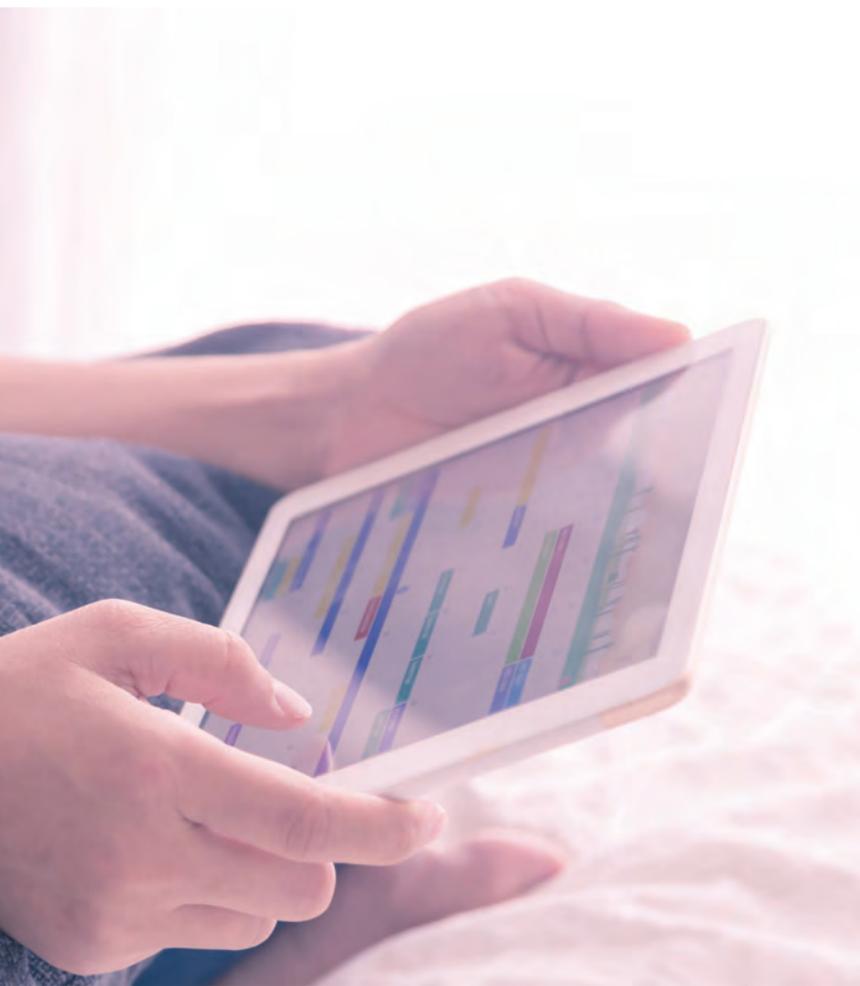
Payment systems to try

I offer three easy ways to pay, which gives my clients a choice, and they appreciate that. I haven't accepted cash or cheques for a couple of years now, and it is rarely a problem. My main reason for this is I need money to be in my bank so I can pay my bills on time. Plus, it takes two hours a week (round trip) to go to my local branch. I could use that time for something more valuable.

GetTimely allows me to automatically raise invoices for each booking, which are sent out by email. The invoice includes my bank details so people can make a BACS payment. *GetTimely* connects with Stripe, an online payment gateway. It's free to set up, but takes a small



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percentage of each payment and the payment takes a week to arrive in my account.

iZettle is a card machine that connects with my smartphone. It is easy to use and I can take payments in clinic. Again, it takes a small percentage of each payment and takes two days to arrive in my account.

You may be thinking that you don't want to pay any fees. I look at it another way. Card payment offers convenience and the option to pay by credit card. This results in fewer cancellations due to budget issues.

Clarity and structure

A clear structure for our practice sets expectations and shows clients that our time is valuable. Here are my three top tips for creating a more professional structure for your business, even if you don't want to use an online booking tool.

Be more formal

Switch to email as your main method of communication to help you create stronger professional boundaries. Consider having a dedicated email address just for work. You can set up an auto-respond when you are not available.

Have set clinic days

Try having just two or maybe three days (including an evening). If you can't see someone this week, offer them a time the following week, or even the week after. This will give you blocks of time when you can focus on cases, write a blog post or a newsletter.

Create a client-therapist agreement

On initial contact with a new client I always attach my client-therapist agreement so they can see more about how I work. This sets the tone for our entire professional

Booking and paying online saves time for both you and your client

relationship. It outlines my policy on payments and cancellations. I also have a printout for them to read and sign when they first come to see me.

I can't say I never have late cancellations or no shows but since I put these steps in place they are rare. Sometimes there is genuine human error and sometimes there is an unforeseen emergency and I completely get that.

Grace and ease

I hope I've given you some new ways to think about how to handle bookings and payments with more ease. Small improvements to booking and payment systems can really elevate your practice. You look and feel more professional, which is good for business.

When you make it easy for a client to make bookings and payments, you are removing potential obstacles for them coming to see you regularly; and you're building a strong foundation for a positive and lasting therapeutic relationship.

You can contact me at tracy@homeopathywithtracy.co.uk, and you can also find more information about me and my work at homeopathywithtracy.co.uk and yourradiantbusiness.com. □