

# Welcome to Coastal AI

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## Client Onboarding Pack

**Coastal AI Consultancy** | AI-Powered Customer Acquisition for MedSpas  
michelle@coastalaiconsultancy.com | coastalaiconsultancy.com

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## A Personal Welcome from Michelle

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Congratulations, and welcome to Coastal AI. I am genuinely excited to be working with you and your clinic.

This onboarding pack contains everything you need to know about what happens next — the timeline, what we need from you, what you can expect from us, and how we will measure success together. Please read it carefully and do not hesitate to reach out with any questions. My direct email is michelle@coastalaiconsultancy.com and I personally respond to every message.

Let us build something remarkable together.

**Michelle** Founder, Coastal AI Consultancy

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# Your Onboarding Timeline

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Phase	Timeframe	What Happens
<b>Kickoff Call</b>	Day 1–3	60-minute call to review your goals, confirm your tech stack, and finalise your implementation plan
<b>Access &amp; Setup</b>	Day 3–7	You provide access credentials; we begin platform configuration
<b>First Tool Live</b>	Day 7–14	Your first AI system is fully operational and tested
<b>Staff Training</b>	Day 10–14	We walk your team through any staff-facing tools (30–45 min session)
<b>30-Day Review</b>	Day 30	First performance review — we share results and optimise
<b>60-Day Review</b>	Day 60	Mid-point check-in and any adjustments
<b>90-Day ROI Report</b>	Day 90	Full ROI analysis and roadmap for the next quarter

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## What We Need From You

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To get started as quickly as possible, please gather the following information before your kickoff call:

### Essential (Required Before Setup Begins):

1. **Login credentials** for your booking/practice management software (e.g., Mindbody, Vagaro, Jane App, Zenoti, Boulevard)
2. **Google Business Profile** access — we will need Manager-level access to your Google Business Profile
3. **Your clinic's main phone number** — the number patients call to book appointments
4. **A list of your most common services** with pricing (for AI Voice Agent configuration)

5. **Your clinic's opening hours** and any after-hours protocols

### **Helpful (Speeds Up Configuration):**

1. **Access to your email marketing platform** (if you have one — e.g., Mailchimp, Klaviyo, HubSpot)
  2. **Your patient database export** — a CSV file of patient names, email addresses, and last appointment dates (for reactivation campaigns)
  3. **Your website login** or access to your web developer (for AI Skin Analysis integration)
  4. **Any existing brand guidelines** — logo files, brand colours, and fonts
  5. **2–3 examples of communications you love** — emails or SMS messages from other businesses that you feel represent the tone you want for your clinic
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## **What You Can Expect From Us**

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### **Communication:**

- You will have Michelle's direct email address and will receive a response within 24 business hours to all enquiries
- You will receive a weekly progress update every Friday during the first 90 days
- All performance data will be shared in a simple, jargon-free format

### **Deliverables:**

- Full implementation of all agreed AI systems within the timeframes above
- Written documentation of every tool configured, including login details and how-to guides
- Staff training session (recorded for future reference)
- 30, 60, and 90-day performance reports

### **Our Commitment:**

- We will never recommend a tool we have not personally vetted for HIPAA compliance

- We will never lock you into a platform that charges excessive fees or is difficult to exit
- If a tool is not delivering results within 60 days, we will replace it at no additional cost

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## Your 30/60/90-Day Success Metrics

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We will track the following key performance indicators (KPIs) together. These will be reviewed at each milestone call.

KPI	Baseline (Day 0)	Target (Day 90)
Monthly new patient enquiries	[To be measured at kickoff]	+25%
After-hours leads captured	[To be measured at kickoff]	+100%
Google review count	[To be measured at kickoff]	+40 new reviews
Google star rating	[To be measured at kickoff]	4.7+ stars
Dormant patients reactivated	N/A	15–30 patients
Email open rate	[To be measured at kickoff]	35%+
Monthly revenue from AI-attributed bookings	N/A	Tracked from Day 1

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## Frequently Asked Questions

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**How much time will this take from me and my team?** The initial setup requires approximately 2–3 hours of your time across the first two weeks — primarily for the kickoff call, providing access credentials, and attending the staff training session. After that, the systems run automatically with minimal ongoing input required from you.

**Will my staff need to learn new software?** In most cases, no. The AI tools we implement work in the background and integrate with your existing booking system. The only exception is if you choose to add a CRM platform, which requires a brief onboarding session for whoever manages your marketing communications.

**What if I want to pause or cancel?** All Coastal AI plans are month-to-month. We require 30 days written notice to cancel. There are no penalties or cancellation fees.

**Who owns the data and the accounts?** You do. All platforms are set up in your name, with your business details, and you retain full ownership of all accounts, data, and content. Coastal AI is given access to manage and optimise — but ownership always remains with you.

**What happens if something goes wrong?** Contact Michelle directly at [michelle@coastalaiconsultancy.com](mailto:michelle@coastalaiconsultancy.com). All technical issues are addressed within 24 business hours. For urgent matters, note “URGENT” in the subject line and we will respond within 4 hours during business days.

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## Your Implementation Team

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**Michelle** — Founder & Lead Strategist Your primary point of contact for strategy, performance reviews, and any concerns. [michelle@coastalaiconsultancy.com](mailto:michelle@coastalaiconsultancy.com)

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## Important Dates

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Please add the following to your calendar:

- **Kickoff Call:** [To be scheduled — Michelle will send a calendar invite]
  - **30-Day Review:** [30 days from kickoff date]
  - **60-Day Review:** [60 days from kickoff date]
  - **90-Day ROI Report:** [90 days from kickoff date]
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*Thank you for trusting Coastal AI with your clinic's growth. We take that trust seriously and are committed to delivering results that speak for themselves.*

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[michelle@coastalaiconsultancy.com](mailto:michelle@coastalaiconsultancy.com) / [coastalaiconsultancy.com](http://coastalaiconsultancy.com)