

Case Study Template

Coastal AI Consultancy – Client Success Story

INSTRUCTIONS FOR USE: Replace all [bracketed text] with your actual client details. Remove this instruction line before sharing. All statistics should be verified with your client before publication.

[CLINIC NAME]: [ONE-LINE RESULT HEADLINE]

Example: “Lumière MedSpa: 68 Dormant Patients Reactivated and \$180K in Revenue Recovered in 30 Days”

Prepared by Coastal AI | AI-Powered Customer Acquisition for MedSpas
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At a Glance

Client	[Clinic Name]
Location	[City, State/Province]
Clinic Type	[Med Spa / Botox & Filler Clinic / Laser Clinic / Dermatology / Plastic Surgery]
Team Size	[e.g., Solo practitioner / 2–5 staff / 6–15 staff]
AI Tools Implemented	[e.g., AI Voice Agent, Patient Reactivation, Reputation Management]
Implementation Timeline	[e.g., 14 days]
Results Period	[e.g., 90 days]

The Challenge

[Write 2–3 paragraphs describing the clinic’s situation before working with Coastal AI. Be specific about the problems they were experiencing. Use the client’s own words where possible.]

Example: When [Clinic Owner Name] first reached out to Coastal AI, [Clinic Name] was a thriving [X]-year-old practice with a loyal patient base — but a growing problem. After-hours enquiries were going to voicemail and rarely being returned the same day. A Google rating of [X] stars and only [X] reviews was making it difficult to compete with newer clinics in the area. And a patient database of over [X] contacts had not been actively engaged in more than a year.

”[Direct quote from the clinic owner about their challenge — e.g., ‘I knew we were losing patients to competitors who responded faster, but I didn’t know how to fix it without hiring more staff.’]”

The core issues were clear: missed leads, a dormant database, and an underperforming online reputation. All three were solvable with the right AI tools.

The Solution

[Describe which AI tools were implemented and why those specific tools were chosen for this client. Keep it accessible — avoid jargon.]

Tools Implemented:

1. [**Tool Name — e.g., AI Voice Agent**] [2–3 sentences describing what was implemented and how it works for this specific clinic.]
2. [**Tool Name — e.g., Patient Reactivation AI**] [2–3 sentences describing what was implemented and how it works for this specific clinic.]
3. [**Tool Name — e.g., Reputation Management AI**] [2–3 sentences describing what was implemented and how it works for this specific clinic.]

Implementation Timeline: [Describe how long setup took and what the process looked like from the client’s perspective.]

The Results

[All results should be verified with the client. Use specific numbers wherever possible — they are far more compelling than percentages alone.]

Key Metrics After [X] Days

Metric	Before	After	Change
Monthly new patient enquiries	[X]	[X]	+[X]%
After-hours leads captured	[X]	[X]	+[X]%
Google review count	[X]	[X]	+[X] reviews
Google star rating	[X] stars	[X] stars	+[X]
Dormant patients reactivated	—	[X] patients	—
Revenue from reactivated patients	—	[\$X]	—
Email open rate	[X]%	[X]%	+[X]%

In the Client's Own Words

"[Direct quote from the clinic owner about their results. This is the most powerful element of the case study — make it specific and genuine.]"

[Second quote if available — ideally about the implementation experience or the team's reaction.]"

— [Clinic Owner Name], [Title], [Clinic Name]

Key Takeaways

[3–4 bullet points summarising the most important lessons from this case study. Write these for the reader — what should another clinic owner take away from this story?]

- [Takeaway 1 — e.g., "Responding to after-hours enquiries within minutes, rather than the next morning, was the single biggest driver of new patient bookings."]
- [Takeaway 2 — e.g., "The dormant patient database was the fastest path to immediate revenue — with zero cost per acquisition."]
- [Takeaway 3 — e.g., "Improving the Google rating from 3.9 to 4.7 stars had a measurable impact on new patient enquiries within 60 days."]

- [Takeaway 4 — e.g., “The entire implementation required less than 3 hours of the clinic owner’s time.”]
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About Coastal AI

Coastal AI is a specialist AI consultancy for medical aesthetic clinics across the United States and Canada. We implement the five AI systems that deliver the most consistent, measurable results for med spas, laser clinics, botox and filler practices, dermatology clinics, and plastic surgery practices.

Every implementation is handled end-to-end by our team — from tool selection and setup to staff training and ongoing optimisation. All tools are HIPAA-compliant and integrate with the most common practice management platforms.

Ready to see results like these in your clinic? Book a free 30-minute strategy call with Michelle: michelle@coastalaiconsultancy.com

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