

The Academy of Nail Design's

MODULE 4



“Client Consultations & Assessments”

Welcome to Module 4: *Client Consultations and Assessments*

In this module we will be discussing the importance of creating and maintaining accurate client assessments and service records.

As with this and all of our other modules included in this program, we encourage you to conduct your own independent research on the subject. Every time you see this icon –



It means we recommend taking some time to do research outside of the material we have presented to you in order for you to reach a higher level of understanding. Use the library or the internet, or interview local salon owners or working nail professionals. Get their opinions or background on how they got into this field. What trials and tribulations did they face? How did they overcome them?

Answer the questions posed within the module on the **‘Additional Notes’** pages included with your study guide.

We’ve found that a common thread between our most successful students is that they use this program as a stepping stone, and spend a lot of time exploring the entire industry. We encourage you to do the same.

Once you feel confident in the material presented in the module, watch your online lesson, then log in to your student desk and take your corresponding test.

If you have any questions regarding your module or program please feel free to contact us directly at info@taond.com



Client Assessments

Prior to performing any hand or foot service, a complete and thorough assessment of your client and their needs is **ESSENTIAL**.

Although we are all accustomed to having assessments performed when we get our hair colored or cut and before having a skin treatment or massage, we rarely see assessments performed in the nail industry.

Why is that? Don't nail professionals need to understand the health of a client, determine lifestyle and therefore the best nail application or be able to recommend professional homecare?

Of course, we do! But why then are assessments not being done? Many nail professionals and clients view nail services as a one size fits all and lacking in variety. Old school thinking is that a manicure is a manicure is a manicure. Clients feel that a manicure service is the same everywhere they go and don't expect or receive any professional advice when it comes to their hands and feet during their services. But as we've discussed in earlier modules, the nail industry has evolved and today there are now as many treatments and retail products for the hands and feet as there are for the face. And as clients become more and more concerned about the age and health of the skin on their hands or the condition of their feet, the more they begin to rely on the advice of a professional.

In order to elevate your status as a professional you must be able to perform a thorough assessment that will allow you to recommend not only the right service choice but also professional homecare.



What is a client assessment?

A client assessment is an evaluation interview and physical examination of your client, in which both you and your client provide insight into how to provide the best suited service to meet your client's desired needs. This is done through a thorough **analysis** and **consultation**.

What is an analysis?

An analysis is a client examination that is performed by observing the physical conditions of the client's skin and nails and asking appropriate questions in order to best understand the current, past and desired condition of your client's hands and feet.

During the analysis portion of the assessment, examine your client's skin, nails, arms or legs (depending on whether you are performing a manicure service or pedicure service – both for both services). Note any irregularities of the nails and skin, conditions that concern either yourself or your client (as discussed in Module 3 nail disease and disorders) , determine skin type (dry or cracked, aging, pigmented), and nail plate health (peeling, supple, or discoloration etc.). This analysis will aid in determining how to proceed with your service consultation.



What is a consultation?

During the consultation phase of the assessment your job as a nail professional is to summarize your findings made during your analysis into a recommended service. Suggesting homecare products also plays an important part of the consultation.

Why do an assessment?



An assessment form should contain **precise questions** that will enable you as a nail professional to properly gather information about your clients' lifestyle, habits (both work and personal), health, service preferences, past problems or issues etc.

Without this information a nail professional is more likely to recommend a service or product that is inappropriate to a particular client and could lead to serious reactions.

A service history is important to maintain as well. With an accurate service history you can easily pinpoint when a problem developed or what applications or services are most appropriate for your client. Always note the date, service provided, retail recommend and purchased by your client and any client comments.

What do I do with the assessment form once it is completed?

In order to provide ongoing professional service, it is advised that you keep all your assessments, both original and updated on record. Make sure they are easily accessible in order to update the original form. Forms can be maintained in electronic or hard copy form as long as they are easily accessible.

There are now some fantastic salon and spa software applications that pop up special messages concerning your clients at the time of their appointment check-in, so you are reminded of their special needs. Some of these software applications even track your client's progression during their services, so they can see how your professional help and recommend homecare is assisting them meet their service goals.



Major Sections of the Assessment Form And Why It Is Important

Contact Information



Maintaining current and accurate client contact information is vital to your business. Whether you need to contact your clients the day before to confirm their appointment or reach them on a regular basis to inform them of specials you may be holding, having outdated contact information can cost a business money.

Each time your client checks in for their appointment make sure you or the salon or spa receptionist inquire whether or not there has been a change in your client's contact information and follow up with changing their records immediately.

If you intend to send out monthly marketing material either by mail or by e-mail having current information will avoid returned mail and bounced back e-mails.

Client Service and Lifestyle Background

This section has been designed to establish what type of services your client has had in the past and whether they were satisfied with these services or not – what they enjoyed and what they didn't.

By asking these specific past service questions you can also determine how best to proceed with the services you'll provide and what may be the best retail to recommend. For example, if a client states that they felt the best part of their last manicure service was the massage make a mental note to put more effort in extending their massage. If the client acknowledges to having had a pedicure recently but couldn't stand having their callous smoothed with the wooden paddle, make a mental note to explore different callous removing techniques.

Each question has been designed to get the most information you can out of your client in order to best address their concerns.

Remember it's like having a conversation, a conversation that will allow you to provide the most comprehensive and pleasing service experience possible.

Life style questions have been included so that you are able to determine what may be the best enhancement application for this particular client – for example if a client is particularly hard on their hands you may wish to recommend they have an acrylic enhancements applied, as acrylic is a much harder wearing enhancement than gel. Also, if they agree they spend a great deal of time taking care of their hands you know this client may look forward to purchasing a wonderfully scented hand cream or cuticle oil.



Medical History

This section is probably one of the most important as you determine what type of services you will be providing. It is imperative for several reasons that you determine the current health of your client. For example, if your client is diabetic this will require you to completely modify their service. Diabetics require special care and some nail professionals may not feel comfortable providing this specialized service. Without asking you may never know and not knowing this information could lead to serious complications.

Medications of all natures can also affect nail, hand and foot services so be sure to ask if a client is on any medications that may affect the service.

The catch all phrase you can ask to determine the health of the client is “Is there are any other medications, allergies or health issues that I should be aware of before proceeding with today’s service?”

Allergies to natural products for example a nut allergy is important as some massage oils or lotions may contain traces of nuts or other bases that could cause complications. Also, due to the increase of aromatherapy oils being used in nail services, determining reactions to specific oils is recommended.

Even more important is determining whether a client has had a reaction to a nail product before. If the answer is ‘yes’ to this question than this product or a similar product should never be applied to the client again. The nature of these types of reactions is that they worsen with each exposure. And you may be putting your clients’ health at risk if you ignore this fact.

If you are uncomfortable asking a client about their medical history than have them fill out the form on their own, but be sure to review it before proceeding with a service. If you have any questions or see something on the form that may raise a question, don’t hesitate to bring this to the attention of the client. It is always better to be safe than sorry.



Observation

The key in this section is your physical examination of the nails and skin. As we discussed in the previous module (**nail disease and disorders**) there are situations or health issues where a nail professional is not permitted to perform a service or where special circumstances must be followed (**the Golden Rule**). The key is to write down anything that is out of the ordinary no matter how small the issue may seem at the time. A small cut or a bruise may not seem like a big deal at the time, but it is always important to make note. You are protecting yourself as well as the client from and misunderstandings in the future.

Write down the recommended service for that day and why you choose that service (based on the conclusions as determined by all of the assessment sections) and have both yourself and the client sign and date the form.

Record of Service

Make sure you update this form each and every time the client has a service or purchases retail items. If a problem does arise then it is much easier to determine at what point in time it may have occurred. It will also allow you the ability to track the number of appointments and/or retail items that have been purchased if you wish to provide some type of Client Loyalty program and award your best clients discounts or special promotions.

ASSESSMENT & CONSULTATION

SERVICE TIME

Please fill in your application **Start time** and **Finish time**. Then fill in your **Total Time** - this includes setting up, filling out the client assessment form, application process, clean up, and proper decontamination time. Ensure that you mark your total time. Total time is used to determine whether you have completed your total required program hours, whereas Application Start and Finish times will help you determine how long your actual application takes for Exam purposes.

Application

Start Time: _____

Application

Finish Time: _____

Total Time: _____

(This must also include your set up, Assessment, service & clean up time)

CLIENT CONTACT INFORMATION

****If your client doesn't want to provide full address information you MUST at least provide their City & State or Province***

Name: _____

Address: _____

Work Phone #: _____

Home Phone #: _____

Best Time to Reach: _____

MEDICAL HISTORY

Do you have (or have had) any of the following?

(Mark in the box with an "X" all those that apply)

Arthritis:

YES

NO

Cancer:

YES

NO

Diabetes:

YES

NO

Heart Problems: YES NO

High Blood Pressure: YES NO

Stroke: YES NO

Others (please list): _____

If you answered "YES" to any of the above or identified any medical issues under 'others' please list any current medications:

Are there any other medical conditions, medications or allergies that I as your service provider should be aware of prior to performing your service today?

CLIENT SERVICES AND LIFESTYLE BACKGROUND

What type of nail service(s) have you had in the past?

(Mark in the box with an "X" all those that apply)

Manicure: YES NO

Pedicure: YES NO

Acrylic Enhancements: YES NO

UV Gel Enhancements: YES NO

Others (please specify): _____

Were you satisfied with the services? YES NO

If you answered "NO" to any of the above, please explain "why?".

Have you ever had an allergic reaction to a nail or beauty product previously no matter how small or how long ago?

In your line of work do you frequently wash your hands?

Do you wear rubber gloves when doing housework or gardening?

Do you spend a great deal of time caring for your own nails?

Are you generally hard on your nails?

Do you purchase retail items for nails, hands, and feet care?

Please list any brands in the past that you enjoyed:

OBSERVATION OF CLIENT'S HANDS AND FEET

List your analysis and observation of the client's hands, feet, and nails prior to service. Note all or any nail disease or disorders as well as any issues you feel necessary (i.e., Extremely dry skin). Please include a detailed observation of the condition of the client's skin, cuticles, and nails.

For Example:

client's skin is very dry, nails have slight ridges on them, pinky nail is bruised, cuticles are overgrown, client has hangnails, index finger has a small cut, etc.

Hands:

(If not applicable for this service, because you're performing a Pedicure or using a Nail Trainer, please state "not applicable")

Feet:

(If not applicable for this service, because you're performing a Manicure, please state "not applicable")

Based on your observations, what service do you recommend today? Please also include a list of recommended products and/or services for future use for the client as well as any retail homecare products and care regimes for this client.

Why are you recommending today's service, future services, and above products?





PRACTICE APPLICATION NOTES
ALL SECTIONS MUST BE COMPLETED IN FULL

List the Service Application that was performed on this client.
(i.e. Spa Manicure or Acrylic with tips etc.)

PLEASE LIST DOWN ALL BRAND NAMES

Products for Service: •	Decontamination Products: •
Implements and Files/Buffers (include grits): •	Cleaning Supplies: •

FYI – WE WILL ASK YOU TO INSERT A PICTURE OF YOUR LISTED MATERIALS INCLUDING SERVICE PRODUCTS AND DECONTAMINATION PRODUCTS AT THE END OF YOUR CPS FORM WITH YOUR 'BEFORE' & 'AFTER' CLIENT PICTURES

What areas during this practice service worked well for you?
(i.e. callous removal, tip application, shaping & consistency, etc.)

What areas of this service need improving? **Be specific and detailed in your answer.**
(i.e. cuticle maintenance, tip blending, shaping & consistency, etc.)

Explain how you plan on addressing these problem areas in order to improve your practice services going forward. **Be specific and detailed in your response.** 'More Practice' is not a qualified answer. We at TAOND feel that self-assessment is a vital part of your learning process, therefore, please be detailed.

Don't forget! We have an excellent Student Resource Center where you can find a ton of helpful resources and videos

Provide a full explanation of your Decontamination Process after the service. You **MUST** include every protocol you implement for all aspects of your work environment including but not limited to: re-useable implements, surface areas, one time use items, pedicure basins, towels etc.

*****Please specify the BRAND NAME of disinfectants, sanitizers etc.**
And indicate the product RATIO for products that require mixing (i.e. Barbicide, etc.)

Manicure Bowl and/or Pedicure Basin (If applicable for the service done):

Reusable Implements:

One Time Use Items:

Surfaces:

Floors:

Towels:

Garbage:

Client Feedback Comments on today's service:

Student Feedback Comments on today's service:

I certify that:

- A hard copy of this Client Assessment Form will be kept on file with the original signatures and a copy of this form will be provided to the client upon their request.
- I have explained in detail to the client that they are a practice client recruited in order to fulfill my program hour requirements and that by signing this Client Assessment Form the client waives any and all liability related to today's service, any future services, and application processes.
- All information on this form is private and confidential and will only be shared with The Academy of Nail Design for reviewing and grading purposes.
- I acknowledge that The Academy Of Nail Design does not allow students to use an electric file during the course of their studies and that if I do choose to using an electric file during my practice services that this can only happen if I completed TAOND's E-File Course or a PROFESSIONAL LEVEL E-FILE TRAINING and received a Certificate stating such training and that this Certificate has been uploaded to my student LMS account as record. I also have advised my practice client that I have been professionally trained to use an electric file and by allowing me to use an electric file during my practice service they sign off on any liability to both myself and The Academy Of Nail Design of any injury or damage that may occur due to the use of an electric file. I have also informed my client that they can opt not to have practice services performed with an electric file if they so choose.
- I, personally, have completed this application and practice service in its entirety and that the information contained herein is accurate to the best of my knowledge.

Date

Date

Student Name

Client Signature

Additional Notes

These Additional Module pages are for you to answer the extra questions we asked within the module and to be adding your research notes.

