

The Academy of Nail Design (TAOND)



CERTIFIED MASTER NAIL PROFESSIONAL PROGRAM

TAOND CMNP Course Outline

TAOND CMNP Component 3

"It's All About Your Client"



We hoped you enjoyed **Component 2 of your TAOND CMNP** program and had some fun drafting your responses to your Component 2 assignments and adding even more to your **Individualized I.B.**

It's now time to take a look at one of the most underused yet important aspects of professional nail services - **The Client Assessment & Consultation Form** and how utilizing these into your CMNP services will work to elevate your professional status.

Are you currently performing an Assessment & Consultation Form with your clients every visit? **You should be.**

Have you thought about the importance of maintaining an accurate client profile and service record, and how not doing so can dramatically affect your level of professionalism and Client health and safety?

Client Assessment & Consultation forms are used with regularity in almost every field within the beauty industry - with the exception of the nail industry. **WHY?**

Is it not important to you as a Nail Professional, especially a Master Nail Professional, to fully understand your client's service needs, their health history or past services? **Of course, it is!**

Can issues arise from nail services when a Nail Professional is unaware of a client's health or history? **Yes, they can!**

Then why isn't mandatory for every Nail Professional to perform an Assessment & Consultation before services?

In this **TAOND CMNP Component 3** we're going to discuss the entire process of creating your forms and how you can easily incorporate an accurate and reliable form into your services.

So Let's Get Into It!

In this component we'll be discussing and dissecting:

- Why Client Consultations aren't been properly utilized in the nail industry
- The importance of a Client Consultation & Assessment Form and how implementing one into your CMNP services will allow you to stand out among all other Nail Professionals.
- The Key Sections of an Assessment & Consultation form
- What is a "Service Record" and why is it important
- And finally, how to create your own Client Consultation & Assessment form

Client Assessments

Your clients are individuals! Each one of them is different from the next, with different service needs, different health issues and different past service issues.

So why aren't you treating them so?

Rarely does any other field in the beauty industry treat all clients the same and provide the same “one size fits all” service options for all clients than the nail industry.

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

Have you ever asked yourself 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 the precise professional homecare in order for clients to maintain their spectacular salon/spa results and benefit their health? **Of course, we do.**

Why then are assessments not being done? If you ask around you'll find that many nail professionals and clients alike view nail services as a “**one size fits all**” and therefore seemingly lacking in variety, so what's to know about a client before performing a hand or foot service?

Old school antiquated thinking is that a “**manicure is a manicure is a manicure**” and “**a pedicure is a pedicure is a pedicure**”. Clients feel that most hand and foot services are the same everywhere they go and therefore don't expect or receive any professional advice or individualized treatment when it comes to their hands and feet.

But the truth is 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.

However, the truth is that prior to performing any hand or foot service, a complete and thorough assessment of your client and their needs is ***ESSENTIAL***.

Essential not only because it is the right professional step to take, but also it protects both you and your clients.

Why do an assessment?

In order to elevate your status as a CMNP you must perform a thorough assessment that will give you insight into a client's health, lifestyle and service background with each and every client visit.

Then you must be able to combine all the information you gather during your assessment in a way that allows you to recommend the right service choice, recommended service return time frames, and professional homecare.

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

Without this information you might be 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 based on their past services.

It is also important to always note in your **Client Service History** (or Record of Service) the date, service provided, retail recommend and purchased by your client and any client comments. This thorough history is how you understand you are performing and maintaining the perfect results for each individual client.



What is a client assessment?

A client assessment is an evaluation interview and physical examination of your client's hands or feet (depending on the service provided that day), 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. Are there any indications that may contradict the Nail Professionals “**Golden Rule**”?

If you are unfamiliar with the Nail Professional's **Golden Rule** it states,

“If the skin or nails to be worked on is broken, swollen, infected or inflamed then you must not perform a service on your client.”

During your analysis determine your client's 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 CMNP is to **summarize** your findings made during your analysis into a recommended service and service return timeframes. **Service return time frames** can also vary from client to client.

Most Nail Professionals just make a “vague” suggestion for a “*re-balance every two weeks*” or “*come back for your next pedicure in 4 weeks*”. **But why?** What are they basing these timeframes on?

If you’ve done the right job in your assessment and consultation, that means you’ve gathered enough information to be able to create a personally tailored application for your individual client, and because this will vary from client to client and also based on the fact that clients have different lifestyles, budgets, nail growth rates, health issues etc. their return service timeframes will also vary dependent on these variables.

Currently, what are you basing your recommended Service Return Time frames on?

The name of the game as we move forward as CMNPs (in your program and in your career) is to start creating an **Individualized Tailored Services (I.T.S.s)**. In your next **CMNP Program Component** we’ll be creating **I.T.S.s** so mastering how to understand your client’s goals through a thorough Assessment & Consultation in this Component is important.

As a CMNP you can’t just “get imaginative” when it comes to creating Individualized Tailored Services (I.T.S.s) for your clients. Your ITSs should be based on real information, data, and client feedback. If you never discuss this information or gather these details from your client than how could you possibly create an I.T.S.?

Homecare Retail

Suggesting the perfect complimentary homecare products also plays an important part of the consultation and therefore your role as a CMNP.

There seem to be 2 roadblocks when it comes to Nail Professionals selling Homecare retail:

- 1) Not knowing enough about current, modern products, their benefits or even where to get them.

And

2) Feeling “uncomfortable” selling homecare retail to their clients.

So, step 1 - **ask yourself** - do you carry or have in stock an appropriate variety of targeted, professional homecare retail for clients to purchase?



From our experience most Nail Professionals carry the odd item or generic retail which again follows that “one size fits all” mentality. Your goal as a CMNP is to thoroughly research several brands of professional hand and foot care retail in order to feel confident that you can recommend the specific homecare that will benefit your clients.

In our next CMNP component when you start creating and developing your ITSs we’ll have you performing quite a bit of independent research on several different product lines in order to have all the options you need to make proper recommendations. But for now, we just want you to understand the importance of having, recommending and selling these brands and products to you clients.

Keep in mind – ‘Having in stock an appropriate variety of targeted, professional homecare retail for clients to purchase’ doesn’t mean you need to invest thousands or even hundreds of your hard earned dollars into product, or have shelves and shelves of product

sitting around expiring.

If space or budget is on the leaner side, you can follow what many successful CMNPs choose to do, which is provide a “**specialty order**” system for their clients.

What that means is during your consultation when you put together your client’s **Individualized Homecare Regime** let him or her know that if you don’t have a specific product on hand that you will “**special order**” it just for them! And then if you can either drop it off to them, do, or have it delivered directly to them (FYI many professional beauty supply stores will drop ship directly to your clients for you. Be sure to ask about this service where you purchase your products). This way you can take their order upfront and collect the money for their order alleviating the need for you to come out of pocket or maintain shelves and shelves of product.



But the key here is to make sure you have your client’s products delivered promptly and as promised. Rely only on distributors or local stores that can fill your orders as expected.

Creating an amazing Special-Order system for your homecare is a fabulous way to increase your client’s satisfaction and allow you to stand out among the crowd.

“But I feel uncomfortable selling to my clients.” Even more Nail Professionals don’t sell any homecare because they don’t want to feel “pushy”, which is a shame because not only can the ‘right’ homecare products do wonders for your clients in maintaining and extending their professional services (leading to more satisfying results and happier clients), but selling the ‘right’ retail homecare items to your clients can increase your income **dramatically.**

Did you know that by selling just one \$10.00 retail item to each of your clients twice a month can increase your annual income by approximately \$6,000.00*?

*(*based on 50% retail markup, 5 clients a day, and a 5-day workweek)*

And that's without spending additional service hours working!

If earning additional \$6,000 revenue a year sounds ideal, then it's time to get over that feeling of being uncomfortable.

Change your attitude by knowing reality. If you think your clients aren't willing to purchase homecare products from you then you're wrong! Clients want and need homecare retail - and they're buying it. Proof of that is confirmed by just perusing the aisles at your local drugstore where there are dozens of hand and foot products that clients are purchasing.

So, if they aren't purchasing it from you, they're purchasing somewhere else. And they should be purchasing the 'right', high-quality products that are tailored to their needs (which they may not be necessarily getting with a purchase on their own) **from you - their CMNP.**

If you still feel out of sorts or are among those who feel it's "pushy" to sell homecare:

Think to yourself, "If I were a client, which is the more enticing situation that would encourage me to purchase homecare retail from my CMNP?":

- 1) If my CMNP simply suggested at the end of my service that I purchase some cuticle oil because "it's good for your cuticles"

OR

- 2) If my CMNP took the time to create and explain in detail a full plan for my homecare with specifically tailored products that would extend and help maintain my services with them. Then carefully explained each product, the benefits and how to properly use them?



Of course, it is the second option!

How exciting - Now your client is going home with the products she or he needs that will actually be beneficial for him or her. Products that have been highly recommended and tailored specifically for their needs, not just something generic (or worse) that they can pick up themselves *cheaper* at the drugstore.

When you've done the proper research and homework finding the right high quality products, your clients will come to appreciate and rely on your depth of knowledge and trust your recommendations and it won't feel like a "pushy" sale at all.

And if as a CMNP you take the time to explain why you are recommending a particular product, what the benefit(s) is (are) for your client in using this (these) product(s), discuss the incredible ingredients that your recommended products contain and how to properly use them, then this moment becomes more of you 'educating' your client and not pushing them into 'a sale'. And a major goal of a CMNP is to have educated clients!

Now let's discuss in detail:

The Major Sections of the Assessment Form And Why Each Section and Question is Important

Remember performing an assessment & consultation is just like having a conversation; a conversation that will allow you to provide the most comprehensive and pleasing service experience possible.

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 there has been a change in your client's contact information or not 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.

Life style questions have been included so that you are able to determine what may be the best 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

moisturizing hand cream or cuticle oil.

So ask them if they spend a lot of time taking care of their hands and feet? Do they wear gloves when doing work around the house or in their garden?

What is their budget like?

There are numerous questions you can add to your forms to get an in-depth idea of your client's lifestyle in order so you can recommend the right service for them.

Each Past Service or Lifestyle question has been designed to get the most information you can out of your client in order to best address their concerns going forward.

Medical history

This section is probably one of the most important sections of your form 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 when it comes to their hands and feet (please read this article on diabetic hand & foot care - [NAILS MAGAZINE](#)) and some nail professionals may not feel comfortable providing this specialized service.

We **DO NOT** recommend you do perform hand and foot services on a diabetic client unless you have taken specialized training on providing diabetic hand and foot services like the courses offered

by the **North American School of Podology** ([CLICK HERE](#) for more information on NASP).

Think back - have you ever gone to a salon to have a professional hand or foot service done and even been asked if you were diabetic? And without asking you may never know and not knowing this information could lead to serious complications.

This is truly an unfortunate state of the nail industry which is why we are dedicating an entire CMNP component to performing assessments and making sure you have an open dialogue with your clients!

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. They may not be sure of the effects of any medication they are taking and you're not a doctor so therefore probably won't recognize the names of certain medications, but it is best to ask and record in case an issue arises. Having a record on hand could become important in pinpointing a specific time frame.

Allergies - another key question is about allergies to natural or synthetic products.

For example, a nut allergy is important to know about as some massage oils or lotions may contain traces of nuts or other bases such as almond or even coconut that could cause complications.

Also, due to the increase of aromatherapy oils being used in nail products, determining reactions to specific oils is recommended.

A lot of times no one thinks about reactions to “natural' ingredients” but this can happen as often and be as severe as with synthetic ingredients.

Past reactions - 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.

The catch-all phrase you can ask to assist you in determining the overall health of the client is, *“Are there are any other medications, allergies or health issues that I should be aware of before proceeding with today's service?”*

Remember, the majority of clients probably have never been asked a health question before a hand or foot service so they aren't likely to understand why or how it can affect their service. And this “catch-all” question has been designed to at least get your client to ‘think about’ what may or may not affect their service.

They may ask you back **“Like what?”** and you can respond by mentioning the key issues we discussed above like, “Are you diabetic?”, “Are you on any medications that may affect your service with me today?” or “Do you have any allergies?”

Sometimes all it takes is a small reminder to get them thinking about this vitally important issue.

**After you've had a chat with your client, it is time to
“TAKE A LOOK.”**

Observation Section

The key in this section is your physical examination of the nails and skin. As we mentioned previously there are situations or health issues where a nail professional is just simply not permitted to perform a service (**the Golden Rule: *If the nail or skin to be serviced is infected, inflamed, broken or swollen then as a Nail Professional you are not to service.***) or a situation where special circumstances must be followed (see Diabetic client) so use a keen eye to look for issues that contradict or follow either of these.

It is important 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 any misunderstandings in the future.

Use this section as your baseline for noting the existing conditions of both your client's skin and nails so that you can make the most accurate recommendations for their homecare.

Note the condition of their skin. Is it dry? In need of exfoliation? Moist? What shape are their cuticles in?

Then note the condition of their nails. Refer back to **Doug Schoon's book "Nail Structure and Product Chemistry"** to determine the actual state of their nails.

Are they - strong, hard, flexible, brittle or tough? Remember through Doug's definitions these terms all mean different things and may need differing homecare to address. Hardness does not mean the same thing as strong.

A client may have the following: moist skin, but dry and brittle nails. What products then are you going to be recommending?

Record of Service

Your Record of Service is your client's service history with you. 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 is also great for marketing programs since it will also allow you the ability to track the number of appointments and/or retail items that each client has purchased allowing you to provide a Client Loyalty program and award your best clients discounts or special promotions.

The Consultation: Tying it all together

Now that you have asked and completed all the sections of your form it's time to tie it altogether in your **Consultation**.

This is where you have your final discussion with your client about your final recommendations of - what is the best service for them on this particular day and why. And what Homecare you recommend and why.

You must understand all the pros and cons of each service you provide and the benefits and ingredients of each retail homecare product you carry in order to make the right professional recommendations.

You also must know how these two may work in conjunction with each other. For example, do any of the ingredients of the homecare that you are suggesting affect your client's polish or breakdown their acrylic enhancements etc. This is where completing in-depth research on your service application and homecare products

becomes essential.

Remember you are now a CMNP and your job and focus is to have an in-depth understanding of all the products you use. This is why we asked you to start your MSDS binder in last month's Component 2.

Consultation examples:

Your client loves a natural nail manicure but complains about her polish chipping 2 days after. Make sure you recommend a gel polish option.

What if your client is extra hard on her nails and has tried gel enhancements only to find they break after a week? Recommend she switch to acrylic.

What if your client loves, just loves every imaginable homecare product available, but is on a limited budget - do you have a price range and/or size range of products available for her? What about suggesting she notify friends and family about your Gift Certificates for her next birthday or special occasion or tell her about your Client loyalty plan and/or referral system - if she refers 'x' number of clients to you then how about gifting her that item?

In your consultation be patient in explaining all your findings and reasoning behind your decisions with them. Clients may take time to get to understand what this process even is during their nail services and there may even be push back **“but my friend wears gel and she loves it.”** While that may be so, but based on your knowledge, your client may benefit much more from a set of acrylics based on her answers to your questions.



Generally most clients will agree with your assessment - after all you are holding yourself out as a CMNP so they will typically rely on your advice, especially if you've done a good job explaining all the fine details to them, however there will also be times when a client pushes back. This push back may be based on different issues such as: the popularity of a certain application as in "What's Hot" right now. Or what their friends wear etc.

If your client mentions they prefer something else and there is no danger or health concern with you applying their choice of application, then you can caution him or her against doing so based on your findings (which you may want to repeat), but if they insist even after your explaining the reasoning behind your decision, then let them make the final decision.

Note this exchange on your form along with what were your recommendations and why in case an issue arises you can refer back to it with your client.

If a client preferred application doesn't work out as they anticipated don't ever let your client feel badly for not listening to your previous advice, just let them know,

"Well, we gave it a try and that's OK. Now, let's see how acrylic works for you."

Again - this is only as long as there is no danger that may come of doing so. We do discuss later in your program the dangers of performing inappropriate services and

how to handle these types of situations and clients, but it is also important to note here as well -

If a client insists on your performing an application or service that goes against your training and professional opinion, then this is **not the client for you**. AND there is nothing wrong with you advising the client of such. You simply cannot perform a service or application you know to be dangerous or unethical just to make a client happy - this is how service issues, client complaints, or lawsuits get started. It is better to turn down the client at the beginning than run the risk of litigation or bad “word of mouth” publicity later.

Even if you decide to not service a particular client, be sure to also note this and your explanation of why and the date on a client record.

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 Assessment & Consultation forms, both original and updated, on record. Make sure they are easily accessible in order to update the original form on-going. Forms can be maintained in electronic or hard copy form as long as they are easily accessible.

FYI if you prefer electronic copies, there are now some fantastic salon and spa software applications available that even allow for pop up special messages concerning your clients at the time of their appointment check in so you and/or the salon or spa receptionist is reminded of their special needs and therefore be prepared in advance.

Some of these software applications even track your clients progression during their services by allowing for you to upload pictures of your client’s hands and feet, so they can see how your professional help and recommended homecare is assisting them meet their service goals.

Here is a link to a website that has reviewed and details different Salon software you may want to invest in:

SALON SOFTWARE EXAMPLES

After fully completing or updating your form, be sure to include: the recommended service for that day, why you chose that service (based on the conclusions as determined by all of the assessment sections), recommended and then “purchased” homecare (remember there is a difference) in your Record of Service and then be sure to have both yourself and the client sign and date the form.

Incorporating Your Assessment Form into your Service Time

After you understand all the sections of a professional Assessment and Consultation form and have created your own you are probably thinking,

“I only allow for a specific time for each of my services with my clients, how am I going to possibly find the time to ask all of this to each of my clients - every time?? If I go through all of this then I will start losing money!”

The rebuff to this is obviously - *Can you afford not to?*

However, there are real ways to scale down the time when it comes to performing the Assessment and Consultations.

First is to understand that you only need to complete a full Assessment and Consultation with new clients, so schedule new clients with the additional time it takes you to complete this form. You’ll know how long this will be because we ask you to practice and time how long it takes you to get through this form in your Comp 3 assignments.

The more often you do it the better you'll get at running through the process and learning to listen for specific responses that you know will be key in your Consultation.

Then with repeat client visits you are basically just asking about how things went with both the application and homecare, has anything changed with their contact or health information that you should be aware of. And finally, if you are using pictures to track a client's progression to take that picture - not much time at all!

Don't let your client record-keeping slide - it is so vitally important to your business and your client's health and safety. And again, this attention to detail and level of professionalism also elevates your status to that of a CMNP!

It's now time to complete your TAOND CMNP Component 3 Assignments which you will find below in your Component Materials. We have some great ones for you so take your time - you have 30 days.

PLEASE NOTE - For your convenience we have created a sample Client Assessment & Consultation form as a download in your Component Materials in WORD format that you can download, play with, and make your own.

Good luck and we hope you have enjoyed this component and we look forward to seeing you next month in

TAOND CMNP Component 4

"A CMNP Service is an Individualized Service"



Where we'll be discussing - NO MORE "One Size Fits All".

Now that you've established your **CMNP Consultation process**, in this component you'll be creating your **Service List of Individualized CMNP Client Services** based on all the principles you learned in **Component 3**, as well as creating one of today's most popular services - the **"Natural Nail Recovery" Program**.

We'll be discussing **proper nail prep** - things you may not even know you're doing wrong and **Mastering your Gel Polish applications**.