



# MASTERING MEMBERSHIPS

HOW TO MAXIMIZE THE VALUE  
OF PRIVI FOR YOUR PRACTICE



# HELLO!

## WELCOME TO PRIVI

Congratulations on enrolling with PRIVI. We're so glad you're here! Now that you're on board, we want to ensure you **unlock the full revenue potential of PRIVI memberships** for your practice.

Offering PRIVI is the first step toward driving growth with powerful, predictable revenue streams from recurring treatments. But it's not enough to just log into the platform and market the membership. **Maximizing PRIVI potential requires a commitment to making memberships part of your practice culture.** This guide will help you do just that.

The guidance that follows comes from aesthetic practitioners who have successfully embedded memberships in their practice cultures and are **realizing significant 7-figure revenue increases as a result.**

READ ON TO POWER YOUR PRACTICE GROWTH.

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## HOW TO DRIVE PRACTICE ADOPTION

Everyone plays a role in making PRIVI a success. Learn tips to onboard your staff and embed memberships in your practice culture.

## HOW TO SELL TO PATIENTS

Learn how to position memberships during patient visits and in PRIVI custom marketing.

## KEY NEXT STEPS

Get started today.





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HOW TO

# DRIVE PRACTICE ADOPTION



# ✿ PRACTICE ONBOARDING ✿

**Culture is KEY to driving practice adoption**

## COMMIT TO EMBEDDING A “MEMBERSHIP-FIRST” MINDSET IN YOUR PRACTICE CULTURE

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Memberships generate the most value when ingrained in an office culture. This will require making a few changes to how things are done, but these changes will be worth it to increase your recurring cashflow stream and keep patients loyal to your practice.



# PRACTICE ONBOARDING



**Culture is KEY to driving practice adoption**

## SET STAFF EXPECTATIONS

- ◆ **“We’re embracing a new approach for recurring treatments”**

Announce a “membership-first” approach when engaging with patients who receive recurring treatments. Make it clear that “this is the new way forward” because it’s best for the practice and best for patients.

- ◆ **“We’re changing how we position recurring treatments”**

LET STAFF KNOW WHAT TO SAY: This is a change from selling one-time, correction-focused treatments to selling results on a membership plan. For example, instead of selling patients a toxin treatment or package, moving forward you can say, “we will create a treatment plan based on the results you want—and your monthly membership covers the cost.” All patients with recurring treatments should be offered the option to pay monthly with a membership.

LET STAFF KNOW WHERE TO START: The most common plans on PRIVI memberships are injectables, HydraFacials, skincare and laser packages. Consider rolling out PRIVI with your toxin patients to get started.

- ◆ **“This will become a natural part of our process flow”**

As with any new offering, it will take a little time upfront to learn the technology, educate patients, and set up your custom offerings. Encourage your team to be patient. Memberships will quickly become second nature and create efficiencies in the long-run. Memberships are worth it!

### PRO TIP

#### SEEK 100% BUY-IN

Practices that realize the most success from memberships are 100% bought in.

Set the expectation that a “membership-first” approach is the way forward and ask your staff for their commitment to making the changes you’ve outlined.

# ✿ PRACTICE ONBOARDING ✿

**Everyone has a role, everyone talks about memberships**

## TALK ABOUT PRIVI THROUGHOUT THE PATIENT JOURNEY

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From patient check-in, to treatment consultation, to procedure, and again at checkout—your membership should be part of the conversation at every step of the journey. Ensure everyone knows their role and talk track.



# PRACTICE ONBOARDING



Everyone has a role, everyone talks about memberships

## THE PATIENT EXPERIENCE

KEEP MEMBERSHIPS TOP OF MIND.  
KNOW THE TALK TRACK.

### PHYSICIANS + AESTHETICIANS

- Introduce custom treatment plan to achieve desired results—covered by a monthly plan
- Tee up checkout experience

### FRONT DESK

- At check-in: introduce membership option
- At checkout: present option to pay on monthly membership
- On the phone: introduce memberships to prospective patients





# PRACTICE ONBOARDING



Everyone has a role, everyone talks about memberships

## PHYSICIANS + AESTHETICIANS

### **Set the tone:**

Shift the conversation from cost to desired results. Discuss creating a custom plan to reach patient goals vs. talking about individual corrections or treatments.

### **Determine the plan:**

Choose a combination of treatments to best achieve desired results, covered by the cost of monthly membership. Upsell and cross-sell when appropriate.

### **Tee up checkout:**

Create a seamless handoff to the front desk for your patient's checkout by saying, "the front desk will talk to you about our beauty memberships."

### PRO TIP

## CREATE A CHECKLIST

Develop a post-training checklist to help all members of your staff remember where PRIVI fits into their patient interactions.

Help them build confidence about how to position memberships and support a "membership-first" mindset.



# PRACTICE ONBOARDING



**Everyone has a role, everyone talks about memberships**

## FRONT DESK

### **At check-in:**

For patients receiving non-invasive, recurring treatments, offer a brochure at check-in so they can read about memberships while they wait.

### **At checkout:**

Present memberships as a payment option at checkout by saying, “we now offer memberships that allow you to pay monthly, interest-free. Would you like to pay on a monthly membership?”

### **On the phone:**

Make phone calls with prospective patients work harder by introducing memberships when patients call to schedule a consultation or inquire about treatment pricing.

### **Technical know-how:**

Understand the PRIVI platform and be comfortable setting up and adjusting PRIVI membership plans.

## PRO TIP

### CREATE A CHECKLIST

Develop a post-training checklist to help all members of your staff remember where PRIVI fits into their patient interactions.

Help them build confidence about how to position memberships and support a “membership-first” mindset.

# ✿ PRACTICE ONBOARDING ✿

**Great for upsell and cross-promotion**

## LEVERAGE THE FLEXIBILITY OF THE PRIVI PLATFORM

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The PRIVI platform allows you to easily customize and adjust treatment plans as much as needed to meet individual patient goals. The tremendous flexibility of the platform makes upsell and cross-promotion products easy to add to existing memberships.



# PRACTICE ONBOARDING



**Great for upsell and cross-promotion**

◆ **BUNDLE TREATMENTS TO OPTIMIZE RESULTS**

Customize treatment bundles, creating the best mix of services to help your patients get their best look. The beauty of memberships powered by PRIVI is that they're completely yours to create, independent from partners—which means you're in the driver's seat.

◆ **MAXIMIZE UPSELL POTENTIAL FOR MEMBERSHIP PATIENTS**

Once patients are committed to a membership, upsell becomes incredibly easy. You'll be seeing PRIVI patients in your office more often. Keep them apprised of new offerings and continue to make treatment recommendations aligned to their treatment goals.

◆ **TREAT HIGH-VALUE PATIENTS WITH STRATEGICALLY SELECTED PERKS**

Select high-margin, low-cost-to-practice treatments to offer as free incentives – like HydraFacials or skin care products. Remember, patients on a membership are worth more, quite a bit more, to your practice. The extra value that you realize from locking in their loyalty will more than offset the free treatment cost.

**PRO TIP**

## MAKE MEMBERSHIPS A TEACHING TOOL

80% of patients know about 20%  
of what your practice offers.

Use memberships to expose patients to additional products and services in your practice. This can often translate into upsell and cross-sell success.



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HOW TO

# SELL TO PATIENTS



# ✿ PATIENT SELL ✿

**Talk about your memberships early, often,  
and at every visit**

## PRESENT MEMBERSHIPS AT EVERY OFFICE VISIT

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Introducing memberships to patients should be a soft pitch, not a hard sell. Many patients prefer membership models that allow them to pay monthly – especially millennials. They're used to paying monthly for everything from their gym memberships to their Netflix accounts – so they've grown to appreciate memberships that provide a convenient way to pay. Present memberships as a payment option early and often — don't wait for the patient to ask.

# ✿ PATIENT SELL ✿

**Talk about your memberships early, often,  
and at every visit**

## ◆ **SOFT SELL WITH FREQUENCY**

Offer membership as an option during every visit. Continue to position recurring treatments as opportunities for patients to opt into “custom treatment plans on a monthly membership.” Even if patients have said “no” in the past, continue to present your membership as a valuable offering.

## ◆ **HIGHLIGHT OPTIMAL OUTCOMES**

During a treatment consultation, focus on desired results – results best achieved by combining different kinds of treatments. Position this as a patient’s “customized treatment plan – just for them,” and highlight a membership as the best, most flexible, easiest way to pay for that plan and achieve optimal results.

## ◆ **FOCUS ON THE LONG-TERM RELATIONSHIP**

Remember, memberships not only lock in long-term loyalty for your practice, but they also create happier, more compliant, more satisfied patients. Locked-in loyalty also fuels a powerful, predictable revenue stream for your practice. Stay the course. PRIVI is a win for you and for your patients.

### PRO TIP

## SEIZE THE MOMENT OF TRUTH

Providers report having the most success selling memberships when their patients are in the office, during the consultation or right before the procedure.

These are the moments when it clicks for patients and they realize, “this is a custom beauty plan, created just for me, paid monthly on a membership.”

# ✿ PATIENT SELL ✿

**Membership incentives, more than just discounts**

## INCENTIVES COME IN MANY SHAPES + SIZES

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Membership incentives almost always include discounts, but there are several other exclusive perks that can create value for your membership patients. And they're worth it. Practices report that PRIVI patients are 3x more valuable than non-membership patients.



# ✿ PATIENT SELL ✿

## Membership incentives, more than just discounts

### ◆ GIVE PATIENTS ACCESS TO MORE TREATMENT OFFERINGS

You'll be seeing membership patients frequently, which means you have more opportunities to upsell a broad range of new and innovative treatments. Leverage free product trials from industry partners or extend "try before you buy" offers. Many patients will add additional treatments and services to their membership plans based on your recommendations.

### ◆ PRICE LOCK GUARANTEES

Offer members pricing guarantees. This ensures they lock in the price of a treatment when they purchase their membership. If treatment prices increase over time, they continue to pay the same amount monthly.

### ◆ AND YES, INCENTIVES

Special pricing is the cost of entry for many patients. Many providers offer a standard 5% discount to patients purchasing treatments on a membership. And patients can still use industry offers or coupons to make their treatments more affordable. Remember, the beauty of PRIVI is that memberships are completely customizable. You select the treatments, choose your perks, and determine your costs based on tiers of patient loyalty. You're in complete control.

## PRO TIP

### INCENTIVES ACCELERATE SIGNUPS

Incentives can help convert patients to memberships. You can offer special pricing or small discounts (e.g., 5% off toxin/filler) to encourage conversion. Or, consider high-margin, low-cost-to-practice treatments to offer for free.

Patients on a membership are worth more, quite a bit more, to your practice. The value you realize from locking in patient loyalty will more than offset upfront special pricing or incentives.

# ✿ PATIENT SELL ✿

**Pull “membership-first” language through patient marketing**

## PROMOTE MEMBERSHIPS ANYWHERE YOU TALK ABOUT RECURRING TREATMENTS

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For many patients, your marketing is the beginning of their journey with your practice. Promote an integrated membership experience from the outset—both in your office and with PRIVI custom marketing assets.

# ✿ PATIENT SELL ✿

## Pull “membership-first” language through patient marketing

### ◆ EMAIL BLAST

The #1 most important thing you can do is send your patient base an email introducing your membership. Email is an easy and effective place to start—we can even do it for you!

### ◆ CUSTOM MARKETING

Once your first membership email is sent, we can support patient signup with a suite of fully customized marketing assets for social, website, TV displays, and more. This will include updating language to include “pay on a monthly membership” or “treatment as low as \$xx/month on a membership” anywhere you feature recurring treatments.

### ◆ IN-PRACTICE

Update in-office promotional screens to include membership promotion anywhere you feature recurring treatments. Add QR codes so patients can learn more while they wait.

### ◆ SPECIAL EVENTS

Hold promotional in-office events that encourage membership sign-up with exclusive monthly pricing. Want help during your event? We’d be happy to send a representative to explain the benefits of membership and help sign up patients.

### PRO TIP

## WE’D LOVE TO HELP!

PRIVI provides fully customized marketing support and lead generation campaigns to drastically increase membership signups.

Contact your PRIVI account specialist to get started with your customized marketing.

[click here](#)



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KEY NEXT STEPS

SUPERCHARGE  
YOUR  
PRACTICE GROWTH



AGAIN,  
CONGRATULATIONS!

THANK  
YOU

FOR CHOOSING



**PRIVI** is a solid win for both you and your patients. Patients get an easy way to achieve, maintain, and pay for their best look. You lock in loyalty exclusively at your practice to fuel a powerful, predictable revenue stream.

By mastering memberships, you will accelerate new patient acquisition, increase patient spend, and keep patients coming back all year long.

Memberships are the way forward to power your practice revenue.

**Are you ready to grow?**

Awesome. Let's go!



## KEY NEXT STEPS

- ❑ Set expectations about “membership-first” culture
- ❑ Ensure everyone knows their role and talk track
- ❑ Shift the script on recurring treatments
- ❑ Upsell and cross-promote with confidence
- ❑ Market your custom PRIVI membership offering everywhere you talk about recurring treatments

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The logo icon consists of four orange, teardrop-shaped elements arranged in a cross pattern, meeting at a central point.

PRIVI.®