

The Ultimate Checklist

Can Your Practice Software Do This?

Growth is deliberate. The right all-in-one system keeps your practice in balance, so every workflow supports care, clarity, and revenue. Here's what to look for, and why it matters.

Marketing, CRM, and follow-up

Client engagement only works when systems connect.

Capability	 PatientNow	Your software
Capture and track every lead from web forms and inquiries	✓	☐
Log phone calls with follow-up tasks attached	✓	☐
Clearly assign lead ownership and show CRM stages	✓	☐
Tie texting and email workflows directly to consult and appointment status	✓	☐
Automate reminders, nurture, and reactivation based on visit history	✓	☐
Report on lead → consult → appointment outcomes without spreadsheets	✓	☐

Why this matters: When marketing, CRM, and scheduling operate in one connected system, follow-up stays consistent, ownership is clear, and growth does not depend on memory or manual tracking.



Booking and scheduling

Scheduling is your highest-frequency workflow. It must stay reliable as complexity grows.

Capability	📞 PatientNow	Your software
Manage provider schedules and shared rooms or resources	✓	☐
Support multi-service and package appointments	✓	☐
Handle reschedules and cancellations without manual cleanup	✓	☐
Offer online booking with guardrails and controls	✓	☐
Provide clear calendar visibility and utilization views	✓	☐

Why this matters: As providers, services, and volume increase, scheduling should protect capacity, reduce staff strain, and preserve a seamless patient experience.



Clinical documentation and provider tools

Documentation should protect provider capacity, not reduce it.

Capability	📞 PatientNow	Your software
Support fast, intuitive charting during live appointments	✓	☐
Maintain consistency across providers and services	✓	☐
Support injectables, weight loss, and evolving clinical services	✓	☐
Keep notes, photos, consents, and intake connected in one record	✓	☐
Offer role-based permissions for teams and multi-location practices	✓	☐

Why this matters: Clinical workflows must stay fast, structured, and consistent as you scale, so providers maintain focus in the room while records remain reliable behind the scenes.



Payments, memberships, and revenue visibility

Payments only “work” when they hold up under real-world change.

Capability	📞 PatientNow	Your software
Process checkout, deposits, refunds, and partial payments without workarounds	✓	☐
Manage memberships, packages, renewals, pauses, and upgrades accurately	✓	☐
Support financing and payment plans when needed	✓	☐
Keep payments, memberships, and reporting aligned in one system	✓	☐
Provide clear revenue tracking and reconciliation without manual cleanup	✓	☐

Why this matters: Revenue visibility depends on connected payments and reporting. As transaction volume grows, your system should handle complexity without manual fixes or financial uncertainty.

The most common signs it's time to switch

- Reporting cannot answer owner questions
- Documentation slows providers down
- Follow-up and lead tracking feel inconsistent
- Scheduling complexity outgrows the system
- Payments and memberships create operational mess
- Tool sprawl becomes unmanageable

These are not software inconveniences,
they are operational signals.

📞 The standard to hold.

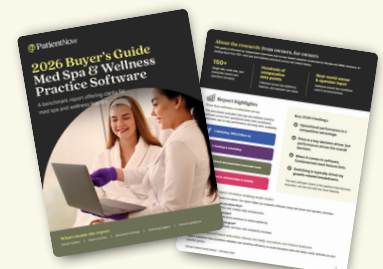
Your software should keep your practice in proportion, with marketing, scheduling, clinical documentation, and payments working together naturally in one connected system.

PatientNow is designed for beauty and built for growth, bringing smart automation for the routine and clear insight for the essential so your team can scale with confidence.

[Schedule a demo](#)

📞 PatientNow

[Read our benchmark report →](#)



Learn more about operational standards from more than 150 medspa owners and operators.