FREE TEMPLATE FROM KO CREATIVE

Med Spa Business Plan Template

A fill in plan for opening or growing a med spa. Nine sections with prompts to fill in, plus a full marketing and launch plan.

KO Creative

Wellness marketing and brand strategy

kocreativemarketing.org

BEFORE YOU START

How to use *this template*

A business plan is only useful if it changes decisions. Write in this one, cross things out, and come back to it every quarter.

Work through the sections in order. Section 2 matters most, because every later section depends on who the med spa is for. If you get stuck there, use our free positioning statement generator and then come back.

Where a section asks for numbers, use your own quotes and local research. This template does not include industry averages, because they vary too much by location to be worth guessing.

> If you are using this plan to apply for a loan or lease, your lender or landlord may want a specific format. The thinking in here still transfers directly. Ask an accountant to check the financial sections.

Contents

1. Executive summary
2. Concept and positioning
3. Market and location
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5. Marketing and launch plan
6. Operations and team
7. Startup costs
8. Revenue model
9. Milestones and risks

Made by KO Creative, a wellness marketing and brand strategy studio. You are free to use, print and share this template.

SECTION 1

Executive *summary*

Write this last. It should let someone understand the whole business in two minutes.

Business name, location and opening date

What the med spa is, in one sentence

Who it is for, and why they will choose it

How it makes money, and what you need to get started (investment, loan or lease)

The three most important goals for the first year

SECTION 2

Concept and *positioning*

This is where most plans are vague and most med spas struggle later. Be specific.

The concept

Which treatments will you lead with, and which will you add later? Injectables, skin, laser, body, wellness. Starting focused is usually stronger than starting with everything.

Who it is for

CUSTOMER TYPE	WHAT THEY WANT	WHAT STOPS THEM BOOKING

Who are the three types of people you most want as clients? Describe each one the way they would describe themselves.

Your positioning statement

For _____ who _____, _____ is the _____ that _____. Unlike _____, we _____.

What makes you different

Why would someone choose you over the other clinics offering the same treatments? Name something you do, such as your consultation process or practitioner experience.

SECTION 3

Market and *location*

Prove there are enough of the right people within reach, and be honest about who you are up against.

The area: who lives and works within a 15 minute drive or walk, and what you know about them

Evidence of demand: waitlists, enquiries, conversations, searches, busy competitors

Competitors

NAME	PRICE	WHAT THEY ARE KNOWN FOR	THE GAP THEY LEAVE

The location: why this site, visibility, parking or transport, lease terms and length

SECTION 4

Treatments, *packages and pricing structure*

Keep the structure simple enough that a new client understands it in ten seconds.

OFFER	PRICE	NOTES
Consultation Free or paid? Who runs it, and is it with the practitioner who will treat the client?		
Core treatments Your lead treatments, priced per unit, area or session.		
Courses and packages Treatments that need several sessions, sold as a course.		
Membership Monthly membership with a set treatment or credit. Builds steady monthly revenue.		
Retail Skincare and aftercare products recommended by practitioners.		
Launch offer For a new location, treatment or practitioner. A clear deadline, not a monthly habit.		

> A permanent discount teaches people the full price was never worth paying. Use offers with a clear deadline and a reason, such as founding places or a launch week, and keep your everyday prices steady.

How a first time client moves from the intro offer to a regular commitment

SECTION 5

Marketing and *launch plan*

The section most plans rush. Your clients have to know you exist, picture themselves inside and have a reason to book now.

The 90 day launch timeline

WHEN	WHAT HAPPENS	YOUR DATES AND OWNER
90 to 60 days out	Lock the positioning statement. Build the website and booking page. Start a waitlist with one clear reason to join early. Announce on your own channels and to everyone you already know.	
60 to 30 days out	Introduce the people: owner, team, practitioners. Show the space taking shape. Open founding memberships or packages with a fixed number of places and a firm deadline.	
30 to 0 days out	Run a preview event or taster sessions. Collect the first reviews and photos. Remind the waitlist weekly. Confirm opening week bookings personally.	
Opening week	Full schedule, extra staff on the desk, content every day. Capture first impressions on camera, with permission. Ask every new customer how they heard about you.	
First 90 days	Track who stays and who drops off. Follow up every trial or first visit within 48 hours. Turn the best stories into proof content. Review what is converting each month and move effort there.	

Channels

CHANNEL	WHAT YOU WILL DO THERE	WHO RUNS IT
Instagram, led by practitioners and treatment explainers		
Google Business Profile and reviews		
Referral programme for existing clients		
Treatment pages on your website that answer pre booking questions		
Email to clients for rebooking and new treatments		

Content and *measurement*

Content pillars

Plan your posts across six jobs every week: **people** (your team and founder), **teach** (answer real questions), **proof** (reviews and stories, with permission), **behind the scenes**, **community**, and **next step** (how to book). Our free content calendar generator builds a month of posts for a med spa in this format.

The three questions every new client asks before booking, and where you will answer each one

Launch marketing budget

ITEM	AMOUNT
Photography and video	
Website and booking setup	
Signage and print	
Preview event or taster sessions	
Paid social, if used	
Marketing support	

What you will measure every month

MEASURE	HOW	TARGET
Enquiries	Messages, calls and form fills per week	
Trials or first visits booked	From enquiries, per week	
Conversion	Percentage of trials or first visits who buy	
Retention	Percentage still active after 90 days	
Average monthly revenue per customer	Total monthly revenue divided by active customers	

SECTION 6

Operations and *team*

How the med spa runs day to day, and who is responsible for what.

AREA	WHAT TO DECIDE	YOUR PLAN
Medical oversight	Rules on who can own a med spa, who must supervise and who can perform each treatment vary by state and country. Get legal and regulatory advice before you sign a lease.	
Team	Medical director, injectors and practitioners, aesthetics, front desk. Licences and training required for each role.	
Software	Booking, consultation notes, consent forms, photo storage, payments. Check privacy requirements for client records.	
Insurance and compliance	Malpractice and liability cover, device training, consent and photo consent processes, advertising rules for medical treatments.	
Devices and supplies	Leased or bought? Servicing, training and supplier agreements.	

Owner role: what you will do yourself, and what you will hand over first

> This template is a planning aid, not legal, medical or financial advice. Licensing, insurance and regulatory rules vary by location. Check them with a qualified adviser before committing to a lease or loan.

SECTION 7

Startup *costs*

Use real quotes. Where you only have an estimate, mark it and replace it before you commit.

ITEM	AMOUNT	QUOTE OR ESTIMATE?
Lease deposit and clinical fit out		
Treatment devices		
Medical supplies and opening stock		
Treatment beds and furniture		
Licensing, legal and regulatory advice		
Insurance		
Signage and branding		
Website and booking software		
Launch marketing		
Working capital for the first six months		
Total		

How the startup costs will be funded: savings, loan, investors, equipment finance

SECTION 8

Revenue *model*

Three scenarios. Be honest about the slow one, because that is the one you need to survive.

MONTHLY REVENUE	SLOW	EXPECTED	STRONG
Core treatments Treatments per month x average price			
Courses and packages Courses sold per month x price			
Memberships Members x monthly price			
Retail Average retail per client x clients per month			
Consultations If paid, consultations per month x price			
Total monthly revenue			

MONTHLY COSTS	AMOUNT
Rent and service charges	
Staff and practitioners	
Utilities	
Software and subscriptions	
Marketing	
Insurance, loan repayments and other	
Total monthly costs	

> **Break even:** total monthly costs divided by your average monthly revenue per client tells you how many paying clients you need each month to cover your costs. Write that number somewhere you will see it every day.

SECTION 9

Milestones and *risks*

Milestones

MILESTONE	TARGET DATE	DONE
Lease signed		
Positioning and brand finished		
Waitlist opened		
Founding offer launched		
Opening day		
Break even month		

Common risks, and a starting response

RISK	HOW YOU WILL RESPOND
Competing on price with high volume clinics	Lead with practitioner trust, consultation quality and natural results. Avoid a deal every month.
Advertising restrictions	Plan organic content, reviews and referrals as the main engine. Check platform and local rules before any paid campaign.
Clients book once and never return	A follow up and rebooking plan for every treatment, plus a membership that gives a reason to return.

KO CREATIVE

Want help with *section 5?*

Positioning and launch marketing are where most new med spas lose months. KO Creative builds the positioning first, then the content, social media and launch plan that fill the diary.

See our med spa marketing services, or book a discovery call. Thirty minutes, no pitch deck.

kocreativemarketing.org