STANDARD OPERATING PROCEDURE

Salon Client Consultation SOP

Document no.	SOP-SAL-002
Revision	1.0
Owner	Salon Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To make sure every client's history, allergies and expectations are reviewed before a service starts, reducing the risk of an unhappy client or an adverse reaction.

2. Scope

Applies to the consultation before any hair, nail or skin service. The hair color patch test and application steps are covered in detail by a separate SOP.

Definitions

Intake form	The form a client completes on their first visit covering allergies, medical conditions and previous chemical services.
Strand test	A test on a small section of hair to preview how a chemical service will process before applying it to the whole head.
Contraindication	A condition, such as an open scalp wound or known allergy, that means a planned service should be declined or modified.

3. Responsibilities

Stylist	Conducts the consultation, reviews history, explains the service, and gets the client's consent before starting.
Front Desk Coordinator	Collects and files the intake form before the appointment and flags returning clients with notes on file.
Salon Manager	Reviews contraindications the stylist is unsure about and approves any service modification or decline.

RACI matrix

Activity	Stylist	Front Desk Coordinator	Salon Manager
Collect and file the intake form	I	R/A	I
Review client history and allergies	R/A	C	I
Set expectations and get consent	R/A	-	I
Decide on a contraindicated	R	-	A

Activity	Stylist	Front Desk Coordinator	Salon Manager
service			
Document consultation notes for future visits	R/A	C	I

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Client intake form
- Salon booking software with client profile history
- Reference photo book or tablet
- Patch test kit for chemical services
- Consultation notes template

5. Procedure

Step	Task	Owner	Done
5.1	**Confirm the appointment and greet the client** Greet the client, confirm the booked service and duration, and offer a beverage while they wait for their consultation.	Front Desk Coordinator	☐
5.2	**Collect a new client's intake form** Have new clients complete the intake form covering allergies, medical conditions and previous chemical services before the consultation begins. **Checkpoint:** No new client starts a chemical service without a completed intake form on file.	Front Desk Coordinator	☐
5.3	**Review history in the client profile** Pull up the client's profile in the salon booking software and review past services, formulas used and any notes from previous visits.	Stylist	☐
5.4	**Discuss the desired outcome** Ask the client what they want, using reference photos to confirm the look, and note any specific concerns such as maintenance time or budget.	Stylist	☐
5.5	**Examine hair, skin or nail condition** Examine the condition of the client's hair, scalp, skin or nails to confirm the planned service is appropriate and check for signs of irritation or damage. **Warning:** Do not proceed with a chemical service over broken skin, active irritation or a condition you are not trained to evaluate; refer the client to a physician if needed.	Stylist	☐
5.6	**Flag contraindications** If you notice a scalp condition, known allergy, or other contraindication, pause the consultation and involve the salon manager before deciding whether to modify or decline the service.	Stylist	☐
5.7	**Explain the process, timing and cost** Walk the client through what the service involves, how long it will take, and the total cost before starting, including any add-ons discussed.	Stylist	☐

Step	Task	Owner	Done
5.8	**Address concerns and reset expectations** If the client's request isn't realistic for their hair, skin or nail condition, explain why and offer an alternative that can be achieved safely in one visit or over several.	Stylist	☐
5.9	**Confirm the final plan and get consent** Confirm the agreed service, timing and cost verbally with the client, and get their consent before starting, including for any chemical service requiring a patch test. **Checkpoint:** Client consent is confirmed and recorded before any chemical service begins.	Stylist	☐
5.10	**Document consultation notes** Record the agreed service, formula plan and any client preferences or concerns in the client profile for reference at the next visit.	Stylist	☐
5.11	**Confirm satisfaction after the service** Check in with the client once the service is complete to confirm they are happy with the result before they leave the chair.	Stylist	☐

6. Quality checks

- Every new client has a completed intake form before their first chemical service.
- Consultation notes are updated in the client profile after every visit.
- Contraindications are reviewed with the salon manager before proceeding.
- Client consent is confirmed and documented before a chemical service starts.

7. Records

- Client intake form
- Consultation notes in the client profile
- Patch test results, where applicable
- Contraindication decisions signed off by the salon manager

8. KPIs

- Percentage of consultations with updated notes on file
- Number of service modifications due to contraindications
- Client satisfaction score at checkout
- Rebooking rate after consultation

9. Common mistakes

- Skipping the intake form review for a client who has visited before.
- Starting a chemical service without confirming a patch test was done when required.
- Not writing down the agreed formula or plan, leading to inconsistent results next visit.
- Agreeing to a look during consultation without checking hair or skin condition first.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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