Advice on Buying Salon Software

Choosing the best salon software for your business is a difficult decision and if you want to pick the right software for your business, this is where you need to start.

What type of software is it – cloud, locally installed on your PC or a combination of both?

Cloud software providers host your system for you so you typically don't have to worry about backing up your data, however your system is dependent on your internet connection so if you have a problem with this then you may find your system is very slow or you may not be able to access it at all.

A locally installed application runs fully on your salon PC, so this solution typically gives better performance than a cloud system and is not dependent on an internet connection. With this type of installation you should ensure you have a reliable backup policy in place, whether as part of your end of day procedures or an automated backup solution from your provider.

A hybrid system (combination of both cloud system and locally installed application) can give the best of both worlds by having your main system running locally on a PC in the salon, but removing reliance on your internet connection to run your business while giving you the flexibility of mobile access both in and out of the salon at the same time. You will still be required to have a reliable backup policy in place.

Online Booking

A good online booking facility can significantly reduce phone calls to your front of house team and is great for acquiring new clients to your salon who may not have previously considered coming in. Check whether there are any transactional fees for this, how many bookings are included in your fixed monthly fees and whether you can take payments online. If you choose to take payments online; what transaction fees apply for the payment? Does your client have to pay extra for the online booking facility, potentially stopping them from completing their booking? Also, does your system give the client the flexibility to modify their appointment online once booked? Does your online booking facility fully integrate into the appointment book? It is also worth checking the flexibility of the online booking system. Can you restrict certain employees, services and times of day from being available for online booking or limit the number of available appointment slots the client sees? Your online booking system needs to be sufficiently configurable to prevent clients having open access to your appointment book and leaving costly gaps between appointments.

Hardware

Fully investigate the hardware requirements for your chosen system and where your provider is supplying the hardware ensure they provide full specifications of this for you to compare against the other software vendors and local PC stores. For a PC to be used intensively in a business for long periods of time it should be of business grade and designed to be left switched on 24/7, which many home PCs are not. All PCs are not the same!

Are you planning to run your software on an Apple Mac? If so, check whether the software can run on this. (And also the other programs/applications that you will be running to ensure they can run on Mac too.)

Marketing communications

Most software systems have a manual or automated marketing system. Choosing a platform with an automated system allows you to set up your marketing campaigns in advance and have the system do the hard work for you by communicating daily with your clients in the background. Be sure to check whether the system can send emails only or if it can handle SMS and direct mail/postcard campaigns also. While emails are a great low cost way of communicating, SMS tends to grab clients' attention more.

Some systems include an unlimited number of emails as part of the monthly cost but some charge per email you send. Factor these "per email" transactional costs into your decision as they can add significantly to your monthly cost if you're sending even one newsletter per month to your client base.

If you or your salon team is responsible for creating emails, check that the platform provides easy to modify templates so you can customise your emails to be in line with your business branding without having advanced design skills or needing to involve a 3rd party design company.

Check what triggers are available to send marketing

communication to your clients. Is it just a database-wide send or can you select specific criteria such as last visit date, does the client have a future appointment, VIP clients etc. Whatever system you choose must be able to easily report on the return of your marketing campaigns and offers.

Gift Cards

Plastic gift cards have become more commonplace, replacing paper gift certificates, with a tendency for clients to more readily carry the plastic cards with them instead of filing them away for future use. If you plan on using plastic cards, investigate the cost of purchasing these along with any activation or usage fees which may apply.

Remote Access

Do you need remote access to your system when not in the salon? If so, be clear on what functionality you need when reviewing software systems. Instinctively many users think they need access to "everything" but in reality it may be only reports or your appointment book you need to see. Check whether the system can restrict levels of access to remote users and most importantly that your employees cannot see client details when out of the salon if you don't want to allow this.

Opening up an employee's appointment book to them remotely can help them feel more involved in your business and assist them with actively filling their own column.

Support and account management

What support does each provider offer? Some software companies offer unlimited support, others restrict to a maximum number of hours per month. Check what each provider's support desk opening hours are – are they available to help your front of house team with end of day procedures for your salon's late night openings?

Is the vendor's support desk a fully equipped support team or is it a call answering service where it may be necessary to call you back at a later stage when a technician is available? Some providers only offer live chat and email support so it is worth understanding how you can get help if needs be.

Does the software vendor offer an account management service or support only? Many software companies offer a full account management service where your account manager will review your use of the system with you periodically and discuss the latest features which can help drive your business.

Beauty/Aesthetic services

If your salon offers beauty treatments, do you need your system to manage room, equipment or chair allocation? Does the system need to manage course sales for your salon?

Skin sensitivity testing & contraindications

A software system should be able to manage skin sensitivity testing and restrictions around offering services where the client has not been tested. Check how this operates and ensure it gives you the level of best practice control you need without having to track this manually.

Phone apps

Do you want to offer a phone app to your clients? Many salons choose to use mobile optimised websites rather than a phone app, but the convenience of your clients having a phone app registered to them instead of having to log into a website can give you an uplift in your online bookings. Whatever access method you choose, whether a mobile website or a phone app, it should give your clients access to their visit history and an easy way to rebook previous appointments. Walk through this process with each solution and compare how easy the experience for your clients is with each.

Client feedback

Does the system have a way to get feedback from clients after their visit? With the advent of social media, clients are finding it easier than ever to share negative feedback about your salon with others. With a client feedback system you have the opportunity to gather your clients' feedback and respond to any negative aspects before they have the chance to share the negativity publicly. If this is something which you plan to implement for your business, an automated solution will save your front of house team time and effort and ensure that only positive responses are not "cherry picked". Check how and when each system will communicate with your clients and whether it's possible to share positive feedback from your clients on social media channels as this can be a great tool for promoting your business.

Setup

As part of the initial setup fees, check how much assistance each vendor will provide. Some offer a full turnkey solution where all setup and configuration services are provided whereas some offer training only, expecting you to carry out your own configuration. Is this an on-site face-to-face service or do they carry out the training remotely? Depending on how you and your team learn this is extremely important to understand from the outset.

In-chair/room experience

With the advancement in technology some providers are developing more consultative features in their software, which means being able to do more with the client at the chair or in the beauty room. Some of the available features on a tablet may include updating a client's details while in the chair to completing a full consultation card with signoff, recording photos of the styles and progress of treatments or booking the client's next appointment so it doesn't need to be done at reception.

Benchmarking

Industry information is key to understanding how your salon is performing. Some software vendors are able to provide you with key data on how the industry is performing as a whole as well as your year on year analysis with details such as average client spend, average retail spend per transaction and time between client visits available.