



## Client Case Study Intake Form Prep & Instructions

Here are instructions and scripts you can use to acquire and mentor participants for the case study assignment. You can copy & paste into an email, text, or social media message. Feel free to edit to sound more like you or fit your style of communication.

### STEP 1

#### **Script to talk to potential case study participants:**

Hi \_\_\_\_\_, I want to share some exciting news with you, and ask for your help. I am a student in school to become a Certified Aromatherapist. Part of my curriculum is to complete a practicum of real-life Case Studies. The assignment is for me to conduct a client intake and assess your health goals. Based on your goals, I am required to formulate and create a custom blend for you that matches and helps you achieve your health goals.

In return, I will need you to consistently use the custom aromatherapy blend, stay in touch and report your results back to me for the next 3 months. This will help me practice the skills and knowledge I have learned, as well as give me feedback that I sufficiently formulated your blend. Your feedback will let me know that the blend is right on track, or if I need to tweak and adjust your formula at any point.

I will be sharing these case studies with my teacher throughout the process to get her feedback and have her mentor me to develop my skills.

Are you willing to be one of my case study participants? If so, I will send you an explanation of the process. I really appreciate your support.



## STEP 2

### **After participant accepts your case study invitation:**

Once a Participant agrees to be one of your case studies, you can then send them a message with the explanation of the process.

Thank you for agreeing to participate in my case study assignment. As promised, here is the explanation of the process:

1. Complete the client intake form (attached) in its entirety being as honest and open as you can. It is a fillable PDF file so you can add your answers right into the document. Make sure you save it before sending it to me, so it saves your answers.
  - a. If you are not comfortable supplying your contact information, you can use your first name only. By sharing your contact information, this allows me to follow up with you through email, phone and/or mail.
  - b. The information you share is kept highly confidential and not shared with anyone outside of me and my instructor. Completion time of the form usually takes about 15-20 minutes.
2. I will review and evaluate your responses, then formulate a custom blend using 100% pure essential oils and botanical carriers, based on your top health goal. This process can take me about 5-10 days.
3. I will mail or deliver your custom blend to use, as well as provide instructions of how to use it.
4. I will email or call you weekly for the first 4 weeks, and then monthly for month 2 & 3, with a Follow-up Questionnaire that I will need you to complete and email back to me within 3 days. I may have follow-up questions after reviewing your responses. The more details and feedback you can give me, the better I can sharpen my aromatherapy skills.
5. If you have any questions about your blend, results, or other health goal throughout the case study process, feel free to contact me any time.
6. Your commitment to participating in my Aromatherapy Practicum, compliance and consistent use of your blend is greatly appreciated.

Let me know if you have any questions. I look forward to working with you to create a special custom aromatherapy blend. Thanks again for helping me.



### STEP 3

Once you have received the completed Case Study Client Intake Form from the participant, you can send them the following message:

Hi \_\_\_\_\_, thank you for completing the Client Intake Form. I will now review it and formulate a custom aromatherapy blends that matches your top health goal. If you have any questions about your blend, results, or other health goals you'd like to address throughout the case study process, feel free to contact me any time.

I will contact you when I have completed your custom blend with a delivery date and instructions for use. Have a great day!

### Step 4

#### Contact participant with delivery date and the following message:

Hi \_\_\_\_\_, I have completed your custom aromatherapy blend and will be (mailing or delivering) it to you.

Here are the instructions on how to use your custom blend consistently as well as the follow up feedback that I need to receive. Let me know if you have any questions. I look forward to hearing how this aromatherapy blend is helping you.

**Frequency of use:** Use your custom blend \_\_\_\_ times a day. I have checked the recommended time frames.

\_\_\_ Morning      \_\_\_ Mid-Morning

\_\_\_ Noon        \_\_\_ Mid-Afternoon

\_\_\_ Dinner      \_\_\_ Bedtime

**How to apply:** list your instructions based on the application method you chose for the custom blend (roll-on, spray, massage oil, bath salt, diffuser blend, etc.)



**Follow-up feedback expectations:**

As you use your blend, I want you to notice how you feel, the intensity of those feelings, where are you feeling it (in your throat, stomach, chest, etc.). How quickly does the discomfort reside after using the blend?

Based on your client intake form, you stated your top health goals you want to accomplish with your blend are:

- 1.
- 2.
- 3.

Please note, while some health goals can be achieved in a matter of days, others may take weeks or months, as we support the body to bring it back into balance.

When you provide feedback to me, it is important that you use your custom blend every day, consistently, in order for me to properly assess your results. If needed I can make adjustments or create a new custom blend.

Specifically, I am looking to see if the essential oils I selected in your custom formulation are bringing you relief on a mental, emotional, and physical level. Some results may be subtle, such as handling a stressful situation a little better than before you started the blend. It may be more profound such as your headache is completely gone within 1 hour of using the blend.

If you feel you have not received any results, let me know what exactly you wanted it to do within the timeframe of using the blend.

In 1 week, I will email or call a Follow-up Questionnaire that I will need you to complete and email back to me within 3 days. I may have follow-up questions after reviewing your responses. The more details and feedback you can give me, the better I can sharpen my aromatherapy skills.

I will continue to email you weekly for the first 4 weeks of this process, and then monthly for month 2 & 3. If you have any questions about your blend, results, or other health goal throughout the case study process, feel free to contact me any time. Your commitment to participating in my Aromatherapy Practicum, compliance and consistent use of your blend is greatly appreciated.



Here is an example of feedback: You can choose to share this with your participant, or not. You can use it as the aromatherapists to help guide your conversations and questions with participants after receiving their feedback, if you need to dig a little deeper into their responses.

Blend goal: calm anxiety

Week 1: I used 3 times a day. I like the smell. I cannot tell if it calmed my anxiety. It does seem like the anxiety bouts are not as frequent or not lasting as long. I find when I have an anxiety attack, I crave sugar and emotionally eat. I will continue using my blend and may increase how often I use it.

Week 2: I used my blend 5 times a day. My anxiety was better. I had 1 less anxiety attack a day than usual. The scents are helping me stay motivated and I do think I have more energy. I will go back to using 3 times a day.

Week 3: Anxiety attacks were much better. I was able to think clearly, complete tasks, and my mood stayed balanced even when I felt anxious. I only had 1 anxiety attack this week that really affected me. I smelled my blend right away and it went away within 5 minutes.

Week 4: I had a very stressful week. I had 3 anxiety attacks this week. I am going to increase using my blend 5 times a day again to get me balanced again. Once I feel like the anxiety is not overwhelming or affecting me, I will go back to using my blend 3 times a day.

Month 2: I was fairly consistent with using my blend at least twice a day. Only had 2 anxiety bouts over the last month that was related to a stressful situation that has since been dealt with. Not only is my anxiety better, I find that I am not emotionally eating as much and lost 4 pounds in my waist.

Month 3: I used my aromatherapy blend maybe once a day. I have not had any anxiety attacks in straight weeks. The guidance you gave me to eat more protein when I start to feel a headache, moody, overwhelmed. or anxious really helps, along with smelling the blend. I can stock it before it starts. Thank you. This blend helped me find confidence and I have more fun rather than being couped up in a corner, too anxious.