



# Building Your Beauty Tech Stack: 5 Steps to Lay the Foundation for Expansion

The Complete Guide to Finding the Best Beauty & Wellness Tech  
Stack for Your Business



- 03 Introduction
- 04 Step 1: Begin with a vision
- 05 Step 2: Research tools that address your pain points
- 07 Behind-the-scenes tech
  - Schedule management system
  - Inventory management system
  - Custom forms and charting solution
  - Accounting system
  - Payroll system
  - Payments system
  - Marketing automation system
  - CRM/Sales Platform
  - Reporting tools
- 11 Client-facing tech
  - Self-booking tool
  - Appointment check-in and POS system
  - Chatbot
  - Online shopping system
- 14 Step 3: Read reviews and get ALL the demos
- 16 Step 4: Get stakeholder buy-in
- 18 Step 5: Make the final decisions
- 19 Conclusion
- 20 About Boulevard

# Introduction

Beauty and wellness businesses have always put relationships first. In a recent survey of North American consumers, 94% of respondents said they'd be more likely to choose a service provider who offered an online booking option. Modern consumers also expect tech to be integrated into the entire journey, eliminating friction and improving the quality of interactions. Meanwhile, tech has also quietly become the backbone of business operations.

Still, building a great tech stack is a major investment — it requires funds, time, and stakeholder buy-in. A single automation or process update is often the key to scaling services or growing into a new vertical. For expanding enterprises, tech is even more essential. The right tools can offload manual labor, synthesize multi-location data and reporting, and reinforce consistent business practices. For business managers, the first challenge is understanding the available options to make recommendations to owners.

The best beauty tech stacks are built with intentionality. In this guide, we'll explore the interplay of tech solutions and provide concrete steps to design yours. You'll learn:

- How to assess the day-to-day needs of your business
- Which tech categories belong on your shortlist
- How to ask the right questions and identify winning solutions
- How to get stakeholder buy-in and set the stage for growth

Let's dive in!

# Step #1: Begin with a vision

The best beauty tech stacks are designed with intentionality. Consider each component of your business—and the interplay of the tech that supports them—to make the most of your investment.

Depending on your outlook, shopping for new tech may feel exciting — or a little daunting. But if you take a measured approach, assessing the present state of your business with an eye for the future, you're already on the right track. Before you start eyeing a booking system upgrade or reading payroll software reviews, take a moment to answer these five questions:

**Which processes give you the biggest headaches?** Many of these can likely be automated, either by transforming analog processes or upgrading outdated systems. Make a list of issues without prescribing solutions at this stage.

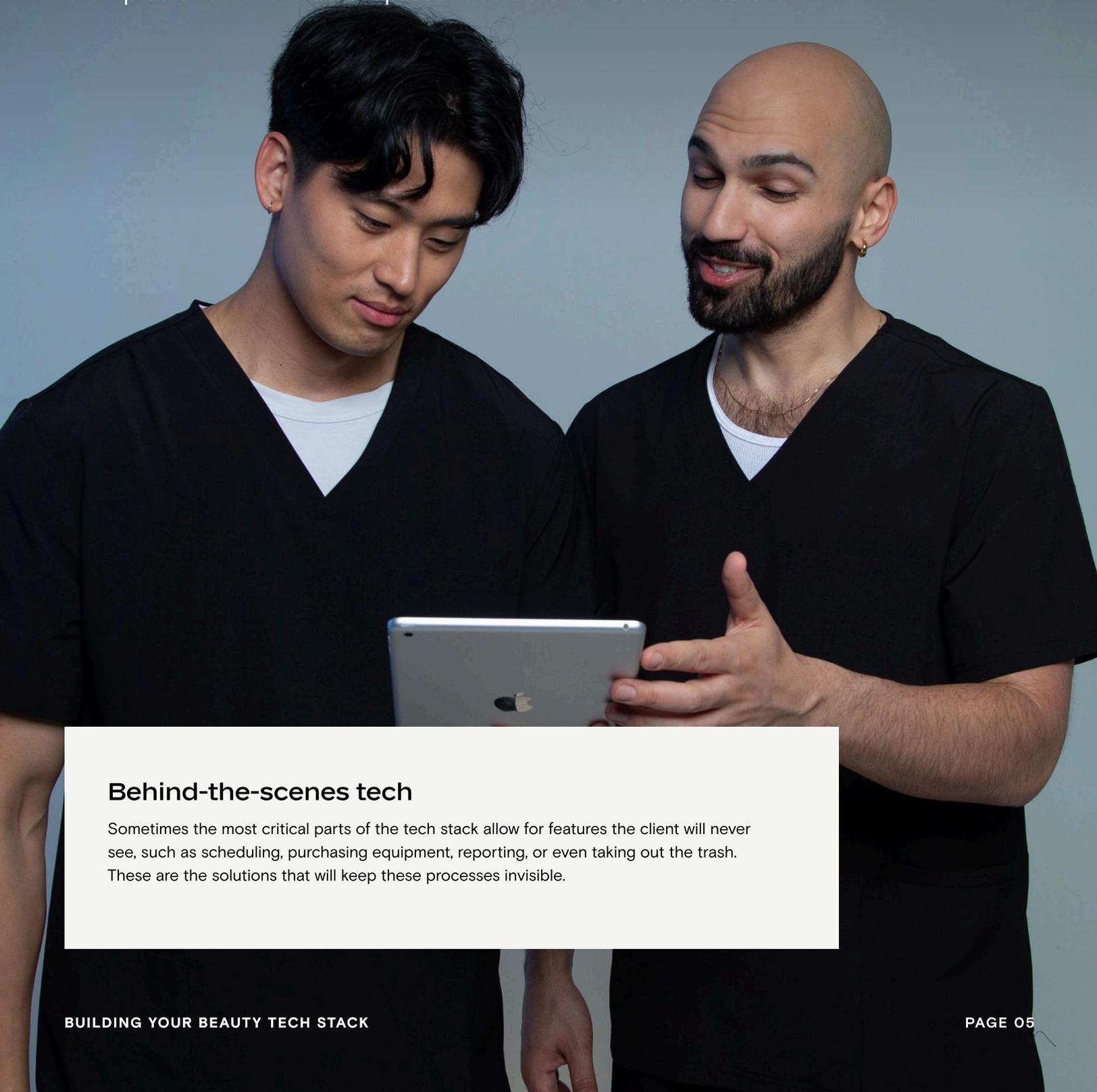
**Where are the missing links in your existing tech stack?** Do all your systems play nicely together? Note any point at which data gets siloed and flag issues that could lead to you passing between various support teams. In the long run, data silos lead to wasted resources. When all your tech talks to each other, you operate with greater efficiency and surface hidden insights that will help you grow.

**Are you delivering the best possible user experience?** Consider this from the client perspective and your managers' point of view — they have to use these systems, after all! What is adding friction to your current processes? Keep in mind that if you're familiar with a system, you may have a knowledge bias. Certain systems may seem intuitive to you but confusing to your colleagues. Get second and third opinions and if possible, talk to your clients directly about their experience.

**Is the tech you rely on future-proof and built to scale?** When you're first starting out, cost plays into every decision. But sometimes, the most affordable solutions can't grow with you. If you were to open several new locations — or even purchase a competitor's chain — could you scale and customize your current tech to support it? If you're unsure of the resilience or scalability of any system, note the processes it supports so you can investigate your options.

## Step #2: Research tools that address your pain points

With these questions answered, you should be ready to build a shortlist of functionalities you need with an eye towards the future. Here is a list of tech capabilities to help you get started, along with examples of software that represent some or all of these features.



### Behind-the-scenes tech

Sometimes the most critical parts of the tech stack allow for features the client will never see, such as scheduling, purchasing equipment, reporting, or even taking out the trash. These are the solutions that will keep these processes invisible.

# Schedule management system

Managing a beauty team starts with addressing their schedules. Beauty businesses must balance staff schedules and client appointments to ensure the entire team is ready for each session. While these elements can theoretically be processed using spreadsheets, advanced scheduling management systems further optimize bookings and reduce downtime. Look for platforms that differentiate between processing, transition, and finishing times to ensure every client — and stylist — gets precisely what they need from each block of time.

### Key features:

- Seamlessly syncs with client booking interface
- Allows customization for different appointment lengths and transition times
- Includes automated features, such as booking to minimize downtime

### Examples:

- Netsuite
- Vish
- Boulevard
- Shopify

# Inventory management system

An inventory management system helps businesses account for any incoming, outgoing, and stored stock. For example, in a beauty spa or salon, inventory systems make it easy to keep track of equipment and supplies, along with any products sold directly to customers. For beauty professionals, inventory management platforms should be robust enough to manage stock but automated sufficiently to operate painlessly. Look for inventory control systems, digital labeling and barcoding, and perhaps even ecommerce support for product shipments.

### Key features:

- Fully customizable system, accessible from the devices you use
- Includes predictive analytics and automated replenishment
- Prompts for items to be counted, improving cycle count accuracy
- Offers multi-location tracking and bin tracking
- Provides full product lifecycle traceability
- Includes vertical-specific inventory features, like color mixing formulas

### Examples:

- Netsuite
- Vish
- Boulevard
- Shopify

## Custom forms & charting solution

Building a modern tech stack isn't just about sleek booking software—it's about seamless client experiences. Digital forms and HIPAA-compliant charts are the backbone of that transformation. From streamlined intake forms to real-time treatment records, going paperless means faster check-ins, easier client data storage compliance, and smoother operations overall. Plus, with instant access to client history and preferences at your fingertips, your team can deliver personalized experiences that keep clients coming back. Custom forms are also key. You'll want a system that features your brand, fits the unique requirements of your business, and makes life easier for your clients and staff.

### Key features:

- Essential for businesses looking to maximize efficiency and personalize client experiences
- Tailored to your business, customizable and features your logo
- Integrates with your booking and client management system
- HIPAA-compliant for medspa or aesthetics businesses

### Examples:

- Boulevard
- Zenoti
- Aesthetics Pro
- Meevo

## Accounting system

Delivering beauty services and paying the bills are two completely different skills, which is why many beauty businesses need accounting software in their tech stack. These platforms can track your appointments, sales, expenses, and tips on a day-to-day basis and generate bookkeeping reports for tax purposes. As a tech solution, your financial records and receipts can even be organized paperlessly, making it far easier to access necessary information.

### Key features:

- Has robust invoicing and expense tracking features
- Offers cloud-based storage so you can scale as needed without paper reliance
- Includes bank-level security to keep your data safe
- Syncs with your booking, scheduling, and payroll systems

### Examples:

- Netsuite
- QuickBooks
- Salon Accounting





## Payroll system

General accounting features are important, but as a business, you must also make sure your system accounts for payroll management. Most beauty businesses need processes that account for individual wages and tips, commissions, and other bonuses. By integrating these services into the tech stack, beauty businesses can go beyond these considerations to address automated payments, financial reporting, and more.

### Key features:

- Has an intuitive interface and user-friendly automations
- Supports hourly and salaried employees
- Supports multiple pay rates (even for one employee in the same period)
- Compatible with every state in which you do business
- Automates taxes, W2s, and 1099s
- Offers reimbursements and benefits deductions
- Integrates with accounting and time tracking platforms
- Includes robust reporting capabilities

### Examples:

- ADP
- Gusto
- Paychex

## Payments system

Yes, it's another finance system. But, look, managing money is hard. Along with managing income and paying employees, beauty businesses need to process payments for clients. Although the hardware is client-facing, the software will be used by your staff. The associated payments facilitator will also act as a middleman for card payments, so security and support are of the utmost importance.

### Key features:

- Has an intuitive interface for managers and staff
- Delivers payments quickly and securely
- Fee structure is fair, and contract terms are mutually agreeable
- Includes comprehensive support for fast dispute resolutions
- Integrates with your accounting and payroll software
- Offers multi-merchant set up so everyone gets paid
- Allows for card-on-file payments via your booking/client profile software

### Examples:

- Clover
- Square
- Boulevard

## Marketing automation system

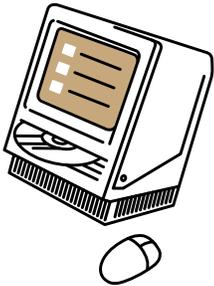
Reaching and attracting new clients is practically a full-time job in itself. Today's marketers need to manage social media accounts, blogs, video streams, and more to reach digital audiences. Marketing automation systems aid this goal by... well, automating what you deliver through each channel. Schedule your ad content in advance, and let your tech stack do the rest.

### Key features:

- Analyzes campaign performance by revenue, verified appointments, and more
- Offers drag-and-drop zero code email and blog interfaces
- Includes pre-built template and versatile, custom design functionality
- Supports automated workflows with conditional logic
- Has a scalable pricing infrastructure
- Integrates with your CRM and CMS

### Examples:

- Mailchimp
- Klaviyo
- HubSpot
- Boulevard



## CRM/Sales Platform

Beyond marketing automation, customer relationship marketing strategies aim to sustain positive communications with clients to sustain long-term relationships. While CRM platforms overlap with marketing solutions, they offer a more holistic approach that analyzes client communications during every stage of their “buyer’s journey.” So if you want to sustain that level of connection along with sales tools, email newsletter deliveries, and social media posts, CRM platforms are for you.

### Key features:

- Comprehensive reporting with visual dashboards
- Supports custom APIs with flexible API call volume
- Includes task ticker to assign to-dos internally
- Integrates with your booking system and marketing automation software

### Examples:

- Boulevard
- Salesforce
- HubSpot

## Reporting tools



We've touched on reporting tools repeatedly in this section, but once more for the people in the back: Reporting tools are the best, y'all. Instead of compiling data from months of appointments and employee schedules, reporting tools summarize your needs with the click of a button. Industry-specific reporting platforms go a step further with customizable templates that you can adapt to meet the needs of any beauty business at scale. Everything on this list is a major time and money-saver, but reporting might be the most important of them all.

### Key features:

- Supports automation, customization, and templating
- Easy organization with folders, simple export functionality
- Granular filtering and data drill-downs, such as segmenting local and regional reports
- Offers select user access and view-only link sharing
- Integrates with EVERYTHING (at a minimum, your booking and accounting software)
- Includes a reporting API to work with homegrown or third-party systems

### Examples:

- Quickbooks
- Netsuite
- Boulevard



## Client-facing tech

These tools and platforms give clients a greater degree of control over their appointments. By integrating them with your stack, you free up the front desk so staff can focus on the clients in front of them instead of clients on hold, putting a stronger focus on sales and revenue.

### Self-booking tool

As we said at the very beginning, clients expect to see online booking options, whether through an app or a web page. Self-booking tools let them see a range of available times without sharing the entire calendar with the public. Of course, the best examples of self-booking tools will automatically generate optimal pairings. This approach gives you the freedom to make necessary adjustments manually without disrupting the client's time slot.

#### Key features:

- Customizable to match your brand, streamlined and beautiful
- Customizable service menu with the option to show/hide services
- Automates schedule visibility to show the best times first
- Captures credit card details to reduce no-shows
- Offers automated email or text follow-up for reminders and intake forms
- Offers waitlist functionality
- Supports gift card purchase

#### Examples:

- Boulevard
- Booker
- Mytime
- Meevo
- Zenoti

## Appointment check-in and POS system

Self-booking is a great start, but you also need a system to check clients in and out once they're on the premises. Tablet-based systems can support self check-ins or the classic receptionist experience. Ideally, your booking, check-in, and point-of-sale system will be a single comprehensive platform that creates a seamless client experience.

### Key features:

- Integrates with related systems (e.g., booking)
- Allows for contactless or self-driven check-in
- Offers intake and waiver forms via an on-site tablet
- Supports card-on-file for contactless payments

### Examples:

- Boulevard
- Booker
- Mytime
- Meevo
- Zenoti

## Chatbot

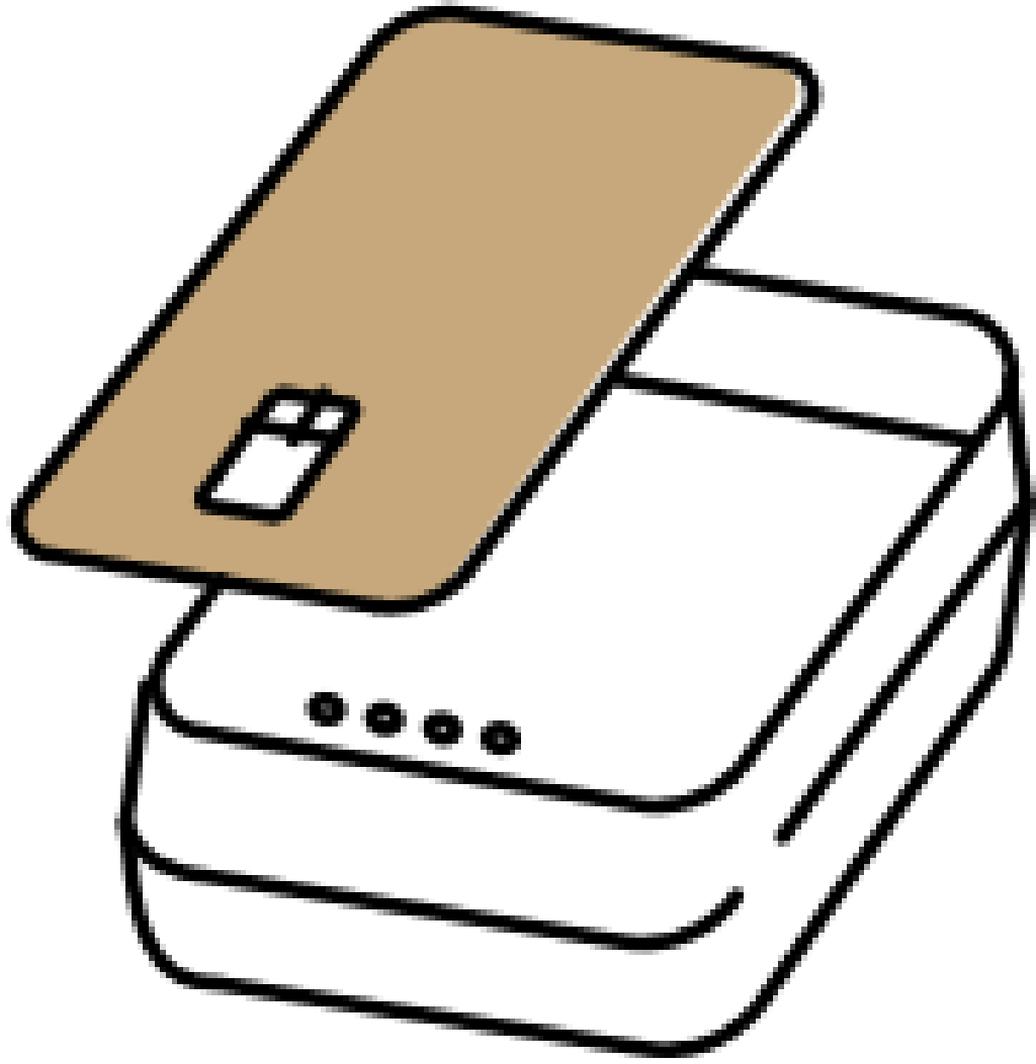
Some clients don't want to go looking for your booking and check-in features. They want to interact with someone who can help them directly. Unfortunately, stylists aren't always available to answer service questions. Enter the beauty business chatbot, an AI messaging service that sits on your main website or integrates with apps like Facebook Messenger and responds to client interactions directly. Integrating a chatbot is one way to help a wide range of clients while still helping everyone feel a personal touch of getting exactly what they need.

### Key features:

- Customizable to match your brand voice, answer FAQs, and align with policies
- Offers webchat and customer service integrations
- Capable of collecting payment information
- Supports text-based outreach
- Forwards calls and notifies business stakeholders
- Designed for your business vertical
- Syncs with booking sof

### Examples:

- True Lark
- Intercom
- Drift



## Online shopping system

Sometimes a client doesn't want to book an appointment, but they do want to try out that treatment at home. An ecommerce shopping system lets them order it directly, at which point the business can ship it from their stock or a separate warehouse. Maintaining an online storefront can be a big task, but it makes it possible to serve your clients with the exact product they need twenty-four hours a day.

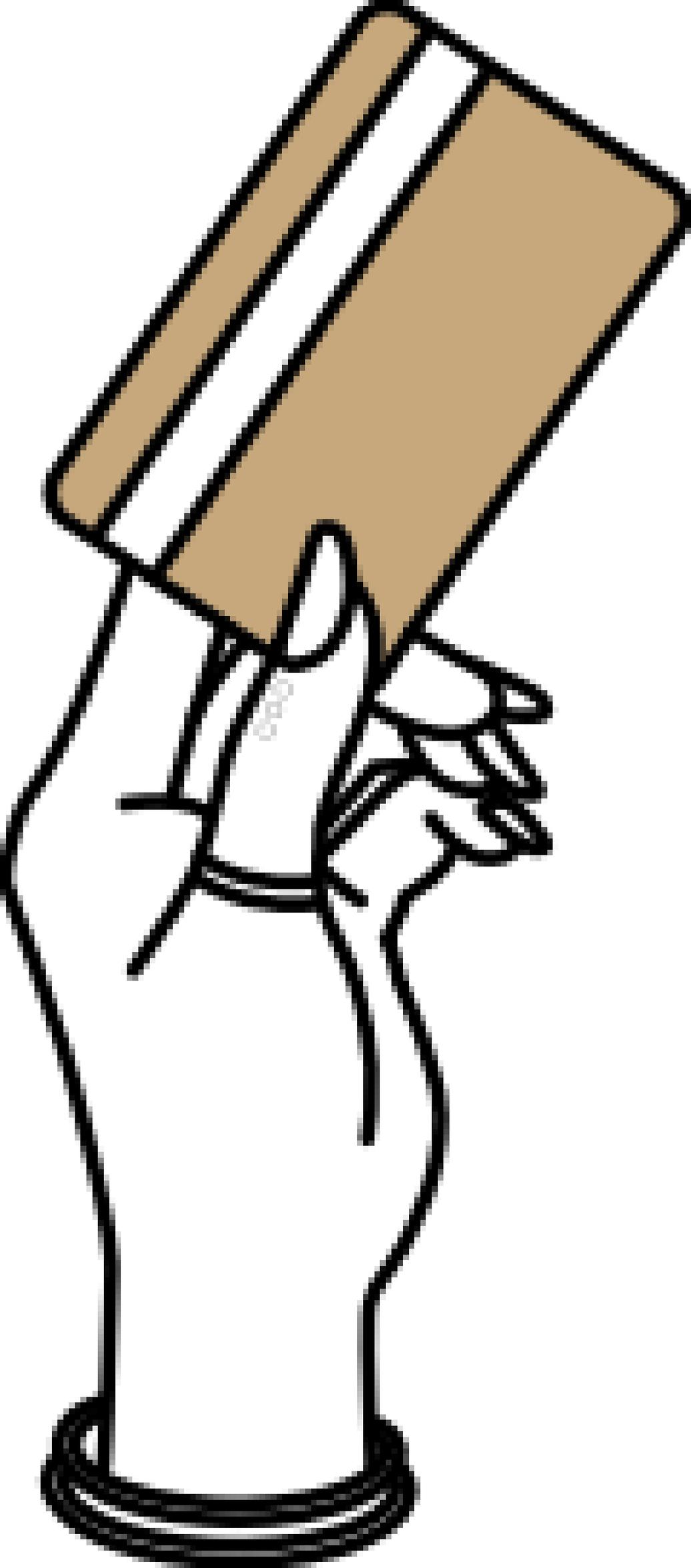
### Key features:

- Fully automated, requiring minimal staff oversight
- Streamlines shipping and checkout with few added fees
- Supports gift card purchases
- Integrates with your inventory management and accounting systems

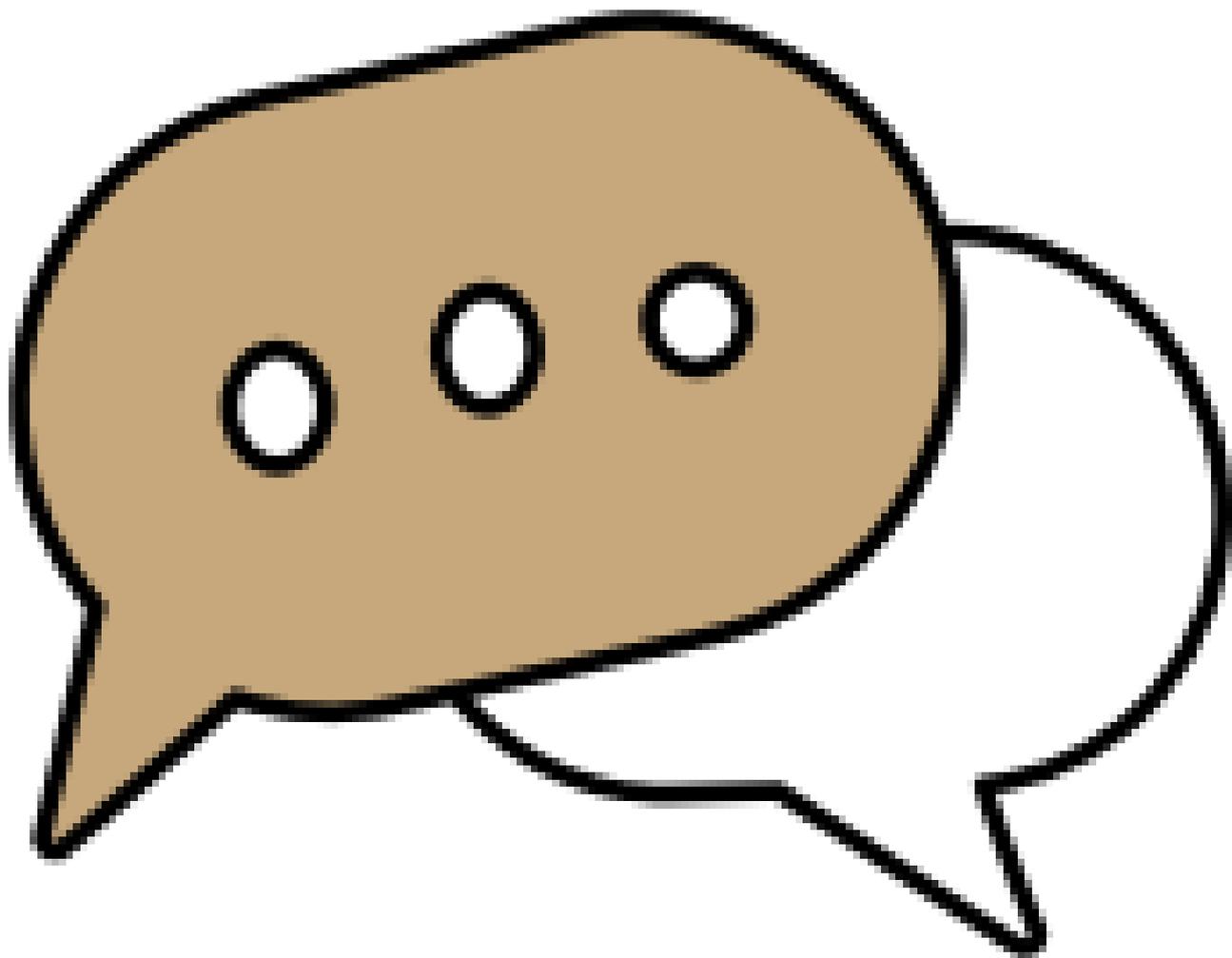
### Examples:

- Shopify
- WooCommerce
- BigCommerce









# Step #3: Read reviews and get ALL the demos



Client Review ☆☆☆☆☆



"Finally, a platform that my stylists and my clients love because of the ease of navigation and booking. The intuitive reporting provides me with the insight I need to operate my salon and better coach my team."

Janine Jarman, Owner, Hairrion Salon

At this point, you should have a list of potential solutions that can solve your specific problems. Now it's time to see what other users have to say. Pick a few favorite tools and platforms and start researching third-party reviews. As you sift through the results, consider the following:

Once you've read some reviews, it's probably time to try out these solutions for yourself. Head to the website for your favorite options from the list and book a demo. Use this opportunity to ask any questions you may have, including:

---

## Check respected review sites:

There are all kinds of tech reviews out there, but not all are created equal — a one-person blog won't have the same scope as a formal publication or review aggregator. When it comes to beauty and wellness technology, your safest bets are review sites like Capterra, G2 Crowd, and GetApp.

## Focus on beauty features:

Reporting, scheduling, and inventory needs will be quite different for beauty businesses than other businesses. Whenever possible, take a closer look at tech solutions that prioritize the beauty industry. That's not to say generalized process tools aren't helpful — sometimes they're the only option! But in many cases, they can't serve your needs the way beauty software can.

---

## Compare all-in-one platforms to specialized solutions:

It's tempting to shop only for comprehensive tech solutions. But generic tools may not satisfy the niche needs of your beauty business. For example, specialized solutions like Green Circle's waste management or Vish's color management are tailored for salons. You might discover that your best option is a hybrid tech stack that leverages different platforms.

---

## Is this solution customizable?

If the product isn't built around your specific business need, it's vital to know whether you can customize it to do so.

---

## What does your product roadmap look like?

Many tech solutions are evolving works-in-progress. If they don't have a particular feature or option now, they might gain them in the immediate future.

---

## How difficult is it to set up your product?

Some solutions may require logging into an app, while others need a technician to install specialized software.

---

## What support options do you offer?

Sooner or later, something will go wrong with your tech solution, and you cannot leave the clients hanging. Find out what support options are available, particularly live or 24/7 support.

---

## How much does it cost?

What support options do you offer? Sooner or later, something will go wrong with your tech solution, and you cannot leave the clients hanging. Find out what support options are available, particularly live or 24/7 support.

## Step #4: Get stakeholder buy-in



**Cost of current inefficiencies:** Look at the key processes you want to address, calculate the person-hours they take and estimate the overall cost to your organization. If your tech stack can resolve this problem in a much shorter time frame, stakeholders will probably be on board.

**ROI in time saved:** : What's the average cost of one hour of an employee's time? Multiply this number by the estimated time per month you'll save by adopting this product or solution. (This calculation is also helpful if you generally want an estimated time to value from the previous step).

**Growth opportunity:** How much can your beauty business grow by adopting this solution? If so, what dollar value does it have? For example, if a self-booking product can increase your appointments by 5%, how much revenue does that translate into?

# Step #4: Get stakeholder buy-in cont.

## Future-proofing potential:

Most tech solutions help beauty businesses insulate themselves for future operations. Show stakeholders how this product helps them future-proof and scale for flexibility.

---

## Third-party findings:

Reinforce your arguments with third-party data. This step can include citing reviews, but you can also reference consumer studies that show other businesses aligning with your proposed solution.

---

## Overall benefits:

Spell out the benefits to your business as a whole to incentivize stakeholders. If possible, highlight the direct impact on their daily work.

---

## Comparison options:

Why did you choose this solution instead of another? Highlight your research process and let stakeholders compare for themselves. Communicate the pros and cons of each option transparently to reduce back and forth and help them feel like active participants in the decision-making process — after all, they should be!

---

## Deadline for making a decision:

Give a timeframe for making a final decision, especially if any solution comes with a limited-time offer.

# Step #5: Make the final decisions

You're just about ready to purchase, but take a step back. Breathe. Maybe have a coffee or mix up a cocktail. Then ask yourself whether this tech stack is the right fit for your specific business. You'll want to be certain this solution aligns with the vision from step one, but also prepare for other organizational obstacles.

---

## Does it solve an actual problem?

Is the platform customizable enough to meet my needs?

---

## Is it easy to use?

Is onboarding support and training enough to get my team comfortable and excited about the change?

---

## Will I still be using this solution in five years?

Does it address my current business needs, and will it help me grow long-term?

---

## Do they have a strong value proposition?

At the end of the day, does it bring something of value to your beauty business?

# Conclusion

Making a big change is scary. Once we get used to working around a particular process, anything that disrupts feels like a problem. Building your tech stack doesn't have to be an obstacle — however, it can be a solution that helps you level up your business and enhances operational efficiencies at any scale. There might be growing pains, onboarding challenges, and nostalgic feelings for the way things were. But if you follow each of these steps — from vision to final decision — every team member should be fully aware of the immediate value. And if you pull it off, everyone will wonder why they hadn't done this sooner, making you a hero for the entire organization.

Rooting for you always,

XO, BOULEVARD



# About Boulevard

**Boulevard offers the first and only client experience platform purpose-built for appointment-based, self-care businesses.**

From initial booking to final payment, Boulevard's modern, easy-to-use platform empowers you and your staff to deliver personable, enjoyable experiences that keep clients coming back. Founded in LA in 2016, Boulevard has earned the trust of thousands of salons, spas, medspas, and other self-care businesses across the nation by delivering simple yet powerful technology and the best-in-class support they deserve.

[GET A FREE DEMO](#)

MAKE A MOVE ON YOUR MARGINS WITH BOULEVARD:



**16%**  
More services  
booked

**71%**  
fewer no-shows &  
late cancels

**18%**  
More retail value

**24%**  
More gratuity  
from clients

\*Average impact T+90 days after switching to Boulevard. These are estimated results based on aggregated customer data, results are not guaranteed. Please keep in mind that actual results may differ based on a number of factors, including market, client base, geography.

[JOINBLVD.COM](https://joinblvd.com) →

