



STEPS TO CREATE YOUR SERVICE OFFERING · WORKBOOK

Developing Your Clinic's SERVICE OFFERING

DISCOVERY · ESTABLISHMENT · EXCELLENCE

Your working copy for building — or rebuilding — your clinic's service offering. Write in it freely: this is where the vague becomes specific, and the specific becomes trainable.

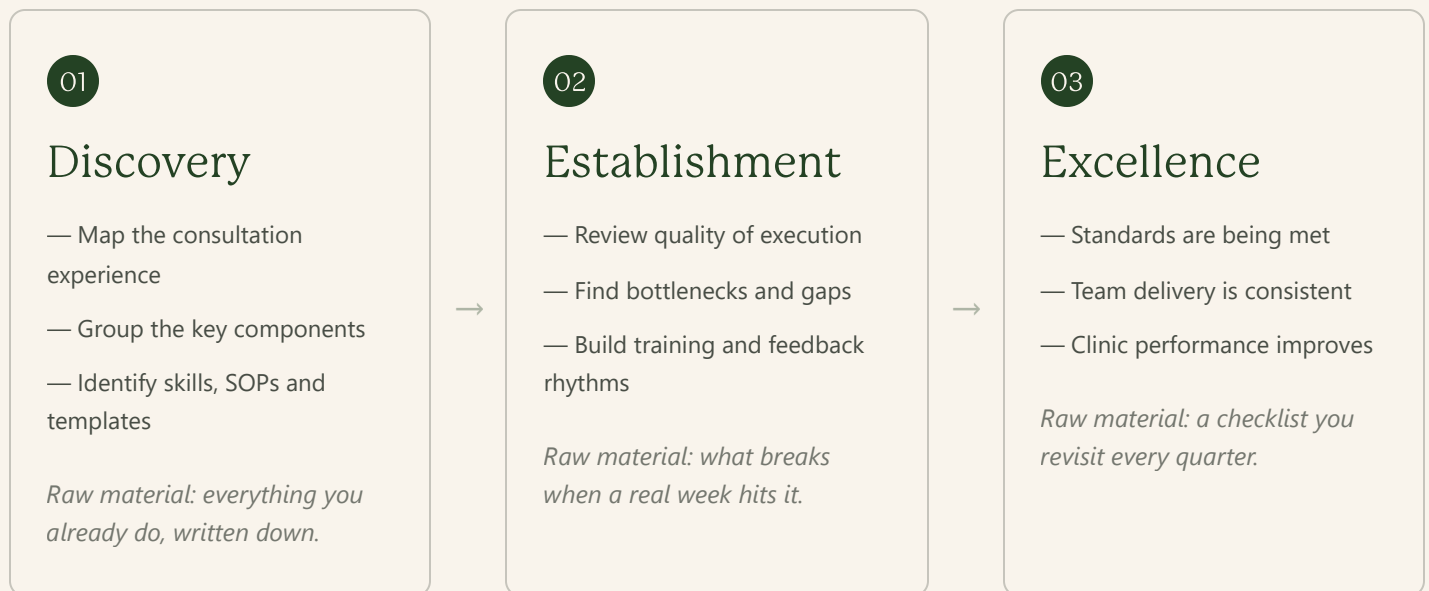
NAME

CLINIC

DATE STARTED

Three phases, one outcome.

Every service offering worth having is discovered, then established, then refined until it's excellent. Work through the phases in order — each one hands the next its raw material.



YOUR SERVICE OFFERING BECOMES THE REFERENCE POINT FOR EVERY MAJOR BUSINESS DECISION.

Why this is worth the time.

FOR YOUR TEAM

- They learn how to deliver the offer consistently
- You hire people who can execute and embody it
- The day-to-day workflow exists to support it

FOR YOUR BUSINESS

- Processes, templates and technology get built around it
- Your message is clearer because the offer is clearly defined
- Pricing, margin and growth decisions are shaped by it

WHAT "DONE" CAN LOOK LIKE

Balance HP's own service offering is built around a simple, repeatable four-step journey: *Initial Consultation* (find out what's wrong and why — establish Point A), the *3 Visit Rule* (be clear on the way forward by visit three), a *Success Plan* (treatment, movement and milestones written down), and a *Review Session* (take stock, establish Point B, decide next steps). Notice how concrete and nameable each step is — a new team member could learn it in a week. Yours will look different. It should be just as specific.

TURN THE PAGE WHEN YOU'RE READY TO START PHASE 01 — DISCOVERY.

PHASE 01

Discovery

Map what you already do — before you decide what to change.

- Map the consultation experience
- Group the key components
- Identify the skills, SOPs and templates you need

You'll leave this phase with — 3 to 5 named themes, and a first list of the skills, admin SOPs and treatment note templates each one needs.

Map your consultation experience.

Answer each prompt in your own words — plain, specific, practical. You'll come back and group these on the next page.

1 — What does an initial consultation look like?

2 — What does a follow-up consultation look like?

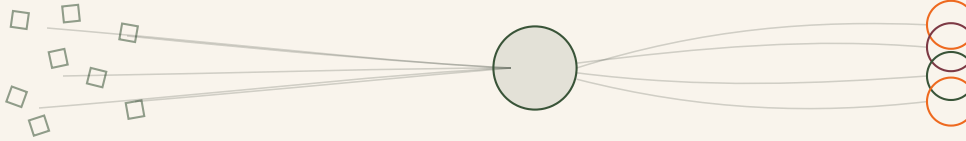
3 — What are the key things you do, in particular, that you want everyone to do?

4 — Are there other types of consultations? If so, what do they look like?

5 — What are the key things you do for patients outside of the session?

Group into themes.

Look back over everything you just wrote. Circle every distinct component, step or resource — then group the related ones together. Give each group a short, plain-language name: this is what your team will call it.



1

POINTS IN THIS THEME

2

POINTS IN THIS THEME

3

POINTS IN THIS THEME

4

POINTS IN THIS THEME

5

POINTS IN THIS THEME

AIM FOR 3–5 THEMES. IF SOMETHING DOESN'T FIT ANYWHERE YET, PARK IT — IT MAY BECOME ITS OWN THEME LATER.

Dr.Nick Coaching — Service Offering Workbook

06

What each theme needs to run.

For each theme, name the skill it takes, the SOP that supports it, and the treatment note template it depends on.

1

Skills — what would someone need to be able to do to execute this well?

Communication SOPs — what needs to be said or sent to patients for this?

Treatment note template — what does the note need to capture?

2

Skills — what would someone need to be able to do to execute this well?

Communication SOPs — what needs to be said or sent to patients for this?

Treatment note template — what does the note need to capture?

3

Skills — what would someone need to be able to do to execute this well?

Communication SOPs — what needs to be said or sent to patients for this?

Treatment note template — what does the note need to capture?

What each theme needs to run, continued.

Same three questions — themes four and five.

4

Skills — what would someone need to be able to do to execute this well?

Communication SOPs — what needs to be said or sent to patients for this?

Treatment note template — what does the note need to capture?

5

Skills — what would someone need to be able to do to execute this well?

Communication SOPs — what needs to be said or sent to patients for this?

Treatment note template — what does the note need to capture?

WORKING WITH A 6TH THEME? PHOTOCOPY THE PREVIOUS PAGE.

PHASE 02

Establishment

Pressure-test what you mapped. This is where you find out if the offering survives contact with a real week.

- Review the quality of execution
- Find the bottlenecks and gaps
- Build training and feedback rhythms

Bring your themes from Discovery — every question in this phase runs against them.

Rate the execution.

For each theme, score how well it's currently being executed — and note whether it's something you could actually measure.

1

QUALITY OF EXECUTION

1 2 3 4 5

HOW WOULD YOU MEASURE THIS?

2

QUALITY OF EXECUTION

1 2 3 4 5

HOW WOULD YOU MEASURE THIS?

3

QUALITY OF EXECUTION

1 2 3 4 5

HOW WOULD YOU MEASURE THIS?

4

QUALITY OF EXECUTION

1 2 3 4 5

HOW WOULD YOU MEASURE THIS?

5

QUALITY OF EXECUTION

1 2 3 4 5

HOW WOULD YOU MEASURE THIS?

Find the friction.

3 — What are some challenges or bottlenecks you've experienced through the process?

4 — WHAT IS THE DIFFERENCE BETWEEN YOUR EXECUTION AND YOUR TEAM'S EXECUTION?

YOUR EXECUTION

YOUR TEAM'S EXECUTION

Time, training and feedback.

5 — Is there adequate time allocated for training, implementation and review?

6 — Is there a process for feedback?

What's not being executed — and what's missing.

7 — Are there any parts of the service offering that are not being executed as well as others? If so, why?

8 — Are there any steps the team are simply missing? If so, why?

ONCE BOTTLENECKS ARE NAMED AND A TRAINING / FEEDBACK RHYTHM EXISTS, YOU'RE READY FOR EXCELLENCE.

Check the signals.

These are the markers that your service offering has moved from built to excellent. Rate honestly — this list is meant to be revisited every quarter, not ticked once.

1 Execution standards are being met

1 2 3 4 5

EVIDENCE / WHAT WOULD MOVE THIS FORWARD

2 The delivery of service is at the standard you expect

1 2 3 4 5

EVIDENCE / WHAT WOULD MOVE THIS FORWARD

3 The team demonstrate the skills required, and discuss deeper questions

1 2 3 4 5

EVIDENCE / WHAT WOULD MOVE THIS FORWARD

4 You are receiving great feedback

1 2 3 4 5

EVIDENCE / WHAT WOULD MOVE THIS FORWARD

5 Clinic performance is improving — appointments and revenue

1 2 3 4 5

EVIDENCE / WHAT WOULD MOVE THIS FORWARD

PRO TIPS

Progress over perfection.

- As you learn more, your service offering may evolve.
- Implement one part at a time, and let your team get used to it before moving to the next.
- They need to maintain the standard as you roll out new parts.
- The service offering is the engine of your mission — make sure it's aligned.

One action that would move you closer to Excellence this month:
