



Practice Advancement Program

Execution Workshop

The Ideal SERVICES

Workshop Description

Craft a slate of services for your clients that are aligned with your mission (from the Ideal You model). Conduct an inventory of your practice's knowledge and skills to deliver services that are differentiated and provide a unique value proposition.

Syllabus

Session One – Develop a customized slate of services for your practice

- Catalogue your current services and define their nature such as historical, real time or advisory
- Identify which services align with your Vision, Mission, and Purpose statements
- Identify services you will be terminating
- Identify services you would like to add to your practice

Session Two – Structure your services into 2-3 service tiers

- Categorize services within your pricing tiers
- Explore complexity levels and impact on pricing

Session Three – Package your services into a subscription model while maximizing profitability and measurability

- Define your ideal client level at each tier
- Manage your workload through effective marketing outreach

Session Four – Create a transition strategy to foster the adoption of your tiered services by your existing clients

- Create a Transition Plan to offboard clients from expiring services
- Create an Acquisitions Plan to engage with clients at each service tier based on your Managed Workload Plan
- Create a Professional Development Plan to add new services and fill in your team's knowledge gaps

*PREREQUISITES: This workshop is available to Advantage and Premium members who have completed the 10-week Ideal Practice Course. While not required, we strongly recommend attending the Ideal You workshop and the Strategic Pricing course prior to participating in this workshop.