



Execution Workshop

Defining the Ideal SERVICES

Workshop Description

Once you have your Vision, Mission, and Purpose Statements written, identifying the services you want to provide your clients is next. Woodard's Ideal Services 4-week execution workshop will guide you to ensure your services align with your VMP, fit appropriately in your 3-tiered pricing model, and consider levels of complexity. You will also create plans and timelines to retire non-ideal services and gain the required knowledge to provide new ideal services.

Syllabus

- 1) Week 1: Begin with the END in mind
 - a. Catalogue your current services and define their nature as historical, real time or advisory
 - b. Identify which services align with your Vision, Mission and Purpose statements
 - c. Identify services you will be terminating
 - d. Identify services you would like to add to your practice
- 2) Week 2: Effective Pricing of your Ideal Services
 - a. Categorize services within your pricing tiers
 - b. Explore complexity levels and impact on pricing
- 3) Week 3: Balance the Load
 - a. Define your ideal client level at each tier
 - b. Manage your workload through effective marketing outreach
- 4) Week 4: Create your Operations Plan
 - a. Create a Transition Plan to offboard clients from expiring services
 - b. Create an Acquisitions Plan to engage with clients at each service tier based on your Managed Workload Plan
 - c. Create a Professional Development Plan to add new services and fill in your team's knowledge gaps