# Mission Guide Productised Services

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Here is a practical guide to getting started with productised services. It will help you get clear on your next steps and what order they should be in. It's designed to be super helpful and took me many hours to make.

And on its own, it will be enough to get you started.But it doesn't have all of the good stuff.

If you want the deep dive, the genuine jewels and every last nugget of gold on productised services, you'll need to get yourself onto the Pivot to Products course or the Productise Your Expertise programme.

This Mission Guide will give you your route. The courses and programmes will get you to where you want to go.
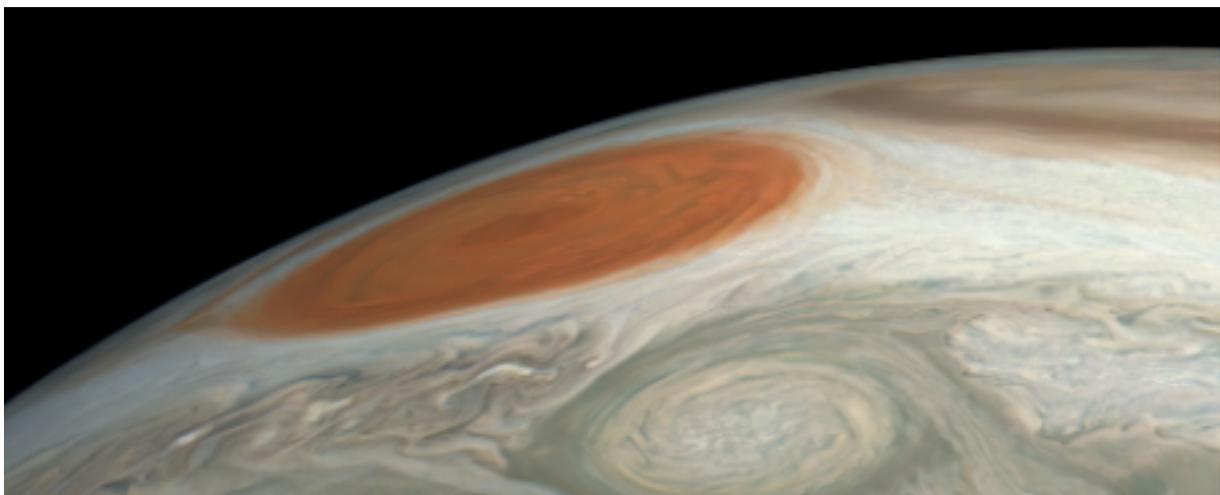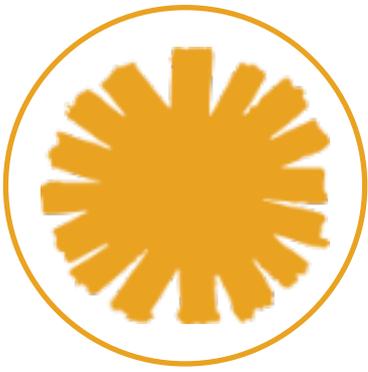
Where are you starting from?

Which one of these fits your situation the best? Feel free to tick more than one.

- I currently have a services business. It's doing okay, but I want more time, flexibility and freedom.

- I want to be able to delegate some of the work I currently do myself to others.

- I'm thinking about a brand new business, and I want it to be a productised service business.

- I think that some of my current services could be productised and made more profitable and efficient.

- I want some "foot in the door" productised services to encourage people to buy my bespoke consultancy.

- Something else...
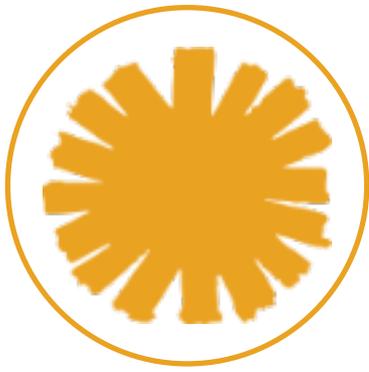
The good news

The good news – how productised services help you move forward.

Adopting a productised services approach can help with all of these situations. I love productised services because:

- **It gives you flexibility.** Often, you can get someone else to do all or part of the work you used to do for clients. Delegating and outsourcing free up your time to work on the business and bring in more clients. Or taking Fridays off. Or both.

- **It improves profitability.** You can often charge more money for the productised version. And at the same time, you can get the client what they need more efficiently.

- **Your marketing is better** with a productised services approach because you can immediately communicate what you're selling and how it solves your customers' problems. And it makes it easy for people to buy from you. That means more customers and therefore higher net profit for you.
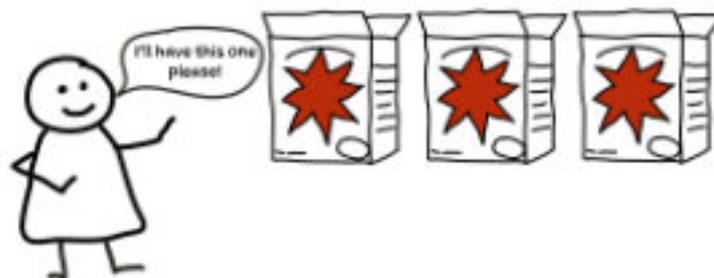
What are you going to sell?

When I work with people on pivoting to a productised service approach, I often get pushback from the clever people I work with. They have so much to offer to customers because of their extensive skills and experience. They want to do it all. They don't like it when I suggest that we do only one or two things.

When you're reading this, if you find yourself muttering under your breath

"Oh, but what about all that super interesting work we did for Tracy last year" – sorry, Tracy, you're not typical of all the clients, so we can't focus on just you.

"I might get bored if we only did X type of work" – Don't worry, you won't be bored because you'll be learning all kinds of new skills here. And if you do get bored, it's time to either take some time off or add in another productised service.

Success in productised services is all about focus

What do you most enjoy doing for clients?

What do you think creates the most value and impact for your clients?

What do clients ask for most often?

What will I stand out for doing?

What's new in my industry and could be fun to focus on?

Is there something I could piggyback on? A new trend, something that's getting attention right now
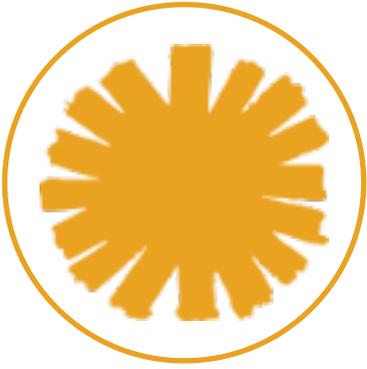
Let's imagine that you and I are sitting down right now in a café and I'm asking you these questions. The kind of questions I ask my one-to-one clients. Email me your answers. I love to have these conversations.
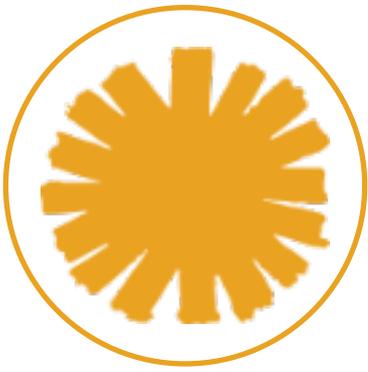
What to exclude

- What are the things that all the people in my industry do that make us all look the same?

- What is very difficult and complex, and only I could ever do this for clients?

- What has been popular but is likely to be less popular over time?

Once you've excluded what you don't want to sell, can't simplify and streamline or shouldn't sell, now start to boil down the potential areas to a small handful of possible services and see how that looks.
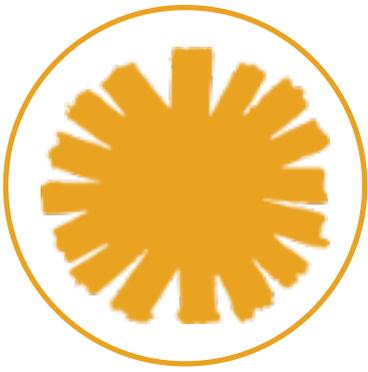
Don't forget the clever bits

At this stage, it's very tempting to take what you already know how to do, put a fixed price on it, and call it a productised service. That's because you're human, and like all other human beings (including me), you want to stay in your comfort zone.

I'm now going to invite you to go outside your comfort zone. I'd like you to start thinking about doing the work in radically different ways.

Imagine that we're in that café, and you've just bought me a second black Americano coffee, and I'm asking a bunch of new questions and suggesting some new ideas.

What if you break your leg or get long Covid. What could you put in place now to ensure that your business can run with very minimal input from you?

Okay, let's do that. Don't break a leg or have long Covid; that's rubbish. I want you to be able to take a six-week break in a villa in Puglia, and you only have to spend an hour every day on your iPad checking in with the business. And that this is possible because you've set all this up now.
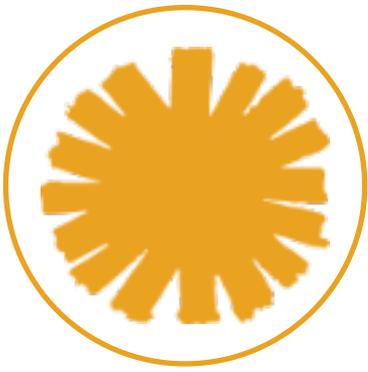
Ideas from other businesses

Here are some specific ideas from other business owners who pivoted to productised services. Which ones can you apply to your potential productised services?

- Make all client interactions asynchronous. Most meetings are an inefficient use of everyone's time. How can you replace client meetings and still get the desired results?

- Automate all client onboarding through a detailed questionnaire to the client. Replace all the questions you would usually ask on a site visit or in a client meeting with this questionnaire.

- Add in recurring income by selling continuing access to a library of resources or ongoing reports. Maintenance and support contracts or monthly diagnostics are also good options here.
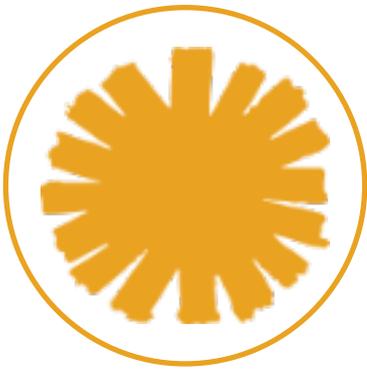
Do you regularly use software to do work for your clients? Can you build reports from this software which would be helpful for your clients?

If you have two or three pieces of software you use, can you glue them together and create a report that is so much more valuable for your client?

Is that software more famous than you are? Many accountants have built their business on the backs of being Xero specialists – can you create a productised service on the back of your skills using a particular piece of software?

Productising Checklist

Okay, let's check that we have everything we need.

You have now:

- Worked out what you are going to offer

- Checked that this has set boundaries so that it's clear what it is and what it's not

- Tested this on a previous client to see if they understand it

- Tested it on a teenager to see if they understand it – teenagers are great for telling you if you've communicated something well

- Dug yourself out of your comfort zone and looked for the most radical solutions
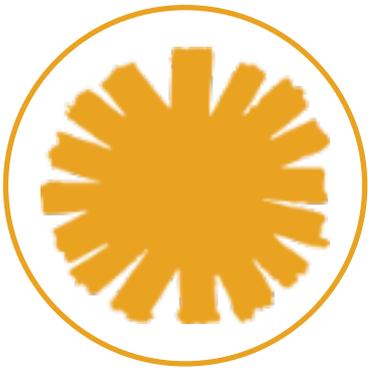
Step one to productising

I now want you to write down a description of your process as if you're explaining it to me. And remember that I know nothing about how you work or your methods.

Some people find it very useful to record a video of how to do each step. You can write it in a Word doc or draw it out on a giant sketch pad. Videos work for processes where you're doing something on a computer, but I've also seen it done for a sandwich shop to show new staff exactly how to make each sandwich precisely so that they are all the same no matter who makes them.

The book *Work the System* may be handy here, especially if you skip the first third of the book. The last two-thirds are all about the process of writing down process.

Put all of this into a document that you think I would be able to understand. I might not be able to do it, but I could understand it.

Note. This step is essential, even if no one except you will ever see that document. Even if you never intend to bring in other people to do some of the work for you, you still need to go through this process for yourself. You'll see why in just a moment.

Step two to productising

I'd now like you to go through this document and cut out as much of the fluff as possible. Ask yourself, "can we":

- Make all client interactions asynchronous. Most meetings are an inefficient use of everyone's time. How can you replace client meetings and still get the desired results?

- Automate all client onboarding through a detailed questionnaire to the client. Replace all the questions you would usually ask on a site visit or in a client meeting with this questionnaire.

- What can I automate? Meeting scheduling, contract signing, billing, client onboarding, collecting client data, client instructions...

- What can I make asynchronous? You might still need to spend hours on the work for every client, but you can build in flexibility and freedom for yourself by being able to choose when you do those hours. Want to work a four day week? Want to do most of your work by 2 pm and then go swimming? By making the communication asynchronous, you get to work when you want.

Step three to productising

Now, I want you to spend some serious time pre-building whatever you can to make your life easier and more productive. You might want to create:

- Scripts for sales calls

- Email templates for sales, onboarding and critical stages of your process. Rather than write an email from scratch to every client, build templates and then adjust and personalise them when you send them out.

- Templates for reports, so you have to pop in the numbers.

- Software processes where different software applications you use automatically talk to one another using Zapier

- Automated email series for marketing, sales and client interactions

- Automatic emails that go out when a client renewal is due

- A guide for clients on how you work and what they need to do to get started

- Automatic invoicing system

- Templates for doing the work itself – I worked with a design company that had a folder full of half-completed designs they could use for clients with a bit of tweaking. It cut their workload by 80% and meant they were always ahead of schedule.

- Client satisfaction survey

Well done

Well done – thanks for the coffee and for answering all these questions

By completing this, you're 80% of the way to your pivot to productised services. Do let me know how you got on.

What else do you need help with to make this happen?

I completely understand that this is a big step. Changing what you do and how you do it is challenging. And I want to make sure that you have all the resources you need.

In the next few weeks, I'll send you some more material by email, which will back up this guide and help you to put this into action.

This guide will be enough to get you started.

But it doesn't have all of the good stuff.

If you want the deep dive, the genuine jewels and every last nugget of gold on productised services, you'll need to get yourself onto the [Pivot to Products](#) course or the [Productise Your Expertise](#) programme.

This guide will give you your route. The courses and programmes give you the extras. The more granular step-by-step walk through videos. The detailed use cases. The options are to take slightly different, perhaps more scenic routes. Or the ones that are more suited to your particular business, skills and aspirations.