# Service Format Planner

*These are examples, not promises. General business education, not financial or legal advice. Results vary. loftybiz.net*

Take your most popular service and sketch it three ways: as a small group of three to five, as a group, and as a template. For each, write who it would suit, what you would charge and how much of your time it would take. Then pick one and test it with five clients. Put that sketch into Systex, our own product, at loftybiz.net.

## 1. Your most popular service

Write the name of the service and what the client receives in the box below.

## 2. Sketch it three ways

| Prompt | One-to-one (today) | Small group (3–5) | Group | Template |
|---|---|---|---|---|
| **Who this format would suit** | | | | |
| **What you would charge (your figure)** | | | | |
| **How much of your time it would take** | | | | |
| **What stays personal, and what is prepared once** | | | | |
| **How you would keep each person feeling seen** | | | | |
| **Main risk if you switch to this format** | | | | |
| **What you would test first, with five clients** | | | | |

## 3. Pick one format to test

The format I will test: _____

Why this one (one sentence):

## 4. Five-client trial log

Test with five clients before you switch everyone. Keep this list in Systex.

| # | Date | Format used | What went well | What to change |
|---|---|---|---|---|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

Decision after the trial (keep, adjust, or stop):

Next step and review date:

## 5. Short notes from the video

**Small groups.** Group people who need the same thing, keep a clear session rhythm, and leave a premium one-to-one option.

**Templates.** Turn repeating work into a short plan you can adjust. Keep personal time for the parts that need you. Do the job by hand many times before you write the template.

**Membership.** Add a light membership only where it is easy to deliver, even if everyone uses the benefit at once.

**Systex.** Keep session lists, waiting lists, templates, membership lists and trial dates in Systex, our own product, at loftybiz.net. Click the link in the description of the video.

*The people and businesses in the video are illustrative examples. Figures in the video are rough examples, not promises. Your numbers will be different.*