

FREE TOOLKIT

The Healthcare Growth Toolkit

Scorecards, cadences and checklists for market entry,
RevOps, clinic follow-up, events and training centers.

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HOW TO USE THIS TOOLKIT

Seven tools. Use the one that matches your biggest leak.

Each tool comes from the guides on my website and the way I work with clients. Print them, adapt them to your business and review them with your team. If you are not sure where to start, take the free 3-minute growth diagnostic on the website.

Tool	Use it when	Page
1. Distributor scorecard	You are choosing or reviewing a partner in a new market	3
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TOOL 1

Distributor scorecard

Score each candidate from 1 to 5 on every criterion, multiply by the weight, and compare totals. Adjust weights to your product.

Criterion	What to look for	Weight	Score 1–5
Portfolio fit	Complementary products, no direct conflict, same customer type	15%	
Customer access	Active accounts in your target segment	20%	
Education capability	Trainers, training space, workshop track record	20%	
Regulatory and logistics	Registration experience, storage, traceability	15%	
Commercial discipline	CRM use, reporting, forecast accuracy	15%	
Commitment	Named team, launch budget, agreed targets	15%	

Clauses to include

- ☐ Territory, channels and online sales defined
- ☐ Exclusivity tied to agreed minimums and reviewed on a schedule
- ☐ Ramp-up targets by quarter for year one
- ☐ Education commitments: trainings, trained staff, events
- ☐ Monthly sell-out and account reporting format
- ☐ Exit terms: notice, stock buy-back, registration handover

TOOL 2

Six-stage revenue pipeline

Write one definition and one owner for every stage, then review the pipeline every week in 30 minutes.

Stage	Entry rule	Owner	Key metric
Lead	Captured in the CRM with source within 24 hours	Marketing	Leads by source
Qualified lead	Fits the customer profile and has shown intent	Marketing ■ Sales	Speed to first response
Opportunity	Need, decision maker and timeline confirmed	Sales	Opportunity win rate
Proposal	Written offer sent, next step agreed	Sales	Deal size and cycle
Won	Signed or first order; onboarding scheduled	Sales ■ Success	Revenue vs forecast
Expansion	Reorder, new product, advanced course or referral	Customer success	Net revenue retention

Weekly pipeline review agenda

- ☐ New leads by source and time to first response
- ☐ Opportunities that moved, and those stalled for 14+ days
- ☐ Deals expected to close this month: owner and next action
- ☐ Lost deals: at which stage and why
- ☐ One process fix to test next week

TOOL 3

72-hour event follow-up

Decide the follow-up before the event. Capture interest, timing and next step in every conversation.

When	Hot leads	Warm leads	General contacts
Day 0-1	Personal message and call; book next step	Personal message referencing the conversation	Thank-you with key resources
Day 2	Meeting, demo or trial confirmed	Call to qualify and propose next step	Added to invitations and content
Day 3	Proposal or training date in CRM	Next step booked or moved to nurture	Nurture sequence running

Before the event

- ☐ Lead categories and owners agreed
- ☐ Follow-up messages and booking links prepared
- ☐ Offline-capable capture form ready
- ☐ Debrief booked for the first morning after

TOOL 4

Clinic 14-day follow-up cadence

For enquiries that don't book on first contact. Stretch the cadence for surgical and high-value treatments.

Touch	When	Channel	Purpose
1	0–5 minutes	WhatsApp or call	Acknowledge, ask one question, offer two specific times
2	2–4 hours	Call	Direct booking attempt if no reply
3	Day 1	WhatsApp	Reassurance: the doctor, the consultation, what to expect
4	Day 3	WhatsApp or email	Answer the likely concern: price, downtime, results
5	Day 7	Message and retargeting	Available slots this week
6	Day 14+	Nurture	Monthly education and seasonal offers

Speed-to-lead standards

- ☐ First response within 5 minutes in working hours
- ☐ Instant after-hours reply with a specific callback time
- ☐ Automatic escalation when the target is missed
- ☐ Every conversation ends with a specific proposed time
- ☐ Weekly: median response time by channel and coordinator

TOOL 5

No-show prevention system

Prevention, recovery and backfill. Review show rate weekly by treatment, channel, coordinator and booking lead time.

When	Action
At booking	Confirmation with date, time, location, doctor and what to expect
Day after booking	Short reassurance about the doctor and the visit
24 hours before	Reminder with one-tap confirm or reschedule
2–3 hours before	Directions and parking
High-value bookings	Personal call the day before
Within 1 hour of a no-show	Kind message with two specific new times
Any cancellation	Offer the slot to the waitlist immediately

Deposit policy

Use refundable or credit-able deposits for high-value treatments and long consultations, explained as a courtesy to other patients and deductible from the treatment. Test before applying to low-value first visits.

TOOL 6

Education pathway map

Place every program in a stage. Programs that fit no stage are candidates to merge or retire.

Stage	Learner outcome	Evidence	Your programs
Foundation	Safe basics in a chosen field	Attendance and knowledge assessment	
Core practice	Supervised hands-on competence	Logged cases, practical assessment	
Advanced	Complex cases and combinations	Case presentations	
Certification	Recognized credential	Examination or portfolio review	
Faculty	Teaching and mentoring	Teaching record and feedback	

Faculty pathway

Stage	Criteria to move up
Guest faculty	Positive feedback, reliability
Faculty	Teaching record, standards training
Assessor and mentor	Assessment training, consistent judgment
Lead faculty	Program contribution, peer respect
Advisory	Recognized expertise, commitment

TOOL 7

Training center pre-launch checklist

Plan from the inside out: business model, approvals and faculty before the room.

Break-even worksheet

Line	Your figure
Fixed monthly costs (rent, staff, systems)	
Average course price per learner	
Variable cost per learner (faculty share, consumables, models)	
Contribution per learner = price – variable cost	
Break-even learners per month = fixed costs ÷ contribution	

Eight decisions, in order

- ☐ Business model and break-even calculated and stress-tested
- ☐ Licensing and accreditation mapped with a confirmed timeline
- ☐ Launch catalogue of three courses with a clear pathway
- ☐ Two or three lead faculty committed in writing
- ☐ Facility and equipment sized to real courses
- ☐ Price list, bundles and payment plans ready
- ☐ Pre-launch pipeline active in a CRM; first cohorts half-full
- ☐ Operations playbook written before the first cohort

Want help applying these?

Discuss a challenge: one focused session on your situation and a written summary with the real constraint and next steps. [Message on WhatsApp](#) or connect on [LinkedIn](#) or email hello@mohamedkumiha.com.