COMMERCIAL LEADERSHIP PROGRAMME

Facilitator Guide

Complete delivery notes, session plans, and facilitation guidance for all 21 modules

CONFIDENTIAL — FOR FACILITATOR USE ONLY

How to Use This Guide

This Facilitator Guide is your comprehensive delivery companion for the Commercial Leadership Programme. Each module section includes everything you need to deliver a confident, impactful session.

For each module you will find: a session overview explaining the purpose and context, clearly stated learning objectives, a detailed session plan with timings and activity notes, facilitator tips drawn from real delivery experience, a complete list of required resources, and assessment guidance for evaluating participant work.

Preparation Checklist (Every Module)

Before each session, ensure you have: read the full module section in this guide, reviewed the slide deck and practised transitions, printed sufficient copies of all templates and workbooks, set up any required spreadsheets on laptops (or printed key pages), prepared any role-play scenario cards or case study materials, and tested the room setup — chairs, tables, projector, and flipchart.

Programme Structure

The programme comprises 21 modules across four tracks. Each track builds on the previous one, creating a progressive development journey from personal leadership through to strategic growth.

Track	Focus	Modules
Track 1: Leadership Foundation	Leadership Foundation	1, 2, 3, 4, 5
Track 2: Financial & Commercial Mastery	Financial & Commercial Mastery	6, 7, 8, 9, 10, 11, 12
Track 3: Operations & Delivery	Operations & Delivery	13, 14, 15, 16, 17, 18
Track 4: Growth & Strategy	Growth & Strategy	19, 20, 21

Programme Resources Overview

Each module is supported by a consistent set of resources. The following materials should be available for every session:

Slide Deck (PPTX) — Presentation slides for facilitator-led delivery. Each deck follows a consistent structure: title, overview, lesson content, key concept, exercise, outcomes, assessment, and closing.

Workbook (DOCX) — Participant workbook with lesson summaries, key concepts, exercises, and self-assessment. One per participant, printed or digital.

Templates (DOCX) — Practical tools for exercises and post-programme application. Print sufficient copies for all participants.

Spreadsheets (XLSX) — Functional Excel workbooks with live formulas for data-driven modules. Require laptop access or printed summaries.

MODULE 1

Foundations of Spa Leadership

Duration: 3–4 hours	Format: Workshop + Self-Assessment	Track: Leadership

Session Overview

Sets the tone for the entire programme. Participants explore what leadership means in a spa context — moving beyond technical expertise into genuine people leadership. This module must feel aspirational yet grounded.

Learning Objectives

Define their personal leadership philosophy | *Complete a comprehensive self-assessment* | *Identify their dominant leadership style* | *Create a Personal Standards Charter*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:20	**Welcome & Icebreaker**	Use 'What made you choose spa management?' as an opener. Sets a reflective, personal tone from the start.
0:20–0:50	**Lesson: Leadership vs Management**	Draw the distinction clearly. Use spa-specific examples — a manager schedules shifts, a leader builds a culture where people want to show up.
0:50–1:20	**Self-Assessment Exercise**	Distribute the Leadership Self-Assessment template. Allow quiet, individual completion. This is deeply personal — no group sharing unless voluntary.
1:20–1:35	**Break**	—
1:35–2:15	**Lesson: Leadership Styles in Wellness**	Cover situational leadership. When to be directive (new therapist, first week) vs coaching (experienced team member seeking growth).
2:15–3:00	**Personal Standards Charter**	Guided exercise. Encourage participants to write standards they genuinely believe in, not corporate platitudes.
3:00–3:30	**Reflection & Commitment**	Pair sharing: one commitment they're taking away. Collect written commitments for accountability in Module 5.

Facilitator Tips

— This module sets the emotional tone. Be warm but authoritative.

— Resist rushing through the self-assessment — silence is productive here.

— Have printed copies of both templates ready. Digital completion loses the reflective quality.

Required Resources

→ Slide Deck: Module_01.pptx
→ Workbook: Module_01.docx
→ Template: 01a_Leadership_Self_Assessment.docx
→ Template: 01b_Personal_Standards_Charter.docx

Assessment Guidance

Assessment is reflective, not scored. Look for depth of self-awareness and specificity in the Personal Standards Charter. Generic statements like 'I will be a good leader' indicate the participant needs more time with the material.

MODULE 2

Communication & Influence

Duration: 3–4 hours	Format: Workshop + Role Play	Track: Leadership

Session Overview

Communication is the single most impactful leadership skill in a spa environment. This module covers everything from daily team briefings to difficult conversations, with heavy emphasis on practice.

Learning Objectives

Master the SBI feedback model | *Build a team communication calendar* | *Practice difficult conversations through role play* | *Develop active listening techniques*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Check-in & Module 1 Reflection**	Quick round: one thing they've applied from Module 1. Builds accountability and continuity.
0:15–0:50	**Lesson: Communication Styles**	Cover direct vs indirect, the impact of tone in a wellness setting. Spa teams are often conflict-averse — address this directly.
0:50–1:30	**SBI Feedback Practice**	Distribute SBI Feedback Scripts template. Run three rounds of practice with increasing difficulty. Pair work.
1:30–1:45	**Break**	—
1:45–2:30	**Lesson: Difficult Conversations**	Frame as 'courageous conversations'. Cover: underperformance, hygiene/presentation issues, client complaints about a therapist.
2:30–3:15	**Role Play: Difficult Scenarios**	Pre-prepared scenario cards. Rotate pairs. Debrief each round — what felt natural, what felt forced?
3:15–3:45	**Communication Calendar Exercise**	Each participant builds their own team communication rhythm. Daily huddles, weekly 1:1s, monthly team meetings.

Facilitator Tips

— Role plays can feel awkward — normalise this. 'Awkward in here means confident out there.'

— Have scenario cards pre-printed. Include spa-specific situations: therapist running over time, retail targets missed, guest complaint about noise.

— The Communication Calendar should be realistic. Challenge anyone planning daily team meetings in a small spa.

Required Resources

→ Slide Deck: Module_02.pptx
→ Workbook: Module_02.docx
→ Template: 02a_Team_Communication_Calendar.docx
→ Template: 02b_SBI_Feedback_Scripts.docx

Assessment Guidance

Assess through observation during role plays. Look for: appropriate use of the SBI model, ability to stay calm under pressure, willingness to be direct. The Communication Calendar should show a sustainable, realistic rhythm.

MODULE 3

Emotional Intelligence in Wellness

Duration: 2.5–3 hours	Format: Workshop + Reflection	Track: Leadership

Session Overview

Spa environments run on emotional energy. A leader's emotional state is contagious — this module helps participants understand and regulate their own responses while reading and responding to their team's emotional needs.

Learning Objectives

Understand the four domains of emotional intelligence | Complete an emotional trigger analysis | Develop personal regulation strategies | Apply the DESC model for assertive communication

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Check-in**	Ask: 'What's one situation this week where you had to manage your own emotions at work?'
0:15–0:50	**Lesson: The Four EI Domains**	Self-awareness, self-regulation, social awareness, relationship management. Use spa-specific examples throughout.
0:50–1:30	**Emotional Trigger Analysis**	Individual exercise using the template. Deeply personal — ensure psychological safety. No forced sharing.
1:30–1:45	**Break**	—
1:45–2:15	**Lesson: Regulation Strategies**	Practical techniques: pause-breathe-respond, reframing, boundary setting. Not therapy — operational tools.
2:15–2:45	**DESC Model Practice**	Describe-Express-Specify-Consequences. Three scenario rounds with partner practice.

Facilitator Tips

— This module can surface genuine emotions. Have tissues available. Know when to pause.

— Make it clear: EI is not about suppressing feelings, it's about choosing your response.

— If anyone shares something deeply personal, acknowledge it warmly but redirect to the professional application.

Required Resources

→ Slide Deck: Module_03.pptx
→ Workbook: Module_03.docx
→ Template: 03a_Emotional_Trigger_Analysis.docx

Assessment Guidance

Assessment is reflective. Look for genuine self-awareness in the trigger analysis. The DESC practice should show progression from scripted to natural across the three rounds.

MODULE 4

Time & Priority Management

Duration: 2.5–3 hours	Format: Workshop + Planning	Track: Leadership

Session Overview

Spa managers are pulled in every direction. This module provides a practical framework for protecting strategic time while managing the relentless operational demands of a spa environment.

Learning Objectives

Complete a time audit to identify current patterns | *Apply the Eisenhower matrix to spa priorities* | *Build a sustainable weekly structure* | *Develop strategies for managing interruptions*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Check-in**	Ask: 'What took up most of your time last week? Was it what you planned?'
0:15–0:45	**Time Audit Review**	Participants should have completed the Time Audit Tracker (spreadsheet) before this session. Review patterns in pairs.
0:45–1:15	**Lesson: Eisenhower Matrix for Spa**	Contextualise: urgent guest complaint vs important team development. Most spa managers live in Quadrant 1 — help them shift to Quadrant 2.
1:15–1:30	**Break**	—
1:30–2:15	**Weekly Structure Planner**	Each participant builds their ideal week using the template. Include: protected admin time, floor presence, 1:1s, strategic thinking.
2:15–2:45	**Interruption Management Strategies**	Practical: how to set boundaries without being unapproachable. The 'open door with closed hours' concept.

Facilitator Tips

— Pre-work is essential — chase completion of the Time Audit Tracker before this session.

— The Weekly Structure Planner should be realistic. If someone has therapist duties AND management, the template needs to reflect that split.

— Challenge anyone who doesn't schedule personal breaks. Burnout in spa management is endemic.

Required Resources

→ Slide Deck: Module_04.pptx
→ Workbook: Module_04.docx
→ Template: 04a_Time_Audit_Tracker.docx
→ Template: 04b_Weekly_Structure_Planner.docx
→ Spreadsheet: 04_Time_Audit_Tracker.xlsx

Assessment Guidance

The Weekly Structure Planner is the key assessment piece. It should show intentional allocation of time across leadership, operations, commercial, and team activities. Flag anyone with zero strategic/development time.

MODULE 5

Coaching & Performance Development

Duration: 3.5–4 hours	Format: Workshop + Observed Practice	Track: Leadership

Session Overview

The capstone of Track 1. Moves participants from understanding leadership to actively developing their team. Heavy emphasis on the GROW coaching model and structured performance conversations.

Learning Objectives

Master the GROW coaching framework | *Conduct a structured performance review conversation* | *Complete a treatment observation using the form* | *Build individual development plans for team members*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:20	**Track 1 Reflection**	Revisit commitments from Module 1. What's changed? What's been challenging? This closes the loop on the leadership foundation.
0:20–1:00	**Lesson: GROW Coaching Model**	Goal-Reality-Options-Will. Demonstrate with a live coaching conversation (facilitator coaches a volunteer).
1:00–1:45	**GROW Practice Rounds**	Three rounds of 10-minute coaching sessions in pairs. Rotate roles. Debrief after each round.
1:45–2:00	**Break**	—
2:00–2:40	**Lesson: Performance Reviews That Work**	Cover: preparation, structure, documentation, follow-up. Emphasise that the review should never contain surprises.
2:40–3:20	**Performance Review Role Play**	Using the Performance Review Template. One 'easy' scenario, one 'difficult'. Facilitator observes and provides feedback.
3:20–3:50	**Treatment Observation Form Walkthrough**	How to observe a treatment professionally without making the therapist anxious. The form is a development tool, not surveillance.

Facilitator Tips

— The live coaching demo at the start is crucial. Be genuine — don't script it. The group needs to see a real conversation.

— During GROW practice, circulate and listen. Common mistakes: jumping to Options before fully exploring Reality.

— The Treatment Observation Form walkthrough should emphasise the feedback conversation after the observation, not just the form itself.

Required Resources

→ Slide Deck: Module_05.pptx
→ Workbook: Module_05.docx
→ Template: 05a_GROW_Coaching_Log.docx
→ Template: 05b_Performance_Review_Template.docx
→ Template: 05c_Treatment_Observation_Form.docx

Assessment Guidance

This is the most skills-based assessment in Track 1. Observe coaching conversations for: quality of questioning (open vs closed), patience in the Reality phase, action specificity in the Will phase. The Performance Review role play should demonstrate preparation and structure.

MODULE 6

Financial Literacy for Spa Leaders

Duration: 3–4 hours	Format: Workshop + Practical Analysis	Track: Commercial

Session Overview

The transition into Track 2. Many spa managers avoid financials — this module demystifies them. Participants learn to read, interpret, and act on a P&L statement.

Learning Objectives

Read and interpret a spa P&L statement | *Identify key financial drivers* | *Calculate and understand key ratios* | *Use financial data to make operational decisions*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:20	**Track 2 Introduction**	Set the context: financial literacy isn't about becoming an accountant, it's about making better decisions. Frame it as empowerment.
0:20–1:00	**Lesson: Anatomy of a P&L**	Walk through the P&L Analysis Dashboard (spreadsheet) line by line. Use a worked example with realistic spa figures.
1:00–1:45	**Practical: Analyse a Sample P&L**	Distribute a pre-populated P&L. Groups of 3 identify the three biggest concerns and two opportunities.
1:45–2:00	**Break**	—
2:00–2:40	**Lesson: Key Financial Ratios**	Labour cost ratio, treatment revenue per hour, retail revenue per guest, cost per treatment.
2:40–3:30	**P&L Template Exercise**	Participants begin populating the P&L template with their own spa's data (or estimated figures). This becomes a reference tool.

Facilitator Tips

— Financial anxiety is real — normalise it. 'If you've never been taught this, not knowing is not a failing.'

— Use colour-coded spreadsheets. Print key pages if working without laptops.

— If participants don't have access to their own figures, provide a realistic sample dataset.

Required Resources

→ Slide Deck: Module_06.pptx
→ Workbook: Module_06.docx
→ Template: 06a_PandL_Analysis_Template.docx
→ Spreadsheet: 06_PnL_Analysis_Dashboard.xlsx

Assessment Guidance

Assessment is the P&L analysis exercise. Look for: correct identification of ratios, ability to connect financial data to operational actions, and quality of the 'concerns and opportunities' analysis.

MODULE 7

KPIs & Performance Metrics

Duration: 2.5–3 hours	Format: Workshop + Dashboard Setup	Track: Commercial

Session Overview

Builds directly on Module 6. Participants learn to identify, track, and act on the metrics that matter most in a spa operation.

Learning Objectives

Identify the 10 essential spa KPIs | *Set up a personal KPI dashboard* | *Understand target-setting methodology* | *Connect KPIs to daily operational decisions*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Module 6 Recap**	Quick quiz: name three key financial ratios from last session. Reinforces retention.
0:15–0:50	**Lesson: The KPIs That Matter**	Revenue, operational, guest experience, and team KPIs. Emphasise: measure what you manage, but don't measure everything.
0:50–1:30	**KPI Dashboard Setup**	Using the KPI Dashboard Tracker spreadsheet. Each participant selects their priority KPIs and sets initial targets.
1:30–1:45	**Break**	—
1:45–2:30	**Lesson: From Data to Action**	The 'so what?' of metrics. If utilisation is low on Tuesdays, what do you actually do? Decision trees for common KPI scenarios.

Facilitator Tips

— Participants will want to track everything — help them prioritise ruthlessly. Five to seven KPIs maximum.

— The RAG (red/amber/green) system in the spreadsheet needs calibrating for each spa's context.

— If participants don't have real data, use industry benchmarks as starting points.

Required Resources

→ Slide Deck: Module_07.pptx
→ Workbook: Module_07.docx
→ Template: 07a_KPI_Dashboard_Template.docx
→ Spreadsheet: 07_KPI_Dashboard_Tracker.xlsx

Assessment Guidance

The completed KPI Dashboard is the assessment. Evaluate: relevance of selected KPIs, realism of targets, and the action plan for underperformance.

MODULE 8

Revenue Strategy & Pricing

Duration: 3–3.5 hours	Format: Workshop + Market Analysis	Track: Commercial

Session Overview

Challenges spa managers to think commercially about pricing and revenue. Moves beyond 'we charge what everyone else charges' into strategic pricing and revenue diversification.

Learning Objectives

Conduct a competitive pricing audit | *Understand value-based pricing principles* | *Develop a revenue growth plan* | *Identify pricing optimisation opportunities*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening Discussion**	'How do you currently decide your prices?' Expect: 'We look at competitors' or 'Head office sets them.' Challenge both.
0:15–0:55	**Lesson: Pricing Strategy**	Cost-plus vs value-based. The psychology of pricing in luxury. Why round numbers underperform.
0:55–1:40	**Competitive Pricing Audit**	Using the spreadsheet. Participants research 2–3 local competitors (pre-work or live research). The 'position' column auto-calculates.
1:40–1:55	**Break**	—
1:55–2:40	**Revenue Growth Planning**	Using the Revenue Growth Planner spreadsheet. Work through each revenue stream: treatment, retail, membership. Quantify opportunities.
2:40–3:15	**Group Discussion: Quick Wins**	Each participant shares their single biggest revenue opportunity. Group challenges and refines each one.

Facilitator Tips

— Pricing conversations can be uncomfortable in employee-run spas. Frame it as 'understanding your value', not 'raising prices'.

— The Competitive Pricing Matrix works best with real data. Assign pre-work: 'Mystery shop 2–3 competitors before this session.'

— Revenue Growth Planner: push for specificity. 'Increase retail' is not a plan. 'Train team on post-treatment recommendation protocol targeting 20% conversion' is.

Required Resources

→ Slide Deck: Module_08.pptx
→ Workbook: Module_08.docx
→ Template: 08a_Pricing_Audit.docx
→ Template: 08b_Revenue_Growth_Plan.docx
→ Spreadsheet: 08a_Competitive_Pricing_Matrix.xlsx
→ Spreadsheet: 08b_Revenue_Growth_Planner.xlsx

Assessment Guidance

Dual assessment: the Competitive Pricing Matrix should show genuine market research with strategic positioning analysis. The Revenue Growth Plan should include at least three quantified initiatives with realistic uplift projections.

MODULE 9

Budgeting & Cost Control

Duration: 3–3.5 hours	Format: Workshop + Budget Building	Track: Commercial

Session Overview

Teaches participants to build, manage, and defend a budget. Covers both the technical construction and the strategic communication of financial plans.

Learning Objectives

Build a 12-month operational budget | *Identify cost reduction opportunities* | *Understand variance analysis* | *Communicate financial results to stakeholders*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:20	**Opening**	'Who here has built a budget before?' Gauge experience levels and adjust depth accordingly.
0:20–1:00	**Lesson: Budget Construction**	Walk through the 12-Month Budget Planner spreadsheet. Revenue forecasting methods, expense categorisation, the difference between fixed and variable costs.
1:00–1:45	**Budget Building Exercise**	Participants build (or begin building) their own 12-month budget using the spreadsheet. Circulate and assist individually.
1:45–2:00	**Break**	—
2:00–2:40	**Lesson: Cost Control**	The Cost Reduction Planner. Identify the difference between cutting costs and managing costs. Protect investment in quality.
2:40–3:15	**Cost Reduction Exercise**	Each participant identifies 5 realistic cost reduction initiatives using the tracker. Group critique: is this a genuine saving or a quality risk?

Facilitator Tips

— Budget building takes time. If participants don't finish, that's fine — the tool is now set up for them to complete.

— Cost reduction in spas is sensitive. Cutting product quality or therapist wages has direct guest impact. Make this explicit.

— For the group critique, create a safe space. 'We're testing the robustness of each idea, not criticising each other.'

Required Resources

- → Slide Deck: Module_09.pptx
- → Workbook: Module_09.docx
- → Template: 09a_Budget_Template.docx
- → Template: 09b_Cost_Reduction_Planner.docx
- → Spreadsheet: 09a_12_Month_Budget_Planner.xlsx
- → Spreadsheet: 09b_Cost_Reduction_Tracker.xlsx

Assessment Guidance

The 12-Month Budget is the primary assessment. Evaluate: realistic revenue assumptions, appropriate expense categorisation, awareness of seasonal variation. The Cost Reduction Planner should show thoughtful analysis, not indiscriminate slashing.

MODULE 10

Retail & Product Strategy

Duration: 2.5–3 hours	Format: Workshop + Strategy Development	Track: Commercial

Session Overview

Retail is the most underleveraged revenue stream in most spas. This module transforms how participants think about product sales — from pushy add-on to genuine guest care extension.

Learning Objectives

Develop a retail training programme for their team | *Understand product margin and performance analysis* | *Create recommendation protocols* | *Design an engaging retail environment*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	'What percentage of your total revenue comes from retail?' Benchmark against industry (target: 15–25%).
0:15–0:55	**Lesson: The Psychology of Spa Retail**	Why therapists resist selling. Reframe: 'If you used a product in their treatment, not recommending it is actually poor care.'
0:55–1:35	**Retail Training Programme Design**	Using the template. Build a 4-week training programme for their team covering product knowledge, recommendation skills, and closing.
1:35–1:50	**Break**	—
1:50–2:30	**Retail Performance Analysis**	Using the Retail Performance Tracker spreadsheet. Analyse product performance, identify top sellers, calculate margins.

Facilitator Tips

— The 'selling is caring' reframe is essential. Spend time on this — it's the single biggest mindset shift for most spa teams.

— If participants represent luxury properties, address the 'our guests don't want to be sold to' objection head-on.

— The Retail Training Programme should be practical enough to implement next week.

Required Resources

→ Slide Deck: Module_10.pptx
→ Workbook: Module_10.docx
→ Template: 10a_Retail_Training_Plan.docx
→ Spreadsheet: 10_Retail_Performance_Tracker.xlsx

Assessment Guidance

The Retail Training Programme is the key deliverable. It should include: product knowledge training schedule, role-play practice sessions, measurable targets, and a follow-up review mechanism.

MODULE 11

Treatment Menu Design

Duration: 2.5–3 hours	Format: Workshop + Creative Exercise	Track: Commercial

Session Overview

The treatment menu is the spa's product catalogue and primary sales tool. This module covers strategic menu design, signature treatment development, and menu optimisation.

Learning Objectives

Audit an existing treatment menu | *Design a strategically structured menu* | *Develop a signature treatment concept* | *Apply menu psychology principles*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	Share examples of exceptional spa menus (collect in advance). Discuss what makes them effective.
0:15–0:55	**Lesson: Menu Strategy**	Menu architecture, the power of three, price anchoring, treatment naming, descriptions that sell experiences not procedures.
0:55–1:35	**Menu Audit Exercise**	Using the Menu Audit Checklist. Participants audit their own menu (or a provided sample) against best practice criteria.
1:35–1:50	**Break**	—
1:50–2:30	**Signature Treatment Builder**	Using the template. Each participant designs a unique signature treatment: concept, story, sequence, pricing rationale.

Facilitator Tips

— Bring printed examples of both excellent and poor spa menus. Visual comparison is powerful.

— Signature treatment development should feel creative and exciting. This is often the highlight of Track 2.

— Challenge generic names. 'Relaxation Massage' tells the guest nothing. 'Mountain Calm Deep Tissue Ritual' tells a story.

Required Resources

→ Slide Deck: Module_11.pptx
→ Workbook: Module_11.docx
→ Template: 11a_Menu_Audit_Checklist.docx
→ Template: 11b_Signature_Treatment_Builder.docx

Assessment Guidance

The Signature Treatment Builder is the creative assessment. Evaluate: originality, commercial viability, storytelling quality, and pricing rationale. The Menu Audit should show critical analysis, not just ticking boxes.

MODULE 12

Upselling & Guest Revenue Optimisation

Duration: 2.5–3 hours	Format: Workshop + Script Development	Track: Commercial

Session Overview

The capstone of Track 2. Brings together the financial, retail, and menu knowledge into a practical upselling and cross-selling system.

Learning Objectives

Develop natural upsell and cross-sell scripts | *Create a systematic approach to revenue per guest* | *Train team members in consultative selling* | *Build add-on and upgrade pathways*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Track 2 Review**	Quick recap of the commercial journey: P&L → KPIs → Pricing → Budget → Retail → Menu → now Upselling. Show the arc.
0:15–0:55	**Lesson: Consultative Selling in Wellness**	The difference between upselling and recommending. Guest-first approach: identify needs, then match solutions.
0:55–1:35	**Script Builder Exercise**	Using the Upsell Script Builder template. Develop scripts for: booking call upgrades, pre-treatment consultation, post-treatment recommendations.
1:35–1:50	**Break**	—
1:50–2:30	**Role Play: Guest Journeys**	End-to-end guest journey with upsell touchpoints. Groups of 3: guest, therapist/receptionist, observer. Rotate.

Facilitator Tips

— Scripts should sound natural, not robotic. After writing them, have participants practise until they can paraphrase rather than read.

— The role play works best with realistic guest personas — create character cards.

— Emphasise: the best upsell is one where the guest feels looked after, not sold to.

Required Resources

→ Slide Deck: Module_12.pptx

→ Workbook: Module_12.docx

→ Template: 12a_Upsell_Script_Builder.docx

Assessment Guidance

Assess the Upsell Script Builder for: naturalness of language, guest-first framing, variety of touchpoints covered. The role play should demonstrate confident, unhurried delivery.

MODULE 13

Operational Excellence & SOPs

Duration: 3–3.5 hours	Format: Workshop + SOP Writing	Track: Operations

Session Overview

Opens Track 3 by establishing the operational foundation. Participants learn to create systems that run without constant supervision — the hallmark of excellent spa management.

Learning Objectives

Build an operational calendar | *Write clear, actionable SOPs* | *Understand the difference between standards and procedures* | *Create consistency systems*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:20	**Track 3 Introduction**	The shift from commercial to operational. Frame: 'You now know what to measure and what to sell. Now let's build the machine that delivers it consistently.'
0:20–1:00	**Lesson: Systems Thinking for Spa**	Why great spas run on systems, not heroics. The cost of inconsistency in luxury wellness.
1:00–1:45	**Operational Calendar Exercise**	Using the Operational Calendar spreadsheet. Build a 12-month operational rhythm: daily, weekly, monthly, quarterly tasks.
1:45–2:00	**Break**	—
2:00–2:40	**Lesson: Writing Effective SOPs**	The anatomy of a good SOP. Clear, concise, testable. Show examples of poor SOPs vs excellent ones.
2:40–3:20	**SOP Writing Exercise**	Each participant writes one SOP using the SOP Writing Template. Choose a process that's currently inconsistent in their spa.

Facilitator Tips

— Bring examples of SOPs from other industries (aviation, hospitality) to show what 'excellent' looks like.

— The Operational Calendar should reflect seasonal demands. A spa in a ski resort has very different rhythms to a city day spa.

— SOP writing is a skill. Review drafts in real-time and give specific feedback on clarity and testability.

Required Resources

→ Slide Deck: Module_13.pptx
→ Workbook: Module_13.docx
→ Template: 13a_Operational_Calendar.docx
→ Template: 13b_SOP_Writing_Template.docx
→ Spreadsheet: 13_Operational_Calendar.xlsx

Assessment Guidance

The SOP is the primary assessment. It should be specific enough that a new team member could follow it without additional guidance. The Operational Calendar should show awareness of seasonal variation and management cadence.

MODULE 14

Scheduling & Capacity Management

Duration: 2.5–3 hours	Format: Workshop + Data Analysis	Track: Operations

Session Overview

Capacity management is where operational skill meets commercial impact. This module teaches participants to optimise room and therapist utilisation without burning out the team.

Learning Objectives

Analyse booking patterns and capacity utilisation | *Optimise therapist scheduling* | *Reduce gaps and no-shows* | *Balance utilisation with team wellbeing*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	'What's your current room utilisation rate?' Most won't know — and that's the point of this module.
0:15–0:55	**Lesson: Capacity Fundamentals**	Available hours vs booked hours vs productive hours. The difference between room utilisation and therapist utilisation.
0:55–1:35	**Booking Analysis Exercise**	Using the Booking & Capacity Planner spreadsheet. Populate with real or estimated data. Identify patterns.
1:35–1:50	**Break**	—
1:50–2:30	**Lesson: Optimisation Strategies**	Dynamic scheduling, gap management, no-show policies, off-peak incentives. Emphasise: 80% utilisation is optimal, not 100%.

Facilitator Tips

— The 80% utilisation point is important. Higher than that and quality drops, therapists burn out, and there's no flex for walk-ins.

— If participants don't have booking data, provide a sample dataset.

— The monthly projection formula in the spreadsheet (×4.33 weeks) gives an immediate 'aha' moment.

Required Resources

- → Slide Deck: Module_14.pptx
- → Workbook: Module_14.docx
- → Template: 14a_Booking_Analysis_Tracker.docx
- → Spreadsheet: 14_Booking_Capacity_Planner.xlsx

Assessment Guidance

The completed Booking & Capacity Planner is the assessment. Evaluate: accuracy of data input, quality of pattern analysis, and actionable optimisation strategies.

MODULE 15

Guest Experience & Journey Mapping

Duration: 3–3.5 hours	Format: Workshop + Journey Design	Track: Operations

Session Overview

Maps the entire guest experience from first contact to post-visit follow-up. Identifies moments of truth and designs systems to deliver exceptional experiences consistently.

Learning Objectives

Map the complete guest journey | *Identify and optimise moments of truth* | *Develop a complaint handling system using LEARN* | *Create service recovery protocols*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	Share a powerful guest experience story (positive or negative). Ask: 'What made this memorable?'
0:15–1:00	**Lesson: Journey Mapping**	Pre-arrival, arrival, experience, departure, post-visit. Each phase has specific touchpoints, emotions, and standards.
1:00–1:45	**Guest Journey Map Exercise**	Using the Guest Journey Map template. Groups map their own spa's journey. Identify gaps and pain points.
1:45–2:00	**Break**	—
2:00–2:40	**Lesson: LEARN Complaint Handling**	Listen-Empathise-Apologise-React-Notify. Walk through real scenarios. Emphasise: complaints are gifts.
2:40–3:15	**LEARN Template Practice**	Using the LEARN Complaint Template. Role play three escalating complaint scenarios.

Facilitator Tips

— Journey mapping works best on large paper with sticky notes. If possible, make this a tactile, visual exercise.

— The LEARN model practice should include genuinely difficult scenarios: a guest who won't be satisfied, a complaint about a specific therapist.

— Post-visit follow-up is often the most neglected phase. Push participants to design a follow-up system.

Required Resources

→ Slide Deck: Module_15.pptx
→ Workbook: Module_15.docx
→ Template: 15a_Guest_Journey_Map.docx
→ Template: 15b_LEARN_Complaint_Template.docx

Assessment Guidance

The Guest Journey Map is the primary assessment. It should be comprehensive, detailed, and identify at least three specific improvement opportunities. LEARN complaint handling is assessed through role play observation.

MODULE 16

Recruitment & Talent Development

Duration: 3–3.5 hours	Format: Workshop + Tool Development	Track: Operations

Session Overview

Talent is the spa's product. This module covers the full talent lifecycle: attracting, selecting, onboarding, and retaining spa professionals.

Learning Objectives

Design a structured interview process | *Build a 90-day onboarding plan* | *Conduct effective stay interviews* | *Develop talent retention strategies*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	'What's the cost of replacing a therapist?' Include recruitment, training, lost bookings, team impact. The number is always higher than expected.
0:15–0:55	**Lesson: Hiring for Spa**	Technical skill vs cultural fit. The dangers of 'warm body' hiring. Structured interviews reduce bias and improve outcomes.
0:55–1:35	**Interview Scorecard Development**	Using the Interview Scorecard template. Define role-specific criteria, behavioural questions, and scoring methodology.
1:35–1:50	**Break**	—
1:50–2:30	**90-Day Onboarding Plan**	Using the template. Design the first 90 days: week 1 orientation, weeks 2–4 shadowing and training, weeks 5–12 supervised independence.
2:30–3:10	**Stay Interviews**	The most underused retention tool. Using the Stay Interview Template. Practice in pairs.

Facilitator Tips

— The cost-of-turnover calculation is a powerful opener. Help participants quantify it for their specific context.

— Interview Scorecards should include at least two spa-specific questions (e.g., 'Describe how you'd handle a guest who falls asleep during treatment').

— Stay interviews are simple but transformative. Emphasise regularity — quarterly, not annually.

Required Resources

→ Slide Deck: Module_16.pptx
→ Workbook: Module_16.docx
→ Template: 16a_Interview_Scorecard.docx
→ Template: 16b_90_Day_Onboarding_Plan.docx
→ Template: 16c_Stay_Interview_Template.docx

Assessment Guidance

Three deliverables: Interview Scorecard (assess for role-specificity and bias reduction), 90-Day Onboarding Plan (assess for comprehensiveness and staged learning), Stay Interview (assess through practice observation).

MODULE 17

Supplier & Contract Management

Duration: 2–2.5 hours	Format: Workshop + Audit	Track: Operations

Session Overview

Covers the commercial relationships that underpin spa operations: product suppliers, equipment providers, and service contracts.

Learning Objectives

Conduct a contract audit | *Evaluate supplier performance* | *Negotiate better terms* | *Manage supplier relationships professionally*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	'When did you last review your supplier contracts?' Most spas auto-renew without review.
0:15–0:50	**Lesson: Contract Management**	Key contract terms, renewal dates, minimum order quantities, exclusivity clauses. What to look for, what to challenge.
0:50–1:30	**Contract Audit Exercise**	Using the Contract Audit Checklist. Participants audit their current contracts (from memory or actual documents).
1:30–1:45	**Break**	—
1:45–2:15	**Lesson: Negotiation Essentials**	Preparing a brief, understanding BATNA, the power of silence, getting to yes. Practical, not theoretical.

Facilitator Tips

— Many spa managers have never negotiated a contract. Build confidence, not anxiety.

— If participants bring actual contracts, this module becomes immediately actionable.

— Cover the basics: notice periods, auto-renewal traps, price escalation clauses.

Required Resources

→ Slide Deck: Module_17.pptx

→ Workbook: Module_17.docx

→ Template: 17a_Contract_Audit_Checklist.docx

Assessment Guidance

The Contract Audit Checklist is the assessment. Evaluate for: thoroughness, identification of risks or missed opportunities, and proposed action items.

MODULE 18

Health, Safety & Wellbeing

Duration: 3–3.5 hours	Format: Workshop + Risk Assessment	Track: Operations

Session Overview

The capstone of Track 3. Covers the non-negotiable operational requirements: health and safety compliance, risk management, COSHH, and — critically — therapist wellbeing.

Learning Objectives

Complete a comprehensive risk assessment | *Maintain a COSHH register* | *Develop a therapist wellbeing policy* | *Understand regulatory compliance requirements*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	Start with a real incident example (anonymised). Make the case: H&S isn't bureaucracy, it's duty of care.
0:15–0:55	**Lesson: Risk Assessment Framework**	Likelihood × Impact scoring. Walk through the Risk Assessment Matrix spreadsheet. Demonstrate with 3–4 common spa risks.
0:55–1:35	**Risk Assessment Exercise**	Participants complete a risk assessment for their own spa using the spreadsheet. Minimum 10 risks identified.
1:35–1:50	**Break**	—
1:50–2:30	**COSHH Register**	Using the template. Explain requirements, walk through completion. Participants begin their register.
2:30–3:15	**Therapist Wellbeing Policy**	The most important part of this module. Using the template. Cover: physical health, mental health, boundaries, sustainable workload.

Facilitator Tips

— Don't make H&S dry. Use stories and scenarios to bring it to life.

— The Therapist Wellbeing Policy is often an emotional discussion. Spa professionals give energy all day — who looks after them?

— COSHH may seem basic but compliance gaps are common. Treat it seriously.

Required Resources

→ Slide Deck: Module_18.pptx
→ Workbook: Module_18.docx
→ Template: 18a_Risk_Assessment_Template.docx
→ Template: 18b_COSHH_Register.docx
→ Template: 18c_Therapist_Wellbeing_Policy.docx
→ Spreadsheet: 18_Risk_Assessment_Matrix.xlsx

Assessment Guidance

Three deliverables: Risk Assessment (minimum 10 risks with appropriate scoring and mitigations), COSHH Register (accuracy and completeness), Therapist Wellbeing Policy (genuine commitment, not token gestures). This module carries the highest compliance weight.

MODULE 19

Brand Identity & Marketing

Duration: 3–3.5 hours	Format: Workshop + Strategy Development	Track: Growth

Session Overview

Opens Track 4 with the strategic positioning of the spa. Participants define their brand identity, develop marketing plans, and explore partnership opportunities.

Learning Objectives

Define a clear brand identity statement | *Develop a 90-day marketing plan* | *Identify strategic partnership opportunities* | *Understand digital marketing essentials*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:20	**Track 4 Introduction**	'You've built the skills, the systems, the commercial awareness. Now: how does the world know about you?'
0:20–1:00	**Lesson: Brand Identity**	What makes a spa brand distinctive. Values, voice, visual identity, guest promise. Show examples of strong vs weak spa brands.
1:00–1:40	**Identity Statement Builder**	Using the template. Each participant crafts a brand identity statement for their spa. Group critique and refinement.
1:40–1:55	**Break**	—
1:55–2:40	**90-Day Marketing Plan**	Using the template. Practical, actionable marketing plan focused on the next 90 days. Channels, content, budget, measurements.
2:40–3:15	**Partnership Strategy**	Using the template. Identify 5 potential partnership opportunities: hotels, fitness, corporate wellness, wedding venues, local businesses.

Facilitator Tips

— Brand identity work should feel creative and aspirational. This is where participants get excited about possibility.

— The 90-Day Marketing Plan must be realistic for their budget. A five-star resort has different resources to an independent day spa.

— Partnership Strategy is often overlooked gold. Push participants to think beyond obvious collaborations.

Required Resources

→ Slide Deck: Module_19.pptx
→ Workbook: Module_19.docx
→ Template: 19a_Identity_Statement_Builder.docx
→ Template: 19b_90_Day_Marketing_Plan.docx
→ Template: 19c_Partnership_Strategy.docx

Assessment Guidance

Three deliverables: Identity Statement (clarity, distinctiveness, authenticity), 90-Day Marketing Plan (specificity, measurability, budget realism), Partnership Strategy (creativity, commercial viability).

MODULE 20

Innovation & Trend Leadership

Duration: 2.5–3 hours	Format: Workshop + Business Case	Track: Growth

Session Overview

Equips participants to evaluate trends, innovate thoughtfully, and build business cases for new concepts. Balances excitement with commercial rigour.

Learning Objectives

Evaluate wellness trends using a structured framework | *Build a business case for a new concept* | *Differentiate between fads and lasting trends* | *Develop an innovation pipeline*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:15	**Opening**	'What's the biggest trend in wellness right now?' Expect: cold water therapy, longevity, biohacking. Challenge: 'Is it a trend or a fad?'
0:15–0:55	**Lesson: Trend Evaluation**	The Trend Assessment Matrix. Criteria: guest demand, brand fit, operational feasibility, competitive advantage, investment required.
0:55–1:35	**Trend Assessment Exercise**	Using the template. Evaluate 3–5 current trends against the matrix criteria. Group discussion and scoring.
1:35–1:50	**Break**	—
1:50–2:30	**Business Case Builder**	Using the New Concept Business Case template. Each participant builds a case for one innovation they'd like to introduce.

Facilitator Tips

— This module should feel energising and forward-looking. Encourage bold thinking.

— The business case discipline prevents 'shiny object syndrome'. If you can't build the case, don't build the concept.

— Use the Trend Assessment Matrix to demonstrate that a lower-scoring trend might still be right for a specific spa context.

Required Resources

→ Slide Deck: Module_20.pptx
→ Workbook: Module_20.docx
→ Template: 20a_Trend_Assessment_Matrix.docx
→ Template: 20b_New_Concept_Business_Case.docx

Assessment Guidance

The Business Case is the primary assessment. Evaluate: clarity of concept, financial projections, risk awareness, and implementation plan. The Trend Assessment should show critical thinking, not trend-following.

MODULE 21

Strategic Planning & Programme Completion

Duration: 3.5–4 hours	Format: Workshop + Presentation	Track: Growth

Session Overview

The programme finale. Participants synthesise everything into a 90-day execution plan and present their strategic vision. Includes programme reflection and certification.

Learning Objectives

Build a comprehensive 90-day execution plan | *Present a strategic vision to peers* | *Complete the programme reflection* | *Receive certification*

Session Plan

Time	Activity	Facilitator Notes
0:00–0:20	**Programme Journey Review**	Walk through all 21 modules visually. Celebrate the journey. Acknowledge the commitment.
0:20–1:00	**90-Day Execution Plan**	Using the template and spreadsheet. Participants build their personal action plan: Foundation (days 1–30), Momentum (31–60), Acceleration (61–90).
1:00–1:45	**Plan Refinement**	Peer review in pairs. Challenge each other's plans for ambition and realism. Revise.
1:45–2:00	**Break**	—
2:00–3:00	**Strategic Presentations**	Each participant presents their 90-day plan (5–7 minutes each). Group feedback and commitment.
3:00–3:30	**Programme Reflection & Certification**	Using the Programme Reflection template. Individual completion, then a closing circle. Certificate presentation.

Facilitator Tips

— This should feel like a graduation, not just another session. Create ceremony.

— The presentations are powerful — they synthesise the entire programme into a personal action plan. Give genuine, specific feedback.

— Have certificates pre-printed and personalised. The physical certificate matters.

Required Resources

→ Slide Deck: Module_21.pptx
→ Workbook: Module_21.docx
→ Template: 21a_90_Day_Execution_Plan.docx
→ Template: 21b_Programme_Reflection.docx
→ Spreadsheet: 21_90_Day_Execution_Scorecard.xlsx

Assessment Guidance

The 90-Day Execution Plan is the capstone assessment. It should demonstrate integration of learning from all four tracks. Evaluate for: strategic thinking, operational detail, commercial *awareness, and leadership maturity. The presentation is the final opportunity to assess communication skills.*