



THE **V.A.L.U.E.** BLUEPRINT™

A practical scorecard for Allied Health practice owners

Visibility · Accountability · Leverage · Utilisation · Enterprise Value

THE SHURIKEN FIELD GUIDE

**Build a practice that performs without
depending on you every day.**

Use this scorecard to see what is working, identify the commercial gaps and choose the first move that matters.

"Well done is better than well said."

— Benjamin Franklin, Poor Richard's Almanack (1737)

Prepared by Shuriken Advisory Group · Allied Health commercial advisers

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A practice is more than a P&L.

The V.A.L.U.E. Blueprint gives practice owners a clearer commercial view of what is building — or reducing — the value of the business.

Most Allied Health businesses do not fail because their owners are not capable clinicians. They stall because the owner is carrying too much of the commercial machine: the numbers, the diary, the team decisions, the client journey and the next growth move.

V.A.L.U.E. is a simple lens for turning that pressure into priorities. Score each question from 1 (not in place) to 5 (consistently working). Do not chase a perfect score. Use the score to decide what needs attention first.

V Visibility You can see the numbers that drive cash, margin, capacity and momentum — early enough to act.	A Accountability The right people own the right actions. Meetings create decisions, not more work for the owner.
L Leverage Systems and capability make the practice less dependent on one person.	U Utilisation Clinical capacity converts into revenue with minimal diary leakage and avoidable cancellations.
E Enterprise Value The business is deliberately built as a transferable asset, not simply an owner-operated job.	HOW TO USE 45 minutes Score honestly, circle the two lowest dimensions, then choose one 90-day priority at the back of this Blueprint.

"Better than a thousand useless words is one useful word, hearing which one attains peace."

— The Buddha, Dhammapada, Chapter 8

THE DECISION RULE

Fix the constraint, not the symptom.

A low score is not a failure. It is a cue to focus the next commercial decision.

V.A.L.U.E. DIMENSION V

Visibility

Can you see the commercial truth early enough to act?

DIAGNOSTIC QUESTION	SCORE 1-5	EVIDENCE / FIRST MOVE
Do you review a small KPI dashboard every month — revenue, gross margin, utilisation, cash and debtor position?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Can you see performance by location, clinician, service line or funding stream without rebuilding the numbers manually?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do you know which services and referral sources are genuinely profitable, not just busy?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Does your cash forecast look at least 13 weeks ahead and identify pressure points before they arrive?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Are targets linked to actual capacity, pricing and margin rather than an annual wish list?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____

First move: Create a monthly owner dashboard with no more than eight measures. Review it on the same day each month.

Score this dimension: ____ / 25

WHERE SHURIKEN COULD HELP — VISIBILITY

Tick up to two areas you want to explore in your complimentary Discovery Meeting.

- | | |
|--|--|
| ☐ KPI dashboard & owner reporting | ☐ Xero management reporting |
| ☐ 13-week cash-flow forecasting | ☐ Pricing & margin review |
| ☐ Performance by service, clinician or location | |

YOUR MEETING NOTE — What is the one commercial question you want discussed?

"Whatever the mind can conceive and believe, it can achieve."

— Napoleon Hill

V.A.L.U.E. DIMENSION A

Accountability

Does the practice improve because ownership is clear?

DIAGNOSTIC QUESTION	SCORE 1-5	EVIDENCE / FIRST MOVE
Does every commercial priority have one named owner, a due date and a documented next action?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do management meetings finish with decisions and commitments rather than open discussion?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Are individual and team expectations clear enough to coach against?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do you regularly close the loop on actions agreed at the previous meeting?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Can the team solve routine operational issues without the owner becoming the default decision-maker?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____

First move: Install a 45-minute weekly leadership rhythm: numbers, decisions, owners, due dates and a written action register.

Score this dimension: ____ / 25

WHERE SHURIKEN COULD HELP — ACCOUNTABILITY

Tick up to two areas you want to explore in your complimentary Discovery Meeting.

- | | |
|--|--|
| ☐ Leadership rhythm & action register | ☐ Role clarity & accountability map |
| ☐ Management reporting cadence | ☐ Team performance measures |
| ☐ Owner workload & delegation plan | |

YOUR MEETING NOTE — What is the one commercial question you want discussed?

"Thoughts become things. If you see it in your mind, you will hold it in your hand."

— Bob Proctor

V.A.L.U.E. DIMENSION L

Leverage

Can the business grow without multiplying the owner's workload?

DIAGNOSTIC QUESTION	SCORE 1-5	EVIDENCE / FIRST MOVE
Are critical client, billing, people and compliance processes written down and used consistently?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do senior team members have the authority and capability to make decisions within clear boundaries?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Could a new clinician or administrator become productive using a repeatable onboarding path?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do you measure the owner's operational workload and deliberately remove work that others could own?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Is the practice less exposed when a key person is on leave or chooses to exit?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____

First move: Choose one recurring owner task. Document it, train another person, and run it without you for four consecutive weeks.

Score this dimension: ____ / 25

WHERE SHURIKEN COULD HELP — LEVERAGE

Tick up to two areas you want to explore in your complimentary Discovery Meeting.

☐ Process mapping & documentation

☐ Practice management systems

☐ Delegation & capability plan

☐ Onboarding & role design

☐ Multi-site operating model

YOUR MEETING NOTE — What is the one commercial question you want discussed?

"Our doubts are traitors, and make us lose the good we oft might win, by fearing to attempt."

— William Shakespeare, Measure for Measure

V.A.L.U.E. DIMENSION U

Utilisation

Is clinical capacity being converted into the right revenue?

DIAGNOSTIC QUESTION	SCORE 1-5	EVIDENCE / FIRST MOVE
Do you know delivered utilisation by clinician and location — not just booked appointments?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Are cancellations, no-shows, gaps and late changes measured and actively managed?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do diaries have practical rules for rebooking, waitlists, confirmations and recovery of cancelled appointments?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Can you distinguish capacity constraints from pricing, conversion, recruitment or referral issues?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do clinical and administrative teams understand the commercial effect of a 5% utilisation change?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____

First move: Measure delivered utilisation weekly. Pick one leakage source — cancellations, gaps or rebooking — and run a 30-day fix.

Score this dimension: ____ / 25

WHERE SHURIKEN COULD HELP — UTILISATION

Tick up to two areas you want to explore in your complimentary Discovery Meeting.

☐ Delivered utilisation dashboard

☐ Diary leakage & cancellation review

☐ Rebooking & waitlist process

☐ Pricing & capacity analysis

☐ Clinician productivity review

YOUR MEETING NOTE — What is the one commercial question you want discussed?

“What is an obstacle on the road helps us on this road.”

— Marcus Aurelius, Meditations 5.20

V.A.L.U.E. DIMENSION E

Enterprise Value

Is the practice becoming more transferable and valuable?

DIAGNOSTIC QUESTION	SCORE 1-5	EVIDENCE / FIRST MOVE
Is revenue diversified across clinicians, referrers, locations and funding sources?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Does the practice have documented systems, stable leadership and credible financial reporting?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Would a buyer see repeatable earnings rather than an owner's personal workload?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Are contracts, leases, registrations, insurances and material risks organised and reviewed?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____
Do you have a clear view of the practice's value drivers before any sale or succession conversation?	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5	_____ _____

First move: Build a value-driver register: earnings quality, client concentration, leadership depth, systems, risk and growth evidence.

Score this dimension: ____ / 25

WHERE SHURIKEN COULD HELP — ENTERPRISE VALUE

Tick up to two areas you want to explore in your complimentary Discovery Meeting.

- | | |
|---|---|
| ☐ Practice valuation & value drivers | ☐ Exit or succession roadmap |
| ☐ Risk, structure & tax review | ☐ Buyer-ready systems & evidence |
| ☐ Personal wealth & post-exit planning | |

YOUR MEETING NOTE — What is the one commercial question you want discussed?

"You do not rise to the level of your goals. You fall to the level of your systems."

— James Clear

The utilisation quick-check

A 5% change in delivered utilisation can change the economics of a practice — but only when you can see the leakage and act on it.

Use a consistent definition. Delivered utilisation is billable clinical hours actually delivered divided by available clinical hours. It is not simply how full the diary looks.

INPUT	YOUR NUMBER	CALCULATION	WHY IT MATTERS
Available clinical hours / week	_____	A	The capacity you are paying for.
Delivered billable hours / week	_____	B	The capacity clients actually received.
Delivered utilisation	_____ %	$B \div A \times 100$	Your clearest operating utilisation measure.
Average net fee / hour	\$ _____	C	Use net revenue after routine discounts/adjustments.
5% recovered capacity impact	\$ _____	$A \times 5\% \times C \times 48 \text{ weeks}$	Indicative annual revenue opportunity before costs.

Commercial note: utilisation is not a target to drive at all costs. Quality of care, clinical judgement and team sustainability come first. The point is to see and remove avoidable leakage, not to push clinicians beyond sensible capacity.

"Research your own experience. Absorb what is useful, reject what is useless, add what is essentially your own."

— Bruce Lee

Turn the score into a 90-day move

The aim is not five parallel projects. Pick one constraint, define the evidence of progress and give it a named owner.

PRIORITY	OWNER	EVIDENCE OF PROGRESS	REVIEW DATE

Use the following sequence: 1) choose the lowest score, 2) name the first commercial move, 3) decide what evidence proves it is working, 4) review it weekly, and 5) do not add the next priority until the first one has traction.

WEEK 1 See the baseline Confirm the number, the cause and the owner.	WEEKS 2-4 Install the rhythm Create the meeting, report, system or process.
WEEKS 5-8 Coach and adjust Test the behaviour, remove friction and keep the decision visible.	WEEKS 9-12 Lock it in Document the new standard and decide the next constraint.

"Anybody can jump a motorcycle. The trouble begins when you try to land it."

— Evel Knievel

YOUR NEXT MOVE

Want an external commercial lens on the score?

Book a complimentary C.A.R.E. Discovery Meeting with Shuriken.

Bring your scorecard into the room.

The first meeting is a practical fact-find: your business, your priorities and whether Shuriken can genuinely assist. It is complimentary, and a focused commercial review of this kind ordinarily carries a \$497 value.

If you use Xero and want us to review the high-level numbers ahead of time, you can invite xero@shuriken.com with adviser access. This is optional. Never send passwords, banking credentials or sensitive client data by email.

1 Complete Finish the V.A.L.U.E. scorecard and choose your two lowest dimensions.	2 Book Choose a complimentary C.A.R.E. Discovery Meeting time.
3 Prepare Bring your priorities, questions and — if helpful — a high-level Xero view.	4 Decide Leave knowing the practical next move, whether or not we work together.

"For which of you, desiring to build a tower, does not first sit down and count the cost, whether he has enough to complete it?"

— Jesus, Luke 14:28

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Important: This Blueprint is general commercial education only. It is not financial, tax, legal, clinical or investment advice.