EMPLOYER TRAINING CANADA · COURSE OUTLINE

Customer Service & Digital Operations Training for Wellness Clinic Teams

A 12-hour instructor-led online cohort building practical, job-related skills for reception, intake, marketing and content, care coordination, and clinic management staff at wellness, physiotherapy, chiropractic, RMT, and multi-disciplinary clinics.

Format: 6 days × 2 hours = 12 hours · Live online cohort · **Cohort size:** 4–10 participants · **Version:** v1.0 (2026-05-21)

TOTAL INSTRUCTIONAL HOURS

12 hours

Six 2-hour live online sessions

DELIVERY FORMAT

Live online cohort

Synchronous, instructor-led live online sessions

PRACTICAL DELIVERABLES

12 role-based outputs

Each participant produces 12 workplace deliverables

FINAL OUTCOME

30-Day Implementation Plan

Each participant submits a personal role-based plan

Scope: administrative training only · no patient health information in drafting tools. This course trains front desk, intake, marketing, and clinic management staff on customer service and digital operations workflows. It does not train licensed practitioners on clinical care, diagnosis, treatment planning, or chart documentation. All templates and routines taught in this course are built around an explicit rule: no personally identifiable patient health information is entered into digital drafting tools, including AI-assisted drafting. Clinics remain responsible for compliance with PIPEDA, provincial health-information laws, College of practitioner standards, and any in-place clinic EMR/charting requirements.

Course purpose

This program trains the customer-facing and back-office administrative roles in a wellness clinic — front desk and reception, intake and new-patient coordination, marketing and content, care coordination, and clinic management — in the practical, job-related skills behind their daily work. The course is built around real workplace tasks: handling new-patient inquiries, confirming bookings, following up with no-shows and recall, drafting service-information content, maintaining local business information, and coordinating front-desk handoffs.

The cohort is small and instructor-led. Each session combines a short teaching block with hands-on practice during the session, so participants leave each day with a role-based deliverable they apply directly to their current work. Digital tools, including AI-assisted drafting, are introduced where they support these workplace tasks within defined review steps and the clinic's privacy boundary.

Audience

This course is designed for current administrative employees of wellness, physiotherapy, chiropractic, RMT, naturopathic, and multi-disciplinary clinics. Specifically suited to staff in:

- Front desk and reception roles
- Intake administrator and new-patient coordinator roles
- Marketing, content, and social media coordinator roles
- Patient communication and recall coordinator roles
- Clinic manager and team lead roles

No prior experience with digital tools beyond standard workplace software is required. Working English reading and writing skills are required. Participants bring a laptop, an internet connection, and access to their clinic's standard productivity tools.

Learning objectives

By the end of the cohort, participants will be able to:

- Handle new-patient inquiries, bookings, reminders, no-show follow-up, and recall messages using documented communication routines, without personally identifiable patient health information entered into drafting tools.
- Draft and review service-information content for clinic websites, social updates, and printed collateral with attention to accuracy, tone, brand consistency, and claim-safety.
- Apply digital tools, including AI-assisted drafting, within defined review steps and privacy boundaries for clinic-administrative communication.
- Document admin CRM stages for new-patient and recall pipelines and apply next-step follow-up routines, separate from the clinical EMR.

- Maintain local business information and apply a privacy-aware review response routine for patient feedback channels.
- Prepare weekly role checklists and front-desk handoff notes between reception, intake, marketing, and clinic management.
- Produce a 30-day workplace implementation plan tied to their current role and the clinic's administrative routines and privacy policy.

Curriculum — 6 days × 2 hours, with 2 modules per day

Day 1 — Workflow & communication standards

2 hours

MODULE 1.1 Role-based workflow review for clinic teams

60 min

MODULE OBJECTIVE

Help participants map the daily communication and record-keeping tasks across their role and identify which routines need clearer steps, shared templates, or documented handoffs.

TEACHING CONTENT (~35 MIN)

- Common task maps for each administrative role inside a wellness clinic
- Recurring administrative routines vs. judgement tasks (clinical care remains with practitioners)
- Which routines need a shared template, a documented routine, or front-desk handoff
- Task decomposition method: trigger → action → response → follow-up → record

IN-SESSION EXERCISE (~25 MIN)

- Each participant lists 10 recurring tasks in their administrative role
- Classify each as template-ready, supported-by-digital-tools, or judgement-only
- Pick the top 3 workflows to improve first

> **Deliverable:** Role-based workflow review sheet

MODULE **1.2** **Customer communication standards, review steps, and privacy boundary** 60 min

MODULE OBJECTIVE

Establish tone, accuracy, and brand-consistency standards for patient-facing communication, and define the review steps and privacy boundary that apply when staff use digital tools, including AI-assisted drafting, within clinic-administrative tasks.

TEACHING CONTENT (~35 MIN)

- Tone and consistency standards for inquiry replies, reminders, and follow-up
- The no-patient-health-information-in-drafting-tools rule: what does and does not go into digital drafting tools
- Review steps for patient-facing communication: factual accuracy, brand fit, claim-safety, privacy
- Designing a written customer communication standards and privacy boundary checklist

IN-SESSION EXERCISE (~25 MIN)

- Draft 3 sample messages for different administrative roles and apply the review steps
- Edit each draft for tone, accuracy, and brand fit
- Use the standards checklist to decide whether each is ready to send

> **Deliverable:** Customer communication standards and privacy boundary checklist

Day 2 — Inquiry handling & booking routines

2 hours

MODULE **2.1** **New-patient inquiry response workflow**

60 min

MODULE OBJECTIVE

Build a structured routine for classifying new-patient inquiries, drafting generic reply templates, and applying a consistent response-time standard.

TEACHING CONTENT (~35 MIN)

- Common new-patient inquiry types: pricing, coverage, direct-billing, intake forms, scheduling, service questions
- Channel-specific reply formats: phone, SMS, email, website form, online booking platform
- Response-time routine and accountability
- Using digital tools, including AI-assisted drafting, to prepare a first version reviewed by staff before sending — without entering patient health information

IN-SESSION EXERCISE (~25 MIN)

- Draft 5 generic new-patient inquiry reply templates
- Adapt each template into SMS, email, and online-form variants

> **Deliverable:** New inquiry response template pack (no patient health information)

MODULE **2.2** Booking, reminder, and no-show follow-up

60 min

MODULE OBJECTIVE

Establish a complete routine for booking confirmations, appointment reminders, no-show follow-up, and reschedule communications.

TEACHING CONTENT (~35 MIN)

- Booking confirmation message
- 24-hour and same-day reminders
- No-show follow-up routine
- Reschedule messaging that maintains a respectful, professional tone
- Patient-status recording practice (administrative information only, separate from clinical chart)

IN-SESSION EXERCISE (~25 MIN)

- Draft 3 reminder templates and 2 no-show follow-up templates
- Document a new-patient communication routine

> **Deliverable:** Booking and no-show follow-up routine

Day 3 — Service-information content drafting

2 hours

MODULE 3.1 Service-information and FAQ content drafting

60 min

MODULE OBJECTIVE

Help marketing and content staff draft clinic service-information content — service descriptions, generic FAQs, package and seasonal information, and social captions — with documented review steps for accuracy, tone, and claim-safety.

TEACHING CONTENT (~35 MIN)

- Common content types in a wellness clinic: service descriptions, hours and location updates, team introductions, generic FAQ posts
- Claim-safety: what services can and cannot say about outcomes, regulated language by discipline (RMT, chiropractic, naturopathic, etc.)
- Using digital tools, including AI-assisted drafting, within defined review steps for clinic content
- Avoiding generic phrasing and over-claims in patient-facing content

IN-SESSION EXERCISE (~25 MIN)

- Draft service descriptions for 3 clinic services
- Draft 3 social captions (team introduction, generic FAQ, service spotlight)
- Apply the claim-safety review checklist to each draft

> **Deliverable:** Service-information content drafting pack

MODULE 3.2 Content planning and posting routine

60 min

MODULE OBJECTIVE

Build a sustainable content planning, scheduling, and posting routine for the marketing and content role at a wellness clinic.

TEACHING CONTENT (~35 MIN)

- Content types: services, generic FAQs, team introductions, hours and location updates, community announcements
- How one content piece becomes multiple channel-appropriate posts
- A 2-week content calendar structure for a clinic
- Content-production checklist with claim-safety review

IN-SESSION EXERCISE (~25 MIN)

- Build a 2-week content plan for a hypothetical clinic
- Decompose one clinic service into 5 content pieces
- Write the call-to-action for each post within claim-safety standards

> **Deliverable:** 2-week clinic content calendar

Day 4 — Admin records & recall routines

2 hours

MODULE 4.1 Creative brief and production workflow

60 min

MODULE OBJECTIVE

Help participants translate clinic content needs into clear creative briefs that internal or external production teams can act on, while respecting clinic brand standards.

TEACHING CONTENT (~35 MIN)

- Structure for clinic visuals: in-house signage, service posters, social images, intake collateral
- How to write a creative brief that a designer or production partner can use
- Brand consistency: colour, typography, photography style, voice
- Review considerations for clinic content production: copyright, accuracy, claim-safety, brand fit

IN-SESSION EXERCISE (~25 MIN)

- Write 3 creative briefs for clinic content (service poster, intake collateral, social image)
- Build a creative review checklist

> **Deliverable:** Creative brief template + review checklist

MODULE 4.2 Admin CRM stages and recall documentation

60 min

MODULE OBJECTIVE

Define a simple, workable set of admin CRM stages for new-patient and recall pipelines, separate from the clinical EMR, that the team can maintain across shifts.

TEACHING CONTENT (~35 MIN)

- Admin stages: new inquiry → booked → attended first visit → active patient → at-risk → recall-due
- Core admin-record fields: source, next contact date, owner, status notes — administrative only, separate from clinical chart
- Next-step follow-up routines for each stage
- How admin CRM and clinical EMR remain separate: what belongs where

IN-SESSION EXERCISE (~25 MIN)

- Document a simple admin CRM stage template
- Define the next action for each stage

> **Deliverable:** Admin CRM and recall stage template

Day 5 — Follow-up & local business information

2 hours

MODULE 5.1 Follow-up routines for new patients, reactivation, and recall

60 min

MODULE OBJECTIVE

Build documented follow-up routines for first-visit follow-up, inactive-patient reactivation, and recall reminders so the work happens consistently across staff and shifts, within the clinic's privacy policy.

TEACHING CONTENT (~35 MIN)

- First-visit follow-up routines
- Reactivation messaging for inactive patients
- Recall reminders that respect the patient relationship
- Patient check-ins with a documented tone standard
- Applying digital tools, including AI-assisted drafting, within defined review steps and privacy boundaries

IN-SESSION EXERCISE (~25 MIN)

- Draft 5 follow-up messages across the three categories using approved templates
- Document a recall follow-up routine

> **Deliverable:** Follow-up message sequence for new patients, reactivation, and recall

MODULE 5.2 Local business information maintenance

60 min

MODULE OBJECTIVE

Establish a documented monthly routine for maintaining the clinic's local business information (Google Business Profile, hours, photos, contact information) and a privacy-aware review response routine.

TEACHING CONTENT (~35 MIN)

- Google Business Profile maintenance basics for clinics
- GBP post ideas and content patterns for service-information updates
- Privacy-aware review response routine: what staff can and cannot reference in public replies
- Location-page basic checks

IN-SESSION EXERCISE (~25 MIN)

- Complete a basic GBP checklist
- Draft 4 GBP posts and 3 privacy-aware review responses

> **Deliverable:** Local business information monthly checklist

Day 6 — Workplace coordination & implementation

2 hours

MODULE 6.1 Weekly role checklists and front-desk handoff

60 min

MODULE OBJECTIVE

Build a weekly cadence that ties reception, intake, marketing, and clinic management together, with a monthly workflow review.

TEACHING CONTENT (~35 MIN)

- Weekly checklist construction for each administrative role
- Key activity indicators: response time, booking rate, follow-up completion, content output, patient feedback, recall completion
- Monthly workflow review meeting structure
- Front-desk handoff: reception → intake → marketing → clinic management

IN-SESSION EXERCISE (~25 MIN)

- Build a weekly role checklist
- Document a cross-role handoff routine

> **Deliverable:** Weekly role checklist + monthly workflow review template

MODULE 6.2 30-day role-based workplace implementation plan

60 min

MODULE OBJECTIVE

Bring every template, routine, and checklist together into a 30-day workplace plan each participant can carry back into their current role at the clinic, within the clinic's privacy policy.

TEACHING CONTENT (~35 MIN)

- Selecting the top 3–5 workflows for each role
- Owner, deadline, tool, template, and indicator for each item
- Defining 30-day visible outcomes
- Keeping plans realistic enough to apply alongside daily clinic operations

IN-SESSION EXERCISE (~25 MIN)

- Complete a personal 30-day implementation plan
- Outline a team 30-day implementation plan
- Peer-review each other's plans for feasibility

> **Final Deliverable:** 30-day role-based workplace implementation plan

Practical deliverables — 12 role-based outputs participants produce during the cohort

Day	Deliverable A	Deliverable B
Day 1	Role-based workflow review sheet	Customer communication standards and privacy boundary checklist
Day 2	New inquiry response template pack (no patient health information)	Booking and no-show follow-up routine
Day 3	Service-information content drafting pack	2-week clinic content calendar
Day 4	Creative brief template + review checklist	Admin CRM and recall stage template
Day 5	Follow-up message sequence for new patients, reactivation, and recall	Local business information monthly checklist
Day 6	Weekly role checklist + monthly workflow review template	30-day role-based workplace implementation plan

Completion guidelines

Participants attend the scheduled live training sessions and complete the practical workplace exercises tied to their role. Progress is assessed through attendance, completed worksheets, and the role-based deliverables each participant produces during the cohort.

Component	Weight	Notes
Attendance	25%	Scheduled live online sessions across the 6-day cohort
Worksheet completion	35%	Two role-based deliverables completed per day
In-session exercises	20%	Practical workplace exercises completed during sessions
30-day workplace implementation plan	20%	Personal role-based plan submitted at the end of the cohort

Completion is recognised when a participant meets attendance expectations and submits the final 30-day workplace implementation plan tied to their current role and the clinic's privacy policy. Each participant who meets the completion expectations receives a Course Completion Summary documenting the job-related skills practised and the deliverables produced.

Lead instructor

Nic Ma — Lead Instructor

Nic Ma is the Lead Instructor for this cohort — a practitioner instructor with hands-on small-business workplace experience since 2012, training Canadian business teams on customer communication routines, content drafting and review, CRM record-keeping, and cross-role coordination across front desk, intake, marketing, and management roles. Through Playheads Creative Ltd., founded in 2012, Nic has worked with more than 300 small and mid-sized Canadian businesses across wellness, fitness, hospitality, and professional services.

Background credentials include an independent Canada Digital Adoption Program (CDAP) Digital Advisor role (Innovation, Science and Economic Development Canada / ISED, June 2022 – March 2025).

The worksheets, routines, and templates participants apply are drawn from workplace systems Nic has documented across in-house teams. Detailed instructor portfolio and references are available to employers on request.

Important note for employers. This is employer-sponsored skills training delivered as an instructor-led cohort. Participants practise the workflows during sessions and produce role-based deliverables they bring back to their current work — it is not consulting, coaching, mentorship, or a marketing service, and it does not include clinical care, diagnosis, or treatment training. Employer Training Canada is a training provider, not a grant application agency. Employers are responsible for their own funding applications, and funding approval is determined by the relevant program administrator.

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Course version: v1.0 — 2026-05-21 · Wellness Clinic course outline aligned with the ETC website copy standard. 12 role-based deliverables across 6 days × 2 hours = 12 hours live online cohort, scoped to administrative and marketing work, not clinical practice.