Medical Courier Resource Pack - Document List and Business Use Guide

Included at no additional cost as self-serve resources. No setup, customization, or support on how to use the tools is included.

Pack Summary: 70 total resources (52 Word documents and 18 Excel files).

How to use this guide: Each item below lists the exact file name from the ZIP file along with a brief note on how it can help in a medical courier business.

Sections included:

- Course Overview, Planning & Launch - 9 resources
- W-2 Job Search & Career Tools - 9 resources
- Marketing, Outreach & Sales - 14 resources
- Pricing, Proposals, Finance & Getting Paid - 17 resources
- Operations, Compliance, Risk & Documentation - 13 resources
- Team, Contractors, Drivers & Scaling - 5 resources
- AI & Automation Support - 3 resources

Course Overview, Planning & Launch (9 resources)

- **Medical Courier Course Outline and Resources** *(Medical_Courier_Get_Work_Ultra_Comprehensive_Course_Outline_and_Resources.docx)* - This is the master roadmap for the training and resource pack. It helps learners see the full path from choosing a lane and getting work to pricing, operations, and scaling.
- **Pick Your Path Worksheet** *(Pick_Your_Path_Worksheet.docx)* - This worksheet helps learners decide whether a W-2 job, 1099 contracting, building a company, or a hybrid path fits their goals, time, and risk tolerance. It is useful for making a practical business decision before spending time in the wrong direction.
- **30/90 Day Launch Plan** *(30_90_Day_Launch_Plan.xlsx)* - This planner turns the training into a step-by-step action plan for the first 30 and 90 days. It helps users stay focused on setup, outreach, onboarding, and first revenue instead of guessing what to do next.
- **Capstone Checklist** *(Capstone_Checklist.docx)* - This checklist shows the key deliverables a learner should complete before they consider themselves launch-ready. It is useful for accountability and making sure critical items like pricing, outreach, and compliance are not missed.
- **Service Lane and Service Area Worksheet** *(Service_Lane_and_Service_Area_Worksheet.docx)* - This worksheet helps define what type of medical courier work to pursue and the exact area to serve. It is useful for narrowing the business model, avoiding overextension, and building a clearer offer.
- **Folder Structure and Naming Guide** *(Folder_Structure_and_Naming_Guide.docx)* - This guide gives a recommended file structure for certificates, clients, invoices, POD, SOPs, and vehicle records. It helps keep the business organized and makes onboarding, audits, and day-to-day admin much easier.

- **Weekly Availability Grid** *(Weekly_Availability_Grid.xlsx)* - This grid helps map out weekly operating availability by day and time block. It is useful for setting realistic service hours, planning work capacity, and communicating availability to employers or clients.
- **Weekly Review Routine** *(Weekly_Review_Routine.docx)* - This routine provides a simple weekly process for reviewing pipeline, finances, operations, and improvement opportunities. It helps the business stay proactive instead of only reacting to problems.
- **Course Disclaimers and Privacy Guardrails** *(Course_Disclaimers_and_Privacy_Guardrails.docx)* - This document sets expectations about what the training does and does not provide, while reinforcing privacy boundaries. It is useful for protecting the business and keeping learners aware of PHI and professional responsibility limits.

W-2 Job Search & Career Tools (9 resources)

- **Medical Courier Resume Template** *(Medical_Courier_Resume_Template.docx)* - This template gives learners a professional resume structure tailored to medical courier work. It helps present reliability, documentation habits, availability, and compliance readiness in a way employers can quickly understand.
- **Resume Bullet Bank** *(Resume_Bullet_Bank.docx)* - This bullet bank gives ready-to-customize achievement statements for courier resumes. It helps users describe experience more professionally and save time when building or improving their resume.
- **Interview Q&A Playbook** *(Interview_QA_Playbook.docx)* - This playbook provides common interview questions and a simple framework for answering them well. It helps learners speak confidently about time windows, documentation, professionalism, and problem solving.
- **Weekly Application Routine Planner** *(Weekly_Application_Routine_Planner.docx)* - This planner creates a repeatable weekly routine for job searching, applying, and following up. It is useful for turning a random application process into a consistent pipeline.
- **Job Application Tracker** *(Job_Application_Tracker.xlsx)* - This tracker keeps applications, job links, pay details, contacts, and follow-up dates in one place. It helps learners stay organized and avoid losing opportunities because they forgot to follow up.
- **Follow-Up Scripts - W-2** *(Follow_Up_Scripts_W2.docx)* - These scripts give professional follow-up language for email and phone after submitting a job application. They help applicants stay visible and increase the odds of getting interviews.
- **Offer Comparison - W-2** *(Offer_Comparison_W2.xlsx)* - This worksheet helps compare job offers side by side, including pay, mileage, reimbursement, and work expectations. It is useful for choosing the offer that makes the most business sense, not just the highest headline pay.
- **LinkedIn Checklist** *(LinkedIn_Checklist.docx)* - This checklist shows how to set up LinkedIn to look more credible and discoverable for courier work. It helps learners strengthen their professional presence and network with local decision-makers.
- **W-2 vs 1099 Comparison Worksheet** *(W2_vs_1099_Comparison_Worksheet.docx)* - This worksheet compares the tradeoffs between W-2 work, 1099 contracting, and building a company. It helps learners make a smarter decision around stability, control, costs, and growth potential.

Marketing, Outreach & Sales (14 resources)

- **30 Day Marketing Plan** *(30_Day_Marketing_Plan.docx) -* This document lays out a simple 30-day marketing plan for building local visibility and lead flow. It helps new businesses focus on the highest-value actions first, such as outreach, local presence, and follow-up.
- **Content Calendar - 4 Weeks** *(Content_Calendar_4_Weeks.xlsx) -* This calendar organizes four weeks of content ideas and draft messaging for channels like LinkedIn or Google Business Profile. It helps maintain consistent marketing without having to invent new content every day.
- **Flyer and Leave-Behind Copy Template** *(Flyer_and_Leave_Behind_Copy_Template.docx)* - This template provides ready-made copy for flyers and one-page leave-behind materials. It helps communicate services, coverage, and professionalism clearly when prospecting in person or by email.
- **Lead List Mini CRM** *(Lead_List_Mini_CRM.xlsx) -* This mini CRM stores target businesses, contact information, and follow-up status in one simple file. It helps build and manage a local prospecting list without needing paid CRM software.
- **Lead Source Tracker** *(Lead_Source_Tracker.xlsx) -* This tracker records where leads came from and what results each source produced. It helps the business see which channels are actually generating conversations and clients.
- **Follow-Up Cadence Planner** *(Follow_Up_Cadence_Planner.docx) -* This planner maps out a simple follow-up sequence across multiple touchpoints. It helps prevent lost opportunities by giving a repeatable cadence instead of relying on memory.
- **Outreach Scripts - B2B** *(Outreach_Scripts_B2B.docx) -* These scripts provide professional wording for reaching out to clinics, labs, pharmacies, and similar prospects. They help users start conversations faster and sound more polished during direct outreach.
- **Referral Ask Scripts** *(Referral_Ask_Scripts.docx) -* These scripts show how to ask for referrals in a professional, non-pushy way after successful work. They help turn good service into word-of-mouth growth and overflow opportunities.
- **Professional Voicemail and Text Templates** *(Professional_Voicemail_and_Text_Templates.docx) -* These templates give polished language for voicemail, text, confirmations, and follow-up messages. They help keep communication professional, consistent, and client-friendly.
- **Capability Statement Template** *(Capability_Statement_Template.docx) -* This one-page capability statement is a fast way to present the business, services, area covered, and strengths. It helps build credibility with prospects, onboarding teams, and referral partners.
- **Service Menu Template** *(Service_Menu_Template.docx) -* This template helps define and present the services offered in a clear one-page format. It is useful for helping prospects quickly understand what the business does, where it operates, and when it is available.
- **Client Meeting Checklist** *(Client_Meeting_Checklist.docx) -* This checklist prepares the business owner for discovery calls or onsite meetings with prospects. It helps gather the right operational details so quotes and proposals are based on real needs.
- **Proposal Template** *(Proposal_Template.docx) -* This template provides a simple structure for submitting a professional service proposal to a direct client. It helps clarify scope, pricing, service windows, and expectations before work begins.

- **Client Service Standards One-Pager** *(Client_Service_Standards_One_Pager.docx)* - This one-pager outlines the service standards clients can expect around communication, documentation, and professionalism. It helps set expectations early and can strengthen trust with prospects and active clients.

Pricing, Proposals, Finance & Getting Paid (17 resources)

- **Minimum Rate Worksheet** *(Minimum_Rate_Worksheet.docx)* - This worksheet helps calculate a minimum profitable rate based on costs, overhead, and desired pay. It is useful for protecting margins and avoiding underpriced work.
- **Pricing Calculator User Guide** *(Pricing_Calculator_User_Guide.docx)* - This guide walks users through the pricing workbook step by step. It helps them enter assumptions correctly and understand what quote output to use.
- **Pricing Calculator Workbook** *(Pricing_Calculator_Workbook.xlsx)* - This workbook calculates recommended pricing based on mileage, stops, time, wait, and other job variables. It helps standardize quotes and price work with profit in mind instead of guessing.
- **Pricing Terms and Definitions** *(Pricing_Terms_and_Definitions.docx)* - This glossary explains common pricing terms such as deadhead, wait time, STAT, and service windows. It helps reduce confusion and supports clearer conversations with clients and contractors.
- **Quote Checklist** *(Quote_Checklist.docx)* - This checklist shows the information to gather before naming a price for a job or route. It helps prevent bad quotes by making sure important details like stops, timing, and wait time are confirmed first.
- **Rate Sheet Template** *(Rate_Sheet_Template.docx)* - This template gives a clean structure for presenting base fees and add-on pricing. It helps the business quote more consistently and communicate rates more professionally.
- **Service Agreement Scope Checklist** *(Service_Agreement_Scope_Checklist.docx)* - This checklist covers the operational and commercial details that should be clear before work starts. It helps tighten scope, reduce misunderstandings, and support cleaner service agreements.
- **Contract Review Checklist** *(Contract_Review_Checklist.docx)* - This checklist breaks contract terms into plain-language items to review before signing. It helps spot pricing, scope, cancellation, and payment issues that could hurt the business later.
- **Contractor Intake Email Template** *(Contractor_Intake_Email_Template.docx)* - This email template helps request missing route and pay details before accepting contractor work. It is useful for clarifying expectations early and screening out unclear or risky opportunities.
- **Cash Flow Tracker** *(Cash_Flow_Tracker.xlsx)* - This tracker records monthly cash in, cash out, and ending cash position. It helps the business monitor stability, avoid surprises, and plan around slow payment periods.
- **Expense Categories and Monthly Checklist** *(Expense_Categories_and_Monthly_Checklist.docx)* - This document organizes common expense categories and monthly bookkeeping tasks. It helps keep records cleaner and makes financial review less chaotic.
- **Job Profitability Log** *(Job_Profitability_Log.xlsx)* - This log tracks payout, miles, time, and estimated cost for completed jobs. It helps reveal which work is actually profitable so the business can adjust pricing or client mix.

- **KPI Dashboard** *(KPI_Dashboard.xlsx)* - This dashboard tracks core weekly numbers like revenue, jobs, miles, on-time percentage, and estimated profit. It helps the business measure performance and make decisions from data, not guesswork.
- **Invoice Template** *(Invoice_Template.xlsx)* - This template provides a ready-to-use invoice format for billing clients. It helps present charges clearly and supports faster, more professional collections.
- **Email Templates for Invoices and Reminders** *(Email_Templates_For_Invoices_and_Reminders.docx)* - These templates provide professional wording for sending invoices and payment reminders. They help speed up collections while keeping communication courteous and businesslike.
- **Proof of Delivery Log** *(Proof_of_Delivery_Log.xlsx)* - This log records pickup, delivery, time, and recipient information in one place. It helps with documentation, dispute prevention, and support for invoicing.
- **Hidden Costs of 1099 Checklist** *(Hidden_Costs_of_1099_Checklist.docx)* - This checklist highlights often-overlooked contractor costs like deadhead, admin time, phone, and wear and tear. It helps 1099 couriers avoid accepting work that looks good on paper but loses money in practice.

Operations, Compliance, Risk & Documentation (13 resources)

- **Certifications Summary One-Pager Template** *(Certifications_Summary_One_Pager_Template.docx)* - This one-page summary organizes training credentials, availability, and readiness in a client-friendly format. It helps present compliance proof quickly during hiring, onboarding, and sales conversations.
- **Compliance Packet Checklist** *(Compliance_Packet_Checklist.docx)* - This checklist shows what to include in a complete compliance packet and how to package it. It helps learners present themselves in a more organized, professional, onboarding-ready way.
- **Certificate Tracker** *(Certificate_Tracker.xlsx)* - This tracker records completed trainings, expiration dates, and renewal timing. It helps prevent missed renewals and keeps proof of readiness easy to find.
- **Training Verification and Renewal Policy Template** *(Training_Verification_and_Renewal_Policy_Template.docx)* - This template creates a simple policy for verifying training completion and tracking renewals. It is useful for maintaining standards as the business grows or adds drivers.
- **Daily Operations Checklist** *(Daily_Operations_Checklist.docx)* - This checklist walks through the workday from dispatch to closeout. It helps standardize execution, reduce missed steps, and improve consistency on every job.
- **Dispatch Message Templates** *(Dispatch_Message_Templates.docx)* - These templates provide standard messages for confirmations, ETA updates, delay notices, and exception handling. They help improve communication speed and consistency without sharing PHI.
- **Exception and Incident Report Template** *(Exception_and_Incident_Report_Template.docx)* - This report template captures facts, impact, and follow-up actions when something goes wrong. It helps document issues clearly for internal review and client communication.
- **Incident Response Checklist** *(Incident_Response_Checklist.docx)* - This checklist outlines the immediate steps to take when an incident or exception occurs. It helps protect safety, document facts, and support faster, more controlled responses.

- **Vehicle Readiness Checklist** *(Vehicle_Readiness_Checklist.docx)* - This checklist covers basic vehicle and equipment readiness before each shift and on a weekly basis. It helps reduce preventable delays, breakdowns, and professionalism issues.
- **Insurance Questions Checklist** *(Insurance_Questions_Checklist.docx)* - This checklist gives practical questions to ask an insurance professional about courier-related coverage. It helps business owners identify gaps, clarify limits, and understand what documentation clients may request.
- **Risk Register - Simple Template** *(Risk_Register_Simple_Template.xlsx)* - This template helps identify key business risks, assign owners, and document mitigation steps. It is useful for reducing preventable problems and reviewing exposure in a simple way.
- **PHI Red Flags Cheat Sheet** *(PHI_Red_Flags_Cheat_Sheet.docx)* - This cheat sheet highlights examples of PHI and other sensitive information that should not be entered into unsecured tools or AI systems. It helps reinforce privacy awareness and safer communication habits.
- **SOP Starter Pack** *(SOP_Starter_Pack.docx)* - This starter pack provides outlines for core SOPs such as dispatch, POD, and exception handling. It helps the business document repeatable processes that support quality and scaling.

Team, Contractors, Drivers & Scaling (5 resources)

- **Contractor Opportunity Scorecard** *(Contractor_Opportunity_Scorecard.xlsx)* - This scorecard helps evaluate whether a contractor opportunity is actually worth taking. It is useful for scoring pay, clarity, route density, policies, and overall fit before saying yes.
- **Contractor Onboarding Checklist** *(Contractor_Onboarding_Checklist.docx)* - This checklist shows what a contractor should confirm and submit before beginning work. It helps reduce onboarding surprises and makes sure key pay, POD, and insurance details are understood.
- **Driver Onboarding Checklist** *(Driver_Onboarding_Checklist.docx)* - This checklist creates a consistent process for bringing on drivers and preparing them for their first shifts. It helps transfer expectations clearly and reduce early performance issues.
- **Driver Scorecard Template** *(Driver_Scorecard_Template.xlsx)* - This scorecard tracks driver performance in areas such as on-time delivery, communication, documentation, and feedback. It helps coach drivers objectively and protect client relationships.
- **Scale Readiness Scorecard** *(Scale_Readiness_Scorecard.xlsx)* - This scorecard helps assess whether the business is truly ready to add volume, clients, or drivers. It is useful for checking if pricing, SOPs, communication, billing, and demand are strong enough to support growth.

AI & Automation Support (3 resources)

- **AI Prompt Library for Medical Couriers** *(AI_Prompt_Library_for_Medical_Couriers.docx)* - This prompt library gives ready-made AI prompts for marketing, sales, admin, and operations tasks without using PHI. It helps save time and generate first drafts faster while keeping privacy in mind.
- **AI Use Policy Template** *(AI_Use_Policy_Template.docx)* - This template defines how AI may and may not be used inside a small courier business. It helps protect privacy, create internal guardrails, and reduce misuse of AI tools.

- **SOP Generator Prompts** *(SOP_Generator_Prompts.docx) -* These prompts help turn workflows into written SOPs using AI with safe placeholders. They are useful for documenting processes faster and creating more consistent operational standards.