

# Assessment of Your Private Practice

You can review these questions to consider which aspects of your practice are working well and which need strengthening. Print the questionnaire and mark True or False for each statement. Try not to think too hard, just mark your initial reaction.

## ATTRACTING CLIENTS

- |  |   |   |
|--|---|---|
| I systematically promote my practice and seek out suitable referrals | T | F |
| People who refer to me know about my specializations                 | T | F |
| I routinely track the sources of my referrals                        | T | F |
| Each year I set a marketing budget and create a plan                 | T | F |
| I know the number of new referrals I should count on every month     | T | F |

## CONNECTING WITH CLIENTS

- |  |   |   |
|--|---|---|
| I return 95% of phone calls within 2 hours                       | T | F |
| I follow a tested method for responding to phone inquiries       | T | F |
| Email inquiries receive detailed information and phone follow up | T | F |
| When people choose not to set an appointment, I usually know why | T | F |
| I consistently reconnect with clients who drop out of treatment  | T | F |

## MANAGING FINANCES

- |   |   |   |
|---|---|---|
| My method for billing and collecting payment is completely reliable | T | F |
| I know how to collect on any current outstanding client balances    | T | F |
| I feel optimistic when I look at my overall financial situation     | T | F |
| My cash flow allows me to manage unanticipated slow times           | T | F |
| Each year I make progress toward specific financial goals           | T | F |

## CREATIVE PLANNING

My systems for managing tasks allow me sufficient downtime	T	F
My clinical practice includes fulfillment of my own personal goals	T	F
I periodically review my written goals for creative project development	T	F
My 6-12 month business plan helps me evaluate ongoing progress	T	F
Continuous learning refreshes me and engages me in my work	T	F

How did this go for you? Was it informative? I hope this helps you gain an understanding of the skill development and self-awareness involved in developing a strong independent practice.

If you answered True to all 5 statements in most of these sections, congratulations. Chances are you are already on track to a successful career in self-employment.

With less than 4 True statements in any section, your practice would benefit from the Create Your Private Practice class. Even if you already do many practice activities well, the material you learn in the class will guide you on the path, saving you time and money.

If your responses included 3 or less True responses, I definitely encourage you to give serious consideration to getting some support with developing your business skills. Just a bit of knowledge and guidance can make a world of difference, and I really want to see you succeed!

Now you can return this completed document to me in preparation for a free 20 minute phone consult in which we'll discuss my suggestions for your next steps. Please send it to this address: [createyourprivatepractice@gmail.com](mailto:createyourprivatepractice@gmail.com)

I wouldn't try to pressure you or sell you anything, I just want to hear about your needs and help you sort out a good solid plan.

I believe good counseling and therapy can change our communities and make a great contribution to people's quality of life. I would love to support you in making your vision real as you create a fulfilling and rewarding practice.