

# PRIVATE PRACTICE BOOTCAMP™

## **WEEK 11: LAUNCHING AND BEYOND!**

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## LAUNCH DATE

What tasks do you still need to complete BEFORE you start seeing clients:

To be completed task	Time needed to complete
<ul style="list-style-type: none"><li>• <i>Ex. website</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Ex. one month</i></li></ul>

After looking at what's left to do,  
determine your launch date.

My launch date will be

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## TELLING THE WORLD

### **FRIENDS**

Who will you contact?	How will you contact them?

### **COLLEAGUES**

Who will you contact?	How will you contact them?

### **COMMUNITY MEMBERS**

Who will you contact?	How will you contact them?

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## ASSEMBLE YOUR TEAM

Write out a list of team members who are going to support you in your work.

### **Personal Supports:**

### **Professional Supports:**

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## GOAL SETTING

On this worksheet determine what your goals are for your private practice, and what your practice will allow you to achieve in your life. Put as much detail as you can.

### Immediate priorities:

- *Complete bio for online directories*

### One month goals:

- *Have bank accounts set up*

### Three month goals:

- *Secure office location, have most of website done*

### Six month goals:

- *Launch private practice*

### One year goals:

- *Have 10 consistent clients, making \$ amount per month*

### Two year goals:

- *Taking 8 weeks holiday/year*

### Five year goals:

- *Write a book*

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## QUARTERLY CHECKUP

### Quarterly Checkup Checklist

- 1) Review active files.
- 2) Contact any clients that have dropped off the radar.
- 3) Review how many clients seen each month, and on average how many per week.
- 4) Record gross income each month.
- 5) Follow-up with any outstanding invoices to determine a course of action.
- 6) Record total business expenses.
- 7) Record referral sources. Send thank you notes.
- 8) Make a list of everything that has been working over the last few months, and what you would like to do more of.
- 9) Make a list of anything that hasn't been working, and what needs changing.
- 10) Pick one main focus/goal for the next three months.

*Use the template on the next page to flesh out how you will achieve your main focus / goal. Break it down into all the smaller tasks that comprise the big goal to make it more achievable. For now, only fill out the information about next quarter, you can move this information up in three months to review your progress.*

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Big Goals / Sub-goals for previous Quarter	Goal Progress or Achievement
<ul style="list-style-type: none"> <li>• <i>Big Goal - Finish website</i> <ul style="list-style-type: none"> <li>○ <i>Sub-goal - Complete copy for about me page</i></li> <li>○ <i>Sub-goal - Complete copy for services page</i></li> <li>○ <i>Sub-goal - Pick out color scheme</i></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <i>Website completed</i></li> <li>• <i>Copy done</i></li> <li>• <i>Colors picked</i></li> </ul>

Big Goals for next Quarter	Sub-Goals to achieve Big Goal
<ul style="list-style-type: none"> <li>• <i>Get 10 clients</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Go to one networking event/month</i></li> <li>• <i>Meet two new therapists/month for coffee to build referral network etc</i></li> </ul>

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## ADDITIONAL NOTES: