



COUNSELING PRIVATE PRACTICE: KEY ELEMENTS FOR SUCCESS

Adrienne Frischhertz, Ph.D., LPC-S, CRC
504-568-5117 | alola1@lsuhsc.edu

DEVELOP A BUSINESS PLAN

Your written plan should include:

- Goals (professionally, financially, etc.) and plans for achieving each one daily, monthly, yearly..
- Conduct an honest assessment of your strengths/assets and perceived challenges to starting your business
- Visit [Louisiana Small Business Development Center](#) for a free workbook
- Set up EIN, LLC, and professional liability insurance.
- Open a separate bank account for your business
- Keep all receipts
- Consult with an accountant & attorney

CHOOSE YOUR NICHE

- Network for clues/referrals-show gratitude for referrals
- Branding your practice- Creative Commons
- What's your basic message/ elevator pitch?
 - What do you do in 2-3 sentences?
- Seek trainings to support your expertise/niche development

ARTICULATE YOUR MESSAGE

- **No more than 3 or 4 short sentences.**
- **No jargon words or technical terms.**
- **Keep your language positive.**
- **Target only one aspect of your work.**
- **Learn to love to say this introduction.**

MESSAGE STYLES

1. I specialize in _____ . What I enjoy (value/appreciate/love/cherish) about my work is _____ .

2. I support _____ in their desire to _____ by the means of _____ .

3. You know how _____ ? Well, I _____ .

4. If you _____, I'm the kind of therapist who can help you to _____ .

WEAR TWO HATS

Clinician vs Business Owner

Understand that the hats are separate

- Your child has a lot of your qualities, but isn't you.

Identify the differences between your needs and what your practice needs to be successful (profitable.)

ENGAGE IN SELF CARE

Do you...?

1. Get enough sleep to feel healthy and alert?
2. Eat foods that promote physical well-being?
3. Exercise several times a week?
4. Connect with friends/family when you need support?
5. Make time each week to do something personally pleasing?
6. Move through your day without rushing?
7. Let go of guilt over past business mistakes/challenges?
8. Prioritize professional and personal integrity?

FIND ONE ITEM THAT YOU HAVEN'T CHECKED AND COMMIT TO WORKING ON IT THIS MONTH.

SET GOALS- AND STICK TO THEM!

My objective for this month is:

_____.

To clear my mind, I will take the following actions each day

_____.

To clear my space, I will take the following steps

_____.

To track progress, I will

_____.

To reward my progress,

I will _____.

RUN A HIGH-TECH, LOW COST PRACTICE

- Focus efforts on things you can do yourself--forget the fancy furniture!
- Less screen time/ more sweat!
- Avoid death by paper cuts
- Online scheduling software
 - www.TherapyAppointment.com (\$30-57.50/ month)
 - Online scheduling (can see your availability)
 - Online payment
 - HIPPA compliant
 - Submit electronic insurance claims
 - Progress Notes
 - www.fullslate.com
 - Online scheduling (can see your availability)
 - Appointment reminders
 - \$29-80/month
 - Online payments

OPERATE WITH CONFIDENCE

Some activities to promote your business may elicit fear:

- Cold calling
- Giving presentations to promote yourself and your business
- Other examples??

Choose to operate with confidence and love for yourself , what you do, and why you do it- this will shift the way you feel about the activity.

MARKET YOURSELF & YOUR PRACTICE

- Business Cards- Moo, Vistaprint
- What's your Tagline?- "Parenting can be easier." "We help kids feel better."
- Website/Blog-Buy Domain (NameCheap or GoDaddy), Choose Hosting (BlueHost or WordPress), Publish!
- Choose URL-Google Insights
- Google Analytics
 - Website content
 - Front Page/Landing Page
 - Contact us
 - About Us
 - Start Here
 - Make an Appointment
 - Map to your location
- Newsletter-Mail Chimp
- Social Media (Facebook, Twitter, Pinterest, YouTube)- Decide how much time you want to spend on "non-counseling" endeavors
- Other Online options- Psychology Today, Therapy Tribe

THINK (AND TALK) ABOUT \$\$\$

- Insurance vs. Private Pay
- Set rates- it's easier to give a discount than to ask someone to pay more
- Accepted methods of payment
- Separate Checking Account
- Billing company
- Establish filing system (receipts for business related purchases, billing, etc.)

DECIDE ON POLICIES & ENFORCE THEM

- Cancellations
- Phone Calls
- Emails
- Texts
- Fees due at time of service
- Develop a system that you're comfortable with for collecting fees during session

EVALUATE YOUR PRACTICE

Who are your ideal clients (niche)?

How many of them do you currently see?

How much do you charge?

How many hours do you work each week?

What is your most/least profitable service?

Where do you get referrals?

What is your average monthly gross income?

What are your average monthly expenses?

How long do you spend on non-counseling tasks?

CHOOSE YOUR STRATEGIC FOCUS

Circle 1- Services you are passionate about

Circle 2- Aspects of your practice that showcase your brand, professionalism, expertise

Circle 3- Services that are consistently profitable

- Your strategic focus will be found in the overlap- what is it about your business that demonstrates your expertise while allowing you to generate income doing what you are passionate about?
- Say no to opportunities that don't contribute to your focus.
- Promote your focus through marketing

PROS & CONS OF PRIVATE PRACTICE?

Pros:

Freedom

Flexibility

Distance from managed care

No one looking over your shoulder

Cons:

Responsibility

Isolation

Ethical Dimensions

No one is looking over your shoulder- checks and balances

ACA CODE OF ETHICS (2014)

- Revised in 2014 (replaces the 2005 edition)
- ACA Members receive free consultation five days a week between 8:30am and 4:30pm ET
- Resolving ethical dilemmas is a process –the code provides direction and guidance
- First code that speaks to the ethics of using social media with clients. It also presents new or expanded guidelines for: preventing the imposition of counselor personal values, distance counseling, confidentiality, dual relationships, multiculturalism and diversity, the use of technology, recordkeeping, diagnosis, end-of life care and the selection of interventions.

STAYING CURRENT: ETHICAL USE OF TECHNOLOGY

- Constantly changing—review standards often
- Informed consent should include information about your use of technology
 - Use of email
 - Frequency of checking email
 - Emergency contact
 - Confidentiality & limits
 - Social media
 - Distance counseling (online)- LA LPC Board mandates that services must be provided to clients in LA by counselors licensed by LA LPC board

BILLING & INSURANCE COMPANIES

- Practice size dictates administrative needs
- Clients should be informed in writing of your practice's billing policies and procedures
- Considerations:
 - Who will view financial info?
 - Do you charge for missed sessions?
 - Do you require payment at the time of service, or do you offer billing plans?
 - Will you utilize a collection agency if the client doesn't pay?

BILLING & INSURANCE COMPANIES

- If you contract with an insurance company, your fees are set by them.
- Unethical to accept more \$\$ than the insurance company dictates for any service
- Avoid giving less attention to clients whose insurance rate reimbursements are low
- Most insurance companies require a formal diagnosis

NOTES ON DIAGNOSIS

- Diagnosis goes on client's permanent record and could skew future psychological evaluations if not accurate
- Relationship with insurance company should be built on mutual trust and respect
- Lying (even when well intentioned) is still lying!

RECORDKEEPING

- Documentation is important for your clients and YOU
- Consistency
- Schedule time
- Ethically, should summarize what has occurred, including any actions of the counselor that could have ethical implications

PROFESSIONAL WILL

- You should have a transfer plan in place in the event of your untimely death or incapacitation
- Private practice—you might be the only one with access to your clients' records
- Name a professional executor and leave specific instructions, including information for referrals, office procedures, access to files, electronic software, or anything else that may contain client records

ESTABLISHING A DECISION MAKING PROCESS

- Adopt a model- there are many!
- Forester-Miller & Davis with ACA (1996)
 1. Identify the problem
 2. Consult the ACA Code of Ethics
 3. Determine the nature and dimensions of the dilemma
 4. Generate potential courses of action
 5. Consider the potential consequences of all options and choose a course of action
 6. Evaluate your choice
 7. Implement your choice

Document this process in your client's record.

MONITOR YOUR WELL-BEING

Professional Quality of Life assessment (Stamm, 2002)

- Measures compassion fatigue, compassion satisfaction, vicarious traumatization, and burnout potential

Self-Care Assessment (Saakvitne, Perlman, & Staff of TSI/CAAP. 1996)

- Assesses how many wellness strategies you're using

REFERENCES

American Counseling Association (2014). ACA Code of Ethics. Alexandria, VA: Author.

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www.personcenteredtech.com

HELPFUL WEBSITES & BOOKS

www.practiceoftheppractice.com & Practice of the Practice (e-book) by Joe Sanok

www.allthingsprivatepractice.com

www.privatepracticesuccess.com (Lynn Grodzki)

Twelve Months to Your Ideal Private Practice

A Workbook by Lynn Grodzki (WW Norton, 2003)

Building Your Ideal Private Practice: A Guide for Therapists and Other Healing Professionals by Lynn Grodzki (WW Norton, 2000)

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