

9 Building Blocks & 68 Key Ingredients for...

A thriving Fee-for-Service, Managed-Care-Free Private Psychotherapy Practice

View & Knowledge of Self

- On being a CEO: business owner, receptionist, marketing director, etc.
- Identify your areas of professional expertise
- What areas/topics are you passionate & care most about?
- Relationship to money, wealth, prosperity (vs. poverty mentality) & fee-setting (conflict between service & abundance)

Management

- Budget & tracking
- Delegating, hiring help & expertise
- Clients' billing & payments system
- Clinical notes: storage & how long
- Tracking key metrics: inquiries, conversion of inquiries to clients, income, expenses, # of sessions per month, average fee per session, etc
- Malpractice insurance that covers boards' investigations
- Work with a coach or small business consultant
- Learn how to get out of *Managed Care*: How to inform clients, notify insurance companies, make it part of marketing, etc.

Ethics, Legal & Clinical

- Record keeping & basic forms (Informed Consent, Treatment Plan, etc.)
- Ethical-legal competence: termination, release of Info, subpoenas, collateral visits, professional will, etc.
- Boundaries: gifts, touch, home visits, out-of-office experiences, home office, bartering, multiple relationships
- Policies: fees, payment/collections, fee increase, cancellation, no-show, etc.
- Professional Support: consult w/ peers & experts on complex cases
- Risk Management 101: careful w/ custody issues & borderline clients
- Clearly differentiate counseling/psychotherapy from coaching

Traditional Marketing

Become a Visible-Helpful Expert in your Community

- Position yourself as an expert 'who can help' in your community!
- Free workshops & presentations on popular issues for the community
- Column in local newspaper on current communal concerns
- Free consultations to local leaders, managers & authorities
- Serve on committees, boards, task forces, etc.
- Join business networking groups, i.e., Rotary, BNI
- Help people go beyond the negative stigma of therapy

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cont....

Web Presence & E-Marketing

- Web site: home, about, services, contact info, resources (give helpful tips, advice or 'how to'), etc.
- Mobile responsive web design
- FB page for your practice (different than FB profile)
- Profiles on LinkedIn, Google & Bing
- Learn basics of Pay-Per-Click advertising on Google & Facebook
- Profile on Yelp.com (it is free)
- SEO: basic search engine optimizing
- Send out informative & helpful E-Blasts or E-Newsletters (not ads)
- Google yourself regularly, sign up for Google Alert: www.google.com/alerts
- Blogs globally and locally
- Offer free webinars for the public

Digital Ethics & Digital Competency

- Complexities of E-mail and texting with clients
- Communicating with clients online via FB, blogs, LI, etc. (have a social networking policy)
- Dealing with clients Googling or stalking therapists
- Therapists Googling clients
- Clients texting during sessions
- Electronic health records (EHR)
- Laptop/computer/cell-phone security
- Credit card charging

TeleMental Health

- Videoconferencing (use www.VSee.com rather than Skype)
- Practicing across state lines
- Informed consent & office policies
- Secured communications
- Get basic training in *TeleMental* Health
- Be aware of relevant *TeleMental* Health codes of ethics and states' laws
- Be informed on insurance companies', federal and states' reimbursement policies
- EHR & Cloud storage
- Incorporate apps into therapy

HIPAA

- Determine if you are a "Covered Entity" or not
- Learn the HIPAA Basics
- HIPAA privacy notice
- Business associate agreements
- Risk analysis & risk management
- Compliance list
- Variety of HIPAA forms
- Breach notification
- Secured computers, communication & storage/backup

Self-Care & Burnout Prevention

- Balanced life: attend to issues of health, time, love, recreation, hobbies, friendship, spirituality, yoga, exercise, meditation, etc.
- Beyond the isolation of private practice: have social & professional support
- Watch out for vicarious traumatization
- Effect of clinical practice on your family
- Replenish yourself, vacations, retreats, etc.

Private Practice Resources:

60 Essential Clinical Forms: www.zurinstitute.com/forms.html

Fee-for-Service Private Practice Handbook: www.zurinstitute.com/privatepracticehandbook.html

HIPAA Compliance Kit: www.zurinstitute.com/hipaakit.html

Free Private Practice Resources: www.zurinstitute.com/articles_privatepractice.html

Consultations: www.zurinstitute.com/services.html