

Private Practice Launch Checklist

The Ultimate Checklist to Launch Your
Counseling Private Practice



Brand Your
Practice

Introduction



When you launch a private practice there are a lot of details you have to pay attention to. It's frustrating, it's time consuming, it's nothing like you've ever done before.

But it's WORTH IT!

This checklist will help you keep the momentum going and give you clarity on what steps to take next.

You do NOT have to do all these steps in sequential order. Think of this as a grocery list. You can go down certain isles and check off items as you go. But, try to complete Phase 1 before you more on to the rest.

Phase one on the launch includes a lot of groundwork that will set your practice up for success for years to come.

I am proud of you for taking this important step. By starting launching your own private practice you'll have more control over your future and multiply your impact in the community that you serve.

PHASE I: Groundwork



Answer the "Why?" Question

Read more on the ["Why" question here](#). AND, you want to BEST course on creating a mission statement. Sign up for Business Made Simple and take the [Mission Made Simple Course](#).

Sketch Out a Business Plan

Keep it simple and should fit on the back of a napkin. [Read more here](#).

Identify your ideal client

Use [this FREE resource](#) to identify your ideal client.

Decide if Private Pay, Insurance, or Hybrid

Here's how you can decide which is [best for you](#).

Look for an office space

Find the [perfect office space](#).

Choosing a name

Read [4 Tips to Choosing A Name For Your Practice](#).

Buy Domain Name

Incorporate Your Business & get Tax ID (EIN) Number

Here's a walkthrough video on [how to incorporate](#).

Open up a business bank account(s)

Watch [this video](#) and read [the best book](#) on how to set your practice up for financial health.

Get Your Branded Social Media Accounts

Set them up even if you only plan to use them 10% of the time. LinkedIn Page, Facebook Page, Instagram Page, Twitter.

Example: Facebook.com/practice-name

Sign a Lease

Get NPI number

It's FREE sign up online.

Sign up for Google Workplace for HIPAA compliant email & document storag.

Set up a branded email account name@nameofbusiness.com

Get a business phone number like Grasshopper

Read more about [Grasshopper here](#).

Open up a bank account

When choosing a bank, make sure they can deposit checks via mobile phones and can easily allow a bookkeeper to access statements easily and securely.

NOTE: Local, small-town banks can struggle with this technology.

PHASE II: Marketing Preparation



Create business cards (optional)

We're a big fan of [Moo.com](https://www.moo.com)

Create logo

Create your sales funnel

Read more about a [sales funnel here](#).

A sales funnel would include your brand message, website, lead generator & an email nurture campaign.

Launch your website (just your homepage for now).

Since you already have Business Made Simple, take the [Marketing Made Simple course](#) to get your homepage website going!

Create a Google My Business page

Be sure to have a physical office space first.

Set up Email Service Provider for your Newsletter.

My favorite newsletter service is [Mailerlite](https://www.mailerlite.com). Plus it's free for the first 1,000 subscribers.

Sign up for a Psychology Today profile.

PHASE III: Pre-Launch



Order Internet

If you need a fax number you could add a phone number but use it just for faxing

Choose Your EHR

My #1 recommended EHR is [Simple Practice](#);
[Click here](#) for on on this resource .

Upload Client Paperwork and Documents

Read more about [client paperwork here](#).

Finalize your new client intake process

Review the [intake process here](#).

Create a STRIPE account to connect to your EHR.

Set Up Your [STRIPE account](#) to collect credit card payments.

File with your Department for Professional Regulations

In Illinois it is [IDFPR](#). For counselors click [here](#), and Marriage & Family Therapists go [here](#).

Sign up for your States Business Registration Application & REG-U-1 for Unemployment Insurance.

Each state is different so do some research or talk to your tax accountant. Illinois [link](#).

Create homepage video

This will be your [brandsript from your Storybrand Framework](#) from Business Made Simple.

Buy all-in-one office copier (with fax options)

You can buy it on [Amazon here](#).

You Did It! 

You're On Your Way To Grow Your Private Practice!

Brand Your Practice



Brent Stutzman

Certified Story Brand Guide
Owner

**We partner with mental health professionals
launch their own private practices.**

- **Branding**
- **Marketing**
- **Business Support**



**Clarify Your Business
Growth Plan**



**Get Your Marketing
Strategy Right**



**Become The #1
Trusted Practice In
Your Community**

Resources For Mental Health Professionals



Brand Your Practice Podcast

Learn about branding, marketing, and scaling your private practice from other private practice owners.

Subscribe today!



FREE Marketing Roadmap Course

A FREE three-part video series that shows you how to marketing and grow your private practice.

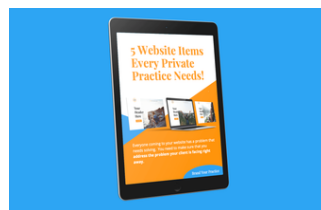
Get The Free Course!



Private Practice Secrets Course

I take you behind the scenes and show you every step and marketing tactic I used to help grow a private practice from 1 to 10 clinicians & from \$0 to \$90,000 in monthly revenue. And the kicker, it's all 100% private pay.

Get the course today!



5 Website Items Every Private Practice Needs

Is your website losing you potential clients? That ends today. Turn your website into a 24/7 selling machine.

Get your free guide!



Ultimate Guide to Launching Your Own Private Practice

This is the ultimate guide to starting and growing a counseling private practice.

Get started today!

Testimonial



Susan Stutzman

owner & child therapist
Kid Matters Counseling | Hinsdale, IL

“My private practice now makes multiple six-figures thanks to Brand Your Practice and their marketing strategy!”

5-Star Review ★★★★★

THE RESULTS

\$950k +
Yearly Revenue

257%
Increase in
Appointments

2,400+
Email
Subscribers

» [See Case Study!](#)

A woman with dark hair tied back, wearing a white high-collared blouse with buttons, is smiling and looking to the right. She is holding a tablet computer. The entire image is overlaid with a semi-transparent blue filter. A white circular graphic is centered in the lower half of the image, containing the text 'Brand Your Practice' in orange. At the bottom center, the website address 'www.BrandYourPractice.com' is written in white.

Brand Your Practice

www.BrandYourPractice.com