

# The Therapist's Guide to Creating a Business and Marketing Plan

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## Using This Guide

When you imagined working in private practice, you probably weren't seeing yourself writing a business plan. You may not have known what a business plan was. You still may not be completely sure. That's okay. When I first started I had no idea how many hours I wanted to work, what I needed to charge per hour, or what my expenses would be. I didn't know how clients would find me. I learned everything the hard way. This guide was designed to make your process easier. And that's what a business and marketing plan is for - to make your life easier.

## My Story: Starting a Business Without a Plan

When my first private practice client called and asked, "What do you charge?" I made up the answer on the spot. It was like looking at the numbers on a slot machine spinning in my head. They stopped at \$95, so that's what I said. And she said "okay." And that was how I set my fee.

Over the years, I've learned that guessing is not the best way to set a fee. At that time, all I knew was that I wanted to quit my agency job and work for myself, setting my own hours. I didn't know how many hours I'd need to work to pay my bills (heck, I didn't even know what my monthly bills added up to).

I didn't have an idea about the kind of clients I wanted to see. I didn't take into account the time I would need to work on my business, doing administrative and marketing tasks. I didn't know if I should accept insurance or not. I made everything up as I went along. A lot of what I learned, I learned the hard way. Ouch!

In the beginning I accepted every client who called me. Then one day, I sat with a young man whose presenting problem was a difficulty wearing clothing. I kid you not. Within a few moments I was sitting across from a completely naked man, a pile of clothes at his feet. They never talked about this in grad school. Lesson learned: Screen clients and trust any niggling feeling of doubt or concern.

Without a plan for how to run my business, my business began to run me. At one point, I was seeing twenty five clients a week and spending another twenty on paperwork and marketing. While it was exciting to have this "success," it came at a huge price. I got so sick, I spent a month in bed. It was a very important month. I realized in that quiet time that I needed to decide how I wanted to work and how I wanted to live. And that's when I first started planning my business.

## Overcoming Procrastination and Resistance

If you've procrastinated creating your plan, it may be due to fear of anxiety that you don't have the skill to write one. Your plan is just for you. No one else ever has to see it or judge it. You can make it as simple or complex as you like. You can follow the guidelines I provide, or not. There is no right or wrong way to do this.

**A business plan is simply a set of steps you plan to take to make your business whatever you'd like it to be.**

Yes, there are thick books on business planning that seem very complex and ask that you do things like forecasting and projecting and various kinds of research. These are useful if you're planning to ask for a business loan and need to show a lender that you will have a way to pay them back.

You are writing this plan for yourself. It's purpose is to help you stay focused on your goals. And for those of you who use the spiritual practice of manifesting, your plan can be a tool for visualizing what you want your practice to be.

Don't worry about the writing. My first business plans (I didn't even know that's what they were!) had almost no words. They were Excel spreadsheets where I fantasized about my ideal schedule and income. Here's a sample of one of my early plans. I was still working part time at an agency, so worked around those hours.