

# Assess Your Private Practice Readiness

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## Phase 1 - Foundations - Assess the basics of your new or current practice

Score the following from 1-5. 1= No or low, 5=Yes or high

You

- Personal vision of a successful practice
- Practice Mission
- Support system

Your Office

- Confidential - noise proof, separate entrance & exit, records behind 2 locks
- Safe - lighted parking
- Wheel Chair accessible
- Comfortable

Business Essentials

Record keeping forms

- Intake
- New Client Information (Consent)
- Clinical notes
- Releases
- HIPAA
- Filing System (secure)
- Communication Systems (telephone, fax, e.mail, voicemail)

Computers & Software

- Practice Management Software
- Electronic Billing

Self Management System

- Scheduling
- To Do tracking

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- Fee structure in place
- Bookkeeping System
- Tax reporting system

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- Collections
- Budgets
- Billing & Tracking system

## Risk Proofing

- Malpractice Insurance
- Liability Insurance
- Emergency procedures clear - Danger to self or others
- Not able to work plan
- Supervision

## Practice Building

- Community mental health needs assessment
- Niche market identified
- Basic Marketing Plan
- Business Card
- Practice Brochure
- Resource Directory

The total score can be 170. How do you rate? \_\_\_\_\_?

Anything you scored low in needs to be addressed. Check out the program offerings on the Professional Practice Institute's webpage.

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## Phase Two - Early Development

Score the following from 1-5. 1= No or low, 5=Yes or high

- Have you revisited your Mission Statement recently?
- Have you asked yourself if your niche is still a good fit recently?
- Have you expanded on your niche?
- Have you upgraded any office systems that broke down or were less effective?
- Have you considered hiring more help?
- Have you developed any strategic partnerships?
- Do you have a website?
- Have you chosen a Domain Name?
- Have you expanded your insurance coverage?
- Are you making more money than last year?
- Do you have an annual Continuing Education plan?
- Are you comfortable with your Authentic Marketing presentation?
- Have you expanded your marketing practices?
- Do you complete an annual practice assessment?
- Does your Self-Management system keep you on top of your schedule and tasks?

The total score is 75, how do you rate? \_\_\_\_\_

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## Phase Three - Mature Practice

Score the following from 1-5. 1= No or low, 5=Yes or high

- Retirement Planning in place
- Annual increase in income
- Quarterly Practice assessment completed
- Expansion of Services continue
- Product Development has taken place
- Further expansion of Marketing Activities continue
- Identifying yourself as an expert
- Exploring ways to apply your expertise in other areas
- Doing extreme Self Care
- Love your work and how it is growing you

The total score can be 50. How do you rate? \_\_\_\_\_

Anything you scored low in needs to be addressed. Check out the program offerings on the Professional Practice Institute's webpage.