**AGPA Connect 2023 Presenter Information**

**Course Code:** 25a

**Course Title:** Work Smarter Not Harder: Building a Thriving Practice

**Course Times:** 10:00 AM - 12:30 PM & 2:30 – 5:00 PM

**Course Dates:** Friday, March 10

**Instructors:** Jill Lewis

 Lisa Wolcott

**Course Description:** For clinicians new to, considering, or aiming to level up in private practice. Will examine foundational underpinnings/best practices and specifically how to start/build a group/groups within private practice. We'll explore imposter syndrome, fears, common mistakes, isolation, and the unknowns about being a business owner in today's climate. We will cover finances, setting up your business, starting a clinical group, creating a private practice with groups in the here and now. Additionally, this explores obstacles around money and barriers to self-care.

**Learning Objectives**

The attendee will be able to:‎

1. ‎Identify two ways to start a private practice that can provide group therapy.‎
2. ‎Identify a minimum of three ways to utilize resources for recruitment, marketing, and professional ‎support.‎
3. ‎Identify two ways to enter into private practice.‎
4. ‎Identify three helpful tools on how to market and sustain a practice.‎
5. ‎Identity a minimum of two ways to address imposter syndrome.‎
6. ‎Identify three tools to on how to navigate finances in private practice.

**Significant Articles:**

1. Aronoff, K. (2017). Best Practice: Everything You need to know about Starting Your Successful Private ‎Therapy Practice. First Printing, Independently Published.‎
2. Brown, B. (2018). Dare to Lead. Random House Grodzki, L. (2015). Building your Ideal Private ‎Practice. 2nd edition, W.W. Norton & Company.‎
3. Walfish, Steven, Barnett, Jeffery, and Zimmerman, Jeffery, Handbook of Private Practice: Keys to ‎success for mental health practitioners, 2017 Oxford University Press.‎
4. Yalom, Irvin 2005, The Theory and Practice of Group Psychotherapy, 5th edition, basic books ‎publishing.‎

**Agenda:**

1. Introductions (Q and A, 15 min,)

a. Ask questions to subgroup participants

i. Currently in private practice

ii. Currently running groups

iii. Wanting to start into private practice

2. Summarize the day, and give objectives (lecture 5 min)

3. Invite questions for the day (Q and A, 15 min)

a. 3 to 4, what do they hope to get out of the day

4. Ways to enter into private practice? (Q and A, discussion, lecture, 15 min, 1 and 3)

5. I’m ready, now what? (lecture, 40 min, 1, 2, 4)

a. Logistics

b. Ensuring the right professionals and legal structure

1. State laws

c. Therapeutic plans

i. What kind of clients do you want to serve? Being attuned to our own biases privilege identities and how this will affect the make up of a practice and a group. Being aware of “onlys and outliers”

ii. Psychology today profile

iii. Naming your business

iv. Business cards or virtual business card

v. List of people to network with vi. Joining any list serves.

6. I’m open for business, now what? (discussion, lecture, 40 min, 1, 2, and 4)

a. Internal – inner

i. Own personal belief/self esteem

ii. How to support oneself internally

iii. Self care

iv. Time management

b. External – outer

i. Foundation for everything

1. Space

a. Accessibility

b. Chair sizes

c. ADA requirements

2. virtual

3.LLC

4. Safety

c. Website i. Do I need one?

1. Can be so simple

2. So essential

3. Visibility is key today

4. Expresses branding and best fits when clients are looking

ii. Wix

iii. Square space

iv. Word press

v. Therapy sites has a generic one

vi. Simple practice now has one

vii. Therapy notes has one

viii. Hire someone

7. Marketing (discussion, lecture, 30 min, 1, 2, and 4)120 min

i. Google ads

ii. Yelp

iii. Networking with other clinicians

iv. Logo/branding

v. Responding in a timely manner

vi. Get a good reputation, that you are available and responsive

vii. A NICHE

1. Do you need one?

2. Focusing more specifically allows people to know you and then refer

viii.Testimonials

1. Ethics of marketing

2. Different schools of thought

3. We live in a digital word, SEO is important for being known

8. Money and fees (experiential, small group, large group discussion, and lecture, 40 min, 1, 2, 4 and 6)

a. Discussion around money Diversity around financial needs/identity around population you are serving

d. Insurance vs not insurance

e. Confident/confidence

f.How can I do this?

g. EMR:

x. How do I talk about this with others

i. Internal and external

j. What do you spend your money on

k. Spending money to make money

l. Credit Card fees and payments

9. Imposter syndrome (small group and large discussion, 30 min, 2 and 5)

a. Your values

b. Your mindset

c. Relational

d. Outer

e. Inner experience

f. Fears

g. Inadequacies

h. Confidence levels

i. How to support yourself

j. You are your own PR person

k. Language in emails and responding, response time, phone responses

10. Being in practice – how to not be alone (discussion, lecture, 20 min, obj 4)

 a. Isolation

b.Group consult

c.Building a collaborative connections

d. Leave door open in your office

e. Create a community

f. Network with coffee and lunches

g. Make a mistake, liable

i. Standard of care

ii. Safer if you are doing what others are doing

iii. How do you know about the community?

11. Safety (discussion, lecture, 10 min, 2, 4)

a. Lighting,

b. Setting up the office

c. Pad lock

d. Security

e.How do you communicate with clients, keeping practice safe

i. Google phone

ii. Portal

12. Lets plan a group (handout, small group, 30 min 1-6)

a. Lets tie it back together

b. Open/closed

c. Timing

d. How many

e. Fees

f. Clinical supervision

g. Seating

h. Rules

i. Theme?

j. Topic?

k. Broken down

l. Handout,

m. Who am I going to call

n. Date I want to do this by

o. Type of group

p. Next steps planned

q. One action step you are going to take

13. Evaluations (10 minutes)

**Assessment Questions:**

Question 1 (include possible answers)

1. What is one way to market yourself when starting a group? a. Google b. Networking c. Trainings d. All of the above

Correct Answer 1

d

Question 2 (include possible answers)

2. Which for the following is not allowed due to HIPPA? a. Zell b. Venmo c. Paypal d. Check

Correct Answer 2

b

Question 3 (include possible answers)

3. If I take insurance in your practice I can a. Let clients private pay for group b. Must take clients’ insurance c. I can pick and choose which I want to d. All of the above

Correct Answer 3

b

Question 4 (include possible answers)

What is one of the first things you need to decide when starting a group? a. location b. type of group c. cost d. all of the above

Correct Answer 4

d

Question 5 (include possible answers)

5. Which is not an EMR? a. Simple Practice b. Therapy Notes c. Jane d. Andy

Correct Answer 5

d

Question 6 (include possible answers)

T/F? An LLC allows you to pass corporate income losses and deductions through the business and thereby limit the amount of money that is taxed in your business, benefiting you financially as a business owner.

Correct Answer 6

False.

Question 7 (include possible answers)

Which of these best describe an LLC? a. protects the personal assets of a business owner from lawsuits against the business. b. avoid double taxation c. an LLC usually costs more d. all of the above

Correct Answer 7

A&C

Question 8 (include possible answers)

8) When is it unethical or problematic to use client testimonials on your business website or promotional materials? a. when you ask a client for a testimonial b. when you take a client's words (from an email, text, or other communication without their expressed permission) c. when the client is a current, ongoing client d. when your professional association (for example, NASW, APA) states that testimonials are unethical e. all of the above

Correct Answer 8

e

Question 9 (include possible answers)

Why is the "Standard of Care" (SOC) especially important in private practice? a. Malpractice cases are built on SOC. b. As a clinician you are judged by the SOC in bad outcomes c. The SOC should underscore your efforts to know and network with your colleagues despite this being an isolating profession d. Knowing you are practicing at or hopefully above the SOC should give you peace of mind e. All of the above

Correct Answer 9

e.

Question 10 (include possible answers)

Which is not a characteristic of a good boundary? a. Identifying your own limits b. Being who someone else wants you to be to keep the peace c. Identifying your limits with other people d. Being selective about when/where/how and with whom you share information e. Communicating your needs

Correct Answer 10

b