Practice-Starting Checklist

Mission, Values & Intention

- ☐ Determine your niche or practice focus
- ☐ Write a statement about your practice mission & values

Business Basics

- ☐ Select a name for your business
- ☐ Check to see if the name is available in your state & in US trademark office
- ☐ Get a Registered Agent (if desired)
- ☐ Form an LLC or use another business structure
- ☐ Create an Operating Agreement and get it notarized

Permits & Insurance

- ☐ Get an EIN for your business (if needed)
- ☐ Check state permitting/license requirements: get license/permit if needed
- ☐ Check local permitting/license requirements: get license/permit if needed
- ☐ Select a liability insurance provider; get a quote and sign up
- ☐ Get an NPI (if licensed)

Mailing List & Website Basics

- ☐ Get a website (domain name, hosting, theme)
- ☐ Sign up for an email service provider

Your Home, About & Contact Pages

- ☐ Draft website home page
- ☐ Draft & publish your contact page
- ☐ Draft & publish your about page
- ☐ Select fonts, colors, and logo for your website

Services, Pricing & Website Policies

- ☐ Decide which services you'll offer
- ☐ Determine a price for your services
- ☐ Write the copy for your "Work with Me" page
- ☐ Create a privacy policy, terms/conditions, and cookie policy for your website

Opt-In Offer & Autoresponder

- ☐ Create a "freebie" (if desired)
- ☐ Connect your website with your mailing list sign-up form and publish home page
- ☐ Set up a series of 3-5 automated emails to welcome new subscribers

Banking, Scheduling & Payments

- ☐ Set up a business bank account
- ☐ Set up accounting software or spreadsheet
- ☐ Determine your regular hours
- ☐ Set up a scheduling system (I recommend Practice Better)
- ☐ Set up an account with Stripe, Square, or Paypal
- ☐ Connect Stripe/Square/PayPal to the system you'll use to invoice clients
- ☐ Update your "Work with Me" page to reflect these decisions & publish it

Forms & Workflow

- ☐ Create intake form
- ☐ Create informed consent/terms & condition form
- ☐ Create HIPAA form (if required)
- ☐ Sketch out your new client workflow
- ☐ Set up welcome email and form delivery
- ☐ Set up or plan for how you'll add client visits to your personal calendar
- ☐ Set up or plan a reminder for you and your clients 24-48 h before an appointment
- ☐ Prepare template note form
- ☐ Prepare template recommendation form
- ☐ Set up or plan a reminder to check in with clients after visits
- ☐ Test new client workflow

Create a Weekly Schedule & Plan for Finding Clients

- ☐ Spend some time thinking about your goals (financial, access, support, other)
- ☐ Create a Seasonal Plan/Intention for the upcoming season (see my free Seasonal Dreams/Planning for Practitioners workshop)
- ☐ Schedule 15-30 minutes at the beginning of each week to plan your week
- ☐ Schedule 15-30 minutes at the end of each month to review your progress

Need help with these items? Come join us in the Roots Course!