



## **Practice Development Consultation Menu**

**I would like to....**

Low  
priority

Medium  
priority

High  
priority

Explore an array of practice options available to me

Identify areas of expertise that I would like to develop

Understand the stages of developing a private practice

Assess my personal, professional and financial readiness for initiating a private practice

Assess my community for goodness of fit for my practice ideas

Other (please specify):

Outline my target client population in a detailed way

Determine the services I want to provide

Articulate my rationale for this practice model, including its theoretical roots and why it is needed in my community

Understand my own priorities and needs, professional and personal

Appreciate key differences between medical, facility-based, and home- / community-based models of practice

Be prepared to clearly and succinctly describe my practice to the general public

Understand and evaluate options for receiving payment

Evaluate the market for my practice

Name my practice and design its public image

Plan and secure the legal and tax structure of my practice

Explore options for where I house and perform my practice

Plan ways to initiate marketing my practice

Locate and connect with or create colleague support systems

Determine my fee rates in a realistic and fair manner

Know effective ways of connecting with potential clients when they initiate the first call or email

Be prepared to describe my OT process and examples of targeted outcomes to potential clients and referral sources

Have a clear and simple service menu form for my clients to indicate their specific areas of priority

Differentiate the roles and needs of clients and customers

Know ways to determine goodness-of-fit during the initial interview with a potential client or customer

Have a "service agreement" form for clients to sign in order to initiate services in a clear, safe and professional manner

Obtain or develop a selection of assessments that fit my practice philosophy and my clients' goals and preferences

Develop a selection of effective interventions that fit my practice model, environment, and clients

Know ways to articulate the evidence supporting my intervention approach

Develop or locate a lean and logical system for documenting and storing essential client information

Have a system for recording and tracking clients' invoices and payments

Be prepared to respond confidently and effectively to questions regarding my fees and billing

Create a plan for scheduling sessions efficiently and realistically

Be equally comfortable in my identity and roles as a clinician and a small business owner

Have a network of resources for clinical, business, legal, and financial support

Know methods to track revenue and expenses

Use a variety of effective ways to market my practice

Diversify my practice to include a wider array of services, clientele, or products

Objectively measure my program's effectiveness

Teach and inspire other OTs to start private practices

Other (please specify):

## Personal Development

I would like to...	Low priority	Medium priority	High priority
Understand my own priorities and needs, professional and personal			
Become more decisive and focused toward my goals			
Approach new people, situations, roles and/or tasks with confidence and skill			
Effectively manage and prioritize my tasks and time			
Select associates who will support and promote my development and performance as an entrepreneur			
Cope with nay-sayers and discouragement			
Identify areas of expertise that I would like to develop			
Understand/compare key features of friendship, mentorship, consultation, therapy and business relationships			
Be comfortable and effective in making my needs and preferences known			

Become more assertive in setting limits  
with others and/or saying “no” as  
needed

Become more comfortable with  
uncertainty and risk

Become more comfortable with asking  
for help or admitting ignorance/  
uncertainty

Be skilled and comfortable when  
dealing with others’ negative feelings  
or resistance

Put my creative ideas into practice