



thrivelution

**THE THRIVING  
PRACTICE CHECKLIST**

# 1

## Phase 1: Strategy

1. Create your mission & vision statement. Keep these all written in one document.

Ask yourself:

- How do I envision my practice?
- How do I want my business to impact the lives of others?
- What size practice do I want to build?
- What population do I want to serve?
- What problems do my clients have that need solving?

2. Identify your purpose and your values

Ask yourself:

- Why is it important to do this work?
- Why am I opening a private practice?
- What are my values as a clinician?
- What are the values of my clients and how do our values align?

3. Create a business plan!

This is your roadmap to success! Having a plan from the beginning will help you stay on track.

Ask yourself:

- Are you serving clients in-person? Via Telehealth? Both?
- Will you be private pay or insurance based?
- What are your rates? Will you offer a sliding scale or reduced fee?

# 2

## Phase 2: Get Ready

### 1. Name your Practice

- Check the USPTO database, to make sure you don't infringe on any name trademarks.
- Search for "[Your state] Secretary of State LLC registration" and register

### 2. Get a Website

This is your business card, the first thing people see when they discover you and the core of your marketing strategy. Make sure to speak to the ideal client you are seeking to connect with

- Search for a reputable **domain registrar** and buy a domain name that relates to your practice
- Take great photographs to help clients connect with you and your brand

### 3. File for an NPI & EIN + Open a Business Checking Account

NPI - National Provider Identification & EIN - Employer Identification Number A.K.A. Tax Identification Number (TIN)

### 4. Buy Professional Liability Insurance

### 5. Obtain any local licenses you will need

If you're functioning in-person, you'll need to get a city business license

# 3

## Phase 3: Get Set

### 1. Select and set-up an EHR

- In the modern world, a cloud based EHR is a must! Make sure you explore all of your options and choose a platform that will grow with you.

### 2. Get Clients

- Reaching the RIGHT clients is one of the most important parts of starting your business. Let Thrivelution take this off your plate and get you the new clients you need to grow your business quickly.
- Sign-up today at [Thrivelution.com](https://www.thrivelution.com)

### 3. Create Practice Paperwork

- Make sure you have all of the professional forms you will need
  - Informed Consent, Privacy Policies & HIPAA Guidelines, Telehealth Consent, Financial Agreement, Intake Questionnaire, Release of Information, Business Associate Agreement (BAA)
- All of these forms are available and ready for you to customize in Thrivelution's Resource Box. Sign up today to get these forms and more!

### 4. Create a screening process for new prospective clients

What questions will you ask to ensure that a potential new client is the RIGHT client for your practice?