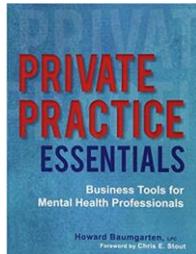


CHRIS SWENSON'S  
**MASTER NOTES**  
MASTER PRIVATE PRACTICE IN LESS TIME

**PRIVATE PRACTICE ESSENTIALS**  
BUSINESS TOOLS FOR MENTAL HEALTH PROFESSIONALS



**BY HOWARD BAUMGARTEN PESI PUBLISHING & MEDIA ©2017 272 PAGES**

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*“With rising healthcare costs, frustrated consumers struggling to understand the system and take their own measure of control of their care, it’s no wonder practitioners moving into or already in private practice undervalue themselves, and therefore often place themselves in positions of low income, not pursuing their dreams, their passions. Why just become another cog in the wheel that is healthcare delivery? That’s why this book is stuffed with highly effective, practical information, and real life tools you need for building a great practice! Hopefully it will inspire and teach you how to unlock the passions you feel inside about doing meaningful work in your community—and doing it at a highly successful level.”*

*“This book is about how you can bring your story alive while reaching your greatest potential, earning a profit, doing beneficial work in your corner of the world. Your story is by far the most important and relevant part of building your successful practice. Without it, you lack authenticity, meaning, and purpose—virtues that are crucial to your success.” ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS*

### **BOOK DESCRIPTION (from Amazon)**

*Private Practice Essentials is an innovative, practical guide and workbook for creating business and clinical success in your counseling and therapy practice. You’ll be guided through numerous exercises that provide a solid and personalized plan with realistic and attainable goals. It’s like having a professional business consultant right at your fingertips.*

*75+ reproducible worksheets, forms and exercises:*

- *Networking & Marketing Strategies*
- *Tips to Improve Financial Success*
- *Budgeting Tools*
- *Clinical Intake and Business Forms*

# CHRIS SWENSON'S MASTER NOTES MASTER PRIVATE PRACTICE IN LESS TIME

- Business Plan Templates
- Diversification Strategies

## NOTE INTRODUCTION

Wow! Talk about a complete book on private practice success! Howard writes in a great style that helps the reader understand easily; signs of a great teacher! This book is filled with everything private practice. The tools and tips act like a swiss army knife for practice success! A must read for anyone truly seeking practice success! Plus, in the book there is a great interview with [Becky Degrossa \(founder of counselingwise.com\)](http://Becky Degrossa (founder of counselingwise.com)) about the ultimate website!!!

Grab your copy today: [PRIVATE PRACTICE ESSENTIALS](#)

## (ASPIRATIONS + INSPIRATIONS) x PERSPIRATION = BASIC BUILDING BLOCKS

*“While authenticity, meaning, and purpose are necessary virtues on your journey, it is aspiration, inspiration, and perspiration that form the basic building blocks. ASPIRATIONS What are aspirations really? An aspiration in our field is a meaningful act, outcome, or state of being, which affects positively one or more beings in your particular area( s) of interest. INSPIRATIONS Remember your story? What or who in your own story inspires you most? If just starting out in practice, think of who inspired you growing up. Pick three areas or more. PERSPIRATION Perspiration is the carrying out of your inspiration so that you can reach your state of aspiration. This is the action part of the equation. What is your level of perspiration? You can have wonderful aspirations and be inspired, but without perspiration nothing gets done.” ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS*

Combine your aspirations with your inspirations, then multiply that by taking actions (perspiration)!

What are your aspirations?

What are who inspires you? Don't forget your own story!

Stay grounded to these two things and then take massive action (perspiration)!

Don't forget what Howard wrote: *You can have wonderful aspirations and be inspired, but without perspiration nothing gets done.*”

## THE FOUR C'S OF PRIVATE PRACTICE PLANNING

*“If you have ever purchased a diamond, you might recall the important Four “C’s” one must know: Carat, Color, Cut, & Clarity. To create easier terms that resonate more with therapists, I prefer to think of these as The Four C’s of Private Practice Business Planning: Capabilities, Challenges, Chances, and Concerns.*”

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*Capabilities and challenges are internal in nature, while chances and concerns revolve around external influence. Additionally, capabilities and chances are positive influences, while challenges and concerns carry negative influences. The idea is to get a snap shot of you in each box, with a "status report" approximately once a year (just like an annual medical check up), during which updates are made, pulling items off a particular box that no longer fit, and adding new items that are relevant to you now.*" ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS

Measuring the quality of diamonds can be used to measure the quality of your practice. Essentially, draw a large box and then divide that box into four quadrants.

List all your Capabilities, Challenges, Chances, and Concerns under their respective quadrants. This gives you the snapshot of you in each section.

Review this snapshot quarterly or yearly. Updating as you progress!

## YOUR "REFERRAL WHEEL"

*"The most important piece of advice I offer when it comes to bringing clients through your door is don't panic when clients aren't coming through your door. Instead, remember that by doing these three important things in succession (Market Research, Marketing, Networking), over and over again, eventually the clients you desire find their way right through your door. I call this three-part process your "Referral Wheel"* ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS

So true! Focusing on what you can control and not what is out of your control is so very important! You can't control whether a client comes through your door but, you can control working the process that leads to clients coming in your door.

That way, you ensure that the clients you desire will come through your door!

That process...Market research...Marketing...Networking!

Doing these three things consistently will lead to attracting great clients! Careful as Darkness seeks to get you to focus on things you can't control and then creates panic! Staying focused on the process is key!!!

## POP YOUR TOP BY DIVERSIFYING

*"What is more, diversifying how you do that one activity is essential to professional success and your personal satisfaction with your practice. Now you are going to put to use these specialty areas not simply as a practitioner providing therapy or a service professional providing clinical services. As an expert within your community and as far reaching outside your community as possible, you can diversify your offerings by creating unique methods designed to reach those who aren't benefitting from your direct counseling/professional routine care services. As you think about expanding your business, start with the idea*

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*of how to move from one-to-one into some one-to-many situations. There are many ways you can provide help in a one-to-many format. You can develop a “one-to-many” stream both with online and live in-person programs, services, or trainings.” “Much the way homeowners “pop their top” on their house, to improve upon their investment and live even better, I recommend you “pop your top” in your practice and improve upon what you already built at the right time.” ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS*

Diversifying your services is all about expanding beyond just offering counseling in your therapy room! You really need to look for ways you can offer your expertise outside of therapy!

Take a look at what you do great with clients. Is there something you do with them consistently that gets them results?

If so, map out those strategies and create an online course or program for clients. Learning to create valuable offerings like this can help you to reach more people and more money!!!

Utilizing your expertise, what offerings can you create? That way you can pop the top on your practice and improve upon what you have already built!!!

## FAILURE IS THE ROAD TO SUCCESS

*“The smartest part of diversifying and developing unique programs and products, and creative roles is simply not giving up after your first fail. In fact, smart and successful business owners fail often and sometimes miserably. Remember, failure is the road that leads to a destination of success; risk is the engine, and you are the driver.” ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS*

Failure is the road that leads to success! Wow! Be sure to ingrain this belief into your mindset everyday!

If you want to get to success you will likely be met with failure. So, when you begin to diversify don't worry about failing because you will fail.

Learn from your mistakes and failures so you ensure forward momentum that leads to success. Never quit and always stay in the fight!!!

## BUSINESS GUILT COMPLEX

*“When teaching the course on practice building to my graduate students, on the first day of class I'd ask each student to share something they are excited about and something they fear about private practice ownership and development. By a landslide the most consistent comment that permeated the introductions was “I am terrified of dealing with money,” and “I handle finances very poorly” or “I don't know anything about the financial side of building a business.” A further complication is the notion that most practitioners enter this field with a strong desire and passion for helping, not an altruistic interest in earning money doing so. Often, a formulation of what I call the “business guilt complex” occurs. Your Protection and Growth of Assets (PGA)*

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*hinge on these 5-Steps: 1. Legal Protection of Financials 2. Insurance Protections 3. Banking/Financial Management Practice 4. Tax Savings Strategy 5. Growth & Investment Strategy & Practice” ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS*

We are plagued in this profession with many professionals feeling guilty about making money helping people (business guilt complex). We tend to feel so guilty when asking clients for money!

Remember, this is a business where you are providing quality services and so deserve to be paid for your expertise!

Not sure where you stack up in the financial arena, then rate yourself in each of the five areas below and then take action to improve upon your knowledge:

1. Legal Protection of Financials
2. Insurance protections
3. Banking/Finance management of your practice
4. Tax Savings Strategies
5. Growth and Investment Strategy

Where do you need to learn more? Or, is there someone out there who can help you with these areas?

## Z.E.N.S.

*“My recipe for burning up and not burning out involves four key elements I call ZENS. You need a fail-proof plan for managing compassion fatigue, avoiding burnout, and experiencing healthy work/life balance in the short term and throughout the course of your career as a helping professional. The following 4 key elements of self-care serve to help make you stronger and more resilient when it comes to the emotional and physical “human factors” of managing and growing your practice. Zzzz’S (SLEEP); EXERCISE; NUTRITION; AND SPIRITUALITY.” ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS*

YOU are the machine that takes care of your business. YOU must take care of YOU! Darkness will always seek to get you to focus on other priorities while seeking to get you to forget about yourself. This is a way to get burnt out!

Being in balance is the key! A balanced practice owner is always a fulfilled practice owner. Only a balanced and fulfilled owner can create a long lasting successful practice!

Ways to stay to in balance...remember ZENS!

Get your sleep (Zzzz’s)...Exercise...Nutrition...Spirituality!

## THE GOLDEN RULE OF PRACTICE SUCCESS

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*“Lastly on the topic of what brought clinicians practice success, almost every therapist who responded commented that, at the heart of what they do and how they practice, they are true to themselves and their values, and by giving themselves the permission to “just be yourself” they are modeling and creating safety and acceptance for their clients. This advice seems to be the Golden Rule of practice success.” ~ Howard Baumgarten from PRIVATE PRACTICE ESSENTIALS*

So easy to understand but may be quite difficult to actually do each and every day!! But so important!!!

Seek to be yourself. Stay true to your values. This way you are modeling safety and acceptance for your clients!!!

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## ABOUT AUTHOR OF “PRIVATE PRACTICE ESSENTIALS”



HOWARD BAUMGARTEN

**Howard Baumgarten, LPC**, has nearly 25 years of clinical experience and is an expert on how to successfully merge high standards in mental health care with solid business principles. He has served the Denver area with a successful private practice for 15 years, learning first hand many of the “secrets” to a successful business. While maintaining his full-time clinical practice, Howard consults with new business owners in the field of mental health practice, provides training programs across the country and is the author of *Private Practice Essentials: Business Tools for Mental Health Professionals* (PESI, 2017).

As the former director for Westside Behavioral Care, Inc., he helped recruit, manage and build one of Colorado’s largest private group mental health practices. Since 2005, he has lectured at the University of Colorado’s Graduate Counseling Program, teaching a course on the establishment, development, and maintenance of clinical practice.

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Howard warms his audiences with creative solutions and practical advice, sharing his experiences, with energy and humor!

Learn more about Howard by visiting his website: <https://www.buildchangeandgrow.com/>

## ABOUT AUTHOR OF THIS MASTER NOTE



CHRIS SWENSON

Chris Swenson is a true [Private Practice Warrior](#) who believes that therapists in private practice are in the best position to truly make a difference in the mental health concerns of our world. He loves helping people succeed in private practice as he studies, embodies, and teaches the fundamentals of mastering private practice. Learn more about Chris at <http://imchrisswenson.com>