



Launching Your Private Practice Checklist

The information provided in this checklist does not, and is not intended to, constitute legal, HR, financial, or professional advice; instead, all information is for general informational purposes only. Users of these documents should contact professionals to obtain specific advice with respect to any particular group practice matter.

- ☐ Complete Business Model Canvas
- ☐ Decide on a Business Name (make sure it's not already taken!)
- ☐ Choose a business entity
- ☐ Find/Apply for an NPI number
- ☐ Buy malpractice liability insurance
- ☐ Apply for an EIN
- ☐ Set up business bank account
- ☐ Identify mission and values statements
- ☐ Complete ideal client avatar
- ☐ Find your specialties and niche
- ☐ Decide: Insurance-based or cash pay practice?
- ☐ Decide: are you offering in-person counseling?
- ☐ Choose a business location
- ☐ Optional: buy office decor
- ☐ Figure out systems: HIPAA-secure email
- ☐ Figure out systems: phone setup
- ☐ Figure out systems: Decide on paper or electronic charting and choose a practice management system
- ☐ Figure out systems: HIPAA-secure teletherapy platform
- ☐ Figure out systems: Point of sale system
- ☐ Figure out systems: bookkeeping system



- ☐ Figure out systems: BAAs for all
- ☐ Figure out systems: track metrics and key performance indicators
- ☐ Set your rate
- ☐ Get informed consent and essential paperwork ready
- ☐ Build your website
- ☐ Get professional headshots
- ☐ Develop your brand story
- ☐ Develop marketing strategy: Join online directories
- ☐ Develop marketing strategy: business cards