HOW TO BUILD YOUR
Full & Rewarding
PRIVATE PRACTICE

THE BE A WEALTHY THERAPIST
SELF-STUDY COURSE
— with —

CASEY TRUFFO
# Table of Contents

How to Use This Course .................................................................................................................. 9

How The Be A Wealthy Therapist! Program Was Developed ............................................................ 10

The 4 Tenets Of The Very Successful Private Practitioners ............................................................ 12

**Strategy 1:** Create Your Vision – Decide What Wealth Means to You ........................................... 13

  - Boutique Practice vs. Mall of America ...................................................................................... 13
  - What Is Your Vision? .................................................................................................................. 14
  - Exercise: Just imagine… Create Your Vision.......................................................................... 14
  - Exercise: The Next Step .......................................................................................................... 17

**Strategy 2:** Resolve Those Old Issues of Money and Worth Quickly ............................................ 21

  - Make Peace With $$! .............................................................................................................. 21
  - Exercise: What WAS Your Family Of Origin Beliefs About Money? ..................................... 21
  - Releasing Old Beliefs ............................................................................................................. 23
  - Exercise: What Are Your Limits? .......................................................................................... 25
  - What is Money? ...................................................................................................................... 25
  - What Does The Fee Represent? ............................................................................................ 25
  - What Should The Fee Be Based On? ...................................................................................... 26
  - Setting The Fee ..................................................................................................................... 26
  - Negotiating The Fee .............................................................................................................. 28
    - If you have a sliding scale..................................................................................................... 30
  - Collecting The Fee .................................................................................................................. 30
  - Credit Cards ............................................................................................................................ 31

**Strategy 3:** Determining Your Unique Wisdom and Gifts to Client ............................................ 33

  - What Is Your Story? .............................................................................................................. 33
  - Exercise: Identify Your Story ................................................................................................. 33
  - Give People Hope ................................................................................................................... 34
  - Tell a Success Story ............................................................................................................... 34
  - Exercise: Craft Your Personal Story or a Client Success Story ............................................ 35
  - People Will Love It ................................................................................................................. 35
Strategy 4: Consider a Specialty (Go Deep Within the Magic of a Niche) ........................................... 37

Pick a specialty for marketing purposes ................................................................. 37

What Specializing IS ......................................................................................... 37

What specializing IS NOT .................................................................................. 38

Why Didn’t Private Practitioners Specialize In The Past? ...................................... 38

The Advent Of Managed Care in the U.S. .............................................................. 38

The Vision Of Therapy Changed ....................................................................... 39

Our Culture Has Changed .................................................................................. 39

Marketing a Specialty Means People Trust You More ....................................... 39

People Know People like Themselves ................................................................ 40

Common Fears Of Specializing ................................................................-------- 41

“I won’t have any clients if I specialize because now I see anybody.” ...................... 41

“I will be bored seeing just one type of client or problem.” ............................... 41

“I don’t know enough about one specialty, it would take a lot of research.” .......... 42

How To Pick A Specialty ........................................................................................ 42

Look At Your Experiences .................................................................................. 42

Look At Your Community ................................................................................... 43

Look At Trends .................................................................................................... 43

Look At Who Has The Money And What Problems They Have .......................... 44

Person, Problem or Person with a Problem ......................................................... 44

Exercise: What Do You Want Your Clients To Know, Realize, Understand Or Have? .... 44

Exercise: What Types Of People And Problems Do You Enjoy Working With? .......... 45

Benefit Summary Of Picking A Specialty ............................................................ 46

Authentic Happiness VIA Strengths Survey ......................................................... 47

Final Note On Picking A Specialty: Trust Yourself ............................................. 47

Strategy 5: Talk About Your Wisdom so People Say, “I Want That!” .................. 48

Who Needs Your Services? .................................................................................. 48

Exercise: Who Is Your Ideal Client? ................................................................... 50

The Ultimate Marketing Outcome ....................................................................... 53

A Common Concern ............................................................................................. 54

The Formula For The Short Answer To The Question “So What Do You Do?” .......... 55

Tips For A Great Short Answer ........................................................................... 56

Test, Test, Test ..................................................................................................... 56
Possible Responses To Your Short Answer .................................................................56

Strategy 6: Create a Marketing Plan that Uses Your Gifts and that Works! ..................58

Successes And Wins ..................................................................................................58

What’s Next? ..............................................................................................................58

Consistency ................................................................................................................58

Dispelling “Marketing Myths” ................................................................................60

A Reframe For Marketing .........................................................................................60

Another Definition Of Marketing ............................................................................60

Your Image ...............................................................................................................61

Your Customer Service ............................................................................................61

Three Common Methods of Marketing A Therapy Private Practice .......................62

“I tried marketing but didn’t work for me.” ...........................................................62

Overview Of Your Marketing Plan ..........................................................................63

What is Your Marketing Personality Type? .............................................................64

The Introverts Marketing Personality Type .............................................................64

The Extroverted Marketing Personality Type .........................................................66

What is a Techno Lover Marketing Type? ...............................................................67

What is a Creative Marketing Type? .......................................................................69

The Marketing Activities .........................................................................................71

Internet (online) Marketing .......................................................................................72

1. Create a Workhorse Website. ..............................................................................72
   What Pages Should Be On Your Website? .............................................................72
   Let’s Make Your Website A True Workhorse Website: Six Optional Features ......75

2. Attract Prospects Online ....................................................................................79
   Get traffic with your branding ..........................................................................79
   Get traffic with search engine optimization ......................................................79
   Get traffic to your site with article marketing ..................................................80
   Get traffic to your site with paid advertising ....................................................80

3. Get Known Online With Content Syndication .................................................81

4. List Your Practice on the Online Therapist Locator Services .........................82

5. Connect with Social Media ...............................................................................86

Internet (Online) Marketing Summary: .................................................................88

Community (local) Marketing ..................................................................................89
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>6. Speak in the Community With Your Signature Talk</td>
<td>90</td>
</tr>
<tr>
<td>7. Connect and Network with Your Current Centers of Influence</td>
<td>105</td>
</tr>
<tr>
<td>8. Build Referral Partners via New Centers of Influence</td>
<td>107</td>
</tr>
<tr>
<td>10. Reach Out in Your Community to Churches, Schools and More</td>
<td>113</td>
</tr>
<tr>
<td>11. Offer Free Consultations</td>
<td>116</td>
</tr>
<tr>
<td>12. Let Your Clients Support You</td>
<td>118</td>
</tr>
<tr>
<td>13. Volunteer Where Your Ideal Prospects Are</td>
<td>119</td>
</tr>
<tr>
<td>14. Your Business Card</td>
<td>120</td>
</tr>
<tr>
<td>15. Direct Mail</td>
<td>123</td>
</tr>
<tr>
<td>PR (Public Relations) Marketing Activities</td>
<td>124</td>
</tr>
<tr>
<td>16. Connect with Reporters</td>
<td>124</td>
</tr>
<tr>
<td>Mobile Marketing Activities</td>
<td>125</td>
</tr>
<tr>
<td>17. Text Messaging (SMS)</td>
<td>125</td>
</tr>
<tr>
<td>Tribe (or Community) Building Activities</td>
<td>127</td>
</tr>
<tr>
<td>Keep In Touch Marketing Activities</td>
<td>128</td>
</tr>
<tr>
<td>Handwritten Notes</td>
<td>128</td>
</tr>
<tr>
<td>Follow-Up Calls</td>
<td>128</td>
</tr>
<tr>
<td>Newsletter</td>
<td>129</td>
</tr>
</tbody>
</table>
Announcement of Talks .................................................................................................................. 130
Holiday cards (pick unique holidays) .......................................................................................... 131
Calendar the Plan ....................................................................................................................... 132
Successes and Wins ..................................................................................................................... 132
Pick Activities That Fit With Your Marketing Personality Type And Make Sure You Have At Least One Keep In Touch Activity .................................................................................. 132
Step 1: Start with the Basics ....................................................................................................... 132
Step 2: Pick the Marketing Activities you plan to do for the next 30 – 90 days ....................... 133
Step 3: Set a goal for each activity: ............................................................................................ 133
Step 4: Identify the tasks that need to be done to meet that goal. .............................................. 134
Step 5: Put the tasks in your Marketing Calendar. ...................................................................... 134
Step 6: ........................................................................................................................................ 134
Get a focusing buddy - someone to help keep you on track. ...................................................... 134
Step 7: Work your plan! (Oh and answer your phone - it is ringing!) ....................................... 134
Strategy 7: Track Your Efforts and Your Money ...................................................................... 135
Every marketing venture is worth testing. ................................................................................... 135
Track your results. How do you know it is working? ................................................................... 135
Tweak as necessary .................................................................................................................... 136
Test again ................................................................................................................................... 136
Strategy 8: Take Time Off and Love Your Life. ...................................................................... 137
Do what you tell ‘em! .................................................................................................................... 137
Plan times out of the office ........................................................................................................ 137
Review what you are tolerating and reduce those tolerations! ............................................... 137
Look for evidence of joy! ............................................................................................................ 138
Beyond Private Practice? .......................................................................................................... 139
Now, Be Wealthy! ....................................................................................................................... 140
Appendix A. Audio/VIDEO Files to Supplement This Course .................................................. 141
Appendix B: Marketing Task List ............................................................................................... 142
Appendix C: The C.A.R.E. Model to Attract New Clients ...................................................... 145
Appendix D. Create Referral Partners via Networking Task List .............................................. 147

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Appendix E. Build Relationships with New Centers of Influence TASK List ........................................148
Appendix F. Speaking at Your Event Task List ..................................................................................149
Appendix G. Speaking at a Sponsored Event Task List ....................................................................150
Appendix H. Sample Feedback Form ................................................................................................151
Appendix I. Sample Marketing Task List ..........................................................................................153
Appendix J. Notes ...............................................................................................................................155
HOW TO USE THIS COURSE

Welcome! I am delighted you have chosen this course. I hope you will find it exciting, helpful, and full of practical steps.

This course contains a workbook (manual) filled with tips, strategies, practical exercises, and worksheets. There is a lot of information here and it can feel overwhelming. Just take it in small bites and you’ll be fine. There are videos and audios that supplement the workbook. You are invited to use the supplemental materials with the workbook to gain maximum benefit.

You can use this course in any way that works for you. Here is my recommendation.

Read the entire workbook prior to doing the exercises. This can give you the “road map” of where you are headed.

Go back to the beginning of the workbook and do the exercises. (There are additional supporting materials for each section in the appendices.)

Listen to the audios or watch the videos to augment your learning, as you like. The audios and videos are not meant to replace the contents of this workbook.

I am holding the vision for you.

Love and success,
Casey Truffo, MFT

P.S. If you could use some additional support, I want to invite you to check out other coaching programs at http://BeAWealthyTherapist.com.
HOW THE BE A WEALTHY THERAPIST! PROGRAM WAS DEVELOPED

I’d like to begin by telling you a little about me and how this program was created.

My name is Casey Truffo and I am a licensed marriage and family therapist in Irvine, California.

I was born to be a therapist. You probably were too. But I started my career in business – because my dad said that was a good thing to do. I made a lot of money there.

However, what I found was that I was counseling everyone. Because I was a good people pleaser, I kept getting promoted. But the higher up I got, the more disenchanted I got with corporate politics.

I thought my therapist had a cool job so I went to graduate school – like we all did. I went through the licensing exams and then got my cute little office. I decorated it with this pretty blue and white striped couch, and I had this lovely therapist chair. I even made café curtains for the windows.

But after the decorating was complete – I realized I had no idea how to get clients.

I also had another problem. (I am curious if you can relate.) I was kind of nervous about the money part. When a potential client finally did call, they’d ask me about my fees. I immediately told them I had a sliding scale – even before they asked.

Then after I told them the fee, and they were processing it – there would be this pause. You know the one I am talking about. I’d fill it with something like “But if that doesn’t work for you, I can reduce it.”

I am sure that engendered confidence in the person on the other end of the phone!

Well, this went on for quite a while and it got to the point where I was having trouble making ends meet. I ended up going into debt….significant debt. Every month I thought “Well, it will get better next month. Let’s see…. I only need 20 new clients and I should be able to get them next month!”

Well, you know how sometimes you just wake up out of denial? One day I did and I looked at my debt. It was $45,000. I said that was it!

So I went back and reviewed what I learned about business in my corporate career. I took several courses on marketing. I read everything I could get my hands on about practice building and marketing. In fact, my “marketing self-help bookshelf” started to have more books on it than my “therapy self-help” bookshelf. I hired coaches and mentors to teach me how to build a profitable practice.
I tested a lot of ideas and found that there were 8 that seemed to work the best. I implemented those 8 strategies and amazing things started to happen. My practice started to grow. I ended up with a waiting list. My income went way up. I paid off my debt. I was able to take vacations. I even got married.

But it nagged at me that we weren’t taught this in graduate school. So I made it a point to start teaching it to interns. Well, they took to it like ducks to water and their practices started to grow. When their supervisors saw that, the supervisors came to me.

Soon I was coaching therapists more than I was counseling clients. I felt so passionate about this work. I mentioned it to my friend, Maria, and she said “Casey, none of us were taught this in graduate school. You need to teach this.”

So now I offer a worldwide coaching program for therapists who want to learn the 8 key strategies, which have been proven to help therapists believe in their own worth and create a fun, fulfilling, and profitable private practice. (As times have changed, I expanded to help therapists who are looking for new income strategies beyond private practice.)

It is your turn now to create the practice you really want. I look forward to helping you.

I hope you enjoy this program.
THE 4 TENETS OF THE VERY SUCCESSFUL PRIVATE PRACTITIONERS

♦ **If you know whom you want in your caseload, you are likely to get them.** Once you know whom you want to serve, then you can let those ideal clients know who you are, what you have to offer and how to reach you.

♦ **Talk easily about what you do and how you help people.** To have your phone ringing and your appointment book filled you must be able to articulate what you do so that your ideal client says “Hey, that's me! And I want what she has to offer!”

♦ **Don't keep your wisdom a secret.** Let the community know you. To truly have a full caseload, you must have a plan. A plan that lets the community know what pain you help to reduce. (You see, people want to come to therapy to have their pain reduced.)

♦ **Be paid well.** Finally, you must decide that you are worthy of being paid a good fee.
STRATEGY 1:  CREATE YOUR VISION – DECIDE WHAT WEALTH MEANS TO YOU

A lot of people feel uncomfortable when they first hear the name of my company “Be A Wealthy Therapist.” They got into this profession to help people – not to make money. In fact, when I do speaking engagements, my first question is usually “How many of you got into this field to make money?” and everyone giggles. In the entire time I’ve asked that question, only two people have indicated they did.

How much money you make is up to you. However, if you want to build a satisfying and rewarding business, I recommend that you get clear about what wealth means to you.

Let me share with you my definition of wealth:

With this definition, my job is to make sure I:

♦ Choose to work with clients I really enjoy.

♦ Work in a location that appeals to me.

♦ Create a schedule that suits my lifestyle.

♦ Set, negotiate, and collect fees that are in the best interest of both the client and me.

♦ Take care of myself physically and emotionally.

You get to design your practice the way you want it to look. You get to decide how much you want to work and with what types of clients. You get to decide how much time you have for work and for play. You get to decide how much you want to earn.

BOUTIQUE PRACTICE VS. MALL OF AMERICA

In a conversation, a fellow coach was suggesting that we collaborate on a venture to help professionals build their business. He said he wanted to make sure we had the same vision.

While I was considering my vision, he blurted out “I want to be the Mall of America for professionals. I want to service as many clients as I can all over the globe. I want to be a huge company.”

I paused. I said, “I want to be a cute boutique.” We decided that a joint venture wasn’t a good idea.
WHAT IS YOUR VISION?

Many studies have been performed regarding goal setting and strategic planning. To me, it all boils down to this:

♦ Know what you don’t want.
♦ Identify what you do want.
♦ Write it down.
♦ Figure out how to get it.

You must know what you want your practice to look like to take the actions to accomplish it. You need to know the vision. It doesn’t matter if you want to see 3 private pay clients a week or if you want to see 33 clients a week with a combination of managed care and private pay. What matters is that you know what you want and what it takes to get it.

The next 2 pages contain a worksheet to help you create your vision. I encourage you to make several copies of the blank form so you can modify it as things change.

EXERCISE: JUST IMAGINE… CREATE YOUR VISION.

My ideal practice is a (group or solo) practice.

I see clients (where):

My fee structure is:
(If you have a sliding scale) My sliding scale is from $____ to $____. I offer a sliding fee to clients when:

The problems I don’t want to work with are:

The types of people and problems I enjoy working with are:

My ideal caseload looks like this:
(Divide the wheel into the portion of your caseload you want to be fee-for-service (cash paying) clients and the portion you wish to be for managed care.)
An ideal weekly schedule for me looks like this: (include client hours, business administration, marketing your practice as well as leisure and family time.)

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Your vision can and probably will change over time. But it is important to identify a basic idea of where you are headed and to write it down. Studies have shown that students who wrote down their goals before graduating were significantly more likely to reach them – even if they never looked at them again!

So take some time and create the vision of your ideal practice.
EXERCISE: THE NEXT STEP

Once you have envisioned your ideal practice and written it down, it is time to figure out what it will take to get it. So ask yourself:

♦ What would I have to do to have my dream practice?

For example, I would have to have an office and phone system. I would have some type of practice management system. It might be a set of paper files. It might be a software service; it might be my own paperless system.) I would have to decide about managed care clients. I would have to get the word out to my community about what I do. I would have to have internal systems for tracking income and expenses. Let’s start on your “to-do” list.

1.

2.

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6.

7.
◆ What skills are needed?

We need good clinical skills to do therapy. But we also need good business skills to run the business side of our practice. We may need accounting, marketing, and computer skills. List the skills you need to make your practice a reality.

1.

2.

3.

4.

5.

6.

7.

Each practice is different. Look at your vision to see what skills you think might be needed to make your vision a reality.
Which of these skills do I have or want to obtain? What tasks should I hire a professional to do?

Years ago I decided I would hire someone else to do whatever it was that I wasn’t brilliant at. Well, I soon went broke because I was good at providing psychotherapy and not at running a business.

I decided to learn more business skills. I did my own accounting. I hired an assistant to answer phones and do office errands.

Today I have a virtual assistant who manages my speaking calendar and writing assignments. I have a graphic artist who designs my print and web materials. I do my own marketing. I do a lot of my own website production but have a computer services company on retainer to do the stuff that is “above my pay grade.” And my husband Bob, since his retirement, serves as receptionist, CPA, editor and business advisor.

Identify which skills you have an interest in obtaining. Also, identify where you’d like to hire a professional. We can’t be great at everything.

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What would I have to believe to have my dream practice?

Scores of books have been written on the premise that what you believe is what you create. If you focus on what isn’t working or what you don’t have, you will get more of the same.

Identify any limiting beliefs that you have about being a successful business owner. You weren’t born with these beliefs. You agreed to them over time. Decide what you want to do with them now. What would you have to believe now to have your ideal practice?

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Please take some time with these questions. Your future depends on it. You can do it!
STRATEGY 2: RESOLVE THOSE OLD ISSUES OF MONEY AND WORTH QUICKLY

I find that there are three areas that seem to limit the success of some therapists in terms of building a successful practice.

The first of these is their relationship with money and the connection with “worth.”

(Note: If you feel you have no issues or limiting beliefs around money or worth that might hold you back from earning a good living, then feel free to skim this and skip to the next strategy.)

MAKE PEACE WITH $$!

What do you believe about money? Do you believe there is enough money or that you'll never have enough? Do you squirm at the idea of having a lot of money? Do you feel you have to be “worthy” to have money?

If you are a little uncomfortable with the idea of wealth, you are in good company. As I said, therapists traditionally get into this field to help people - not to make a lot of money.

Recently I was listening to a meditation and the narrator said, "Not all rich people are bad. There are some good rich people. Some people do a lot of good with money. I could do a lot of good with money. I could do a lot of good with a lot of money."

I loved that! Somewhere along the way, we developed ideas about what kinds of people have money. We also developed beliefs about how much money we can have. Experts now believe we have a "set point" for the amount of money we feel comfortable having. If we have more or less than this amount, we feel uncomfortable.

On the next page, you will find a journaling exercise. Many people tell me that after doing this exercise, their income tends to increase. I encourage you to spend some time with it.

EXERCISE: WHAT WAS YOUR FAMILY OF ORIGIN BELIEFS ABOUT MONEY?

I believe that what you learned as a child about money significantly affects your current earning, saving and spending habits. The good news is that if you don’t like your current beliefs and habits, you can change them. (How many times have you told a client that?)

Here are the questions I invite you to consider.

♦ What did you learn about money growing up?
♦ How did that affect you then?

♦ How does that affect you now?

♦ What is your current relationship with money?

♦ What fee would you like to be charging? Why that amount? Why not $25 more per hour or $25 less per hour?

♦ What fee are you averaging now?

♦ If there is a gap between what you are charging and what you'd like to charge, why do you think that is?
What is your belief about the fee? What does the amount represent to you?

Do you believe certain people should charge more than you charge? Or less? Why or why not?

Do you believe the fee is a measure of your skill or worth as a therapist?

What would you have to believe, allow, or do to get your full fee?

This exercise can sometimes bring up feelings and beliefs that we weren’t aware we had. You may be experiencing some anxiety when you consider these questions.

What I have found is that we can have the best marketing plan in the world but if we don’t deal with the money and worth issues, we end up leaving money on the table and we don’t attract the clients we really want.

So please, give yourself this gift. Take the time and look at how your family of origin beliefs about money affects your current earning and saving habits.

RELEASING OLD BELIEFS.

I am often asked, "How do I deal with the idea that I don't deserve money?" My response is simple. Does anybody deserve money? Doesn't everyone deserve money?
How did deserving get linked with money in the first place? Money is not a measure of how deserving we are. It is simply a medium of exchange. We trade our time (by working) for money. It isn't about worthiness or deserving. Well, it isn't unless you decide it is.

Ask yourself: "What would I have to believe, allow, or do to have more money or increase my income?"

This is a very powerful question. Sometimes we need to change our beliefs. We need to let go of the shaming beliefs we have about money. We may need to challenge our own belief that people won't pay a good fee for therapy. Sometimes we need to let go of the shaming beliefs we have about money. We may need to challenge our own belief that people won't pay a good fee for therapy. Sometimes we need to allow ourselves to receive. Sometimes we need to take some action such as increasing our fees or making sure we charge for late cancellations. As you explore and modify your beliefs, thoughts and actions, I predict you will find more money in your pocket.

I am often asked, "How do I change my beliefs?" (I might add I am asked this by wonderful, precious therapists who spent a fortune learning how to do this in graduate school and do this everyday with their clients.)

There are many ways to change your beliefs. Your theoretical orientation comes into play here. You may wish to do some cognitive restructuring exercises. You may want to do some EMDR, TFT, or EFT around the issues of money and worth. I love having a friend or therapist use paradoxical interventions to help me. (I was once told that if I was uncomfortable collecting fees from clients that I should set up shop on a curb in the worst part of downtown. The people there had no money and I wouldn't have to worry about collecting it.)

Sometimes it is too hard to move from thinking "I don't deserve to have money" to "I deserve to have a lot of money." One technique that can help is a bridge belief.

A bridge belief is a thought that moves you closer to the desired belief but is a smaller step. For example, "Maybe sometimes it is okay to have more money than I do now. Maybe it is okay to have $1,000 more per month than I have now."

For a bridge belief to be effective, pick something that is different than you believe now and that doesn't create a lot of resistance in you. It can help move you toward the desired goal.

Notice how often your thoughts are on the idea of lack rather than abundance. Notice how often thoughts such as "No one can afford my fee" or "I'll never make enough money" crosses your mind. Many therapists are not even aware they have these thoughts of lack. If you find you continually have less money than you want, there probably is a belief about it lurking somewhere in the subconscious.

The mind is powerful. If you focus on not having enough money, you will indeed experience that. If you assume people can't afford your fee, those are the ones you will attract.

When you find yourself focusing on "lack thinking," quickly look around and recognize three areas where you have enough – or maybe you have even more than enough. Once I was complaining about my 5-year-old car. I wanted a shiny new one and was feeling very deprived.
On that day, it was pouring rain and I noticed a man in a fast food uniform riding his bicycle in the rain. I quickly counted my blessings! Train your mind to focus on what you want as well as what you have.

**EXERCISE: WHAT ARE YOUR LIMITS?**

Here’s another assignment for you. Let’s look at the internal limits you set.

♦ How much money would it be okay for you to make? Why not more?

When we set a limit (internally) on our income, we often create that reality. If I don’t believe I can make a good living, I will probably attract those who can’t or won’t pay me well. Please take note of your internal limits. They are yours. You can decide to change them.

**WHAT IS MONEY?**

Joe Dominguez and Vicki Robin in their book “Your Money or Your Life” state, “Money is life energy.” We work (expend energy) and for that we receive money. We then use this money to buy goods and services. Money is the currency that represents the energy we expend.

Money is neither good nor bad. It is neutral. I believe it is our job to make sure we get paid enough money to acquire the goods and services we want to purchase.

**WHAT DOES THE FEE REPRESENT?**

Okay, so lets say you charge $125 per session.

Why did you pick that fee? Does it have to do with your effectiveness or what others charge in your area?

I don’t recommend setting the fee based solely on your license type or education. We’ve all known “not-so-great” therapists who have several degrees or many years in the field. We have also known some new therapists who are better than some seasoned clinicians because they are closer to their passion and education.

It shouldn’t be tied to our “worth” or effectiveness. If so, we would need to charge those clients with whom we’ve been more effective a higher fee. That doesn’t make sense.
And I’ve never had a client who was interested in paying me a higher fee because of more training or degrees I acquired.

**WHAT SHOULD THE FEE BE BASED ON?**

The fee is the amount you want to be paid for giving up your free time to sit across from a particular client and engage in the therapeutic relationship for this session and possibly 300 more sessions.

**SETTING THE FEE**

Set your fee so you will be happy to enter into this relationship with the client. Understand this fee includes all the time and energy you expend - including the non-session time and energy. It’s not just the 45-minute hour. There is the time that you carry them in your heart and mind when you are not in session. We don’t “turn off” just because the session is over.

The most important advice I have is that you set a fee you will feel comfortable receiving for a long time from this client. Regardless of the client’s financial situation, you must set a fee that both of you feel comfortable with. Please never set a fee that will lead you to resent the client. This may sound obvious but let’s go deeper.

Some therapists offer lower fees when clients appear not to be able to afford therapy. Remember – the fee to you is what you want to be paid for sitting across from this particular client for this session and possibly 300 more sessions. The fee to the client is how much they are willing to part with to engage in therapy.

This is an important point. The fee isn’t about how much the client can “afford.” It is about what they want to pay. We have all known clients who have taken on extra jobs to pay for therapy and others who drive Porches and say, “I can’t afford your fee.”

So get the idea of “affording therapy” out of your head.

But please don’t replace it with “it’s a matter of priorities.” While that may be true, there is an implied judgment.

The truth is that we all get to choose where we spend our money. It reminds me of the envelopes some of our parents had. When dad came home with his pay, mother would divide it up among the “expenses” with each envelope containing money for that expense. Most who grew up with “the envelopes” quickly learned that you could have what you wanted but that meant that you didn’t get something else. Money was moved from envelope to envelope depending on where the money was to be spent.
How does this relate to our fees and our clients? One client may want to spend her money on summer camp for her children and not so much on therapy. One therapist I knew had a client who said she couldn’t “afford” the therapist’s fee. The therapist believed that her client was in a financial bind and chose to offer a much lower fee. In the therapist’s mind, this was justified because the client simply didn’t have the money to pay her.

The client told her a few months later that two recent in-vitro attempts hadn’t worked and she was feeling depressed.

The therapist became irritated at the client. The therapist had assumed that the client had “no money.” The reality was that the client had “no more money” that she wished to put in the “therapy” expense envelope. The therapist came to resent the client, which, as you can imagine, quickly affected treatment.

This is an example of how therapists unwittingly set financial priorities for their clients.

Let me explain. We see the client as struggling financially. We, as caring people, want to help. We offer a lower fee. The belief that we don’t always realize we have is this:

When the client has more money, I am entitled to it.

You see, we lowered the fee due to the client’s lack of funds. So the natural assumption is that when the client gets more money – so should we.

This is not what the client is thinking. Let’s say I am your client and I’ve been out of work. You offered me a lower fee four months ago when I lost my job. When I finally get work, I excitedly tell you about it. If you are like most therapists, you will assume that I should now pay you more.

But the client is thinking. “I have been out of work for four months. If I don’t make a mortgage payment soon, I will lose my house. I have denied myself all luxuries for the past several months and now that some money is coming in, I want to go on a 3-day mini-vacation. Or my kids really need new sneakers and some clothes. They have grown like weeds over the past few months.”

Just because the client gets more money, doesn’t mean he or she is interested in giving it to you. This isn’t a statement of your worth or even the value of therapy. It is the way they wish to spend the money for which they work.

The moral here is that you always want to set a fee with which you will feel comfortable regardless of what else the client is doing with his or her money. This way, the amount of the fee doesn’t affect how you feel about the client.

There is an added benefit here. When we set a fee that we feel comfortable with and we choose not to expect the client to give us more if they get more, we can then be excited about the client’s abundance. We can get excited that they are taking a trip to Hawaii without thinking “That’s my trip they are taking!”
NEGOTIATING THE FEE

Here are some ideas that have worked for me and for many of my clients. You may have ideas that work well for you and I encourage you to continue doing what works.

If you have a sliding scale, know what it is before you engage in a “sales conversation” with a potential client. This way, you aren’t tempted to go below your scale.

TIP

If you do decide to offer a lower fee due to a situation arising with a client, I suggest you do so within a particular time frame. For example, you may wish to offer a lower fee for 3 months. In the beginning you make it clear that in 3 months, you will both take a checkpoint and see where you are. You can then decide to extend the time frame or determine other options such as transitioning to a therapist the client can “afford” for ongoing treatment.

Understand that the fee you set is what you want to be paid for entering into the relationship with the client...for being with them in session and carrying them in your heart when you aren’t in session. To the client, the fee is the amount of money they are willing to part with for therapy. It isn’t about your “worth” as a therapist. It is about what they want to pay.

Here is the four-step process I use when first speaking with a potential client who is calling for an appointment:

♦ I open with “Hi, this is Casey Truffo returning your call. You had called about a counseling appointment?”

♦ They say “yes.” I respond with “I am glad you called. I wanted to get back to you as soon as I could. However, I need to tell you that I have an appointment in a few minutes so unfortunately we don’t have a lot of time now – but I did want to get back to you. So, while I’d love to hear the whole story now, our time is a little limited. Could you share with me the reason why you are seeking counseling now?”

♦ I listen for about 90 seconds to decide if I want to see them for an assessment session.
If I decide I do want to see them, I validate them: “Wow – sounds like you have a lot going on.” Or “I am so sorry that is happening to you.”

Then immediately after the validation sentence, I ask, “May I tell you how I work?” I wait for an affirmative answer before continuing. If they go back into their story, I repeat the validation sentence and ask again “May I tell you how I work?”

If they say “Yes,” I start my four step process:

- My office is located near John Wayne airport.
- My sessions are 45 minutes in length.
- My fee for each session is $150 and
- I have openings on Wednesday at noon or Thursday at 2:00 - Do either of those work for you?

Then the trick is to be quiet and let them respond. You just gave them a lot of information. They have a lot to think about.

They will either respond with an objection to the fee or the times, or make the appointment.

Objections are normal and should be expected.

If they object to the time, that is great news. It usually means they have “hurdled” the money issue. They probably aren’t going to ask you for an appointment on Tuesdays, book it and then tell you they can’t afford it (at least not right now).

Some clinicians get confused when I suggest offering two appointment times in the above four-step process. They think I am suggesting that they “act busy” and offer no other times. I am not suggesting that. It is like breaking the banana in half and asking your child “Which half do you want?” It is offering them a choice. If they can’t make those times, then you can offer other times.

But again I want to stress this – if you have used the four-step process in the exact order listed above and they want a different time, it is a good thing. They probably aren’t going to object to the fee.

Let’s say they object to the fee. That is not uncommon. Many people don’t know what therapy will cost until they call.

Please attempt to join with the client in the objection. “No problem. I understand. Therapy isn’t inexpensive.”
The objection isn’t the end. It is an opportunity for you to continue joining with the client. You may want to give them a moment to get over the “sticker shock.” You can see if the client is still someone you want to see.

If you do not have a sliding fee, you can ask if they would like some referrals that might fit better within their budget. (Note: when you want to offer someone some referrals, it is best to ask the person if they would like the referrals rather that stating “Let me give you some referrals.” They may already have other therapists they are considering. This is just a simple word change but it can make a big difference to the prospect or client.)

**If you have a sliding scale….**

Here is how I would negotiate the fee using a sliding scale:

♦ If they say, “I didn’t think it would cost so much” I just agree that therapy isn’t inexpensive. Then I say, “Let me think for a moment.” (I pause for 3 or 4 seconds.)

♦ Then I say, “I am curious - what did you think it would cost?” or “How much were you thinking of paying?”

♦ If the number they say is within my sliding scale range, I say “Hmm. Let me think.” And I pause for another 3 or 4 seconds.

♦ Then if that number is within the sliding scale range, I say, “Could you afford (and I add $5 or $10 to what they just offered)” If they say “yes,” everyone wins. They feel they got a good deal and I know I did.

♦ If they say “NO! That was the absolute max I could afford,” I say “Okay. I think I can work with that. Let’s get together and see if I am the right therapist for you.”

♦ By the way, if the number they offer is below your scale, pause for a second and then say, “I know therapy can be expensive. I totally understand when there isn’t a lot of extra money in the budget. I’ve been there myself. And we don’t want the cost of therapy to be an additional stressor for you. Let’s see if we can find a good therapist that will work within your budget. May I offer you some referrals?”

**COLLECTING THE FEE**

Once we decide on a fee, believe in it and have negotiated it with the client, it is time to collect it. Many therapists think of the fee as an administrative task. While this is true, I believe the fee is also a clinical issue. The client has contracted with you for a service and has agreed to pay you. I encourage you to model taking responsibility and take responsibility for getting paid. I was lucky enough to have several supervisors teach me this early on and it hasn't failed me yet. I think it is important for the therapist herself to collect the fee (rather than a receptionist) at the beginning of each session for that session.
While many therapists successfully collect the fee at the end of the session, I recommend that therapists collect the fee at the beginning of the session.

The client’s contract with you is for that time so they can pay you for that time - why not pay at the beginning of the session? After all, you aren't planning on leaving the session before it's over. Also, people tend to write their check or pay via credit card faster when they do so in the beginning of the session - it is on "their time.” Finally, if the client stays only 15 minutes and leaves, they still pay for the session and you already have the check. (Twice in my career, I've had the situation where people left very angry and I wouldn't have been paid had I not received the check at the beginning of the session. If someone does leave angry and has paid via check, use the rest of the session to go to the bank and deposit the check.)

Also, since I believe that the fee is a clinical issue, I want to address it during the session if the client has "forgotten" their checkbook for the second time in a row. If I wait until the end, there is no time to address it as a clinical issue.

I explain my policies in my informed consent paperwork. It says, “If you decide to pay by check, please have it prepared ahead of time. This will allow us to make the best use of our time together.”

When a client comes in and doesn’t hand me a check or a credit card, I say, “Do you need a pen to write your check?” If they indicate they will write the check after the session, I then say, “You know, let’s get that out of the way now. That way we can fully focus on you and not have to worry about finances because it is already taken care of.”

Lately some therapists have told me they don’t collect the fee each session but send a monthly invoice to their clients. My concern is that this turns you into both their creditor and a bookkeeper. Then if they don’t pay, it turns you into a collection agency.

Please offer the option for your clients to pay via credit cards. This way you get paid on time and the client is able to use credit from the credit card company.

Honor yourself. Honor the client. Get paid well and on time.

Finally, if you are called to poverty – embrace it and enjoy it. If you aren’t – see what is keeping you from having the money you want. Look at your own beliefs. Bring it up with your therapist or coach. You can resolve those old issues of money and create a thriving and financially rewarding practice.

**CREDIT CARDS**

No discussion of therapy and money would be complete without talking about credit cards.

Here is an email I received a while back:

Casey Truffo  www.BeAWealthyTherapist.com  949.309.2590
Hi Casey,

I have purposely chosen to not accept credit cards. My thinking has been that it is not healthy for clients to go into debt to pay for sessions. But I am open to your ideas.

(Name omitted for privacy.)

She is right - many people need therapy and can't afford the weekly outlay.

I think it is important to give people a way they can pay for therapy over time. After all, we buy our cars, houses and almost everything else on credit. In fact, if we got rid of credit, our whole economy would go under. If we don't offer credit card options, some people will get less treatment than they need because we ask for all the money up front.

Some therapists will then offer a very low fee or a payment plan for their clients. I am okay with this as long as the therapist feels called to do so. Then, however, therapists are not only being therapists, they are also being creditors for the clients. Is that the business we want to be in? And part of me is concerned that we have now created an unnecessary dual relationship for ourselves…creditor and therapist.

Plus by assuming the client can't pay for therapy and offering them a lower fee, this can sometimes be thought of as enabling the client. My eye doctor never asks me "Are you sure you can pay for this? Want me to lower my fee for you?" Most other professions don't do this – which is another reason why therapists are among the lowest paid health care providers. By allowing a client to have the option to pay their credit card company over time gets us out of their financial business - which I think we should be.

Finally, who is to say that using a credit card to pay for therapy means one is going into debt? I have a huge credit card bill that I pay off each month so there is no balance. It sure is easier to use a card than write a check - especially if the card is already on file and I can just say, "Use the card you have on file." And I love the reward points that come with using my credit card.

Let's eliminate any resistance of using credit cards. It really is a service to everyone. The client can use their card to pay for therapy and the credit card issuer is the one who makes the financial arrangements with the client. We will never have to go into a collection situation again and we can focus on our clients' treatment.
STRATEGY 3: DETERMINING YOUR UNIQUE WISDOM AND GIFTS TO CLIENT

WHAT IS YOUR STORY?

Remember when you were five years old and people asked you what you wanted to be when you grew up?

“A ballerina and a veterinarian.”

“A firefighter or a cowboy.”

Did any of us say “a therapist?”

Of course not. In fact, most of us only understood the power of therapy after we emerged from it ourselves. We went to therapy with some hurts and came out wanting to help others. We saw providing psychotherapy as a viable way to do so.

We often forget this when we’ve been practicing for a while. The work becomes about scheduling appointments, doing sessions and keeping records.

Let’s go back to the wonder.

EXERCISE: IDENTIFY YOUR STORY

What did you learn in your life that you want others to know?

What struggle did you come through?
What hope do you have to offer to others?

What do you know that those in pain don’t yet know?

This is your story. This is the gift you have to share. Your experience brings hope to others.

At a conference I attended, one of the presenters was a famous therapist. He began his talk by telling of a time in his life when he felt ultimate despair. He even attempted suicide.

He told the audience how he was able to get help and how his life turned around. Now he is a therapist, author, and teacher.

In fact, we all studied his theories in school. He reported his life is very full. He then proceeded to teach what he had learned...what had helped him to heal.

The audience was mesmerized. People felt connected to him. People wanted to know what he had learned.

**Give People Hope**

People in your community – your prospects - want to feel connected to you. They want to feel you are human. Most of all, they want to feel you have found some answers - the answers they are seeking.

Don't be afraid to share your story. The part you've processed. The healing you've experienced. Tell it in a way that shows that you've been there and you can show them the way out of the pain and darkness. Let the wisdom you have bubble up inside so you can share it with those who need it most.

**Tell a Success Story**

For those who feel uncomfortable about sharing a personal story, I recommend crafting your story as a client’s success story.
Tell of a client you saw early on in your practice who was in pain (changing any identifying information, of course.) Share what happened after treatment. Again, when people hear the hope, they are drawn to you. And I predict your appointment book will begin to fill!

**EXERCISE: CRAFT YOUR PERSONAL STORY OR A CLIENT SUCCESS STORY**

Telling your story can be a powerful way to attract clients. When someone asks, “So what do you do for a living?” you can say:

I can best describe that by telling you about a difficult time in my life. I was (then you describe the pain in ways that your ideal client would recognize as their pain.)

Then I decided to do something about it. I read everything I could, I studied, and attended some meetings, and I found a wonderful therapist.

After a short time, I found (list the benefits you received after you got out of that pain.)

As a result of this, I decided to devote my professional life to helping others (eliminate that pain) so that they to can have (list of benefits.)

Here is the formula to help you craft your story:

1. **IN ORDER TO EXPLAIN WHAT I DO, I’D LIKE TO TELL YOU OF A STRUGGLE I ONCE HAD.**
   (Tell your story here. Tell the struggle you had or the pain you experienced. Tell the situation that surrounded it.)

2. **THEN I ...**
   (Tell what you did that caused you to experience hope, growth, change...I read books...entered a program...started therapy...tried a new cool job...whatever it was.)

   **AND WHAT HAPPENED WAS...**
   (Show the cool outcome you received ... I started liking myself more... I got out of that rut... I started making new friends...I liked getting up in the morning...I found a great partner and got married…tell of the powerful, positive change that you experienced - whatever it was.)

3. **AND IT WAS AT THAT POINT I NEEDED TO HELP OTHERS TO...**
   (What follows here is your ultimate marketing outcome - who you help and what you help them with. It is what you help people to achieve or do or believe. This is the power you see from therapy.)

**PEOPLE WILL LOVE IT**

You can do this with your own personal, processed, and appropriate information or you can create the story based on a success story. It is up to you. The important point is that people you meet begin to see that you are caring, kind, and knowledgeable.
THE EXTRA BENEFIT

The side benefit is that crafting your story can reconnect you with the wonder of this work.

Identify, craft, and tell your story. (Again, you only want to tell the very appropriate and the very processed part. Remember, we aren’t trying to overwhelm someone with our old pain.)

We want to show them there is hope.
STRATEGY 4: CONSIDER A SPECIALTY
(GO DEEP WITHIN THE MAGIC OF A NICHE)

One time I was at a networking meeting for therapists. During the introductions, one of the therapists stood up and said “I have to admit I kind of have a specialty now. But I am really embarrassed to admit that. Somehow the specialty has found me. And that is doing sex therapy.”

He looked down sheepishly as he said it. Several ladies stood around him and shook their heads as if to say “Oh, poor you. I am sorry you have to be pigeon-holed as a specialist.”

Somehow being a generalist got a better reputation.

I was thinking, “I know so many female therapists who would like to know a good male sex therapist to refer to. I know one in my hometown, but this was a man who practiced in a different city and I would love to know more male sex therapists that I could refer to.”

It made me sad to see him apologizing for his desire, skill, and ability to help people with a certain type of pain. I believe he easily could have filled his practice by proudly talking about how he loved doing sex therapy. He could have changed any identifying information and told of a wonderful success story. I imagine many therapists in that room had couples they could have referred to him. But no one wanted to because he seemed unhappy about his specialty.

PICK A SPECIALTY FOR MARKETING PURPOSES

I want to go on the record here as saying that I am inviting you to pick a specialty for marketing purposes. This means picking a population you enjoy or a problem you like helping to resolve. And then telling your community about it.

It absolutely does not mean excluding or limiting your practice. You can see whomever you wish. My belief is that when you pick a specialty to market, your practice fills faster, you feel better, and you have more consistent referrals over time.

WHAT SPECIALIZING IS

Specializing is about choosing a population of people you enjoy and crafting your marketing to appeal to them so that you can enjoy more of them in your caseload.

Specializing is about identifying a particular pain that you’d like to help people reduce and letting our community know that you do.
WHAT SPECIALIZING IS NOT

Specializing is not excluding clients because you only see certain types of people or problems. With every intake call, you decide if you want to see that person. You get to choose.

Specializing is not about only seeing one type of person or problem. We will go into this more in a moment.

WHY DIDN’T PRIVATE PRACTITIONERS SPECIALIZE IN THE PAST?

In the late 1970s and early 1980s, many therapists I knew were very, very successful. They seemed comfortably busy and they had schedules I envied. They worked three hours in the morning, had lunch with friends followed by a yoga class and then three hours of sessions in the afternoon. They brought in over $100,000/year. They seemed to be able to take time off on a regular basis. They had a really great schedule. So I assumed that when I became a therapist, all I had to do was sit in my office, answer my phone, and schedule those appointments.

Well, it didn’t happen that way for me and hasn’t for many of my clients.

What is different now? I did a little research, and I found out that indemnity insurance paid really well in the early 1980s. The insurance companies paid 80% of the client’s fee and clients happily paid the other 20%. Rates were pretty good. There were no Out-Patient Treatment Reports required for additional sessions. Sometimes we didn’t even have to give diagnoses; we just had to indicate that we saw a client. Insurance paid well and billing was easy.

THE ADVENT OF MANAGED CARE IN THE U.S.

Around that time, things really started changing economically in the United States. For one thing, health care costs started rising. Laurie Kolt, in her book, Starting A Private Practice, notes that psychotherapy was brought into the spotlight as a reason for the rise in health care costs. A lot of that had to do with in-patient mental health stays, but outpatient care was perceived as too expensive and sometimes unnecessary.

Reducing managed care became the answer to get insurance costs under control. For therapists, it meant we had to give diagnosis and document our treatment plans. We had to show a case manager who never met our client that she was still “sick” enough to warrant more treatment but that she was showing progress. Each 6 or 10 sessions required another report or phone call. The clinical paperwork was an amazing maze in itself.
THE VISION OF THERAPY CHANGED

Instead of being a personal growth opportunity that it was in the 1970s and 80s, therapy began to have a more negative stigma. We accepted the medical model and clients had to have a mental disorder to have managed care pay for their treatment.

Clinical treatment became briefer and more solution focused. We were asked to cure people in 6 sessions. Clients often saw therapy as solving a problem rather than seeking to grow as a person or become healthier emotionally.

When we were coming out of the ‘me’ generation, the 70s and 80s, - where it was all about ‘me’, - everyone was in therapy. We bragged about it. We started our sentences with, “Well, my therapist says…” or “My shrink says…” I am willing to go on record as saying I do not think this is the case now. Therapists are not revered in the way we once were.

OUR CULTURE HAS CHANGED

We have become a nanosecond generation where we want answers (or the ‘giant fix’) right now with no waiting to schedule an appointment and drive to a therapist’s office. The self-help movement recognized this trend and, as you know, there is a plethora of free and low cost self-help available on and offline. This means that therapy may not be the first choice when someone has a problem and is looking for a solution.

But what if you were known, both online and offline, as being very successful in helping people who struggled with a certain type of problem? What if you were known as the Stress Reduction Therapist in your city? What if you had a reputation of helping people avoid the high emotional and financial cost of divorce?

Marketing a Specialty Means People Trust You More

There are people in your community that want to see a person who deals in their kind of pain. So if we don’t let people know what kind of pain we resolve, they are not going to find us, our phone is not going to ring, and our caseload is going to be lighter than we would like it to be.

I had another thought when that therapist apologized for having a specialty: Would you rather have your loved one see a generalist, or a specialist? I don’t know about you, but I would much rather have my loved one go to a specialist.
Generalists may not engender confidence. You look at those therapy locator listings where people said that they cure everything from anxiety to zoophobia. Does that give you any sense of confidence in their skills? It doesn’t in me. One size doesn’t fit all; it doesn’t in pantyhose, and it doesn’t fit all in therapists.

When listing your specialties on your website or on an online therapist directory, be cautious of how many you specialties you say you have and, if possible, make sure they are related. If you are both a marriage counselor and divorce coach, consider how that will look when listed together on your site. You may know (and feel confident) that you can do both – but what about the couple who is conflicted about their marriage? How might they react when seeing both on your site? Will it engender confidence or concern?

**TIP**

Many therapists stop here and get frustrated. The idea of picking a specialty – even for marketing purposes only, can be enough to put the brakes on. Please don’t let this happen to you. If picking a specialty doesn’t feel right to you, trust yourself. Or perhaps pick a specialty that is very generic – such as relationships. Make the process of marketing your practice as easily and comfortable as possible. As always, don’t quit before the miracle.

are both a marriage counselor and divorce coach, consider how that will look when listed together on your site. You may know (and feel confident) that you can do both – but what about the couple who is conflicted about their marriage? How might they react when seeing both on your site? Will it engender confidence or concern?

**People Know People like Themselves**

If, for example, you are helping the mother of a strong-willed child, I bet that mother knows other mothers of strong-willed children that might want to see you.

We know people like ourselves. If I am struggling with my weight issues and you are a hypnotherapist who helps me - believe me, I am going to tell everyone on the planet and your practice is going to be full. That is another good reason to specialize.

Those are some ideas on why it is good to consider marketing to a specialty that you enjoy. Remember you will not ONLY see that specialty. It is just to help you become known as an expert – online and offline.
COMMON FEARS OF SPECIALIZING

“I won’t have any clients if I specialize because now I see anybody.”

You certainly aren’t going to stop seeing your current clients or turn away new clients who call you but aren’t in your area of specialty. What I am asking is this: “What wisdom do you have and who needs to hear it? Whom do you want to fill your practice with? Who energizes you?”

When we indicate we have a specialty, it engenders confidence in others about our abilities. What often happens is that people say, “Oh, you work with kids. Do you work with adults too?” This is called the ‘halo’ effect. When you indicate you have a specialty, people will often ask you about other specialties.

Sometimes when you share your specialty, unexpected things happen. Here is a true story. A therapist in my coaching program decided she would market a specialty of working with “little guys – ages 6 to 10 – who were struggling at home, at school and with their siblings.” She started telling people this and referrals started coming it. However, these were referrals for adults! They were attracted to her loving nature when she spoke of the “little guys.”

“I will be bored seeing just one type of client or problem.”

Again, I am not talking about seeing just one type of client or problem. I want you to pick a specialty based upon what you love. Why not pick a problem that you would like to see frequently and that you know you can be helpful in, and that energizes you. What is bubbling up inside of you that you want to share? What is it that you love?

It doesn’t mean that you limit your practice to those types of clients. It doesn’t mean that you exclude anyone. It means that you have the opportunity to choose that client, rather than passively waiting to be chosen by a client. You get to go out and chose them with the types of problems that you love and get excited about working with.

Further, as you grow and change and have more experiences, your specialty will change. (I have noticed that therapists tend to pick specialties that mirror their own recently resolved issues. And that is good because they are closer to their hope and passion.)

Over time, you will probably decide that you want to work with a different type of specialty. When you pick a specialty, please know that you are not picking something for the rest of your life. You are picking something that you would like to market over the next few months or over the next few years. If you love it, you keep doing it. The cool thing is if you don’t love it, you can change it. You get to figure out what you love to do. That is one of the really wonderful advantages of being a therapist. It is not like accounting or architecture, where you have to like doing that type of work. We like working with people and there are many ways to help people.

I want you to think about what excites you, what you are a passionate about – what gets you on fire. If at some point you get bored, you can always pick another specialty.
“I don’t know enough about one specialty, it would take a lot of research.”

Here is the truth: You are good enough, smart enough and you know enough right now!

You don’t need more training. You don’t need more degrees. You don’t need to read a 100 more books, and you don’t need to study a zillion more theorists.

We go through an incredible amount of schooling. We train. We study. We read everything. We go through numerous hours of supervised practice in an internship. We take rigorous (and in some states) multiple examinations.

Again: You are good enough, smart enough and you know enough right now.

I just want you to listen to that little voice inside you that says, “Wow, that was a good session!!” Think about those clients that energized you, that you loved working with. Then look at what problems they were struggling with. That is one of the best ways to pick a specialty.

**HOW TO PICK A SPECIALTY**

There are a couple of ways that you can go about that. Here are some of my suggestions.

**Look At Your Experiences**

What has happened to you? What have you learned in your past that could help others? Maybe you are a stepparent, and you are keenly aware of the challenges that blended families face. I bet that if your marriage resulted in a blended family, then you have a lot of strategies that you can use to assist other people.

When I married my husband he had a daughter who had just graduated from college and I really wanted to connect with her. I remember looking on the Internet and calling all over trying to find books on how to be a stepparent to an adult. There was nothing, and I would have gladly gone to see someone who could have helped me with that issue. Luckily we have a great relationship so it was not an issue. It was something that I was worried about and wanted to check into.

The narrower your market and the more that it is based on your experience, the faster it will fill, the more passionate you will feel, and the more that you will be able to give to that client.

Maybe you struggled with the loss of a child, or maybe in mid life you ended up rediscovering what your role was, or maybe like many of us you had a mid-life career change.

While your counseling skills are of benefit to others, your experience and the fact that you went through this and found hope on the other side gives hope to others.
Looking at your experiences is one of the most important things you can do when you are looking at specializing.

**Look At Your Community**

Who lives there? What problems do they have? Before I was married, I dated a man who lived in Fresno, CA. I was told that in Fresno, there are seven times as many women as men. I was thinking that if you were a therapist in Fresno, maybe a really good thing to specialize in is how to help women find and keep a great guy.

I work with several therapists who are gay, and they often work in predominately gay areas. So we look at the concerns of that population. The therapists say that the gay clients come in with some of these concerns: “I never learned how to date in high school.” “If I come out, I am afraid that people will think I am one of the activist types and I don’t want to be considered that type of person.” “Do I tell my co-workers that I am gay? I just came out to my family.”

**TIP**

Appealing to concerns in your community will help to fill your practice.

**Look At Trends**

For example, we as a society are aging and maybe you have had some experience with working with children of aging parents. There are numerous concerns that baby boomers have these days. “My mother wants to live alone and she won’t take her medication” or “My daughter is on her third divorce and is returning home.”

However, please don’t pick a specialty only based on a trend. Pick something that you enjoy and that energizes you.

I worked with one therapist who picked a specialty based upon a trend and as we were finishing our program, she said that she really hated this specialty. I know that many people get into a specialty and then change it. I said, “Let’s talk about why you picked it.” She replied, “Because somebody said that it was a good place to make money.”
You never want to pick a specialty based solely upon money. Pick it because it is something that you enjoy and where you feel you can make a difference.

**Look At Who Has The Money And What Problems They Have**

Again, we are picking something that we love and not just because of the money. However, it doesn’t hurt to look at who has some money. After all, let’s not discriminate against rich people. They have problems too. In fact, a rich person often knows that money isn’t the answer to his problems.

One therapist I know is working with student athletes and their families. These are people who usually have money and understand about the need to invest in their children. The parents may not be too worried about having their insurance cover the therapy. This therapist was a student athlete and understood the pressures of competition. She is in a perfect place to help.

Another therapist I know is working with families in family-owned businesses.

Those are some ways to specialize, but the most important thing is to come from your own experiences and interest. You cannot sell something that you aren’t interested in. This brings me to your practice.

**Person, Problem or Person with a Problem**

In my workshops, I encourage the participants to identify their specialty in one of three ways:

- A recognizable type of person: ex) Attorneys, Mothers
- A problem: ex) Arguing with a mate, afraid of going to the dentist
- A person with a problem: ex) Attorneys with alcohol problems, Children whose mothers have a serious illness

The clinicians I have seen do this have filled their practices easily. Just make sure there is a market for your specialty.

**EXERCISE: WHAT DO YOU WANT YOUR CLIENTS TO KNOW, REALIZE, UNDERSTAND OR HAVE?**

You also want to take some quiet time and just imagine what you would like people to know. What hope do you want to offer?

When I was implementing the 8 Key Strategies in my psychotherapy practice, I realized I wanted others to know how to build successful practices. This is my mission, this is my desire, and this is my passion.
What is yours? What is bubbling up inside of you that you want people to know?

When you figure that out, then ask yourself “Who needs that information?”

And then you ask yourself:

♦ “Do they know that they need it?” (If not, what do they know they need?)

♦ “Would they say they need it?” (If not, what would they say they needed?)

♦ “Would they pay for it?” (If not, what would they pay for?)

Take some quiet time to consider these questions. It will help you pick a specialty to market.

**EXERCISE: WHAT TYPES OF PEOPLE AND PROBLEMS DO YOU ENJOY WORKING WITH?**

Make a list of your five favorite clients. Identify what you liked about each one of them. Identify any commonalities.

Then with each one, identify:

♦ How would you describe their problem from a clinical perspective?

♦ What did they say (in their own words) was their problem?
♦ What precipitated their seeking treatment? (What made them pick up the phone on that first day to request an appointment?)

TIP

Become Known For A Specialty that You Love
And Watch What Happens To Your Practice

Look at the reasons that your favorite clients sought therapy. Please try to separate out your clinical observations from what they said they needed. Their evaluation of their problem (in their own words) will be instrumental for developing your marketing plan to attract more ideal clients.

If you are not doing this, as you get new clients in, ask them these questions:
♦ “What made you start coming to therapy at this time?”
♦ “What do you see as the problem?”
♦ “If therapy worked for you, what would be different?”

Then make notes of what they said.

As I said, the words they say will be very important as we seek out more clients like them in our marketing efforts. We will discuss this more in the next chapter.

**Benefit Summary Of Picking A Specialty**
♦ You get to have a practice full of people and issues that energize you.
♦ When you market a specialty, people see you as the expert and you get more referrals.
♦ Ideal clients see you as a solution to their pain and ask for an appointment.
♦ You can make the most of marketing time and dollars when you target a specialty.
♦ People know other people with the same problem. As you help one, they refer others.
♦ Referrals sources can easily identify appropriate referrals for you.

♦ Marketing to a specialty can help those in agencies get more clients through the door.

♦ Those clinicians in the U.S. who want to get on managed care panels have a better chance of getting on full panels when marketing a specialty.

**AUTHENTIC HAPPINESS VIA STRENGTHS SURVEY**

If you are curious and would like to explore your wisdom and gifts, I encourage you to take Martin Seligman’s authentic happiness VIA Strengths Survey. You can find it at: www.authentichappiness.org.

This questionnaire will help you identify your core strengths. Dr. Seligman’s premise is that when we identify our gifts and strengths and use them in our work, we become happier. Check it out!

**FINAL NOTE ON PICKING A SPECIALTY: TRUST YOURSELF.**

In this strategy and the next, we talk about specializing and finding your ideal client. Many clinicians find themselves stuck here. Some stay stuck for years reporting, “I didn’t know what to do since I couldn’t find a specialty I wanted to market. So I stopped marketing.” Others say, “I will start marketing as soon as I figure this out.”

Let me help you to not be one of the clinicians who gets stuck here.

If you find yourself resisting specializing, ask yourself if there is a general specialty you are open to….perhaps ‘reducing anxiety’ or ‘feeling better’ or ‘improving relationships.’

If you are newer to the field, allow yourself to be open for a few years before picking a specialty. For now, enjoying seeing all types of issues and people and see to whom you are drawn.

Please keep moving. If you don’t find a specialty or aren’t drawn to a particular ideal client, continue with your marketing anyway. Follow what feels right to you. As I said, trust yourself. (And of course, get some supervision or consultation if that feels right too.)
STRATEGY 5: TALK ABOUT YOUR WISDOM SO PEOPLE SAY, “I WANT THAT!”

First we identified our wisdom and gifts. Then we asked, “Who needs this wisdom?” We then begin to develop a plan to market to those people who can use our help.

All companies know that identifying a target market is very important. They will often create advertising that specifically appeals to that market. (Just watch an Erectile Dysfunction Medication commercial. The men look so tan, thin, well-coffed, vibrant and “ready for intimacy.” Their slightly gray haired partners look so happy that the men are “ready.” You don’t see overweight, (or very thin) balding men in ED medication ads. They want men (and their partners) to think if they buy the med, that they will feel younger and look like those actors.) The same is true with ads for gyms.

While the way they go about that advertising can seem a bit slimy, the truth is that you want and need to talk directly to your ideal prospect in words that resonate with them. You want to let your ideal prospect recognize themselves when you talk about whom you work with. You want them to be able to say "Hey! That's me!" or "Hey, that's my sister."

You also want them to want the solution you offer. You want them to think "Hey! That's me! I want that! Are you taking new clients?"

WHO NEEDS YOUR SERVICES?

I invite you now to consider your ideal client. Now, if you are like many therapists, you enjoy many different types of people. But hang in here with me for a bit. Let’s imagine an ideal client.

I suggest we don’t think in terms of a large target market when creating our marketing plan and materials. For now, let’s think in terms of a single person and then write our materials "to" that person.

For example, USA Today newspaper markets to a 40 year-old businessman. Volvo markets to a 35 year-old mother of 2. Of course, this doesn’t mean that women don’t read USA Today and men don’t buy Volvos. It doesn’t mean that Volvo and USA Today turn down others who want to buy their product. It just means that when Volvo creates marketing materials, they are going to appeal to their ideal client. What does that mom want first of all? Safety. Volvo hopes that their ideal client, that mom, will see their ads, hear about the safety features of a Volvo, and say “I want that!” and buy a Volvo.

To best describe what we do to attract ideal clients, we want to know what a perfect client would be concerned about and why they would come to therapy. We want to know what they worry about. We want to know what wakes them up at night and what problems they want to pay for help with.
To make the best use of our marketing time and dollar, it would make sense to determine where ideal clients “hang out” (both online and offline) so we can efficiently focus our efforts.

The exercise on the next page is designed to get you thinking about who you’d like to have in your practice. (Make a copy of this exercise because you will probably do it several times as you change specialties over time.)

I often find therapists are uncomfortable with this exercise because they are worried they will exclude others or they enjoy diversity. You may have several types of clients you enjoy. Developing an ideal client profile doesn’t mean you ONLY see this type of person. Developing an ideal client profile will help you to easily develop an effective marketing plan. It helps prospects and referral sources to “get it” when you talk about what you do.

If you decide you want to market to a more general practice, just make sure you talk (in your marketing) in words that the general population would understand.

You can certainly add more ideal client profiles as you go along. However, I suggest you start with one.
EXERCISE: WHO IS YOUR IDEAL CLIENT?

Please create a vignette about a fictional person - not a current or past client. Current or past clients can carry an emotional charge for you so please create a fictitious client profile. Here are some questions to get you started developing your ideal client profile.

Feel free to add anything else you'd like!

(Note: To eliminate the he/she pronoun problem, I am going to use the feminine pronoun. Please change it if your ideal client is male. If your ideal unit of treatment is a couple or family member, please describe them all.)

♦ What is her name?

♦ How old is she?

♦ Marital status? If married, how long?

♦ If she has a husband, what is his name, age, occupation and how is their relationship? Marital history?

♦ If single, why would she say she is?

♦ If divorced, why? If divorced with children, what is the custody arrangement?

♦ Number, names and ages of children

♦ Number, type and name of pets

♦ Socioeconomic status
♦ Living situation (where, what type of place, with whom)

♦ Occupation

♦ Work situation (position, income, general job description)

♦ Who is she close to?

♦ What is her relationship with her family?

♦ Where does her family live?

♦ What is her Myers Briggs type? (What is her personality type?)

♦ What size is her body (wt, ht)?

♦ Hair color and style? Eye color?

♦ What does she do for fun, hobbies? Does she exercise? If so, how often?

♦ What does she do on weekends? Evenings? During the days?

♦ Does she eat out or eat in more?
If she eats out quite a bit, at what types of places?

What is her name?

What keeps her up worrying at night? (This is a key question for you to ask yourself about your ideal client.)

Most importantly: what precipitated her calling for an appointment now? Why today and not yesterday or tomorrow?

How would she describe her problem?

Finally: how would she answer the question "What would you like from therapy?"

The last four questions can really help us understand her current problems and needs.

One of the conditions for someone to hire you is that they believe you can help them with their problem. If we know how the ideal client defines her problem, we can show her we understand and have ideas to help her. It is important for her to know we can help her. It is more important to show her we can.
Once you understand who your ideal client is and what she needs, you can begin to think about how to best translate what you do into words that would appeal to her.

**THE ULTIMATE MARKETING OUTCOME**

In sales terminology, the solution to the client’s problem is called the “ultimate marketing outcome.”

So, let’s say your ideal client profile is a woman named Margie. Margie is 39 and lives in San Francisco, CA. She is married for the second time to an engineer named Alan. Alan is 44. Alan has a daughter, Camilla - age 13 from a previous marriage and Margie and Alan would like to have a baby. They’ve been married for 5 years and have been struggling with fertility issues.

Margie is a successful freelance writer who writes about gourmet restaurants and cooking. She takes a gourmet cooking class every other month. She has written a cookbook that is half complete. She exercises at a “gym for women” three times a week. She loves taking extension classes at the local university.

Margie is the middle child of 5 girls. She and Alan are close to her parents who live 15 minutes away. Margie talks to at least one member of her family each day and she is very close to her sisters. All of her sisters are on their first marriage so none have step-parenting experience. Three of her sisters have children – Margie’s youngest sister has three sons. Alan is an only child and lost his parents in car accident 10 years ago.

Every other Wednesday evening, Camilla is dropped by her mom and goes to dinner with Alan. Then they come home and watch TV or do homework before Alan takes Camilla back to her mom’s house. Every other weekend, Camilla spends the weekend at Alan and Margie’s house. Margie is trying to teach Camilla to cook but Camilla isn’t interested. She prefers computer games.

On the weekends that they are alone, Margie and Alan visit her parents and experiment with recipes. They are active in their church and attend a social group for couples.

Margie calls you for an appointment. It seems there was a big blow-up this weekend when Margie tried to get Camilla more involved in the household chores. Here is the call from Margie:

“Are you taking on any new clients? I would like to schedule an appointment for my husband and me. He is letting his daughter run our house when she is here. I am hoping you can help him understand he has to get her in line.”
What is the ultimate marketing outcome for Margie? (What is it SHE wants?)

♦ To get her husband to listen to her point of view?
♦ To get her husband not to take his daughter’s side over hers?
♦ To help her have more control when Camilla is there?

Now, from a clinical perspective, you may have lots of ideas about how you can help Margie. But how do you want to talk about what you do in your marketing (online and offline) so that you will attract people like Margie?

You could say:

“I help step moms who are depressed.” (Would Margie respond to that?)

Or you might say:

“I help those in blended families understand the difficulties of combining two families.” (Would Margie respond to that?)

I am guessing that these statements wouldn’t be too appealing to Margie. Let’s try these:

♦ “I help step-moms who want to better connect with their somewhat difficult stepchild.” (Would Margie respond to that?)

♦ “I help stepparents to create more peace in their house.” (Would Margie respond to that?)

♦ “I teach step families proven strategies to have more peace in their family.” (Would Margie respond to that?)

If you found that one of these fit your style, when people asked, “What do you do for a living?” you could say:

“I am a special kind of counselor.” (And then follow it up with the sentence that would appeal to your ideal client)

A COMMON CONCERN

Some people might worry that by narrowing the description of what they do, they might turn away possible clients.

While I do agree that some people may not think you can help them if they don’t fit your narrow specialty, my belief is that you will attract more clients than you will keep away. Plus remember the ‘halo’ effect I described earlier. When you sound like an expert in one area, people will often ask if you know about their problem area too.
THE FORMULA FOR THE SHORT ANSWER TO THE QUESTION “SO WHAT DO YOU DO?”

Earlier I wrote that there are three areas that seem to limit the success of some therapists in terms of building a successful practice. The first is their relationship with money.

The second has to do with how they speak about what they do. Most of us have tripped over our words at least once when asked what we do for a living. And if we use our license titles, we can confuse or alienate prospects. Our license titles usually don’t lend themselves well to describing what we do. Recently an LCSW told me “I realize I need to speak differently about what I do. When I tell people I am a licensed clinical social worker, they think I hand out welfare checks.”

The way to help the public understand what you do is to discuss how you help your ideal clients. Once you are clear regarding whom in your community you help and the ultimate marketing outcome (what they would say they wanted), you can then explain it in words that will attract more clients.

I call this your “short answer” to the question “So, what do you do?” Some people call this an “elevator speech” or “15-second commercial.”

When someone asks, “So what do you do for a living?” it is a marketing opportunity. Not to push yourself or your services but to remind yourself of the joy of this work. Remember, it is a community service when you let your community know what pain you help to reduce. You want to say something that invites a conversation. (Note: please don’t try to give an exhaustive description of what you do. Speak simply to invite a question or start a conversation.)

Here is a suggested formula for your short answer to the question "What do you do?"

♠ I am (some category that helps people define you) followed by a breath – a verbal ‘period.’
♠ I (verb: teach, work with, help) (your target market defined by their problem.)

Example: I am a special kind of therapist. I work with loving moms of difficult children.

Example: I am a special kind of counselor. I work with couples that love each other most days, but some days don’t like each other. (Sounds better than" I am a marriage counselor.")

Example: I am a special kind of coach. I teach single women over 40 how to find great partners.

Example: I am a special kind of counselor. I help frustrated parents and teens get along better. (Sounds better than "I am a family therapist.")

Example: I help women and their families who sometime in their life made the very difficult decision to terminate a pregnancy. (Sounds better than "I help post-abortive women.")
Remember to talk about what you do in a way that helps ideal prospects to recognize themselves, engenders hope, and helps them see that you could help them. You want them to ask you a follow up question. Try not to make your short answer too long though. You don’t want to try and explain everything – but give them a bite.

Again, the formula is:

♦ I am a (therapist/special kind of counselor/psychologist/psychotherapist/coach).

♦ I (teach/work with/counsel/train/support) (your target market defined by the problem they have.)

**TIPS FOR A GREAT SHORT ANSWER**

Try to use down-to-earth, concrete, benefit language. I would, for the most part, avoid words like “I help women find their purpose/balance.” Unless of course, your ideal client is a therapist or is someone else who is willing to pay you find purpose and balance.

Make sure the words you use are something that your ideal client would be willing to admit to. If you say, “I help people who abuse their children,” I am not sure anyone would call you. You might attract more clients if you said, “I help parents who love their children but don’t know what to do to get them to behave.”

Make it conversational and make it simple. Use words that a 6-year-old (or maybe a 10-year-old) would understand. On some level, I believe we are all wounded little 5-year-olds. If you can appeal to a child with simple words – you will appeal to the hurt part in the grown-up.

**TEST, TEST, TEST**

Try your short answer out on people you don’t know and who don’t already love you. People who love you or already understand what you do are wonderful – but not the best audience to test your short answer. Try saying it to 20 people and see what happens. You know your words are resonating when someone asks you a follow up question or asks you for your contact information. Keep track of the 20 tests and see how many asked you a follow up question or seemed to connect with what you said.

**POSSIBLE RESPONSES TO YOUR SHORT ANSWER**

As you test, you will find that you will get a variety of responses. Some you’ll like and some you won’t. You will have to use your intuition to decide why you are getting the responses you are. I recommend you keep a journal of responses. It will help you as you test your short answer.
Here are some common responses and how I interpret them.

♦ **“May I have your card (contact info)?”** Smile. Hand them a card with the text on the card facing them. Hold the card by the corners so they can read it as you hand it to them. Let them decide if they are going to say anymore. (This means your short answer is a good one and this might be an ideal client or referral source.)

♦ **They change the subject or their eyes glaze over.** There are three reasons this can happen. Either they aren’t your ideal client, or they had a negative reaction to what you said or they didn’t “get it.” Again, use your intuition. Maybe you said “I help people with the pain of a loss” and you realize this person just lost his wife of 40 years. Maybe he is “too close” to his pain to hear what you offer. If you believe that maybe the person could be an ideal client and just didn’t “get it” when you said what you did, then rework your words in your short answer and try again. (later.)

♦ **They get agitated.** For example, let’s say you answer, “what do you do?’ with “I help couples who are having trouble staying together but don’t want to get divorced.” If someone gets angry, you know you hit a transferential button. You may begin to hear how “marriage counseling does not work.” Please don’t take the anger personally. You have touched this person’s pain. Reframe their response in your own mind. Your words must have been pretty powerful to have that reaction.

♦ **They ask you about another type of client or specialty.** “I see you work with teens. Do you work with adults too?” Smile. And if you do work with adults then say “Of course. I love working with adults too.”

♦ **They ask you a follow up question.** If they ask you a follow up question or how you got started doing this work, you can tell them your personal or success story that you crafted in Strategy #3.

So, what do you do for a living?
**STRATEGY 6: CREATE A MARKETING PLAN THAT USES YOUR GIFTS AND THAT WORKS!**

**SUCCESSES AND WINS**

By this point, you have addressed your issues with money. You’ve decided upon a fee structure.

You have identified what is bubbling up inside of you that you want to share with those in pain. You have crafted a personal or success story.

You have developed a short answer to the question “What do you do?” that is intended to get conversations started around what you do.

Congratulations! If you do absolutely nothing else but share your short answer with a lot of people and continue to address those old money issues, you may notice an increase in your practice. Let your joy out and ‘love them into your practice.’

**WHAT’S NEXT?**

If you really want to get that practice going full and steady, then I recommend you come up with a plan with focused marketing strategies that work with your marketing personality type.

I also recommend that you develop an action plan that you can consistently implement to get your phone ringing.

People often ask me “What is the best way to market my practice?” That is similar to asking, “What counseling theory is best?”

There are as many marketing strategies and ways of implementing them as there are therapists. Your job is to decide which ones will work best in your environment and then implement them consistently.

And while we will get into the details in a moment, this is *not* about writing some letters once or speaking to anyone who will listen. We want to develop strategies and action plans that will work best, as I said, for you, your personality, and your community.

**CONSISTENCY**

I have used the word *consistent* several times in the past few paragraphs so let’s address it.
As I said there are 3 major areas where I believe that therapists tend to limit their private practice success:

1. Old, unresolved issues connecting money and worth.
2. Lack of a clear message in describing what they do.
3. Inconsistency in marketing efforts.

Let’s address the third one now.

Many therapists do what I call “binge marketing.” Here is how it works. They notice they are low on clients. They know that marketing can help them to get some new clients.

So they get very focused and market like crazy. And they get some new clients.

Then they stop marketing because they have enough clients and are now servicing those clients.

Often I’ve noticed that clients tend to stay with us for a certain length of time. Have you noticed this? Each therapist tends to have his or her own “average length of stay.” I am not sure why this is.

For example, Mary Jane may notice her clients often stay 6 months. But Don’s clients stay with him for an average of 2 years. Janice’s clients stay an average of 10 sessions.

This doesn’t make one therapist “better” than another – they are just different. This “average length of stay” variance may be related to personal beliefs, or theoretical orientation or personality. For purposes of this discussion, why this happens doesn’t really matter.

However, what often happens is that the clients we got all at once due to our “binge marketing” efforts tend to stay a similar length of time. Then we are faced with them terminating treatment about the same time.

And guess where that puts us? Out of clients and scrambling to get them. So we start to “binge” in our marketing efforts again. No wonder we don’t like marketing!

By developing and implementing a consistent plan, you can avoid the “binge marketing” phenomenon.
**DISPELLING “MARKETING MYTHS”**

Many therapists say they don’t want to market “themselves.” And that is why marketing feels so uncomfortable to them.

I say you are absolutely NOT marketing *yourself*. You aren’t even marketing your *services*. You are marketing your willingness to help some people reduce their pain.

Other therapists tell me “I am not good at selling.”

Here is the truth. The best sales people are those who listen and empathically connect with the prospects’ needs.

And these are exactly the skills that make you a good therapist!

**A REFRAKE FOR MARKETING**

If you really want to help people, then I believe you owe it to those in your community to let them know you are there.

If you help to reduce a particular type of pain, then please let those with that pain know you are available to help them.

Maybe one time you had an emergency with your pet and needed to see a veterinarian in the middle of the night. Or maybe you’ve been on vacation and had a dental emergency. I imagine you were grateful that those professionals marketed their services. Otherwise you might not have found them when you needed them.

It is important to let the community know your gifts, wisdom, and the help you offer to others. This way, people who have pain can find you. This is marketing. Marketing your practice is a service to the community.

**ANOTHER DEFINITION OF MARKETING**

Marketing is:


♦ It is so much more than advertising, promotion, and publicity. Because everything you do affects the way your market perceives you. And ultimately everything you do affects your productivity and profitability.
YOUR IMAGE

How do you want your prospects and referral sources to “see” you? Are you an Ann Taylor or Brooks Brothers tailored-suit kind of person, or are you a more free-spirit Birkenstock sandals type?

Let’s go back to your ideal client. Ask yourself “Would my ideal client be attracted to the image I present?” “Would she feel comfortable in this office?” If not, consider what needs to change. Do you need to change your ideal client profile or do you need to change your image?

Right or wrong, your prospects and clients will make judgments based on your appearance and your office location and décor. Make sure there is a good match between what you “present” and whom you want to attract.

I was once given this advice: “Dress as if you were going to lunch with your wealthiest client.”

YOUR CUSTOMER SERVICE

I am sure most of you reading this have at one time or another left someone’s office because you were kept waiting too long. In fact, my husband and I have chosen to pay a ‘concierge medical practice’ a monthly fee just to have concierge-level customer service.

How punctual you are sends a strong message to your clients. They will use it as a barometer of how you value their time.

How quickly you return a phone call is another measure upon which clients will judge you. I encourage new private practice practitioners to use a cell phone for their business line and answer it whenever it rings. I am convinced that the first clinician to actually speak to a prospect will get that prospect as a client. People are tired of voicemail.

Several years ago, I hired an assistant to answer my phones and set appointments. She had a lovely voice and really enjoyed talking to people. My business soon doubled and then tripled when she answered my phones – even though she answered the phone for only 3 hours in the morning!

Be the kind of therapist that your ideal client would like to see. Your appointment book will be full.

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1 If you use a cell phone for your business line, please let the prospect know you are on a cell phone and you can’t guarantee privacy. I would also recommend that you let new clients know (via the informed consent paperwork) that your business line is a cell phone and, again, you cannot guarantee privacy on a cell phone line.
THREE COMMON METHODS OF MARKETING A THERAPY PRIVATE PRACTICE

♦ Sit and wait for the phone to ring. (This was what I did in the beginning. I really don't recommend it!)

♦ Develop your own marketing plan and activities.

♦ Get on EAP and insurance panels if you can. The insurance company does the marketing for you.

NOTE

Clinicians who say they don't market because they are on insurance panels are half-right. They may not be out in the community giving talks but they are marketing. They have just "out-sourced" the job to the insurance companies.

Many therapists use the third method as their major marketing strategy. The disadvantage, of course, is the lower pay, paperwork, and that someone else is involved in your case management.

"I TRIED MARKETING BUT DIDN’T WORK FOR ME."

Many therapists say this and I don’t doubt it was true for them. It could have been due to several reasons.

It could be that they didn't have the right words to talk about what they did so people said, "I want that!"

It could be because the activities were "hit and miss" with no plan for follow up. (I know one very good therapist who did a lot of marketing and wasn't seeing the results she wanted. It turned out she disliked her office space and really didn't want to see clients there!)

You need someone to be marketing your practice. You can either “out-source” your marketing efforts to the EAP and insurance companies or you can do it yourself.
If you choose to use the insurance companies – then be happy with your choice. They work for you!

If you decide you’d like to do some of your own marketing, then read on!

**OVERVIEW OF YOUR MARKETING PLAN**

Your marketing plan will include:

♦ The vision of your practice

♦ Your ideal client profile

♦ The marketing activities that work best for you and your personality type.

♦ The tasks and dates you will do those marketing activities scheduled on a marketing calendar.

By this point, you have identified your vision and your ideal client profile. Now we can look at how to best reach those ideal clients. First, let’s determine your marketing personality type.
WHAT IS YOUR MARKETING PERSONALITY TYPE?

Based on working with thousands of therapists, coaches and healers, I found that there are four main “marketing personality types”:

♦ Introverts
♦ Extroverts
♦ Techno-lovers
♦ Creatives

Let’s look at each of the 4 types – their strengths and their biggest challenges.

First I will identify which marketing activities seem to work best for each marketing type. Then I will go into detail on how to actually do each of the marketing strategies.

TIP

Most people can identify with at least 2 marketing types. So review all the marketing types and pick a couple of strategies that seem like fun to get started.

THE INTROVERTS MARKETING PERSONALITY TYPE

Many therapists fall into the Introverted Marketing Type category. Introverts are deep thinkers and people of great depth. They enjoy one-on-one conversations and this makes the helping profession a perfect one for them.

They love quiet reflection and enjoying time with their family. Introverts have huge hearts and care deeply about people. They will go the extra mile to help someone in pain.

Much has been written about Introverts. My two favorite sayings about introverts are:

"Still waters run deep” and

"Introverts aren't party poopers - they are pooped by the party!"
When they think of marketing their practice, Introverts often experience mild to significant anxiety. They worry about "selling" themselves. They imagine having to make small talk with people they don't know at networking meetings.

However, it is the Introvert's desire to get the spotlight off them that can actually be the very best and most effective marketing technique. Introverts can actually be the best private practice marketers.

Most people love to talk about themselves and this gives Introverts a distinct advantage. Introverts can easily invite people to talk about themselves in a way that makes potential referral sources want to refer to them!

**The Introvert's Biggest Marketing Challenge**

The Introvert is the Marketing Personality Type most prone to "binge" marketing. Once Introverts get into the swing of marketing (in ways that use their gifts), they tend to enjoy it and feel pretty comfortable with it. But as their practice fills, Introverts will often slow down and even stop marketing. It is like going to the gym, once you stop - it is harder to get back there again.

**The Overview of How To Market Your Practice As An Introvert:**

Here is the “what” to do if you see yourself as an introverted marketing personality type. I will explain how to do them in the next section.

Recognize that being an introvert gives you a distinct advantage in your marketing efforts.

Remind yourself that marketing your practice is doing your community a service - that there are people out there who need to know you are there.

Develop a list of questions that you can ask people as you meet them - potential referral sources and prospects. As you have these questions in your mind, it will be easier to talk to people.

Never try to sell yourself. Always come from your very natural "How can I serve you?" place.

Consider joining a very structured business-networking meeting - such as BNI. (BNI is Business Network International. BNI is the largest networking organization in the world.) The structure will give you comfort and the people there will want to help you build your practice.

Make sure you have one-on-one meetings (coffee or lunch) with potential referral sources you meet and you like - especially ones you might meet in the networking group. Good referral sources are people who offer non-competing services to your ideal client. If possible, plan to have at one or two one-on-one meetings a week.
Develop a method of "keeping in touch" with those potential referral sources - such as "nice to meet you" notes and follow-up "How are you?" calls. Plan a strategy to gently stay in touch with those you like. As you build those relationships, the referrals will come. Make sure you keep in touch with anyone who has ever sent you a referral - and not just when he or she sends you a referral.

Plan to stay in touch with them at least once a month.

Consider online therapist locator services - such as Find-A-Therapist.com, psychology Today, GoodTherapy.org or others you find when checking the internet for therapists in your area. Write a listing that is directed to your ideal client.

Create an accountability system for your marketing efforts - a set of goals you review regularly or a coach or colleague to keep you moving toward the practice you really want.

It may take a little longer for Introverts to become known in the community and they may need to do some structured extroverted activities but they can still build a fantastic practice! (I speak from experience. I am a flat-out Introvert.)

**THE EXTROVERTED MARKETING PERSONALITY TYPE**

Extroverts love meeting and connecting with new people. Their excitement about life and their practice is evident to anyone who meets them. Extroverts can be really fun to talk to and people often enjoy being in the company of an Extrovert. When invited to do a speaking engagement or attend a networking meeting, Extroverts often get excited about the opportunity! They relish the idea of networking and expanding their circle of influence.

Extroverts have a distinct advantage over some of the other Marketing Types. Their natural ease in new situations and their desire to connect with others makes marketing a practice pretty simple.

*The Extrovert's Two Biggest Marketing Challenges*

Extroverts just love developing new relationships and connections. It is important that Extroverts develop a system to keep in touch with previous contacts and referral sources. It is much easier to get "repeat referrals" from an existing source than to develop new ones.

While Extroverts can easily charm a room full of people, it is important to remember that marketing is not about selling yourself - it is about coming from a "How can I serve you?" place - and inviting others to talk about themselves first. Extroverts can use their ease with people to invite less extroverted people to talk about themselves and thereby endear the other person to them.
**The Overview of How To Market Your Practice As An Extrovert:**

Here are some recommendations if you see yourself as an extroverted marketing personality type. I will explain more about how to do them in the next section.

Pick two marketing activities - such as Speaking, Networking, or Building Strategic Alliances.

Make a list of 20 places, individuals, or occupations that might also service your ideal client. Do not get up from this exercise until you have 20 on the list.

Create a schedule where you will contact several on your list per week. Plan to share your network, your compassion, or your knowledge with them each time you connect. (For more on this see Tim Sander’s book, *The Likeability Factor*.)

Develop a signature talk and offer it to organizations that service your ideal client. Make sure you have something to offer people in the audience so that they can get more info from you. For example, create a "Top 10" tip sheet they get online in exchange for giving you their email address. Offer a free consultation to get them into your office.

Consider attending a few networking meetings - such as BNI. Your natural ease with people will be a big attraction factor for you. Make sure you have one-on-one meetings (coffee or lunch) with potential referral sources. Good referral sources are people who offer non-competing services to your ideal client. If possible, plan to have at 1 or 2 one-on-one meetings a week.

Create your keep in touch strategy and calendar it. Make sure you stay in touch with prospects and potential referral sources at least once a month.

Don’t neglect your online marketing strategy. Get a website and consider purchasing listings on a couple of online therapy directories.

By learning a few simple techniques, extroverts can use their natural marketing gifts and build a fantastic practice!

**WHAT IS A TECHNO LOVER MARKETING TYPE?**

Techno lovers are great analytical thinkers. They like puzzles and love to solve problems.

And they love technology. Techno lovers can get excited about websites, the Internet, and high tech gadgets. They tend to be online shoppers and spend much of their leisure (and creative) time online. They aren't at all afraid of what they don't know - it excites them and they really love learning.
The Techno Lover's Two Biggest Marketing Challenges

Creating a technological marketing strategy can be a lot of fun. It can almost be addictive. It is important for the Techno-lover to know when to "step away from the technology" and consider a project "complete" (at least for now.)

Sometimes, with Techno Lovers, the marketing effort is about "the game" - the game of "How can I get people to visit my website?" Let's remember that you want more than visitors to visit your website - you want to convert that web visitor into a person scheduling an appointment.

The Overview of How To Market Your Practice As A Techno Lover

Here are some recommendations if you see yourself as a Techno lover marketing personality type. I will explain in more detail how to do them in the next section.

Make sure your website is 80% about the client and only 20% about you and your services. Remember - the client cares most about "Do you get me?" Your experience and credentials are usually only interesting to a prospect once they believe that you understand them and "get them." In fact, in all your web marketing - speak to the client. Let them know you understand their pain and want to help them.

I recommend you list your practice on three to five online therapist locator sites such as Find-A-Therapist.com, psychology Today, GoodTherapy.org or others you find when checking the internet for therapists in your area. Write a listing that is directed to your ideal client.

Put audio and/or video on your website. Let your prospects get a sense of who you are and what you look like or sound like. This will give them the opportunity to decide if they want more from you. (Note: If you do decide to have audio or video, make it so they have to click on something first instead of it coming on automatically when they come to your website.)

Let the web visitor have the opportunity to make an appointment with you via an online appointment manager/scheduler.

Have something free that you will give away to your web visitors in exchange for their email address. Create an online newsletter - something of value to your ideal client - that comes out regularly to your email list.

Consider pay-per-click Internet advertising (such as Google adwords) but make sure you do it in the geographic region where you are located and that you set a reasonable budget. Then watch your statistics.

Don't forget to get out from behind the computer once in a while and consider networking with others that service your ideal client with non-competing services. It can be fun!
Technology is wonderful and if you enjoy it, then you are very lucky.

**WHAT IS A CREATIVE MARKETING TYPE?**

Creatives are very warm, loving, spiritual people whose purpose is to bring a sense of joy into the world. They approach life with a sense of wonder and curiosity. Creatives tend to enjoy hobbies that bring beauty to their environment such as gardening, photography, decorating and crafting.

Creatives seek to find balance and purpose in their lives. They tend to engage in spiritual practices. They love anything that can help their clients get in touch with their own inner beauty.

Creatives can be either Extroverts or Introverts.

Creatives are very giving people. Creatives can sometimes get themselves in trouble by not attending to their own money issues. They will sometimes let a client's money issues become their own.

**The Creative's Biggest Marketing Challenge**

Creatives tend to get off course sometimes by following the "shiny" factor. As they are involved in one project, and another fun opportunity presents itself, Creatives will often get excited and involved in the new project. This can sometimes result in various uncompleted projects.

**The Overview of How to Market Your Practice As An Creative:**

Here are my recommendations if you see yourself as a creative marketing personality type. I will explain in more detail how to do them in the next section.

Appreciate your gifts and vow to use them in your marketing.

Consider visiting and joining networking groups with holistic and spiritual practitioners.

Build one-on-one relationships with like-minded potential referral sources from those groups.

Develop a method of "keeping in touch" with your prospects and referral sources that showcase your personality - hand-designed "nice to meet you" cards - gifts for referral sources that you make - an electronic newsletter for your clients and prospects designed with your personality in mind. Keep in touch with your prospects and referral sources and prospects consistently. You could create stylish, personal videos created just for them.
Use your creativity and let your energy come through in your website design and marketing materials.

While you want to capitalize on your creative gifts, make sure you keep track of where your referrals are coming from so you know where to continue to focus your marketing efforts.

Consider a "focusing buddy" or "accountability partner" such as a colleague or coach to help you stay focused and on track with your marketing efforts.

Tell everyone what you do for a living - let them see your joy and passion for your work!

Creatives bring a special joy to the world and can be natural marketers!

Now that you have an idea of the various marketing types and a sense of which one you most identify with, we can move on and explain each of the marketing activities in more detail.

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THE MARKETING ACTIVITIES

Now is the time to learn about effective marketing activities. While there are many more, I have chosen to discuss 17 marketing activities for therapists. Implementation details are listed below with additional information in the appendices. Once you begin marketing your practice and meeting new referral partners, you will want to create some Keep In Touch marketing activities to follow up with potential new clients and referral sources. Several Keep In Touch activities are listed in the next session.

I invite you now to review the marketing activities to see which ones will work best for you with your target market, your personality, and your community.

How to Use This Section: You may wish to skim the list first and then go back and read in more detail those you feel might work for you. There is a lot of information so please don’t let it overwhelm you. You won’t be doing it all. This is just to give you some ideas. As you read, think of three that might be good for you to start implementing right away.

Ready? Here we go….

I have divided the marketing activities into five categories:

♦ Internet (Online) Marketing*

♦ Community (Local) Marketing*

♦ Public Relations

♦ Mobile Marketing

♦ Tribe Building

* If you are marketing in-office services in your community, please make sure you diversify your marketing between online activities and community marketing. I cannot stress this enough. Having all your eggs in one (marketing) basket is asking for trouble. Our goal is to avoid dependency on any specific activity or referral source.
INTERNET (ONLINE) MARKETING

1. CREATE A WORKHORSE WEBSITE.

You can view a series of short videos I created for you on websites here. http://StartYourCounselingPractice.com/yourcoolresources/

Technology has changed so much since I wrote the first draft of this manual in 2007. Back then, a website or online presence was an option for a private practitioner. Today I say it is the first marketing activity you want to tackle. Just as you got your office space and business card, please create a website.

If you don’t yet have your own website, please purchase an online locator listing. (See Marketing Activity #3 for more details on what to put on your listing.) Potential clients and referral sources will check you out online before they ever contact you. Let’s make this easy.

Set a “goal date” to have your website (and/or online therapist locator listing) completed and online. Many private practitioners get stuck here. They agonize over the right words or pages on their site. I understand the concern. But set some goals. How about these:

♦ One week from today you will have a listing on an online therapist locator/directory.

♦ Two weeks from today you will decide how you are going to create your website. You can use a blogging platform. You can do it yourself or hire someone. (See this video on how to get your site online here: http://StartYourCounselingPractice.com/yourcoolresources/ )

♦ Three weeks from today you will have your first draft of the copy (text) written for your website home page, about the therapist page and the contact page. You will be ready to implement it yourself or hand off to your web support person.

♦ Four to five weeks from today you will have it completed and online!

I know it can be very tempting to marinate in your website planning. Think of it this way. Your first website will in all likelihood be a draft. Your website will change often so let’s target for completion not perfection.

What Pages Should Be On Your Website?

To make it simple, I recommend four pages for your site: Home page, Meet (your name) page, a Contact (your name) page, and, optionally, a Frequently Asked Questions page.

In just a moment, I will discuss the content of each of those four pages. But for more detail about website content, you may want to consider our Write Your Website in a Week Course at

Casey Truffo  www.BeAWealthyTherapist.com  949.309.2590
1. Home Page: Your home page is your first connection with the prospect. Make it count by writing text that shows you understand the client and his/her pain. Make it at least 80% about the client. The client cares less about you and your credentials than you might think.

Start your home page with a headline that talks about a problem, benefit or outcome. “Tired of arguing with your mate?” or “Let’s See if We Can Reduce Your Anxiety So You Feel Better” or “Stop the Cycle of Perfectionism.” Can you see the impact as compared to “Welcome to my site?” Your headline is what invites your reader to stay on your webpage and more. Make it interesting and they will read the next paragraph.

After the headline, you could write about (to) your web visitor (also known as prospective client). Discuss the pain they might be struggling with right now and in their words. Next, show you have hope for them. Third, invite them to contact you and list how to do so right there on the home page in this final section.

Please note the order here – (a) recognizing and empathizing with their issue, (b) showing hope and desire to help, (c) inviting them to contact you. A common mistake is to mix up the order - going back and forth from pain to hope. You can see why the order is important. As soon as I understand you “get me” and have hope for me, I want to know how to connect. If you go back into describing my pain, I feel bad again. You no longer seem like a good option for me. I worry that it will be like that when working with you. Will I begin to feel better and you will pull me back into feeling worse? You can avoid those problems by paying attention to the order of your copy.

But Where Do You Put The Business Admin Pages On Your Site?

While you may want to put your intake and HIPAA forms, payment forms, and client resources pages on your site, I recommend you don't make them highly visible. Consider putting links to them in the footer.)

The purpose of your website is client attraction first, so let's not immediately show a prospect a page like 'Make a Payment')


Casey Truffo www.BeAWealthyTherapist.com 949.309.2590
By creating a client-attractive home page, you have joined with the client, helped them know you “get them” and are ready to help them make a decision about hiring you.

2. **Meet The Therapist Page (put your name in there: Meet Amira for example)**

Here you can share the personal parable story you created in Strategy 5: Talk About Your Wisdom so People Say, “I Want That!” You can end the story with how you now help people who had that problem to find relief. (Of course, use the words your ideal clients would use to describe their pain and the relief they want.) The next step on this page is another “call to action.” Something like, “And now I would like to hear your story and see if I can help. Please (give contact info and instructions.)” You can then add a “P.S. For those who are interested in my credentials” followed by your license, certifications, etc. This way you have connected heart-to-heart with your story and then you give their left-brain a chance to catch up by listing your credentials.

Please have your picture on this page (as well as on other pages if you like.) Pick a picture that best looks like you and what your ideal client is searching for. If your ideal client is a harried, first time mom, you may choose a different picture than you would if your ideal client is a Fortune 500 CEO. Either way, dress (in person and in your photo) as if you were going to present to or go to lunch with your very best client.

3. **Contact The Therapist Page**

Give some thought as to how you want them to contact you and how to make it easy for them to do so. Place some welcoming text around it. “Let’s see if we can make it better for you. Please give me a call at (your number here) or (additional instructions).” You may choose to have them email you. Some therapists will invite text messages from prospects. I recommend an online scheduling option so they can immediately make an appointment without having to leave their computer. More on that below.

4. **Frequently Asked Questions Page (Optional)**

This is probably the most misunderstood page on therapists sites. The purpose of this page is not to describe therapy or to share all your office policies. It is to answer any questions that would keep a client from contacting you. (Please read that sentence again.)

What concerns or doubts would your ideal client have that would make them hesitate to go forward. Perhaps they are afraid you will tell them what to do (or NOT tell them what to do.) You can address this easily. Say you specialize in helping women decide whether to stay or go in their relationship. On your FAQs page, you could have “Are you going to tell me whether I should divorce my husband or not?”

To create your FAQs, spend about 30 minutes imagining what would cause hesitation and write kind responds addressing their concerns.

People often ask me if they should post their fees on their site. I honestly go back and forth on this. If you are new and just starting out, I would recommend against it. Give yourself a chance to join with the client via your site and an intake call prior to discussing fees. On the other hand
if you have an online scheduler, it might be a good idea so that people know your fees prior to booking. I am not sure there is one “best way” you might want to experiment and track your results. However, if you have a full practice, you may choose to publish your fees to avoid ‘tire kickers.’

The same is true when people ask if you take insurance. My strong preference is that you join with them first and then handle the objection when it comes up. However if you have a full practice, you may choose to address it on your FAQs page.

Finally, just as we talked about the order of your copy on the home page, beware of the order of your FAQs. Start with a joining one – a quiet concern they might have. End with “How can I get started right away?” and give them your contact instructions there. Again, do not make them hunt for your contact information.

**Let’s Make Your Website A True Workhorse Website: Six Optional Features.**

When I built my first practice website, there were 7 therapists in my county with websites. Today, 377,000 websites are listed when I search for ‘marriage counseling orange county.’ In the next section we will talk about how to get traffic to your website. But here I want to talk about how to *engage your visitors* once they find you.

1. **Video.**

As I write this, online marketing experts agree that video is one of the best ways to connect with your web visitors. Consider making a fifteen second video saying something like this: “I can imagine why you are here. It’s not easy is it? (followed by maybe 2 sentences about their struggle) I don’t think it has to be like this (or I don’t want you to keep feeling like this.) Please don’t wait. I’d like to hear your story and see if I can help.” Of course please change the wording to suit your personality and your ideal client’s issues but give them a sense of you. The purpose of a welcome video is not to actually say ‘Welcome to my site’ but to let them hear your voice and get a sense of what you look like.

Caution with your video: Make sure that in the video, your ‘look’ is at least somewhat similar to your picture. Many of us (me included) tend to have nice professional headshots on our sites and yet have videos where we don’t have the same ‘look.’ I once saw a therapist’s site where she had a gorgeous professional headshot in her banner – yet her intro video caught her on…let’s just say…not her best hair day. Please don’t let this deter you. You do not need a professional videographer or to pay lots of money to create an intro video. You can do so with your built-in webcam, a camcorder, or a simple USB camera. I am just suggesting that the camera can wash us out so spend a little extra time on your appearance on video-creation day.

2. **Audio**

While I think video allows for a better sensory experience for your website visitor, audio is an option for clinicians who might prefer it. As with video, you can create a welcome message for your site no longer that 15 or 20 seconds and have a “call to action” in it. Something like, “I imagine you have found this site because you and your teen are struggling. As you and I both
know, it isn’t easy to raise teens today. It can be confusing knowing what to do. You don’t have
go through this alone. I’d like to help. I am (your name here). Please call me and we can
figure this out together.” Simple. Short. In just a few sentences you join with them and give an
invitation to connect with you.

3. Online Assessments (Quizzes)
Are you familiar the Cosmo Quiz? Growing up, I used to look up those quizzes in Cosmo and
other magazines. They were quizzes on “How well do you know your mate?” or “How much of
a procrastinator are you?”

Creating a “self test” or assessment can be a great way to help your prospects get in touch with
their need for your services. Let’s say your specialty is anxiety. You might have 10 questions
such as “Do you find that your nervousness is causing you problems in your relationships?”

“Do you find your heart racing and/or palms sweating at some time most days?” “Are you tired
of feeling scared of social situations?” I recommend these questions not be out of the DSM
manual but try to use the words average folks would use. I encourage you to ask questions
where the answer would be “yes.” Then you can say, “If you answered yes to at least four of
these questions, maybe you could use some support. I invite you to call me (or schedule an
appointment if you have the online calendar service) and let’s see if we can help you feel better.”

4. Online Appointment Schedulers
The first person to connect with the prospect usually gets that prospect as a client. Why not
allow him or her to do while they are on your website?

Online calendaring services (web-based software) are available to make scheduling easier for
both you and your client. These services put your calendar on the web for your clients and
prospects to make their own appointments. You put into the scheduler the times that you wish to
see clients. Then you have a button on your website or blog that says, “Schedule an
appointment.” When a person schedules an appointment, you are sent an email (or text)
notifying you that someone has scheduled an appointment with you and it has all his or her
contact information.

Online Appointment Schedulers offer these benefits to new (and current clients):

* Convenience.
Convenience is the obvious benefit to having an online schedule. A guaranteed advantage to you
with online scheduling is seeing an almost immediate increase in the number of clients your
practice will see. Once they come across your website, if they have the ability to make an
appointment right then and there, you're more likely to attract that client into your practice. Any
client can also make appointments on the go by using a smart phone or other device. As the
telephone begins to become a secondary form of communication, having an option for people to
book appointments online makes a lot of sense.
* **Anonymity**
Although a client will have to come to your practice at some point, being able to schedule that first appointment without having to speak to anyone in person can be a very attractive feature for a client who is nervous about seeking treatment in the first place. Online scheduling software gives the client a sense of anonymity, which often will give that person the courage they need to seek out treatment. Of course, it's a good idea to follow up with the client via the telephone to confirm the appointment and to assure them that you care and you'll be able to help them.

* **Accessing Desired Appointment Times**
A great benefit for clients with using online scheduling software is the ability to schedule their appointments during the most convenient times for them. Clients can look ahead at the calendar and schedule weeks in advance if that is what they need. Some of those popular appointment times are hard to come by. When a client is able to schedule those times in advance, it gives them a greater sense of control.

* **Professional Image**
A therapy office that uses online scheduling software is demonstrating to their clientele that they are on the cutting edge of technology. This is impressive to clients, who might be used to practitioners who use computers to schedule but who don't often have a feature for the client themselves to make appointments. Many offices still use books to make appointments. Professional image is important. An impressed client will share with their friends that you are the go-to office for that type of care.

* **Email (or Text) Confirmation**
Another benefit of online scheduling software is the ability to provide appointment email reminders. Clients love this feature because it accomplishes the job of reminding the client about the appointment without having to speak on the phone. Clients can print out their confirmations to keep as a reminder. Email confirmations, unlike phone calls, are difficult to miss, especially when a client uses a smart phone that lets them know every time they get a new email.

Your clients are the heart and soul of your practice. They will love the benefits of having a way to schedule appointments with you online. And you will love being able to provide them with even more exceptional service.

Due to the fact that you haven’t personally connected with the new client, there does tend to be a higher no-show rate among these new clients. Calling them within 12 hours of the time they first scheduled the appointment can reduce these. This personal connection can make a big difference.

Online appointment schedulers can be stand-alone services or can be part of a practice management software service. Before you sign up with an online calendaring system, consider the administrative needs of your practice (beyond client attraction.) For more information and things to look for with online calendaring and practice management software, visit [http://TherapyOfficeTools.com](http://TherapyOfficeTools.com)
5. Pink Spoon Giveaway (Free Gift) from your website

Giving something away can help your website stand out and can help the client get to know more about your thoughts and style. This could be a free video, audio, report, e-course, or e-book. The term 'pink spoon' (originally coined by Andrea Lee and Tina Forsyth) refers to the small taste we are offered at the ice cream store. If we like that free taste of mint chocolate cherry ice cream, we might decide to buy a cone or a bowl of it. If we really like it, we may decide to buy a full quart or maybe even get it delivered monthly. The point is that before many will make a large purchase, they want to have a sample. Again, this can be done by giving away (often a digital download) of some content that would be of interest to them.

In recent years, "free" has become so common (almost standard) that web visitors expect to get something for free. And the line of free has moved. Our culture is expected more than the oldie-but-goodie '10 tips' article. On the other hand, don't give away so much on your site that it becomes overwhelming to your prospect. Consider what you can offer that would add value but not take too much time. For example, a 5-minute video with tips may be better received than a one-hour video. As always, put yourself in your client's mindset and ask, "What would be of value to me? What is the right medium? (Audio, report, video)"

In the early 2000's, internet marketing experts suggested we offer this free content in exchange for a web visitor's email address. Then the idea was (and still is) to keep in touch over time with the client with more relevant content until they decided to hire you. However, most of us receive an overwhelming amount of email and are hesitate to give away our email addresses. A good result is that those of us offering pink spoons in exchange for email addresses need to up-level the quality and relevancy of what we are producing. As my business coach is fond of saying "No more info-crap!"

6. Blog/Articles

A blog is an easy way to create and share content with potential prospects. You can update your blog easily and instantly. Each “post” you write to a blog appears “above” the previous post. That way visitors are always looking at fresh content. You can have a separate blog to post videos or articles or you can actually build your entire website on a blogging platform such as wordpress or squarespace.

Blogging has a lot of advantages. Blogs easily lend themselves to powerful search engine optimization. Publishers and journalists are often looking to bloggers for their expertise. It is a way to show off your knowledge and writing style.

Writing articles about your subject matter and posting them on your blog and then on online article directories (such as ezine articles) can help build your credibility as well as back links to your website. If you love to write this could be an excellent marketing strategy to attract more web visitors. If you are really interested in pursuing this avenue, it might make sense to hire a search engine optimization expert who can help you optimize your articles for maximum results.
2. Attract Prospects Online

Once you have a website or online presence, how do you get traffic to your site(s)?

Most people will get to your website or blog in one of three ways.

The first way is through your branding. I don’t mean some fancy, expensive idea of branding like ‘Coke’ or ‘Nike.’ I simply mean people come to your site because they already know of you; they have heard of you in some way due to your other marketing efforts.

Get traffic with your branding

To attract people to your site with your branding, make sure that you offer potential web visitors a reason to come to your site. Perhaps you offer a pink spoon (discussed earlier) or have a Cosmo-type quiz on your site. Make sure you identify this (with your web address) on all your marketing materials and when you do any of the community marketing activities such as networking and speaking. Some private practitioners offer their pink spoon on social media too.

“How shy are you? Free quiz with 10 tips to reduce shyness at (your site address here)” could be printed on the back of your business card and something you send out over social media. You could mention it in a talk or have it for the audience in your handout. As mentioned, make sure your pink spoon is interesting and relevant to your potential client.

Get traffic with search engine optimization

The second way to get potential clients to your site is with search engine optimization (seo). This can be a somewhat complicated process as the search engines are often changing their algorithms for website placement. Since this is not a manual on seo, I will give you some suggestions that are current as I write this. But since these things change so often, consider talking to an expert if this is something you wish to take on. And while I am on the subject of experts, do your due diligence before you hire someone to seo your site. Don’t blindly hire people who convince you they can get you on page 1 of Google. Ask questions. For what keyword would get that listing? What do they do for your money? Ask your colleagues for references and then ask your colleagues for specifics about the results they received.

In terms of keywords, you want to target words that your ideal client might type in when searching for a therapist. This sounds easy right? But you don’t want keywords that have too many monthly searches on them (or too few) and that don’t have too much competition. If I were reading the last sentence, my next question would be “How many searches is a good number to shoot for?” I wish I had the right answer and here I am going to suggest that first you use your common sense and then you may wish to consult an expert. At the time of this writing (and these thing change all the time) the google keyword tool can be very helpful. (Just put ‘google keyword tool’ into your search engine and you will find the link for it.)
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The google keyword tool will show you how many global and local (monthly) searches are made on the keywords you enter into it. For example, today I typed the following keyword phrase into the google keyword tool:

marriage counseling orange county

The keyword tool reported that there only 1,000 local searches on that term and the competition is high for that term. Hmm. So I played around in the keyword tool and found that the keyword phrase ‘family counselors’ has medium competition and 27,100 searches per month in my local area. I might choose to use that term where possible (if I felt it fit with my mission) rather than marriage counseling. And I also found that ‘articles on marriage’ had medium competition and 33,100 local searches per month. This leads me nicely into my next idea for you – article marketing. But before we leave this section, if you find that the competition is high for your desired keyword, you may wish to hire a professional to help you.

**Get traffic to your site with article marketing**

One suggestion to improve your ranking with the search engines is called ‘article marketing.’ If you like to write, this may be a great idea for you. Basically you are writing keyword rich articles and posting them on your site and then syndicating them via posting them on article directories such as ezineArticles.com. This gives you some nice back links into your site. People can not only view your article from the article directories (which would have your contact information and a link to your site) but they can publish your article in their newsletters as long as they give you full attribution. This increases your visibility. As with any of these strategies, if you’d like to learn more, consider taking a class or getting support from experts who know to maximize your results.

**Get traffic to your site with paid advertising**

The third way to get traffic to your site is by paying for it. In a way, that is what happens when you purchase a listing on an online therapist directory. Part of your investment goes to pay their current or past seo efforts to make their site and you come up higher on web searches.

You can also pay for this yourself; we call this ‘pay per click’ advertising. You can purchase ‘sponsored listings’ on the major search engines and on some social media networks (such as Facebook). Here is how it works: You write an ‘ad’ (usually a 2-3 line ad with a headline) and you agree to pay in some way for that ad. It may be in ‘pay per click’ in that you pay when someone clicks on it or it may be a flat monthly charge. If you choose to pay for traffic to your site, please educate yourself on the basics and then decide if you want to do it yourself or if you want to hire an expert. Google has great training on theirs, called ‘Google Adwords.’ If you do decide to do it yourself, take the training and be mindful of the budget you set and various demographic and geographic settings. I once lost several hundred dollars in a weekend by not limiting my listing to my local area. I paid to have people in China check out my office listing in Irvine, California.

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3. **Get Known Online With Content Syndication**

For those who are attracted to the article marketing strategy, you could even take it one step further to include video and audio. Imagine this. You write an article and then create a short 3 to 5 minute video from (with) the content. It could be a ‘talking head’ video where the camera is on you and you paraphrase the content of the article (rather than read it). Or you could take the content of the article and put some PowerPoint slides with it and make it a video slideshow with you narrating. (You can do this with PowerPoint or a number of other pieces of software.)

So now you have an article and a video you could first post on your site and then post on the online article and video directories. But how about extracting the audio from the video and sending it to the podcast directories. Now that is content syndication! You don’t have to start with the article either. If you enjoy video more, create the video and then extract the audio for a podcast and create the article from the video. There are also freelance writers who will create articles for you based on the keywords you are targeting.

Just make sure your contact information is on everything. More importantly, make sure it is relevant to your prospective clients.
4. **List Your Practice on the Online Therapist Locator Services**

More and more consumers are searching the web for therapists these days. Since there are so many people searching online for therapists, it makes good sense to be on several of the online therapist locator services. Many professional associations have online therapist directories where you can place a listing. Some countries such as Canada and Australia have directories specific to their part of the world. In the US, examples include are Find-A-Therapist.com, Counsel-search.com, PsychologyToday.com, GoodTherapy.org and NetworkTherapy.com. More are being created all the time.

Here is how they work. You pay a monthly or annual fee, and in return you get a listing on the online therapist locator service. You put in information about who you work with and your practice. This is called your listing, profile, or personal statement. A person seeking a therapist will enter into the search engine a search term - for example: "marriage counseling 92660" or "find a therapist Atlanta."

One or more of these services will come up and the person seeking a therapist (the prospect) can then go to that site and enter their zip code. A list of nearby therapists who have signed up with that online therapist locator service will come up on the prospect’s computer.

The prospect has the opportunity to read several therapists’ profiles and get contact information.

Remember, online, you only have a few seconds for someone to decide if they want to click further on your listing or click through to your website. It is imperative that you make those seconds count!

Here are my Ten Tips to maximize your results with these Online Therapist Locator Services. They might remind you of the client attraction tips we talked about with your website in the previous section.

1) **Make your listing about the client.**

Since we know people will scan your text and that they don't read everything, make sure your first few words capture their interest. Make sure the first 20 words in your “profile” speak to your client and their pain. Most therapists mistakenly think the prospective client cares first about the clinician's qualifications. They do care but first they want to know if you understand them and their pain.

Some of these services ask you questions in order to help you develop your listing or personal statement. The question might be "How do you see therapy?" or "How do you work with clients?" You don't have to answer these questions. The prospects never see those questions. Just write what would appeal to your ideal client. Speak to their pain.

2) **Don't try to be all things to all people.**

Several of these services allow you to pick your specialties. Resist the temptation to pick a lot of them. Keep the total of your specialties to 5 or less. Less is better. Make sure the ones that you
have relate to each other and to your personal statement. Use the blank at the bottom of specialties to put yours in if you have a nice niche. For example, I am encouraging those specifically marketing to Lesbians not to click off the specialty "Gay & Lesbian Issues" but make up a special one called "Lesbian issues" or "Counseling for Lesbians." Again, make sure your specialties match up with your listing (personal statement).

3) **Use simple language.**

Again, write your listing in the way we talked about creating your short answer to the question "So what do you do for a living?" Make sure you speak in simple language such as that of a 6 year-old. Make sure you use some emotional words but don't go overboard. I have seen listings with so much pain in them that I am afraid they'd scare people away.

4) **Avoid un-hearable and clinical words.**

Instead of saying “I am cognitive-behavioral therapist who does some psychodynamic work,” say something that would resonate with the client. (“Are you struggling with a very difficult loss? And sometimes it feels like the pain will never go away? Are well-meaning loved ones telling you ‘It’s time to get on with your life?’ I know this can be a very difficult time. If you could use some support, I’d like to help.”)

Earlier in this section, I discussed how some of these services ask you questions in order to create your profile such as "How do you envision therapy?" I have seen many listings where clinicians have started their profile with "I believe that therapy is a co-creative process where you can find the courage to change your life.” While this may indeed be how the therapist envisions therapy, remember that the web visitor has not seen that question. They just see several therapists’ names and then some parts of their profile.

Imagine that your ideal client is a person in pain searching the Internet for a therapist. What is their first concern? Is their first concern about a co-creative process of change? I don’t think so. They just want to know that you understand their pain.

I have also seen clinician's listings that talk about how their office is a "safe and accepting place.” Prospective clients will assume that your office is safe and accepting. Don’t spell it out. That is like a restaurant advertising "We serve our food on clean plates."

5) **Understand how to put in your fee range.**

Some of these services ask you to state your fee on your listing. While I don't usually recommend you state your fee on your website, you may need to do it on these listings. On some services, you have the choice of several "ranges" of fees - for example: $110 - $119 or $120 - $129. I recommend you pick the range where your fee is in the beginning or in the middle of the range. In this example, if you fee is $120 or $125, you would pick the $120 - $129 range.

6) **Sliding scales and free initial consultations.**

Do you want to offer either a sliding scale or a free consultation? This is up to you and it is a very personal choice. I recommend (as we discussed earlier in the section on money) that if you offer a sliding scale, that you don't broadcast this fact unless you have a reason for doing so. If
you tell me on your online directory listing that you offer a sliding scale, then I will want (and probably expect) to pay the low end of that scale and will be asking about your scale. You may be losing money before you have really even started. Again - whether you choose to offer a sliding scale is beside the point. I just want you to make a conscious choice about advertising it. In other words, just because you have a sliding scale doesn’t mean you have to advertise it everywhere.

7) When you put in all the info about insurance - make sure that is what you want.
Some therapists in the United States who take managed care (HMO) insurance will include that info in their online therapy directory listing…in fact listing all the insurance panels they are on. If you choose to do this, understand that you are inviting insurance clients into your practice. You may or may not want to advertise this.

8) Always include a picture.
A while back, I was part of a discussion forum where some therapists were expressing their concern about putting their picture on their listing. Please put your picture on your listing. Right or wrong, as a society we judge people by how they look. We start to connect with people when we see their picture online. And if they are going to reject you based on your looks, let them do it before they ever call you and waste your time. (Okay that is just my two cents.)

Use a flattering picture - one that you like and that looks like you. Make sure it is no more than 3 years old. While you may not feel like you've changed over the years, others might.

9) Respond to requests as soon as possible.
Usually, the first therapist to make contact with the prospect gets the client. If a person searching on the Internet emails or calls you, try to respond within four hours. Tell them you are delighted they contacted you and would like to meet with them and hear their story. Give them some times and a phone where you can be reached to schedule an appointment. If an email comes in with a lot of questions about how you work, don't take the bait and respond with long answers. Just thank them for the great questions and invite them to call and give them a time and number where you can be reached. Voicemail - while a good thing - can also be a hindrance to connecting with prospects.

10) Finally, never look at the statistics these sites provide.
They will frighten even the most secure clinician. You may see that your listing has been displayed 3,478 times and no one has contacted you. These statistics are deceiving. Who knows - your colleagues may be looking your profile over and over again and this will drive up your statistics. YOU may be responsible for dozens of those when you were creating or checking your profile. The stats don’t matter. What matters is how much money you bring in from referrals from these sites.

What type of results can you expect?
The online therapist locator services can be an amazing way to market your practice. But please don't let it be the only way. In some zip codes, you may have better results than others. Some specialties may lend themselves to better results.

Always ask yourself "Will my ideal client be looking for a therapist on the Internet?" I know therapists who receive a new client a week and others who receive only one new client every 3 months from the locator services.

Some people ask me, "If I only get a client every 3 months, is it worth it?" That is when you want to run the numbers. Let's say you spent $350 a year for an online locator service. If you received at least $500 in income from it, then it would be a decent return on your investment. Usually even one client who comes 3 or 4 times will pay for that. So while you may not fill your practice with clients from these services, you will usually receive much more in income than your membership fees in the services. However, if you are not receiving at least 150% of your annual investment, then consider expanding your efforts with other marketing activities instead.

Before you submit your listing, visit one of these sites. Put your zip code into the service and see how many other therapists are in your areas that advertise on that service. If there are 20 or more, you may wish to reconsider. That is a large number of therapists for clients to search through. Also, check out the listings of others in your area. Put yourself in your ideal client's shoes and see what appeals to you. It will help you write a better listing.
5. CONNECT WITH SOCIAL MEDIA

As I write this there is quite a debate about social media. I believe we are in an interesting time in that social media has already been adopted by big business and small businesses are working hard to figure out how to best use it to build their brands and ultimately attract clients.

So, here is where I think we are right now. Social media definitely has its place in terms of expanding our professional branding. Posting links to your blog articles on the social media sites can help bring more traffic to your website. Social media can help position you as an expert. Post ideas and comments about your specialty and connect with others who also do. Comment graciously on other people’s blogs on your area of specialty. Any content syndication can also be shared via social media.

Social media can help you get speaking engagements if you position yourself correctly. Posting regularly on social media (and interacting with others) has resulted in a handful of people I know getting book deals. Social media is a great place to continue the connection with referral sources you have met at conferences or networking meetings.

There is no doubt that social media can increase your credibility and visibility. The question is ‘does it bring in new clients?’ When I asked this of the current ‘social media experts for therapists’ most said that while it didn’t result directly in new clients, the increase in online visibility meant more traffic to their site. And that additional traffic may have resulted in more clients.

Many experts on social media these days are saying that asking if social media brings new clients is the wrong focus and question. “The efficacy of social media is directly related to how well it is used”, report these experts. If you have bad social media habits (e.g. trying to sell yourself, inconsistent presence, limited interaction with your online community) then you will have bad results – just as with any other marketing effort. And of course no single activity is going to bring you clients alone.

It makes sense for therapists to have social media as a part of their overall marketing plan. Decide which sites you want to post on, how often you will post and how you plan to interact with others. That said, I might recommend that you focus on a client-attracting website and perhaps some community marketing activities (speaking or networking) first – and then use social media to support those efforts.

Finally, make sure you are clear on your social media policy as it relates to current and former clients. At http://StartYourCounselingPractice.com/yourcoolresources/ you will find a video from social media expert for therapists, Dr. Keely Kolmes. In this video, she talks about her beliefs about social media and her social media policy for therapists. You can get a copy of her social media policy on her site as well. (Just google her to get the site.)

I am having a ‘vision moment’ right now. Last week, I opened the first draft of this manuscript (from 2005) and saw that I written, “Turn off your pagers when you are at networking

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meetings.” (For those too young to know, pagers were how we were told we had phone messages before cell phones and email.) So I smile here and wonder what will have changed when I read this section in a year or two. I can only imagine. Bottom line: if when you read this, all your friends and mentors are getting tons of clients from social media, ask them how and do what they are doing. 😊
INTERNET (ONLINE) MARKETING SUMMARY:

We have covered 5 different marketing activities to help you attract web visitors and help turn those web visitors into clients:

Create a workhouse website. Start with four pages (Home, About, Contact and optionally FAQs.) Then consider the addition of some client attractive features such as video, audio, an online assessment (Cosmo quiz) and/or a free gift (pink spoon) to improve the engagement with your web visitors. Make sure your content is client-attractive and focuses on them and their issues.

Attract Traffic to Your Website. Traffic will most likely come in one or more of these three ways: your personal branding, search engine optimized traffic or “paid for” traffic. While some of you may be very good at this, others may be well served to consider expert help to get more web traffic. Please be cautious in who you pay to help you.

Get Known with Content Syndication. Take one piece of content that is relevant to your market and create a video, audio and article from it. After posting all 3 on your site, syndicate that content on the online article, video and podcast directories.

Join the Online Therapist Directories (Online Therapist Locators). Consider getting on two or three of these if it makes sense after you do your research. Again, remember to make your listing about the client and resist the temptation to try and be all things to all people by listing numerous specialties.

Connect via Social Media. Understand that social media strategies change often. Consider how you might use it to increase your credibility and visibility. Be consistent with your social media presence.

Now, let’s make sure you diversify your marketing plan by marketing in your local community.
COMMUNITY (LOCAL) MARKETING

Before the internet (there really was a ‘before’) most clinicians built their practices from referrals from other clinicians, from referral partners and from speaking in the community.

In the mid 2000’s so many therapists began to focus marketing their practice online that it created a vacuum locally. There were great opportunities and less competition for those therapists who wanted to market locally. These opportunities fall into two basic categories: local referral partners and speaking.

Referral partners: There are dozens of people and organizations in your area that also serve your ideal client – and with non-competing services. They need a good therapist to refer to. And they are going to refer to someone they know personally – not just from on online presence. By building relationships with these referral partners, you just might be the one they remember and refer to.

Speaking: When therapists began to abandon local marketing activities for the internet, program directors had more difficulties finding speakers for their groups and organizations. Speaking, which we will go into in detail in a bit, is one of the most efficient methods of attracting clients into your practice. You present on your area of interest and specialty to a roomful of ideal clients. And if you make it easy for them to move from audience members to clients, you can really build your practice quite easily.

Now for the detail: let’s take a look at the local community marketing options for you.
6. **Speak in the Community With Your Signature Talk**

You can view two short videos on speaking at:
http://StartYourCounselingPractice.com/yourcoolresources/

**Why Is Speaking A Good Way To Build A Practice?**

Marketing experts know that people will hire you as their therapist when five conditions are met.

♦ When they trust you,
♦ When they respect you,
♦ When they like you.
♦ When they believe that you have the solution to their problem and
♦ When they are ready.

So in order for me to select you as my therapist, I have to decide that I trust you, respect you and like you. I have to believe that you can help me.

♦ And I have to be ready.

**Speaking Is A Great Way to Market Your Practice Because People Can Get An Experience Of You**

In order for people to decide if they trust you, respect you, and like you, they have to get an experience of you.

So when you are speaking in front of people, they are deciding if:

♦ They trust you, respect you, and like you.
♦ But further, they are deciding if you have the solution to their problem.

I will give you an example. The first financial advisor I ever hired came from listening to a talk. The woman was discussing the tax advantages of Sep IRAs. Her information was good. But more importantly – when she spoke, I liked her. I told my husband about her. He had a meeting with her and we hired her.

So the number one reason that speaking is a really good way to market your practice is that people get an experience of you.
Speaking Can Also Be a Very EFFICIENT Method Of Marketing Your Practice

When I first did talks, I was asked to do a talk at a Lions Club in a large city. The title I proposed was “Create the Life You Really, Really Want.”

When I got there, I found that most of the people there were in the 70s, 80’s and even 90s! The youngest person in the group had just retired at age 68.

And here I am going to tell them how to create the life they really wanted! I found this pretty hilarious because they should have been teaching me!

I suggested that we just eat our dinner and enjoy a conversation and they said ‘No, No, little lady, you give us your talk.”

And I was mortified. But I plowed through it and tried to get their wisdom along the way.

After the talk, one gentleman said to me, “I should have met you 60 years ago!”

While this was quite sweet, I realized if I wanted to get clients from speaking, I needed to speak in front of my ideal clients. I developed a talk that would appeal to my ideal client. I found places where my ideal client would be and offered to do talks there. That is when my business started to pick up. Prior to that I was giving a lot of talks and not getting anyone expressing interest. When I began to speak to my ideal client with information they wanted, my phone started ringing.

So speaking to a room full of ideal prospects can be a very efficient way to get them to know you and decide if you have a solution for them.

TIP

To be effective at turning audience members into clients, I recommend offering free consultations via a feedback form at the end of your presentations.

See the marketing activity: 'OFFER FREE CONSULTATIONS’ for complete details on how to use this strategy.
Speaking Can Help You Find People for Your “Keep in Touch” Cycle

I used to measure the success of a presentation by how many clients I received.

Now I measure it by how many subscribers I get to my newsletter, how many new connections via social media or how many requests for free consultations I get. (More on that in a bit.)

Because the people in the room may trust, respect and like me, they may believe that I have the solution to a problem. But they may not be ready right now to hire someone to help them reduce their pain. However, if I connect with them with tips, strategies and motivational information over the months, they may one day wake up and decide, “Today is the day!” Then they call me.

If I hadn’t given them the opportunity to be in my “Keep in Touch” cycle, then they might have forgotten about me the next day.

Let’s say you do a talk on “Parenting great boys to become great men.” You may attract mothers of sons who want to be even better mothers.

If you offer your attendees a free subscription to your monthly newsletter on the same topic, you begin to build a list of people who’ve asked you to “keep in touch.” As your list grows and you send valuable information, you will get clients. People often say to me “I’ve been getting your newsletter for months and I think I am ready to get started with coaching.”

Or they may be watching your posts on social media or reading your blog for a while, and one day when they are ready, they will call because they’ve decided they know, like and trust you and believe that you can help them.

Speaking Can Help Your Ideal Clients Get To Know You

Let’s say I am working with career women who are struggling with finding “Mr. Right.” If I do a talk called “The secrets that men want women to know if they want to get married,” then there is a good chance that I am going to get some prospects from that talk.

I did a talk for a group of personal trainers called “Create the relationship with money that you really want.” And I recognized that they were young business people and that they were all struggling with family of origin issues with money.

What happened was that several of these trainers decided that they trusted me, respected me, and liked me. They decided that I had the solution to their problem and at least 14 of the 40 that were at that talk were ready. I acquired 14 clients from that talk.

That is a lot different than my experience at the Lion’s Club.

What Is A “Signature Talk”?

Your signature talk is the presentation you do to your ideal prospects on an issue that is important or of interest to them. It is about your specialty – the pain you help to reduce. It is what we love talking about!
For example, if your ideal client is Margie, our step mom, you may wish to offer a talk on “How to create more peace in your stepfamily.”

The idea is that your talk (and your marketing materials describing the talk) speak to your ideal client. They tell your ideal client “I understand what you are going through and I believe I can help.”

“What Do I Need To Give A Talk?”

A lot of therapists think they need a lot of supporting materials, lesson plans, and years of information to give a talk. You don’t.

Simply put, you need a talk title that would appeal to your ideal prospects.

You need a very simple handout that includes your business card, a one or two page summary of your talk, a feedback form, and a blank page for “Notes.”

Since one of our major objectives is to give people the opportunity to be in your keep in touch cycle, the feedback form is very important. This is where they will ask to get more information. But we want to make it easy for them to do so.

On the feedback form, ask them what they will remember from this presentation. Ask ‘what is one action you want to take as a result of being here today?’ Ask for their name, phone number, and email addresses. Invite them (on the feedback form) to enter a special raffle, to get your free pink spoon gift, and to have an initial, no-charge consultation with you. To see my feedback form, please see the Appendix E.

Your Signature Talk Title

I suggest that you develop at least two talk titles for the same talk. For example, I have “Private Practice and a Big Fat Bank Account? Yes you can!” I have another talk titled “The Eight Key Strategies to the Ultimate Private Practice.” I also have “Teaching you what they never taught you in graduate school on how to create a successful business.”

Now, for those of you in the know, all three of those are the same talk. But whenever I am offering to speak somewhere, I say, “My 3 most popular talks are … “ and I give those talk titles.

Different organizational cultures will want different things. I speak at many therapist organizations and a lot of them will want the 8 Key Strategies talk but more of them will want the more “edgy” talk - “Private Practice and a Big Fat Bank Account.”

So by suggesting different talk titles, you might capture a wider audience.

How to NOT feel uncomfortable giving talks.

There are 3 main reasons that therapists are often uncomfortable giving a talk.
1. "I don’t have enough material."

Think about it. I don’t know about you but when I go to a community lecture the last thing I want is a lesson plan where somebody is going to give me an excruciating amount of detail.

If I am going to leave my home, and not watch my favorite TV show that night to listen to your community lecture, what I want are some tidbits, some information.

I want to get the feeling that you respect my problem, that you have some information for me, and if I leave with one nugget of either amusement, or one nugget of information, I am going to feel that I got a lot out of the evening.

It is a myth that people want a lot of information.

When I first did presentations where I taught a “lesson plan” and tried to give a ton of information, it was guaranteed that people were going to fall asleep. I would watch them and see their eyes glaze over.

When I saw this, I was worried they were bored so what I would do when they would yawn, is give them more information! Believe me, this did not make them stop yawning.

People usually don’t want a lot of information. They just want one or two nuggets.

2. "Speaking makes me very nervous."

Here are some really cool ways to reduce your anxiety.

Deep Breathing

When I am being introduced, I practice deep breathing. I inhale and hold for a count of 3 and then I slowly exhale. This helps to calm me.

Get Moving

What most speakers will tell you is that in the beginning of a talk, one of the most important things is to move around, breath, and get the audience involved.

The way that I do this is to start with my little happy dance.

Okay, I’ll admit it. I look really bizarre, but I am moving around. People kind of like it. I laugh and have a good time of it and it helps me join with my audience.

When I do my happy dance, what I am really doing is getting my body moving. This helps me not to be stiff. It helps to get oxygen to my brain, and blood to the major muscle groups. This helps cognitive functioning and gross and fine motor movement. The bottom line is that it helps to calm me so I can think more clearly.

Get The Audience Involved
One of the best ways to get the audience to have a positive experience of you is to get the audience involved right away. This can help reduce your nervousness as well.

After I am introduced, I use an old Toastmasters trick. When I am in front of the audience, the first thing I do (well, maybe after my happy dance) is raise my hand in a big sweeping arm movement and ask a question.

And it is a joining question.

The first thing that you do - the very first part of your talk is a joining question.

When I did a talk for singles, I would open by saying, “How many of you here are between relationships?” And I would raise my hand.

They would laugh. I could laugh, and again it was movement. It was getting the oxygen and blood in my body moving. This helped me not to feel stiff and to begin to relax.

This also gets the audience involved.

Let’s talk about why that is important.

People will trust, respect, and like you a lot better when it is about them.

When I do my “How To Attract More Clients” talk for private practice psychotherapists, I raise my hand with that sweeping arm movement, and I say, “How many of you would like more clients?” Since I did that sweeping arm movement, my arm (or hand) is now raised.

Usually they chuckle and raise their hands. Then I lower my hand and do another big sweeping arm movement and I say, “And how many of you got into this business for the money?” We all giggle together.

Those are examples of joining questions. By doing something physical with my body (raising my hand) and asking the audience a question, I have attempted to accomplish 3 things:

♦ I released some of my nervous energy.

♦ I have connected with the audience.

♦ I have given them the opportunity to begin to like me.

An Outline of Exactly How You Can Create and Deliver Your Signature Talk

The Introduction

I recommend that you bring an extra copy of your bio.

If you are introducing yourself, then clearly you should know your bio, but if you are going to talk at someone else’s event bring an extra copy of your bio in huge print. (Even if you sent a
copy to the event organizer. You never know if someone will lose it or forget it and you don’t want to be making one up a minute before you speak.)

You want it in large print. There is nothing worse than having somebody who doesn’t have their reading glasses try to introduce you and they can’t read the tiny little print.

**Bring a gift**

I often bring a gift bag and fill it with a cute, five or ten-dollar gift. I have the tissue paper coming out of this pretty gift bag. When somebody introduces me, I walk up and hand them this gift.

Well, let me tell you, the people in the audience rightly or wrongly have now decided that I am a very giving person. This can immediately increase your likeability.

It may or not be your style, but I did that once and got 11 clients from the talk. I gave a gift to the event organizer and one to the person who introduced me. And everybody went “ooh ahhhh.”

**Your opening (joining) question**

Remember the objective of the opening question is to join with the audience. I encourage you to make sure that your opening question is kind of fun and quite positive.

A woman I met at a networking meeting asked (as her opening question) “Do you feel you have to sell your soul to have a business?”

I am sure she meant well, but I don’t think the audience (of small business owners) was attracted to her via this question.

The opening question is one that people would say, “Yes” to and would readily admit to. You want to make it positive and honest so that people are willing to raise their hand and get involved with you.

**Create your credibility – share your circle of wisdom story**

Since your goal is to get people to trust, respect, and like you with this talk, you need to establish your credibility early on.

Paradoxically, sharing your many degrees, licenses, and titles does NOT do this. You earn their respect by sharing either your personal story or by sharing a success story. You want to show that you know about the pain you are getting ready to speak about. You want to show that you have reduced that pain – either yourself or with a client. Let the audience see you have a solution to their pain.

After your joining question, you can say, “We are here today to talk about INSERT YOUR TALK’S TITLE and let me tell you how I came to be here today.”
This is where you tell your personal story or a client success story that we discussed in strategy #3. Since you have done the work earlier, you have this part of talk already crafted.

My Story

When I speak to therapists, I start by telling them how I didn’t know how to get a client when I was first licensed. And when I did get a client, I was often afraid to charge them. I tell about how I went into a lot of debt. Then I came out of that denial and started reading everything I could on marketing. I hired experts and tested many strategies. I developed the 8 key strategies and my business took off. I had so much fun that I began to teach other therapists because none of us were taught how to do this in graduate school. Now I devote my professional life to helping great clinicians across the country build the private practices they really want!

When I start my talk with this story, the members of the audience think: “Here is a woman who was maybe like me or worse than me in that she went $45,000 into debt, but now she has this booming practice.”

This gives me some credibility. Because it comes from a place of emotion, people can often resonate with it. By sharing either our story or an emotional client success story, the audience has the opportunity to decide that you might have the solution to their pain.

Can you see how this can help us connect more to the audience than if we stand up there and try to be the expert?

It is nice when you bring your own story into it. Again, if you feel uncomfortable about self-disclosure, then share a client’s success story.

Let’s say you were doing a talk at a stepfamily meeting. You may start out with:

“Let me tell you how I got here today. When I was a young therapist, I was working with this lovely client named Margie. She had married a man who had children and she wanted so much to be a wonderful stepmother. But she quickly found that her stepchildren didn’t exactly want her in the picture. And Margie found out that she and her husband had very different ideas on how to raise children. When they had a baby, Margie’s dream of this Brady Bunch family went totally out the window. Well, Margie and I worked together for a few months and we developed some strategies to help her feel calmer, happier and have more peace in her home. As a result of our work together, she has developed a better relationship with her stepchildren and her husband. They have developed some family guidelines and traditions that are helping everyone get along better. When I saw the sparkle return to Margie’s eyes, I knew I wanted to devote my career to helping loving step moms have more peace in their homes.”

To gain credibility – share a story.

The “Special Offer” and the Feedback Form

After your personal or success story, tease them with a special offer.
“I just want to say that I have a special offer coming for you in the audience today. I will talk more about this at the end of the talk. I just want to let you know we have something coming.”

“Also, there is a feedback form in your handout. It is the second to the last page in your handout. I am going to invite you to fill that out. We are going to raffle off some movie tickets (or a Starbucks gift card) later. So if you want in on that, please make sure you fill out the feedback form. We will collect them at the end of the talk. Now the special offer will only be for some of you; it won’t be for all of you. I’ll talk more about that later.”

The Body of Your Talk

After the joining question, your credibility story and the tease of the special offer, you jump into the body of the talk.

People often ask me, “Casey, how long of a talk are you talking about?” I have done this in as little as five minutes and I have done it in a seven-hour workshop. It can be any length that you want it. It is the same structure.

The body of your talk consists of points. I suggest you make them questions. This way you are facilitating a group discussion rather than being a lecturer.

This is one of the best ways to reduce nervousness. Make it interactive.

Let’s say your talk was on “Raising your teenager.” You might title your talk “My mother told me I would have a teen that wouldn’t talk to me someday! How to get your teen to open up to you.”

In the body of your talk, you may have 3 points:

♦ Why it is hard to raise a teen today?

♦ What doesn’t work when you are trying to get your teens to talk to you?

♦ What does work?

So you might ask the audience, “Why is it hard to raise a teenager today?”

This open-ended question gets the audience more involved with you. You get the audience talking. People love to hear themselves talk.

They are now going to trust you, respect you, and like you more because they are hearing themselves talk. (This is very funny to me. They like you more when they talk. But that is how we humans often are.)

Allow people to start giving ideas. Your questions will be different depending on your talk title. When I spoke on how to deal with difficult people, the first question I’d ask in the body of my talk was “Why are some people difficult?”
When I speak to psychotherapists I often ask, “Why do therapists tend to be poorer than other health care professionals?”

The objective is to get them talking and then you are just facilitating. Respond to their points with validation. “That is a great answer.” “Let me see if I understood what you said.” “That’s interesting.” “Does anybody else have a thought on that?”

Of course, you want to have some of your own answers to the questions as well. But ask the audience first. Let them feel like the experts. Everyone loves to feel like an expert. They also want to feel as if you understand their pain.

By opening the body of your talk with these types of questions, people often get more interested and involved.

Make sure that you insert your own wisdom. For example, when I say, “Why is it that therapists tend to be poorer than others in the health care industry” a lot of people will throw out answers.

I will say, “Have you ever met a surgeon who is poor?” or “Have you ever met a surgeon who said you don’t have to pay my fees since you have high divorce bills?” No.

Then the audience and I discuss what is unique about therapists and family of origin issues around money.

As you finish your third question, make sure that you have at least inserted the words “some of my clients,” or “people that I have had the opportunity to work with have discovered…” Let them know you work with people who have the pain you are talking about. Don’t be afraid to tell some more success stories.

**The Feedback Form And Special Offer**

As you finish your third question and have inserted your wisdom (answers), it is time to close. But you want to get back the feedback forms. So prior to closing, discuss the feedback forms.

“As I said, there is a feedback form in your handout. It is the second to the last page. If you are interested in entering the raffle (remind them of the prize), please fill out your information and turn it in to (the organizer). We will have a drawing for the winner.”

“But now, I said earlier that I had a special offer for you. I don’t always do this but if you think you are finally ready and could use some support with (INSERT YOUR TALK TITLE HERE), then I want to help. As you know I am a therapist and I do have a few openings in my practice. If you’d like to come in and talk about how some counseling might help you to (INSERT YOUR TALK TITLE HERE), then I am offering an initial free consultation. This will give us a chance to get acquainted and see if it makes sense for us to work together. If you are interested in that consultation, please just check the box on your feedback form and we will contact you tomorrow to schedule a time and give you directions to the office.”
Your Offer To “Keep In Touch”

“I am also offering a free copy of our special report “Top Ten Ways To Talk To Your Teen (or Insert Your Specialty Here)”. If you’d like to get a copy of that, please fill in that information as well.”

If you don’t want to offer a free consultation, that is your choice. (It may at times simply not be practical.) But please do have something you can offer them to “continue the relationship” with you – a special report – a newsletter subscription. This way they have asked you to send them more information. They have asked you to keep in touch with them. If they aren’t ready to hire a therapist at this moment, they may be ready later as you keep sending them information of value.

The feedback form gives the attendees the opportunity to enter the raffle, get your free report, or ask for a consultation with you or any combination of these.

When I first did presentations, I didn’t use a feedback form. The attendees left with my card and handout but I didn’t keep in touch with them. I had nothing further of value to offer them. If they weren’t ready to hire a counselor at that moment, I was probably forgotten.

The Awesome Close

Just as you spent time with the opening (joining) question, I recommend you close with a joining statement. It can be as simple as:

“You guys have been awesome tonight. Thank you so much for your attention and graciousness.”

My personality tends to be a bit more effusive. So I say, “I have really had fun here today. Thanks for being so welcoming. And I end all of my talks the same way. I think every one of you is a precious and special, wonderful and unique, unrepeatable miracle. Live your life with that knowledge. Get support when you forget.”

Then I do my quick little bow, and I let the organizers do the raffle.
I don’t take time at the end of the talk to answer questions in a group. The reason I don’t is because a lot of times those questions are irritating to the other people.

So I let them come up one at a time to ask their questions. This gives you the opportunity to interact with them more; you can advise them to sign up for the initial consultation where you can further discuss their question if it isn’t a short one.

I usually stand to the side with an open posture and smile as people come up to me. When the raffle is over, I collect the feedback forms from the organizer.

Special note: When you get those feedback forms, one of the most important things is to not sit at the table and read them. Go back to your seat, especially if you are at someone else’s event. If they have some announcements after your talk, sit down and eat your dessert. Do not look at the feedback forms yet. Wait until you get home. I have seen too many speakers open up their feedback forms at their table or in their car, and they looked desperate. It is just not pretty.

**Follow up the next day**

Make sure you have allotted time in your schedule the day following a talk to follow up with those that have indicated they wanted more information.

Several years ago – in fact the first time I offered initial consultations on the feedback form, I had 43 people indicate they wanted initial consultations from one talk. I freaked out and didn’t follow through. The next time I did a talk there, only a handful of people wanted consultations. I had completely destroyed the credibility I had built by not following through.

Then make sure you keep those that asked for more information in your “keep in touch” cycle. We will go into this more in the section on Keep In Touch Activities.
4. “Where do I speak?”

At your events

You can host a talk (aka discussion) in your setting – in your office or any other venue you choose. You set up the topic, venue, and do the advertising.

You can give these talks in your office. Even if your office only holds 5 people, when the 6th person calls you can say "I'm sorry, the 6:00 p.m. section is filled but we have one starting at 7:30 p.m."

Don't be afraid if there are just a few attendees. You never know who will become a client or referral source for you. (I once had only one person show up. She became a client for 2 years. She referred someone else who became a client for 4 years.)

You can plan a talk (aka discussion) in your setting – in your office or any other venue you choose. You set up the topic, venue, and do the advertising.

You can often send a press release to the local papers to announce it. The press release would contain your date, time, location (or "call for location information"), a statement that says, "reservations required," if it is held in your office, and the talk title.

5. How do I market my talk?

You can market your own event via:

♦ Your website and blog
♦ Online press releases
♦ Press releases to the “community events” section of your local daily and weekly newspapers.
♦ Invitations to your circle of influence, colleagues, and those who have asked to be in your “Keep in Touch” cycle.
♦ Social media
♦ Flyers (if it makes sense) – perhaps to have in your waiting room or on a table at a networking event.

Marketing tips:

♦ Make sure your talk title is upbeat and positive and something that ideal prospects could admit to.

♦ You can send a press release to your local papers. You'll need to do some research on where in the paper to send your press release. Look for the calendar section in different sections of the paper. The weekly papers are great for these press releases.
I recommend that you look through all 7 days of your daily paper. Look in the paper where there are announcements for people giving talks like yours. They may be in the family section or the business section or the health section. That is why you want to look for 7 days as they may be only in one day of the paper.

Once you see what section your talk could be announced in, contact the editor of that section and find out how they want the announcement to be sent. Do they want the announcement via email? Do they want the announcement sent via snail mail? Do they want it faxed? Do they want it printed? You also want to know how much lead-time they need.

Some editors will put your announcement in the paper within 5 days of receipt of the announcement. Others will want up to a month’s notice.

I encourage people to offer talks in their office in the beginning. It is very inexpensive to get started this way. I recommend that you plan your talk for 5 weeks in advance. Then just follow the steps outlined here. (See Appendix D.)

You’ll never be 100% ready to start – so just start! Pick a date and a title. Find out where to send your press release. Find out the paper’s lead-time. Announce it several times on social media. Tell everyone you know. Invite your friends and colleagues.

Then decide on the body of your talk – your questions.

Have fun!

6 How do I find other places to speak?

You can also be the guest speaker at a meeting or organization. I called this a “sponsored event.” The organizers set the venue, the date and sometimes the title or basic content of your talk.

The advantage to speaking at a sponsored event is that they are responsible for all the arrangements and the advertising. If you have chosen well, you will be speaking to a room full of your ideal prospects. This can be very lucrative.

If you'd like to get some speaking engagements at groups or organizations, look for ones where your target market would be in the audience. For example, if you want to work with Christian women, consider women’s groups at local churches. If you want to work with mothers, consider MOPS (Mothers of Preschoolers) groups.

When you find those groups, I suggest you get the name, address, and phone number of the Program Chair or Director. You can then write a nice note telling her or him that you'd love to speak before the group. Then give the name of your signature talk (or two), the objectives of the talk or what the participants will walk away with. Again, you want to make it upbeat, fresh and positive. I recommend you follow up your initial contact with a telephone call and say "I would just love to give a talk to your group." Don’t expect an immediate call back and don’t be afraid to follow up a few times.
To speak for free or a fee?

Often therapists tell me they want to be paid to speak at someone else’s event.

While I certainly encourage therapists to be paid well, I ask you to reconsider. The income you earn from even one new client can be significantly more than the speaking fee you might receive. And asking for a fee might eliminate you as a speaker. I routinely make between $2,000 and $18,000 from new clients when I do a talk.

When thinking about being paid to speak, don’t think about this talk. Think about what you might earn over time from potential clients (or their referrals) hearing this talk.

Some of the very, very well known speakers sell services and products when they speak. Often they don’t ask for a speaking fee. They actually pay the organizers a percentage of the sales received from the talk. I don’t recommend therapists do this. I just wanted to suggest that we think beyond this talk.

Consider how you want to use speaking to build your practice. See the Appendices F and G for some ‘next steps.’

Now, let’s discuss networking and building referral relationships.
7. CONNECT AND NETWORK WITH YOUR CURRENT CENTERS OF INFLUENCE.

There are many well-connected people in your community. And most likely you already know some of them. They may not, however, have a good understanding of what you do and how to make a referral to you. Now that you have identified your specialty and can talk in “benefit” language, you can tell people what you do in a way that they “get it.”

Let these people know you have an interest in working with “step moms who want a little more peace in the household” or “women who are finding it a bit overwhelming to balance a full time career with motherhood.” Chances are a person of influence will say, “I didn’t know you did that! Well, a woman in my office is going through that right now.”

If the person of influence knows you as a “psychologist,” you may not be the first name that comes to mind when he or she is listening to the problems of the person in the office. But speaking in “benefit” language can make you more memorable to those who can and want to help you.

Let’s take the ideal client we profiled earlier, Margie. Do you know anyone who might serve her now? For example, maybe your friend teaches aerobics. Get together with your friend and tell her what you do. Use your new “short answer.” Tell her “You know how it can be stressful at times when a woman marries a man who already has children? Well, I help step moms have less stress and more peace in their homes.”

Before we proceed, let me say a little about building referral relationships.

I can’t stress this enough – referrals come from relationships – not from just one contact. Connect with your centers of influence and other referral partners regularly. Ask about their lives, families, and businesses; share their interests. Focus more on “being interested than interesting.” When asked, you can share your passion about your clients and the work. Let them know you have “a few openings” in case they think of someone who could use your services.

A good resource for helping you build better referral partner relationships is Tim Sanders book, “The Likeability Factor.” It is a quick read and talks about 4 levels of connection with people.

While we will discuss the “keep in touch” strategies later, please recognize that to get referrals from someone, you must actively maintain this relationship. We can’t just call someone once and ask for referrals. That is not a “relationship.” As my friend and colleague, Elizabeth Marshall says, “Relationships before requests.” Build solid relationships over time before asking for referrals.

Whenever you are networking with potential referral partners, keep track of when you last connected and what you discussed. Note any special occasions, projects or interests they discussed. Create a schedule to connect with your centers of influence on a regular basis. For some this will mean monthly. For others perhaps quarterly. With a record of when you last spoke and what you discussed, you can schedule a date to connect with them again. This connection
could be an email, phone call, letter, card, social media connection, offer to have coffee or a meal.

Tim Sanders (and others) have recommended that when building relationships with others, you can share your compassion, your knowledge and/or your network. As you meet with potential referral partners (whether with your centers of influence or those you might meet in networking meetings) consider how you might next connect with them. If they have just published a book, you might send a congratulations card. If they recently lost a family member, you could give your condolences in some way. My husband Bob is interested in model trains and I love it when colleagues reach out to me with train videos or articles to share with him. ‘Sharing your network’ means introducing two people you know to each other. They may both love dogs or perhaps they both service the same type of client with non-competing services. When people see that you care enough to reach out and help them, you become very attractive to them.

Be relevant, kind, and interested and people will take notice. Networking is not about getting clients – it is about building the relationships that lead to clients.

So – who do you know that is well connected in your community? Maybe you know an attorney or maybe your old college roommate is active in local government. When given this exercise at a workshop, one therapist nearly fell out of her chair when she exclaimed, “Oh my! I forgot that my best friend is a family court judge!”
8. BUILD REFERRAL PARTNERS VIA NEW CENTERS OF INFLUENCE

How do you find good (new) referral partners?

(Note: You can also find potential referral partners at business networking meetings. We will cover this aspect below.)

First you could ask your friends and colleagues for introductions of people they know who might be a good match for you, your ideal client and your community. Once your friends know who you serve and what pain you reduce, they may help connect you with centers of influence that they know.

Second, make a list of the types (occupations) of people that would be a good fit as potential referral partners. Let’s circle back to our ideal client – Margie. Who else services her? Well, she probably sees an OB-GYN, acupuncturist and maybe a fertility specialist. She may have a personal trainer at her gym. She may seek out the services of a realtor or mortgage loan broker. She may get massages.

Now research potential people from those categories. Consider where they might be networking. Yes, it takes a bit of research but often you can come up with a list of 20 people, organizations or occupations of people who might be potential referral partners. Then begin to reach out to them. When you approach potential referral sources, you want to do it in a way that is of service to them. Ask how you can help them. How do you do this? Zig Ziglar, the motivational speaker said, “You can have everything you want in life if you help enough people get what they want.”

If you work with children, you may wish to contact schools, PTAs, pediatricians, tutors, piano teachers, and athletic coaches just to name a few.

Many people who serve your ideal client are members of business-networking meetings. We will discuss the “how to” of networking at business networking meetings in a moment. But as an overview…

At these meetings, you seek out the professionals who would also service your ideal client. If your ideal client was Margie, you might seek out massage therapists, acupuncturists, insurance agents, aestheticians, or mortgage loan brokers. You would find those you’d like to get to know better. Then you begin the process of forming a relationship.

In a way, it is like dating. You talk on the phone or go to coffee. You learn about each other’s values and businesses. You decide if you’d like to refer to this person and they to you.²

² Some therapists feel uncomfortable with the idea of referring to other professionals in a networking group. They are concerned that the client will take our advice as the “authority” and enter into business relationships that may not work out for them. Other therapists believe that it is an act of service to recommend professionals we trust to our clients. This choice is a personal one. If you have questions about this, please seek consultation.
One extra note. Referrals are rarely “one for one.” In other words, don’t expect to get a referral from everyone you refer a client to. There seems to be a ‘karmic’ nature to referrals. Some call it ‘give, give, get’ meaning this: be willing to give to others and it will come back to you.

Let me share an example. Years ago I met a wonderful fitness trainer, Heather, at a networking meeting. I hired her to help me get in shape.

Heather was an executive in a fitness training organization and asked me to do a talk at their annual conference on “How To Improve Your Relationship With Money!” It went very well. Then the CEO of the organization asked me to be the official “business coach” for the fitness trainers in the organization. So knowing Heather not only led to great biceps but to a lot of great clients and income.

One day I received a request to speak to the staff of a local hospital. I was already scheduled to speak somewhere else that day but I suggested that Heather talk to them on a fitness topic. They were delighted with Heather. She proposed a corporate fitness program for the hospital and they accepted. She ended up with almost 60 clients from the first year of the program.

This is one example of how referrals might come in unique ways. Here is another example with our fictitious client, Margie. I may give Margie a referral to a group therapist I know that does groups for stepmothers. That therapist may never refer back to me. But someone else will.

I know a mortgage loan broker who referred several clients to me over the years even though I had never referred a client to her. I maintained this relationship by having breakfast with her occasionally and hearing all the news about her family and her business. She enjoyed our conversations. My name was in her mind when some of her “house hunting” couples began arguing over finances.

My point is this. Please don’t think you have to “trade” referrals with someone or be annoyed if they don’t refer back. Just allow yourself to speak to people, get to know them and see if you can support them in some way. They may need to know what to do when a baby has colic and you have been through that with your baby. Maybe they just want to have someone ask about the book they are writing. And sometimes – just listening and empathically connecting with someone can be your best marketing effort!

As you meet new, potential referral sources, don’t forget to stay in touch with them. Now let’s get into some specifics about networking with other professions to build relationships that would lead toward more referrals for you.
9. BUSINESS NETWORKING MEETINGS

Next we will cover two types of business networking meetings – general meetings and referral-type meetings.

The Chambers of Commerce, the Elks Club, Rotary Clubs, and the National Association of Women Business Owners are examples of general business networking meetings. Members are usually small business owners who meet on a regular basis to get to know one another and build business relationships. They can be casual or quite structured.

Business networking referral groups - such as BNI or Business Network International - usually have 15 to 35 members. Each member has a different occupation. For example, there is one mortgage loan broker, one car mechanic, one therapist or coach, one photographer and one chiropractor (as well as many other occupations). The members meet regularly – usually weekly or maybe every other week – for the purpose of sharing “referrals.” You have a “referral” for someone when you know someone else who needs the services of someone in the group and you make the introduction to that group member.

For example, a woman in my referral group made fabulous cakes. When someone I know needed a cake for a celebration, I would tell him or her about Marian and her amazing cakes. That was considered a “referral” for Marian.

In essence, you are educating the group about your services and then (because the goal is to give a lot of referrals) the group members become a sales force for you as they tell others about you! You can often find these groups online under “business networking groups or associations”. They can also be listed in the Calendar section of the Business section of your local paper.

Different groups have different personalities and cultures so go at least twice if you can before you become a member. Also, take special note of the location for the meeting. If the group meets in a higher-end restaurant, chances are you are connecting with more successful people.

Tips to Make Networking Easier at Business Networking Meetings

The Pre-Call
Always call before you go to a meeting for the first time. I like to speak to the director or person in charge. Tell them you are new and are wondering if the group might be a good place for you to network. Tell them you are a little shy and could she (the director) meet you at the door and introduce you around. They want new members so usually they will have someone do this for you. The benefit is they will usually introduce you to the well-connected people. This beats walking in alone!

Your Nametag
You will probably be asked to fill out a nametag at the door. Bring your own medium “Sharpie” marker in case they have small ones there. People will be able to read your nametag better if it is written with a “bold” marker.
If the organizers have pre-printed a nametag for you and you don’t like it, ask for a blank one and make your own. At a meeting one time, my nametag was pre-printed with “Casey Truffo – mental health.” No one wanted to talk to me.

On your nametag, put your name and if you like, a couple of words that might invite a question or start a conversation. For example, I used to put “Casey Truffo – Happiness Locator” or “Casey Truffo – Difficult Person Expert.” People would read my nametag and we’d start talking about what it meant. (As an Introvert, I loved this tip.) Make sure what you write is printed in block letters and easily readable. It is uncomfortable when someone has his or her face in your chest trying to read the fine print on your nametag.

It is “nametag etiquette” to put your nametag on your right lapel/shoulder area. This is so when you shake hands with someone, their eye will go toward your outstretched arm. And at the top of that outstretched arm is your nametag.

If you have long hair, make sure you have it out of the way of your nametag. This may sound obvious, but it is annoying to try to read someone’s nametag though long hair.

“Old Friend Technique”
At the networking meeting, you do not have to have a smile plastered on your face. In fact, relax your face. Then when someone comes over and you are introducing yourselves, you can then bring a smile to your face. I once heard this referred to as the “old friend” technique.

As someone approaches or gives you their hand to shake, you imagine you are reconnecting with an old friend. When you do, a very natural smile comes to your face.

I used to do this when I welcomed new clients in my waiting room. I’d go out with a neutral face and when I made eye contact with the client, I’d let a big smile come to my face and say, “You must be Kelly! Welcome.”

Try it. I think this will feel a lot more natural than trying to smile the whole time.

Plan To Arrive Early
It is easy for those of us who are more introverted to wait until the last minute to arrive. In reality, this actually makes it harder to enter conversations.

The secret is to arrive early. Then as people begin to arrive, you can introduce yourself and ask about them. “Are you a member of this group?” “How did you hear about this group?” “What is your business?” It is much easier to begin conversations with people when there is only one or two in the room than when there are groups already formed.

Identify Potential Referral Partners in the Meeting
At the meeting, be on the lookout for who in the room might also service (or know) your ideal client. Ask for their card. Note: never offer your card unless the person asks for it. This is seen as poor etiquette and even pushy.
You want to:

♦ Have your cards easily accessible. It is annoying to ask someone for a card and wait while she hunts for it in her purse.

♦ Have one pocket for your cards and one pocket for cards that others give you. When you have a moment alone, write down on the back of the card something you spoke about with that person – even if you think you will remember later. This will be helpful in your keep in touch activities when you leave the event.

**Be the Bride**

When I was nervous going into a networking meeting, I used another trick. I pretended I was the bride and this was my wedding (and there were people from the groom’s side that I didn’t know). I’d walk around and introduce myself and ask about them. It put me at ease and often others as well.

Another trick I used was to introduce myself to the shy people that were near the display tables around the edges of the room. They were often very happy that someone came to talk to them!

**Other Networking Etiquette Tips**

While this may be obvious, please turn off your cell phone. Do not expect to make or take calls for the duration of the meeting. Do not check your email or text. This is the time to build relationships with new people.

**How to Follow Up After A Networking Event**

When you get back to the office, sort the business cards you collected. Have a pile for “People I liked that may service my ideal client.” Have another pile for “People that may be good contacts” and one for “other.” Either throw away or file away the “other” pile.

**With Possible Referral Partners**

Your first pile is the one you want to focus on. You can write a “nice to meet you note” to them first if you like. In these days of electronic communication, a handwritten note is such a treat to receive and open.

Also, you can connect with them on LinkedIn or other social media venue.

To maximize the connection and start to build the relationship, I highly recommend you consider calling those you are interested in and say something like this:

“I enjoyed meeting you this morning. I’d love to get to know more about you and your business. Would you be open to having a conversation about how we might mutually support each other’s businesses?”

You can see if they’d rather do it over the phone, in one of your offices, over coffee or over lunch.
When you meet with them, start with some small talk. “Have you always lived (or worked) around here?” As you both warm up a bit, ask, “How did you get started in this business?” “Who is an ideal client for you?” “What should I be listening for to know if someone is a good referral for you?”

You can end this part with “I’ll keep my eyes and ears open for someone who may need your services” Or “I look forward to referring business to you” (whichever feels more true for you.) They will then ask you about your business and you can share your short answer and the other things we discussed earlier.

While networking can seem scary (especially for Introverts), therapists are actually great at these one-on-one meetings. Start by focusing on them and empathically joining with them. Use your active listening skills. They will love you! And this is what translates into referrals later.

Remember that one lunch date does not make a referral partner. Plan a follow-up contact with this person. Maybe a thank you note for lunch. Put them on your calendar to contact them again in 4 to 6 weeks. Take note of any special events they mentioned and call around those times to ask about how the event went. This is how relationships are built!

**With Those Who May Be Good Contacts for the Future**

For the second pile of cards from the meeting – people who may be good contacts in the future:

Write a handwritten “nice to meet you” note and/or connect with them on social media. Reference something you spoke about at the meeting. Indicate that you are looking forward to talking to them again at a future meeting.

Before we move on, I invite you to consider what actions you might take from what you have read so far about networking. Something sound interesting and worth a try?
10. REACH OUT IN YOUR COMMUNITY TO CHURCHES, SCHOOLS AND MORE

How do you get to the leader or decision maker in churches, schools, etc? Or to Doctors in their offices? The secret is to make the gatekeeper your new best friend.

I learned a long time ago that the person who answers the phone in an office has a lot of power. I recommend that you treat them with the respect and dignity of “the one in charge”.

Let’s say you wanted to build a referral relationship with the clergy in a church near your office. Some therapists might just write a letter to the pastor and offer to do a talk for the parishioners.

There are several things wrong with this approach. First, the pastor may not be the one who schedules these types of events. Second, you have no idea what the church needs. They may need therapists for their referral list. I was once asked to do a “staff retreat” facilitation for a church. So find out what the needs are prior to suggesting your solution (e.g. your talk.) Finally, the church may already have a counselor on staff. It is important to know this prior to suggesting your services.

Here is what I would do. Call the place you wish to connect with (Church, school, etc.) and ask the person who answers the phone:

“I was wondering if you could help me out for a minute.” The gatekeeper will most likely respond, “Sure, how can I help?” Occasionally, they may say, “Who are you?”

Then you say, “Oh, I am sorry. Let me introduce myself. My name is Casey Truffo and I am a counselor in the area working with couples that want even happier marriages. (That was an example; you would use your short answer.) I was wondering if you had a counselor on staff or if you refer to counselors in the community?”

If they have a counselor on staff, ask for his or her name and phone number. You can then call the counselor and introduce yourself. Offer to get together for coffee. Interview him or her about what it is like to work there. Ask about the practice. Be interested. Ask how you could help him or her.

This has rarely failed me. When people see me as interested in them and their work, they decide they like me. Relationships begin to be built and referrals come over time. One therapist I coached received a steady stream of new couples clients when he met with a church counselor who did not care for couples work.

If they don’t have a counselor on staff or - for example, you are calling a doctor’s office, say, “I was wondering if you could help me out. My name is … and I am a counselor in the area specializing in helping women who have great lives but yet feel like something is missing. (Again, this was an example; you’d use your short answer.) I would imagine that you probably see some women like this in your practice (or parish). I was wondering who would be the right person to talk to about how I might be able to help some of the women you see in that situation.”
You could also say, “I am feeling called to serve there in some way. Who would be the right person for me to speak with?”

The gatekeeper will give you a name of a person. In the church, it may be a clergyperson or it may be a lay minister. In a doctor’s office, it may be the office manager.

Then call that person and tell them the gatekeeper suggested you call them. Ask them if they could help you out for a minute. Tell them who you are and what you do. Tell them you’d like to see if you could support them in some way. Treat this person as an expert. Ask them what needs they see your target market as having.

Here is an example. One of my clients—a therapist—went to a psychiatrist’s office and said she worked with ADHD children. She said to the office manager “I know the doctor sees some of these children and I was wondering if I could ask you some questions about what you see as the difficulties that ADHD kids and their families struggle with.” She treated the office manager as an expert. The office manager agreed to meet with her for 15 minutes. The therapist met with the office manager and listened to what the office manager thought those ideal clients needed. The therapist took notes and treated the office manager as an equal who clearly understood the issues of their patients. After a nice 15 minute conversation, the office manager then said, “I think you should meet the doctor.” And a referral relationship was born—with both the doctor and the office manager.

Too many therapists make the mistake of sending some business cards and an intro letter (all about the therapist) to potential referral partners (e.g. schools, doctors). Let me ask you—would you refer to someone who sent you a letter? Mostly likely you wouldn’t. Think of the last referral to a professional you made. I imagine it was because you knew them, liked them, and trusted them to help.

So when you want to develop relationships with organizations or offices, find out what their needs are. Don’t immediately offer solutions. Listen to the needs. It is just like therapy. Don’t do the intervention before listening. And ask how you can support them.

You can do the same process with schools. One therapist recently told me she had a conversation with a school principal and told him she’d like to do a talk for the PTA. The principal told her he’d contact the PTA president and relay the invitation. The therapist said, “It didn’t work. No one ever called me.”

No one else (except maybe managed care companies) will market your practice. We can’t be upset that someone else didn’t do the effort to help us market our practice. That is our job. If you haven’t heard back in a while, check in again. If you ordered a meal in a restaurant and it didn’t come after a while, you’d follow up. We must follow up in our practice as well.

Better yet, get to the decision maker. When the principal says, “I’ll talk to the PTA president” you can say, “That means so much to me. Maybe it would be good if I spoke to her as well and found a little bit about what needs they have.”
It really is important to do a “needs assessment” in this way. For example, let’s say you sent a letter to the PTA president and offered to do a talk on “How to teach your child to manage bullies.” You may not know that someone else gave this talk last month. You might not know that they need a talk on “when great parents divorce…” This is why a conversation to learn their needs can be the difference between speaking for the group and not speaking for them.

**Follow Up Is Essential**

If you meet with the church secretary, office manager (or any gatekeeper), plan to keep in touch. Call or drop by on a regular basis. Send a handwritten note. Call and ask about how the church bazaar or the gatekeeper’s son’s little league game went. This may sound like a lot of work and I won’t kid you – it is work. But have fun with it! Pick people you like.

**Don’t Forget To Keep In Touch**

Don’t be discouraged if you don’t get referrals right away. Continue to think about how you can serve others. Continue to keep in touch. Ask how you can serve them and you will begin to build relationships. Relationships nurtured over time yield referrals.
11. Offer Free Consultations

Before going further, please note that I am only recommending free consultations in certain circumstances – primarily at a speaking engagement. There may be other ways to use them but I am not advocating you offer them to people who contact you for services. So let’s discuss them from the standpoint of offering it on your feedback form at a speaking event. Here we are using it to bridge the gap and help an audience member become a client.

I structure the free consultation in a very specific way. If you have any questions about this, please check in with your legal and ethical advisors.

I strongly recommend you hold the free consultation in the same space where you work and for the same length of time as your regular session length. If you do in-office work with 45 minutes sessions, invite the audience members who requested free consultations to come to your office (at a time you both agree to) and note that the session will be 45 minutes. If you usually do your therapy over the phone, you can have the consult over the phone.

By having the session as close to a regular session (in structure) gives them a much better sense of what it is really like to work with you and allows you to do your best work.

The most effective way I have found to structure these free consultations is as follows. (My clients and I have had great success with this ‘formula’.)

Take gentle charge from the beginning and then structure the consult (for yourself) into 5 sections. The first 4 will be asking the prospect 4 questions and you will be actively listening and empathically connecting with the prospect. Here are the 4 questions:

What is the situation now?

What would you like the situation to look like?

What will that mean to you if it does? (What will happen in your life or relationships if things turn out the way you’d like them to turn out?)

And Heaven forbid, what happens if things stay the same – if nothing changes?

Now, please use the words your prospect is using. If she is complaining about a lack of peace at home (when you asked question #1) then when you are ready to ask the second question, you might say, “How would you like everyone to behave at home? What would more peace look like for you?”

The order of these questions is important. You are learning about their pain and connecting with their struggle. Next you are helping them to see new possibilities. Third, you are amplifying and helping them to see the benefits of those new possibilities. Finally, you are showing them the cost (in their eyes) of not getting help and moving toward those happier possibilities.
Helping the client to clarify these things can be very helpful whether or not she becomes your client. Structured this way, the client can become more aware of how her current situation is affecting her and she can get more in touch with what she really wants. Once she is in the ‘feeling state’ of the new possibilities and what they will mean to her life, you ask her what will happen if nothing changes.

This is such a great question and can, again, be quite clarifying for the client. With this question, she is gently invited to consider the price she will continue to pay if she doesn’t address her situation. (Of course you don’t say it that way…you just ask, “What happens if nothing changes?”)

You will see it on her face as she recognizes what keeping things as they are is costing her. (And this is true whether the client has generalized anxiety, or is overcome by loss, or is struggling with a loved one. The reaction is very similar. They want the pain to stop.)

If after those 4 questions, it becomes clear to you that this person might be a great client for you (and you think you can help her) you might say, “I don’t want you to continue like this. I want to help you (go back to the possibilities she discussed in questions 2 and 3.) I am thinking it might make sense for us to work together. What do you think? May I tell you how I work?”

And then you can go back into the intake call script. “My sessions are done here. My sessions are 45 minutes in length. My fee for each session is $175. And I can check my calendar for some available times for you. What do you think?”

If you have 45 minute sessions, plan on the first two questions taking about 10 minutes each. The third and forth one will take about 6-8 minutes. Take the time to help the client amplify the response with your active listening skills. Make sure you leave time (at least 10 minutes) for the prospect to have some objections. Address these just like we discussed in Strategy 1.

If you are offering free consultations as a result of a speaking engagement, consider scheduling several on one day. There is a rhythm to this process and doing them back to back gives you a chance to tap into that rhythm.

If things go well, you can expect 25% to 75% of the free consults to result in paying clients. Imagine the possibilities! If you speak in a room of 50, 10 might sign up for free consults. You could end up with 2 to 7 new clients from that one speaking engagement!

If you aren’t converting at least 25% of your free consult folks to paying clients, spend some time analyzing why that might be. Are you speaking (and offer the free consults) to people who aren’t your ideal clients? For example, one clinician I know did not accept insurance and tended to speak in front of lower income women. While I encourage pro-bono work and giving back to the community, don’t consider it part of your marketing plan to fill a for-profit practice. Another private practitioner was discouraged with her results from her free consults and on reflection, realized she was burned out and really didn’t want any more clients. A third clinician strayed from the formula (without a good reason for doing so) and found her results weren’t as good as when she followed the 4-question formula.
12. LET YOUR CLIENTS SUPPORT YOU

This is not a strategy that will work for every clinician or with every client. I invite you to skim it and see if it feels like something that would work for you. If not, there are lots of other marketing activities to choose from.

Reactivation (“Check-in”) Calls with Former Clients

This is a strategy that works better after you have been in business for a while and want to increase your current client load. Look back over your caseload for the past 2 years. Think for a moment of your favorite 10 or more clients. (Note – please do not have any clients you didn’t absolutely adore on this list.)

Write their names on a list. One by one, imagine their faces. Imagine their growth points and the stuck points. Spend about 2 minutes thinking of each one and savor those good feelings. Aren’t you curious how they are doing now? Wouldn’t you love to connect with them – just for a few minutes? Why not pick up the phone, give them a call and ask them how they are.

The conversation may go something like this. “Hi, it is (your name.) You know, this morning I came into my office and I just couldn’t stop thinking about you. I am so curious as to how you are and what is new in your life.”

If you received a voice mail, you could continue. “If you’d like to give me a quick call to say hi and let me know how you are, I would love that. Here is my number (say it slowly). And if you don’t feel like calling, that is fine too. I just wanted to let you know I was thinking about you and hope all is going really well. Take care.”

Now of course if you leave a voice mail, make sure you do what you can to ensure confidentiality. Don’t leave it on a shared voicemail for example.

Many people get about 10% of the former clients calling back with “I was JUST thinking of calling you. I’d like to make an appointment.”

Some that you call will never call you back. Some will call you back and catch you up on how they are – but won’t make an appointment. But that is fine because you only called people you adore and wanted to check in with anyway.
13. Volunteer Where Your Ideal Prospects Are

If you volunteer to help an organization that is filled with your ideal clients, you will have visibility each meeting. This credibility will help people remember you. If you choose to use this type of volunteering as a way to grow your practice, make sure the place you choose to volunteer is one where your ideal prospects will be.

I have seen therapists use this strategy as they volunteered for charity events, performing arts festivals and church missions. Be mindful of dual relationships but if handled well, you will meet wonderful people who can help sing your praises.
14. **YOUR BUSINESS CARD**

In the first edition of this manual, I said your business card was your most important marketing tool. Today I think it might be the least important. But you still want to have a business card that is elegant and unique. Even though technology is a primary means of communication, please give some thought as to the design and production of your business card.

**Appeal to Your Ideal Client**

Review your ideal client exercise. Visualize your ideal client. Remember her name and the reason she is seeking therapy at this time.

Imagine you are handing your card to this prospect. Would she look at your card and say, “This therapist understands what I am going through. I am going to make an appointment.”

Consider putting some additional words on your card that describe you beyond your professional title. One of my clients says, "Helping those touched by loss.” Another says, "Helping frustrated parents and teens to get along better. Doesn't that sound better than just "individual couple and family therapy"? It is nice when a prospect picks up your card and says, "I want that!” Please note: This is not mandatory so if you can’t think of anything, please don’t think you have to have something.

**Card Content**

Include your name and phone number of course. Make those bold and large enough to easily read. Check your legal and ethical resources to determine what is required or prohibited in your state.

Carefully consider every word you put on the card. If it isn’t legally necessary, does it help the client in some way?

For example, what do you want to put under your name? Some people put “Marriage and Family Therapy” or “Individual, Couple and Family Therapy.” Does this speak to your ideal client? If so, then make sure it is on the card. If not, consider what might help your client understand what you do.

One therapist puts “Bereavement Counselor” under her name. Another says “The Career Woman’s Therapist.”

That said; resist the temptation to put too much on your card. Your business card isn’t a brochure.

**Design of Your Card**

Have the style of your card match the style of your ideal client. If you want to attract women CEOs, you may have a different style card than if you want to work with artists.
I am often asked, “Do I need a logo?” I don’t know that you need a logo. But you want to look established and differentiated from the other therapists.

Before I go further, let me share one of my favorite online resources for business cards – ‘Moo’ is the name of the company. You can make business cards that will look like no one else’s. You can upload your own photos or take them from your Facebook account. It is quite easy and your cards can look strikingly different from your colleagues. You might do that now, save some time and get on with building your practice. (Enter “Moo Business Cards” in your search engine to find their site and check them out.)

But in case you want more ideas on business cards…

Print Your Card

There are several ways to print your card but please know that I am not a printing expert. As technology changes so quickly, please consider talking to an expert when you are ready to design and print your card.

Online Printing Services

There are some online printing companies that have business card templates. As mentioned, I like and use is Moo. Here are some things to consider when using any online business card printing company:

♦ Some services will offer free business cards in exchange for posting advertising on the back in fine print: “Business cards are free at (and a website address.)” Your business card represents you and your image. You are asking prospects to pay you a good fee. Don’t let your clients catch you are handing out business cards that state you got them for free. That type of card doesn’t give the image of a prosperous, successful, businessperson.

♦ Who else has the design you picked? Without fail, every time I speak, I get at least one business card that has the ocean and sky on the front. It is one of these free templates. My concern is that it will seem as if these therapists are connected in some way since the cards look identical. These therapists have no idea who else is using that design.

♦ You can pay for cards at these sites and that will eliminate the “free” message on the back of the card. It doesn’t eliminate the concern I have about other therapists having a card that looks like they work with you.

♦ A regular business card is 3.5” x 2”. At least one of these online printing companies cuts their business cards at 3.43” x 1.93”. This makes them a bit smaller than regular cards. It may not seem like a big deal but if someone has a few cards, yours can get lost in the middle because it is “smaller.”

♦ Make sure you get to “proof” your cards prior to print.
Please don’t print your business card on your own printer
You want your business card to look sturdy, professional, and successful. Please make sure it is professionally produced. I know many of us feel we can do it on our home printers. Often that is what they look like - homemade.

Digital Printing
If you have someone design your card (or you have it printed at an online printing service), you will probably have a digitally printed card. They can be glossy (with a UV coating) or they can have a matte finish.

If you do decide to print digitally, you might want to ask for “uncoated” (or matte finish) on the back. The glossy coating makes it difficult to write on and you want prospects to be able to write on the back of your card. Digital printing is not very expensive. You can have color and the cards look really good. Moo cards are printed digitally.

Getting started with your card
If this is your first business card or if you are picking a new specialty, don’t invest a lot of money in the printing. Choose the smallest amount of cards you can (maybe 50 or 100) – even if there is a huge discount for buying 1,000 more. Things will change. You’ll come up with a better way to appeal to your ideal client. Or you’ll change your specialty. Or your zip code or area code will change. Order a small quantity when trying something new. This way you won’t be out a lot of money if something changes.

Final words on business cards
Please make this a quick project. Start with you name, license and contact info. Find a digital printer or office supply store you like and get cards in your wallet! In fact, I just made some new Moo Facebook business cards in 15 minutes. Let’s get the business card out of the way and spend your time now building that marketing plan so you can get your phone ringing!
15. DIRECT MAIL

Even though I rarely recommend direct mail, some marketing experts are suggesting that direct mail is ready for a comeback as we are so inundated with email. If you do decide to use direct mail, please think it through and have a good plan for sending multiple mailings to the same people. Here is how it works.

You can buy mailing lists from printers or from companies that sell mailing lists. A mailing list can cost between $250 and a few thousand dollars depending on how many ‘variables’ you use to narrow the list. The more variables, the more ‘targeted’ your list. The more targeted your list, the better results you are likely to have. Variables can include almost anything such as income, number of people in the household, shopping habits, occupation, etc.

Years ago I bought a mailing list of 3,000 married women with a combined family income of over $100,000 who lived within five zip codes around my office.

I sent a flier and a letter to all of them. My family and I stuffed 3000 envelopes and took them to the post office in large Tupperware containers. I was worried that I would get so many clients that I wouldn’t find a way to see them all.

My flier, though, wasn’t very “ideal client specific.” I said I helped these women with their marriages, their children, their jobs and any combination of anxiety and depression. It didn’t make me look like an expert in anything.

I got one client from that mailing.

Now, she stayed with me for 6 years so the mailing did pay for itself. But it certainly wasn’t the best use of my marketing time and dollar.

If you do decide to do a direct mailing, make sure you target your ideal client. Make sure your mailing piece speaks to their pain.

And don’t just send it out once. Consider sending to a smaller sample of people and send at least a 3-piece mailing. You could send a postcard once, a letter next and a flier for the third mailing.

Direct mail experts say that the average rate of return on a direct mail campaign (of a 3 piece mailing – meaning that the prospect receives 3 mailings from you) is .5% to 1%. This means if you send your mailing (3 times) to 200 people, you are likely to get (at most) one or two clients from it. I believe if you make your mailing very specific and your flier specific as well, you can increase those numbers a wee bit. Again, please use your common sense and only use this rather expensive option if you have implemented the other marketing strategies we have discussed in this manual.
PR (Public Relations) Marketing Activities

16. Connect with Reporters

Being quoted in the media can help to build your brand – your credibility and visibility. Here are two ways to get started with the media.

Reach Out Directly to Reporters.

When reading an article about your subject area, contact the reporter or editor and compliment them on the article. Keep in touch. If you find you have an idea for the editor or reporter, they are much more likely to listen to you if you have built the relationship before making the suggestion.

Register for a reporter-connection service.

There are services that either for free or for a fee, will connect reporters with experts. One example is HARO – Help A Reporter Out. Another is PR LEADS. Take a look at both sites and see if this is a marketing activity you would like to pursue. Because like all marketing activities, it pays to be consistent.

When you sign up with these services, you indicate which areas you would be willing to offer expert input on. For example: relationships, marriage, divorce, parenting, etc. Each day (or sometimes several times a day) you will get emails with a list of reporters and their needs and deadlines. To be successful, learn how to respond to these requests in ways that appeal to reporters. PRLEADS (while a bit pricy) has great training.

Once you have been quoted in a publication, consider adding their logo to your site with the words, “as seen in...” or “as quoted in...” This will, most likely, differentiate you from the other therapists in your area.
**MOBILE MARKETING ACTIVITIES**

Mobile marketing is likely to be an important way we market in the near future. We use our mobile devices constantly and the younger generations have grown up with them as constant companions. Mobile marketing allows you to connect with your audience wherever they are. Take a look around next time you are waiting anywhere – at the doctor’s, in line at the supermarket, or even at the fast food drive through. I was in an elevator yesterday and everyone but me was looking at their mobile device.

There are six common types of mobile marketing.

1. Text Marking
2. Mobile websites
3. QR (Quick Response) codes
4. Apps
5. Geo-location
6. Mobile Ads

If you are just building your website, (especially if you are building it on a blogging platform) make sure your site is mobile compatible. You don’t want mobile users to have difficulty navigating or reading your site.

Most mobile users have many apps and it is tempting for therapists to think, “I’ll create an app to market (or to sell.)” While I am certainly not a mobile marketing expert, my advice would be to do research on your market before you go through the effort and expense of creating an app. Which devices are they using? How would they use your app? How would it benefit both you and the app user? What would your projected costs and revenues be? Who maintains it and how much does that cost? How much customer service is involved and who on your team would manage customer questions?

**17. TEXT MESSAGING (SMS)**

Probably the easiest way to get into mobile marketing is with text marketing (sending texts to your list after they have opted in with a keyword.) At the time of this writing, experts report that within 10 minutes of sending a text to their list, 90% percent of the receivers will open and read the text. This is a much better open-rate than with most email lists.
Want to see how it works? Open your text browser and create a new message to: 75309

Then type in: tips

And hit the send key.

(In case you didn’t want to do that, let me tell you what would happen if you did. You would get a text welcoming you to the “Income Tips for Therapists.” It would let you know that you will get a tip every other week from me. It would also tell you how to stop getting (opt-out) of my texts too.)

How could you use text marketing? I am sure that as soon as this manuscript revision is completed, mobile marketing will be quite commonplace. But for now, imagine sending a personalized video via text to new connections you made while networking. If you give assignments to your clients, you could send special texts with the assignment. You could use text messages to remind people about group events or classes you are having. You could have an opt-in list for couples who would like ‘relationship tips’ that you send weekly or every other week.

To learn more about mobile marketing, watch what service providers are doing. Most are using it now to either build their list (by offering special pink spoons via text) or to improve their branding. If you decide this is something you wish to pursue, please take a class in it. You may want to check what we are offering at http://BeAWealthyTherapist.com (We may offer classes in mobile marketing in the future as it becomes a more effective way for therapists to market.)

I can’t wait to see where technology takes us!
**TRIBE (OR COMMUNITY) BUILDING ACTIVITIES**

Developing a following…a community around your issue or interests…is often called list-building or (tribe building.) The word ‘tribe’ comes from the marketing guru and author Seth Godin.

To build a community or tribe, most people start with what we call ‘platform.’ By this I mean your take on a certain issue. Taking a stand and sharing that online, on social media, and when you network or speak – and then inviting people to stay in contact with you are the tasks of tribe building. Your tribe can help to fill your private practice because they are people who know, like and trust you.

And they are very useful if you decide to build revenue streams beyond your practice.

Creating a business that uses your therapy skills in ways other than private practice is the subject of another book and for another day. Many of you know and understand that at some point your income and reach will be capped in private practice because you will want to help more people or make more money but you simply don’t have enough time in your week. You may wish to then (or now) begin to build a following of people inside and outside your local area so that you might leverage your time and income with other business models one day.

For now, your tribe may consist of those who follow you on social media or who subscribe to your blog or newsletter. You can build it with many of the internet, community and mobile marketing activities you’ve read here.
KEEP IN TOUCH MARKETING ACTIVITIES

Marketing experts say that it takes 5 to 9 “touches” before a person buys a product or service. This means that the person hears about you or sees you (or something you’ve written) 5 to 9 times before they decide to hire you as their therapist. (We are talking about private pay – non-managed care clients.)

Now you may or may not believe those numbers. But let’s review the conditions that must be in place before someone decides to hire you as their therapist. They must trust, respect, and like you. They must believe you have the solution to their problem.

And here is where the keep in touch activities come in.

When they are ready, we want them to think of you!

Yesterday a therapist shared a wonderful success story with me. She specializes in working with people who are facing the possibility of a divorce. A while back she met an attorney at a networking meeting. She took him to lunch last week “to get to know more about each other’s businesses.” After the lunch, she sent him a handwritten “nice to get to know more about you and your business” note. And the next day, she received a call from him with a referral.

Her comment to me was “Tell other therapists that this stuff works! You may not feel like doing it but it sure feels great when you see the results!”

HANDWRITTEN NOTES

I don’t know about you but I love getting handwritten notes in the mail. We are so used to texts and emails that handwritten notes can be such a joy to receive!

You can write notes to prospects or referral sources you meet at networking meetings. You can write a “just thinking about you” note to someone with whom you’ve been out of touch.

I recommend that you don’t use letterhead or your business note cards to do these letters. Write on a nice note card that you can buy at any stationery shop. Pick stamps that you find attractive. Don’t worry about your handwriting. Everyone loves handwritten notes and no one can resist opening one!

FOLLOW-UP CALLS

I am amazed (you probably are too) at the number of therapists that do not return phone messages. About 25% of clients calling my office would say, “You are the only one that called me back.”
Please return every call. Even if you know you aren’t the right therapist for them, please just call back and, if they’d like, offer some referrals.

When you attend networking meetings, follow up with people you like and plan to connect with them.

Make a list of past referral sources and reconnect with them. Ask how you can support their businesses. Let them know “have a few openings” in your practice now.

Then plan a date that you will connect with them in the future and put this date on your calendar.

**NEWSLETTER**

A newsletter is one way to keep in regular touch with prospects, clients, and referral sources. However, if you don’t feel like creating a newsletter month in and month out (or every week) please don’t think you have to. Pick another keep in touch strategy. You could produce regular videos or connect regularly on social media.

Should you decide you want to publish an online newsletter, here are some tips:

**Determine the focus. (Hint: Your focus is your specialty.)** The purpose of your newsletter is two-fold. You certainly want to provide interesting information for your reader. You also want to stay in their mind as someone who could help them with a particular problem. If you decide to specialize in "How To Effectively Deal With Difficult People,” then each issue may have tips on how to deal with different kinds of people. For example, one issue can deal with neighbors. Another issue might deal with in-laws. Make sure your newsletter contains information that your ideal client would want.

**Determine the frequency.** I recommend sending your newsletter no less than monthly. It keeps your name in front of your prospects. If you do it less frequently, your name doesn’t come as quickly to mind when they need a referral. If you are posting your newsletter as blog posts, consider doing posting the content to your blog weekly or twice a week.

**Determine how you will manage your list.** If you plan to use your blog for your newsletter content, you can invite people to get your RSS feed or you can use a feed management service. (RSS and feed management services notify your blog subscribers that you have posted something new. You can research the current feed management services online.) Should you decide you want a ‘regular’ online newsletter (rather than a blog), there are many online list management services. Research them for cost, ease of use, and features. Many will have free trials so use the free trial first to test the features.

**Start small.** When you are just starting out, you may decide to just have one short essay in each issue. For example, “Top Ten Ways To (whatever you help ideal clients with.)” Suppose your ideal client is a woman struggling with infertility. You might write an article called "Ten Things To Say When Well-Meaning Relatives ask 'When are you going to have a baby?"
Design the sections. After you get going, you may wish to add to your newsletter. You may wish to answer a reader's question in each issue. You may decide to share success stories. I enjoy motivational or humorous quotes. It still doesn't need to be big. Remember your purpose - to inform and to be "top of mind" when they need a referral.

Create great headlines. Your readers will glance at the headline and see if they wish to read further. A good examples is "How to ..." (Ex: "How to flirt without saying a word.” "How to disarm the critic in your family.")

Another example of a good headline is "x-number of ways to ...". (Ex. "21 Ways to Say Yes to Romance" or "The 8 Key Strategies to A Fun, Fulfilling and Profitable Private Practice.")

A quote or question can also make a good headline. One headline that has been used over and over is: "Are you making one of these 5 critical mistakes?" Remember, the purpose of your headline is to get them to read your first paragraph.

Create an "opt-in" and "opt-out" method. You only want to have those that have requested to be on your list. Please don’t offer it to people when you meet them as it is awkward for the other person who may be thinking, “I don’t want another newsletter.” Put a sentence at the end or beginning of every email that tells the reader how they can "opt-out" of the mailing.

Create the publishing schedule. Sometimes we get excited about creating a newsletter and do an issue or two and then stop. I have subscribed to newsletters with excitement only to have the publisher stop within a few months. I lose confidence and interest in the publisher. Remember, your subscribers want to hear from you! So I recommend you put your publish dates on your calendar. Then schedule the tasks necessary to get it out by that date. When you calendar this, sticking to the schedule becomes much easier.

Write several issues at one time. If you are in a creative mood (or simply want to make the best use of your time), write several articles or issues at a time. You can have them ready to go by the publish dates. If you are looking for topics to write about, check out bookstores or web sites and see what others are writing. This can not only give you some ideas, it can tell you what your readers may be interested in.

Consistently provide value. Always keep your ideal client in mind when you write your newsletter and provide information that could be of value to her. However, I encourage you to invite the reader to go one step further in connecting with you. Don't be shy about also mentioning any offers you have - such as free initial consultations, free lectures, or even paid groups.

ANNOUNCEMENT OF TALKS

Some therapists regularly send out announcements of talks or workshops. This can be a good way to keep your name and contact information in front of prospects and referral sources. My only concern is that you balance this type of keep in touch activity with the others. Otherwise it
will be too much about you and what you are doing rather than providing valuable information to the client.

**HOLIDAY CARDS (PICK UNIQUE HOLIDAYS)**

Getting a nice card on Independence Day or at Thanksgiving can mean a lot to a prospect or referral source. Many of us get cards on the major holidays and if you send yours out, it may get lost in the shuffle. I recommend picking unique holidays. (Search online for unique holidays.)
CALENDAR THE PLAN

SUCCESSES AND WINS

Here is what you’ve done so far:

♦ Discovered any leftover issues with money and have ways to help address them.

♦ Determined a fee structure and method of payment so you can easily set, negotiate, and collect fees from your clients.

♦ Created an ideal client profile and identified what precipitated this client to seek therapy now.

♦ Developed a “short answer” to the question ‘So, what do you do?’ that attracts ideal prospects and helps referral sources understand who is a good client for you.

♦ Created a personal story or a success story that you can talk about that will help explain how you got started doing this work. It will help others to believe you have the solution to their pain.

♦ Reviewed the 17 different marketing and keep in touch activities.

Now it’s time to pick your strategies and calendar the plan.

PICK ACTIVITIES THAT FIT WITH YOUR MARKETING PERSONALITY TYPE AND MAKE SURE YOU HAVE AT LEAST ONE KEEP IN TOUCH ACTIVITY.

STEP 1: START WITH THE BASICS

Many therapists start with this section. They jump directly into the marketing activities without giving (in my opinion) enough attention to and clarifying what they are marketing and to whom they are marketing it. If you haven’t already done so, I recommend you watch the four hour-long ‘More Clients for Me’ videos here: http://StartYourCounselingPractice.com/yourcoolresources/

Then you will have a much better focus with which to create your marketing plan.

Start with:

♦ Create an online presence with either your website and/or a listing on an online directory

♦ Create a business card
Set up your business account on LinkedIn. Make sure you put your picture on the profile listing. If you plan to post regularly on other social media venues, create accounts for your business on them.

**Step 2: Pick the Marketing Activities You Plan to Do for the Next 30 – 90 Days**

Review the list of activities and see which ones work best for you, your ideal client, and your community. I recommend you that include both online and community (local) marketing if you are marketing an in-office practice.

- Put audio and an assessment on my website
- Keep In Touch Activities: Handwritten notes and follow up calls.

**Step 3: Set a Goal for Each Activity:**

A goal is a measurable objective for an activity. Here is an example of how to set your goals.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build Referral Partners</td>
<td>I will find a BNI meeting in my area that doesn’t already have a therapist.</td>
</tr>
<tr>
<td></td>
<td>I will follow up with at least 2 people from every meeting.</td>
</tr>
<tr>
<td>Speaking</td>
<td>I will research groups in my area that might be filled with my ideal client.</td>
</tr>
<tr>
<td></td>
<td>I will reach out to 5 program directors a week with the goal of booking at least one to two speaking engagements a month.</td>
</tr>
<tr>
<td>Put a welcome video &amp; an assessment on my website</td>
<td>I will write the content and create the video by xx/xx/xx.</td>
</tr>
<tr>
<td></td>
<td>I will create the assessment questions by xx/xx/xx.</td>
</tr>
<tr>
<td></td>
<td>I will reach out for help if I cannot do the technical task of putting them on the site by xx/xx/xx.</td>
</tr>
<tr>
<td>Keep In Touch: Handwritten Notes</td>
<td>I will (each week) write at least two notes a week to referral sources or colleagues with whom I’ve been out of touch or that I put in my list of 20 that I would like to connect with.</td>
</tr>
</tbody>
</table>
**STEP 4: IDENTIFY THE TASKS THAT NEED TO BE DONE TO MEET THAT GOAL.**

Break down each marketing activity into smaller tasks that you can calendar. (In the appendices, you will find summary task lists for some of the marketing activities to get your started.)

For example, if I want to build referral partners via business networking meetings, I will need to identify possible networking groups. I will call them and determine if they are appropriate for me. I will attend several meetings and decide which groups I want to join. I will then follow up and begin to build relationships with people I meet who might also serve my ideal prospect. In the appendices, you will find a blank worksheet for you to record your activities and goals tasks.

**STEP 5: PUT THE TASKS IN YOUR MARKETING CALENDAR.**

Then schedule those tasks on your calendar just as you would any other appointment. Plan to spend anywhere from 5 to 20 hours a week marketing your practice. Treat your marketing with the importance of any client session or other meetings you have. The truth is if you don’t market your business, you probably won’t have clients.

**STEP 6: GET A FOCUSING BUDDY - SOMEONE TO HELP KEEP YOU ON TRACK.**

It is a fact. Having someone support you, encourage you and keep you focused can help you reach your private practice goals faster.

You’ve done a lot of work here. It is sometimes easy to lose focus, direction, or motivation. Find someone (coach, mentor, or fellow practice builder) who is as motivated as you are. Accountability to another can increase your success!

**STEP 7: WORK YOUR PLAN! (OH AND ANSWER YOUR PHONE - IT IS RINGING!)**

After you have the activities calendared, then you just follow the schedule. The beauty of this is that you know exactly what to do when.
**Strategy 7: Track Your Efforts and Your Money**

**Every marketing venture is worth testing.**

What seems like a good idea can sometimes be perfect. Other times it misses the mark completely. We don’t know this until we test.

We test *everything*. For example, we test the short answer. How did people respond? Who responded well and who indicated they didn’t “get it” when we told them what we did for a living. Were the ones who “didn’t get it” ideal prospects? If so, we need to change the words.

How did people respond to your website? Are people calling and making appointments? Do you get offers to speak when you tell people the title of your signature talk?

Don’t be discouraged if an effort doesn’t bring you the results you want. Try to understand why it didn’t and modify.

You will continually be modifying your words and materials. This means you are getting to your target market better.

**Track your results. How do you know it is working?**

Begin to keep track of every dollar that comes in and where it came from. Which type of activity did it come from? If it was a referral from Dr. Antoinne, how did you first connect with that doctor? Was it at a networking group? If so, which one?

Track your income by type of marketing activity, specific venue, and specific person. This way you can see which venues are making you money. You can also see the “practice angels” – those wonderful people who send you great referrals. When you track your income by actual person referring, you can really identify your practice angels.

For example, I track my income by person referring and by marketing effort. If I speak at a therapist meeting, I track the income I made (over time) from that talk. I also track income made from the referrals from anyone who heard me speak at that talk.

Someone once told me if you make double what you spent on a marketing activity, then “It’s working.” I am not sure of the exact numbers because there are many factors to take into consideration. But start tracking.
**Tweak as Necessary**

Once you start tracking, you will see which marketing efforts pay off for you. Then you’ll eliminate those that don’t give you a good return on investment. You will do more of the ones that do!

Before we noted that people need to be “touched” 5 to 9 times before “buying.” Don’t give up too soon. Try something for 6 months before you decide it “isn’t working.”

I once tracked that I made $7000 in one year from a business-networking meeting. The group cost $350/year and then there was the cost of weekly breakfasts. To be accurate, I should include the lunches where I met with group members outside the meetings to further build relationships. The bottom line is that this was a good investment of my money and time.

**Test Again**

This will be ongoing process. Keep trying. Keep track. If something doesn’t seem to be working, see if it is the activity, the venue, or the people.

Be honest with yourself though. Are you following through? I once declared that a particular networking group “didn’t work.” When I realized I came late, left early, and didn’t talk to anyone there, I understood why it didn’t work. I changed my attitude and behavior and over the next 2 years made $10,000 from that group.
STRATEGY 8: TAKE TIME OFF AND LOVE YOUR LIFE.

This one is the hardest for me.

To do this work, we must be at our best. We can only be at our best when we make self-care a priority.

DO WHAT YOU TELL ‘EM!

How many times have you told a client “Take some time for yourself!”?

Maybe it’s time we listened.

PLAN TIMES OUT OF THE OFFICE

After about 3 months of coaching therapists, my husband and I took a 4-day vacation to visit my family in Sedona, Arizona.

The weather was rainy but the scenery was majestic. We laughed with my family, ate wonderful food, and enjoyed the beauty of the countryside.

When I returned, I felt guilty for taking the time off. During the first session I held upon returning, the patient said, “You should take more time off. You are better!”

I had to laugh. For the co-dependents or workaholics among us, I say “We are better for others when we take the time to nurture ourselves.”

REVIEW WHAT YOU ARE TOLERATING AND REDUCE THOSE TOLERATIONS!

Make it a practice to regularly review what is worrying, annoying or scaring you. Then take action.

One woman I knew was terrified because she had never obtained a business license for practicing in her city. She worried about this for several years. (She had her therapy license; she didn’t have a city business license.)

When we made her “tolerations” list, this was at the top. I encouraged her to address it. She called the city and had a license within 24 hours. They were so impressed that she called on her own that they waived all penalties. She said that night was one of the best night’s sleep she ever had.

Casey Truffo www.BeAWealthyTherapist.com 949.309.2590
LOOK FOR EVIDENCE OF JOY!

Marty Seligman, the awesome therapist and researcher on the subject of Happiness recommends that people daily write down the 3 best things that happened and *why* they happened. It is amazing what you might learn about yourself and your life.

When bad things happen to me these days, I try very hard to see how that bad thing could actually be the best thing that happened. My friend calls this the “Gift in Dirty Paper.” Figure out how you can change your perception, your beliefs, your actions, or your situation. Because each “bad” thing gives you that opportunity.
**BEYOND PRIVATE PRACTICE?**

My mission is to help therapists have financially rewarding businesses. For some this means growing a private practice. That had always been my dream.

But at some point I realized I could only help people in my local area. I realized I wanted to help more people than I had time for if I continued with one-to-one sessions for the rest of my career. For me the next step was to take my passions (technology and helping people) and create an online business offering products and coaching services to therapists who want more money.

There are many different business models that would allow you to use your therapy skills and leverage your time and effort in ways that may make you more money and reach more people than in private practice. If that interests you, please follow me on social media or check out our programs on [www.BeAWealthyTherapist.com](http://www.BeAWealthyTherapist.com)

With some innovation, some focused attention and action, you really can have the life and business you want.

Lots of love,
Casey
NOW, BE WEALTHY!

I hope you have enjoyed this course. I know that a lot of information has been presented. Please take what makes sense to you and leave the rest.

I encourage you to make a plan, get some support, and get moving! You can have the practice you want! I’ve done it and so have many others.

Earlier, I mentioned having accountability partners to keep you motivated and moving. At BeWealthyTherapist.com we are a community of success-minded therapists, coaches, and healers who get together regularly in teleclasses and on social media to learn new marketing skills, stay focused on our practice-building efforts and look toward the future for making more money and having fun. To check out our upcoming events and programs to help you stay motivated and on-track, please visit http://www.beaweightytherapist.com

If I can support you in any way, please let me know. I wish you great success!

Until our paths cross again…

Love and blessings,

Casey Truffo
APPENDIX A. AUDIO/VIDEO FILES TO SUPPLEMENT THIS COURSE

I have included several video and audio recordings to supplement this course. These files supplement the workbook. They don’t replace it.

View or listen to the recordings in any order you wish. Enjoy!

You can check out the videos and audios at:
http://StartYourCounselingPractice.com/yourcoolresources/
### APPENDIX B: MARKETING TASK LIST

<table>
<thead>
<tr>
<th>Activity</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select 2 to 4 activities from the list below or add your own.</td>
<td>For each activity you select, create one goal for that activity. For example, if you selected Network at Business Networking Meetings, your goals might be: I will attend one networking meeting a week. I will follow up weekly with 2 people from the group.</td>
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</table>

**Marketing Activities:**

<table>
<thead>
<tr>
<th>Online Activities</th>
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<tbody>
<tr>
<td>Create a Basic Website</td>
</tr>
<tr>
<td>Add ‘Workhorse’ Features</td>
</tr>
<tr>
<td>Attract Prospects Online</td>
</tr>
<tr>
<td>Get Known with Content Syndication</td>
</tr>
<tr>
<td>List on the Online Therapist Locator Services</td>
</tr>
<tr>
<td>Connect with Social Media</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speaking</td>
</tr>
<tr>
<td>Network with your Centers of Influence</td>
</tr>
<tr>
<td>Build Referral Partners with NEW Centers of Influence</td>
</tr>
<tr>
<td>Business Networking Meetings</td>
</tr>
<tr>
<td>Reach out to Churches, Schools, Doctors</td>
</tr>
<tr>
<td>Offer Free Consultations</td>
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<tr>
<td>Let Your Clients Support You</td>
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</tbody>
</table>
### Be A Wealthy Therapist! Self-Study Course

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<td>☐</td>
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<tr>
<td>Volunteer Where Your Prospects Are</td>
<td>Create Your Business Card</td>
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<tr>
<td>Direct Mail</td>
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**PR MARKETING ACTIVITIES**

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<tbody>
<tr>
<td>☐ Contact Service (HARO, PRLeads)</td>
<td>☐ Build Relationships with Reporters</td>
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**MOBILE MARKETING ACTIVITIES**

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<tr>
<td>☐ Text (SMS) Marketing</td>
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**ADD YOUR OWN ACTIVITIES**

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**KEEP IN TOUCH ACTIVITIES:**

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<tr>
<td>☐ Handwritten Notes</td>
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<td>☐ Follow-up Calls</td>
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<tr>
<td>☐ Newsletter/Blog posts</td>
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<tr>
<td>☐ Stay Connected with social media</td>
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<tr>
<td>☐ Announcement of Talks</td>
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<tr>
<td>☐ Unique Holiday Cards</td>
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Once you have created the goals:

Identify the tasks you need to do. Many of them are listed in the Appendices of this course. For example, let’s say you select Build Referral Partners via Networking. The goal you might create for that activity is “I attend one networking meeting a month.” Then look in Appendix B for the tasks you need to do to reach your goal.

Schedule those tasks on your marketing calendar. Then you know exactly what to do to build those referral relationships and reach your goal.
APPENDIX C: THE C.A.R.E. MODEL TO ATTRACT NEW CLIENTS

(article originally published in CAMFT The Therapist magazine.)

If you wonder about how to attract new clients or feel a bit overwhelmed at the idea, here is a process you might find helpful. It is called C.A.R.E. which stands for Clarify-Act-Review-Enjoy.

Step 1: Clarify.

First look at the last 10 to 12 months. Ask yourself what is working in your business. How much did you earn? Where did that money come from? How did you attract your clients? What did you love about the work you did? Next ask yourself, "What did not work this past year?" What marketing activities did you try that didn't attract the clients you wanted? Why do you think they didn't work? Were there clients that you took on that you didn't enjoy? What was it about them that didn't allow you to do your best work?

Look at your business model. Are you happy with the way you are delivering your services? Have you considered adding a new method of delivery - online counseling or video conferencing? Have you considered adding a new revenue stream so that you have multiple streams of therapy income - such as create a workbook, a membership site or even creating an institute?

What other opportunities are possible? What about creating a workshop with a colleague? What about getting a CE provider number and teaching your process to other therapists? Let yourself dream and brainstorm ideas. Ask yourself, "If I could do anything with my practice, what would it be?"

Once you have all your data, meaning you know what worked and didn't work last year (and why) plus any new ideas for 2012, select the ideas that have the most "charge" for you - those that make you smile and make your pulse race a bit. Don't try to do everything on the list - just pick a few. Put those on a separate list and let them simmer for a bit. Step away from them and then come back in a couple of days. Do they need to be pruned? Do you they still feel exciting and worth doing? Do you really, really want to do this? How would you feel if you accomplished each item? This is all about clarifying your next steps.


Once you know what you'd like to accomplish, it is time to 'chunk it down.' For example, take the first item on your list - what is the FIRST thing you'd need to do or learn to make it happen? Some clinicians get overwhelmed because they try to look at the entire project so just look at the first step - and then maybe the step after that. Explore if there are any outside resources you need. Do you need to talk to anyone else - perhaps someone who has successfully accomplished
what you want to do? Do you need to acquire the skills of a different professional - a web designer or book coach?

Maybe you've decided it is time to get a bookkeeper so you can spend more time doing what you love - therapy. Or maybe you just need to sit down and revise your website text to make it more client-friendly.

Once you have decided on your next steps, it is time to both declare them and do the task. Let others know what you are ready to accomplish and then calendar the steps. What studies have shown is that tracking your efforts and results on a daily basis leads to greater productivity. Summer, a therapist in Hawaii recently told me, "Once I started keeping track of my efforts and actions each day, I found myself looking for things to write on my accountability log throughout the day. I started doing more than I ever thought I would. It is leading me to my dream practice!"

Step 3. Review.

Not everything will go according to plan and not all marketing activities will be ones you enjoy or bring you results. Take time each month to review your data. You can ask yourself the questions from Step 1. What is bringing in the money? What is it you love? Where do you need to let go or "prune"? Remember, pruning involves cutting live plant growth so that the plant has the opportunity to really grow and thrive. What are you doing that you really ought not to be doing? What doesn't bring you joy or money? Is it time to let go? On the other hand, what activities should you increase - ones that you love and are supporting you and your business?

Step 4. Enjoy.

In our marketing, just as in our personal growth work, there is always more to do. That is why it is especially important to make sure that we create a business that not only serves our financial needs but also fills our heart. Take the time to enjoy the successes and accomplishments - both clinically and financially. You deserve great and wonderful things in your life! And, as always, please do not neglect your self-care at the expense of your practice.

Why not take out your calendar now and book in two hours of C.A.R.E time? Spend this time in a place that you enjoy - a park, a neighborhood coffee shop, or even a cherished space in your home or office - and get started on your C.A.R. E. plan!
APPENDIX D. CREATE REFERRAL PARTNERS VIA NETWORKING

TASK LIST

♦ Review your local papers and identify possible groups to attend. (Often the business networking meetings are in the Business section – sometimes on Monday.)

♦ Call the contact person and ask if you can attend as a visitor. Please say to them “I am a bit shy in groups. Could you meet me at the door and introduce me to some people?” (They will be happy to do that and will likely introduce you to the most influential people in the group.)

♦ When you attend the meeting, give your short answer to what you do in “I want that” language.

♦ Attempt to collect at least 5 cards from people you don’t know.

♦ Write all of them handwritten “nice to meet you notes.”

♦ Plan (calendar) a follow up call to at least two of them (if appropriate).

♦ When you call them, say, “I met you at (the name of the networking meeting) and I’d like to get to know more about you, your services, and who is an ideal client for you. Would you like to have a phone conversation (or meet for coffee) and discuss how we could mutually support each others businesses?”

♦ Then when you meet with them, start out with some casual “getting to know you” questions such as “Were you born here?” or “Have you always lived in this area?” Then after some warm-up time, you can ask, “How did you get started with the networking group?” and you can ask them to tell you about their business and who would be a good referral for them.

♦ The purpose of this meeting is to decide if you like them and to let them have the opportunity to decide if they trust, respect and like you.

♦ I can’t emphasize it enough: Referrals come from relationships – not just showing up indicating you want referrals. The people who have been successful from networking groups know this and spend time in these one-on-one meetings with people they like. Then they keep in touch with these people on a regular basis. That is how you eventually get referrals from networking.
APPENDIX E.  BUILD RELATIONSHIPS WITH NEW CENTERS OF INFLUENCE TASK LIST

♦ Consider what other services your ideal client might purchase.

♦ Identify people supplying those services.

♦ Create a letter/email/social media connection introducing yourself and commenting on them in some way. Do your homework ahead of time and be relevant. Remember – relationships before requests. (Review “Love is a Killer App” and “The Likeability Factor” by Tim Sanders for ideas on how to connect and build those relationships.)

♦ Ask if they are looking for more referrals, and to discuss how you might mutually support one another.

♦ If they are responding to you online and you are building the relationship appropriately, consider placing a phone call. Ask them about their business and their ideal client. Ask if you can serve them in some way. Say, “I’ll keep my eyes and ears open for someone who may need your services.”

♦ Create a contact management system. Keep track of the last time you spoke, some personal interests of the new referral source. Plan (calendar) a follow up call.
APPENDIX F.  SPEAKING AT YOUR EVENT TASK LIST

♦ Identify two fresh, catchy titles that your ideal client would like.

♦ Identify your three main points (your wisdom).

♦ Create the benefits/objectives in “I want that!” language.

♦ Determine your venue, a date, and the fee, if any.

♦ Research local papers to see where you could announce your event. Find the editor of the right section. Ask how they would like it written and where and how should it be sent (email, fax, snail-mail). Make sure you ask about “free listings” – not paid advertising.

♦ Create that announcement and send it to the papers.

♦ If it makes sense for your ideal client and talk, create a flyer with the title, benefits, and date, time and contact information. (Give to clients. Put in your waiting room. Put them where your ideal client “hangs out.”)

♦ Post your event on your website and on social media. (Don’t blindly add all your social media contacts though. That is a pet peeve of mine. I get dozens of event invitations daily on social media. It feels very much like spam.)

♦ Make marketing copy 90% about your ideal client’s pain with “pull questions.” Pull questions are questions that lead them to read more of the marketing piece. For example” “Do you wish there was an easier way of getting your teen to talk to you? Well, there is! Join us for a fun and free talk given by a therapist specializing in helping families with teens to get along better.” (Then give the date and time, your contact information and “call for reservations.”)

♦ After your pull question(s) or statement and also say “You will learn…” and give them 2 or 3 benefit points that they will learn in the talk. Make sure you don’t use therapy words. For example,” You will learn:
  
  o What teens wish their parents knew.
  
  o The 3 mistakes that many parents make and how you can avoid them.

♦ Create a handout with a feedback form so they can request more from you.

♦ Follow up with the feedback forms.
APPENDIX G.  SPEAKING AT A SPONSORED EVENT TASK LIST

♦ Identify two fresh, catchy titles that your ideal client would like.
♦ Identify your three main points (your wisdom).
♦ Create the benefits/objectives in “I want that!” language.
♦ Identify “ideal client” groups or organizations that are filled with your ideal client.
♦ Contact the group and see if they could use a speaker. If so, find the name and contact information for the Program Director.
♦ Create a letter/email/social media connection to that director telling your two talk titles and the benefits/objectives.
♦ Create a bio with your picture for the organizers.
♦ Create a handout with a feedback form so they can request more from you.
♦ Follow up with the feedback forms within 24 hours.
♦ Make sure you collect names for your keep in touch activities.
APPENDIX H.  SAMPLE FEEDBACK FORM

Date: ____________________  F E E D B A C K  F O R M

What will you remember from this today’s presentation?

What is one action you will take as a result of being here today?

Thank you again for your attention and feedback.  I wish you great success!

Name: (please print)_________________________________________________________

Email Address: _____________________________________________________________

Phone number: ____________________________________________________________

☐ Yes!  I want to be entered into the raffle.

☐ Yes!  Please email me a free copy of the Special Report: Top 10 Ways To Talk About What You Do So People Say “I want that!”  (You will also be subscribed to “Practice Builder” newsletter – published every two weeks filled with practical tips designed to get your phone ringing!)

☐ Yes!  I would like a free consultation to see how practice-building coaching might help me attract more ideal clients.  Please call me to schedule it.

Casey Truffo                  www.BeAWealthyTherapist.com                  949.309.2590
### APPENDIX I. SAMPLE MARKETING TASK LIST.

<table>
<thead>
<tr>
<th>Activities (for this month)</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build Referral Partners via Networking</td>
<td>I will attend 2 networking meetings a month.</td>
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<tr>
<td></td>
<td>I will follow up with at least 2 people from every meeting.</td>
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<tr>
<td>Speaking at my event</td>
<td>I will offer a talk in my office in 5 weeks.</td>
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<tr>
<td></td>
<td>I will schedule one in my office once a month after that.</td>
</tr>
<tr>
<td>Website/Online Presence</td>
<td>I will purchase a listing on 3 online locator services by xx/xx/xx.</td>
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<tr>
<td></td>
<td>I will complete by website copy for my home page, about page, FAQs and contact page by xx/xx/xx.</td>
</tr>
<tr>
<td>Handwritten Notes</td>
<td>I will write 2 notes a week to referral sources or colleagues with whom I’ve been out of touch per week.</td>
</tr>
</tbody>
</table>

Make your own chart to record your goals!
APPENDIX J. NOTES

Just a place to jot down your thoughts and next steps.

Take care!
Casey Truffo, MS, MFT