

GOAL SETTING FOR PRIVATE PRACTICE

A guide for therapists who want a more fulfilling business

Ahh, good ol' goal setting. Nothing can bring about more hope and enthusiasm than coming up with goals for yourself and your business! *And nothing can bring about more disappointment, frustration, and self-criticism than watching those goals go unmet. Glares cruelly over at dust-covered vision board of broken dreams from last year.*

When it comes to growing our business and clientele as therapists, we all know the value in having goals to keep us focused and on the road to success.

- See ___ # clients per week
- Make \$ _____ money per year
- Write ___ # blog posts a month
- Update social media ___ # of times per week

Those are some of the goals I used to think mattered to me and would lead to success. Until I realized, *they don't*. Plenty of those things are important and certainly need to be addressed as *stepping stones* to reaching some of your goals. However, when it comes to your goals, they need to have more heart.

Some of the old questions I would ask myself when setting goals were:

- What do successful private practices look like?
- What are other therapists in private practice doing?
- How many clients am I supposed to see per week to appear successful?

Ya know what happened when I spent my time trying to do what I *thought I was supposed to be do* based on what I saw other people doing? I didn't meet my goals. And as a bonus, I got to carry around a bag of shame and self-loathing each day to help remind me that I definitely was a failure. **So. Much. Fun!**

Things changed though when I started asking myself questions from the heart.

Questions like:

- What excites me about my job?
- What am I *really* good at doing?
- What do I most enjoy doing during my work hours?
- What do I want my practice to look like 5 years from now?

The difficulty I see for so many people when it comes to setting goals for their business is that they base them off of other people's expectations, leading to either

1. reaching their goals, but feeling unfulfilled, or
2. not reaching their goals because, as it turns out, it's really hard to achieve something that isn't compelling to you on a personal level.

But what if we were to all pause for a moment amongst the hustle of private practice to check in with ourselves and see what **we** want for our business? What **we** want for our lives? Check in with ourselves to see **what things actually matter to us**.

Because if we keep basing our goals off of what other therapists, podcasts, facebook communities, and ingrained expectations tell us, those goals will continue to fall flat. But once we tune into *ourselves* and find goals that excites us? The world of private practice will become much more fulfilling.

INSTRUCTIONS

In the rest of this guide, you'll find questions designed to help you reflect on yourself as a person and clinician so that you can create goals consistent with your values. Let go of any expectations or shame around what your answers should or shouldn't look like. And when you find that some of the questions feel redundant (because they will), use that as an opportunity to dig even deeper with your answers.

HELPFUL TIP

When questions ask you to think of *work tasks*, remember that there is more to our job than just seeing clients. It can vary person by person, but some examples are: clinical work, writing case notes, billing, responding to emails and phone calls, networking, writing blogs, social media, advertising, designing marketing materials, website design and maintenance, tracking business expenses and mileage, handling taxes, treatment planning, consultation, reading/learning/continuing education, etc, etc, etc... because there's no limit to all the shit us private practice folks have to do!

TECHNOLOGY TIP

You may want to answer these questions in your own journal, but if you decide to use the text boxes provided in the guide, be sure to only type your answers in them after you have re-saved the file to a specific place on your computer and then re-opened that saved file. If you type directly into the file that automatically pops up after the download and try to save it *after* filling it out, none of your answers will show up when you re-open it.

When I initially imagined going into private practice (long before actually starting one), what did I think and hope it would look like?

What parts of that vision have and have not matched up with how it's actually been for me so far?

How does it feel thinking about either the alignment or discrepancy between those two things?

Reflecting on my work in 2017, what things have been the most and least fulfilling and enjoyable?

Most

Least

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For the next four questions, don't be surprised if your answers contradict each other (ie: you may both look forward to *and* dread some of the same tasks in private practice). In those instances where your answers feel contradictory, be sure to write out the distinctions: what is it that makes that thing feel good when it is good, and what makes it feel bad when it is bad.

When I wake up, what do I look forward to about my job?

Just write out quick, gut responses. You'll go more in depth in a bit.

When I wake up, what do I dread / least look forward to about my job?

Just write out quick, gut responses. You'll go more in depth next.

Which work tasks (*from clinical, to creative, to admin, and everything else*) do I most enjoy doing during my work hours?

What is it about doing these tasks that feels good? / Why do you seem to enjoy them?

Which work tasks (from clinical, to creative, to admin, and everything else) do I least enjoy doing during my work hours?

What is it about doing these tasks that feels bad? / Why do you seem to dislike them?

What things am I really good at doing?

As a clinician

As a business owner

As a human being (for myself, for others, creatively, etc)

This question can help you recognize strengths you might be able to incorporate into your private practice that you wouldn't have originally thought about

What feelings do I want experience more of next year?

Struggling to think of feelings? Try using [this](#), [this](#), or [this](#) link for an inventory of feeling words.

Which work tasks do the best job of making me feel the ways I want to feel?

What feelings do I want to experience less of next year?

Which work tasks make me feel the way I don't want to feel?

If I didn't have to worry about money, what would I choose to spend my time doing each work day?

As I reflect on *all* of my answers so far, what would I like to spend *most* of my time and energy doing in my practice? This is different from the previous question in that you should write things that *can* somehow be translated into profit -- meaning you probably shouldn't spend all of your time coloring mandalas if that's your ideal day. But guess what, you *can* spend your time designing therapeutic art if that's what is speaking to you!

Alright, whew! That was a lot of thinking and feeling and reflecting. Nice work! For this final part, I want you to integrate everything you've discovered about yourself thus far in order to answer the big questions that will turn your discoveries into goals.

What do I want my business to look like 5 years from now?

Don't be afraid to think big, and feel free to have as few or as many answers as you want. If you include a financial milestone in your answer, be sure you're aware of how you want that money to come in. Ex: Want to make 6 figures? Would that be mainly through clinical work? Running groups? Consultation? Teaching? Writing? Owning a group practice? Other things? *Hint: your answers to the previous question should help inform your 5 year vision.*

If you answered the previous question with *more than 3 items* (which is completely fine if so), for now you should pick the top 3 that you feel the most excited about. Write those out.

On the next page, for each of those 3 items, create 1-2 goals that you can accomplish within one year that would move you closer towards your 5 year vision.

Example: if one of my top 3 items for my 5 year vision is: have 70% of my income be through training other therapists, I could create a 1-year goal of putting on 2 workshops ... or ... create a website for training and consultation services ... etc

Example: if a top item is: being a leading expert in a certain modality or topic → 1 year goal: read 6 books on that modality/topic ... or ... lead a therapist study group on that modality/topic ... etc

Vision #1	
Goal 1	Goal 2

Vision #2	
Goal 1	Goal 2

Vision #3	
Goal 1	Goal 2

Of those narrowed down goals, write out the 3 you would like to focus on the most in 2018.

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And there you go... all done! Nice job digging deep and setting some goals. Remember that your vision and goals can evolve over time, so nothing has to be static and you're encouraged to check back in with yourself semi-annually to see if you're still headed in the direction you want to go.
