Building Success by Becoming a More 'Professional' Business Professional: Three Critical Preparation Steps for Counselors

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Abstract: Professionalism begins long before the first counseling session. In this interactive workshop, counselors will implement three critical steps for preparing to present themselves as professional professionals to potential clients. Following these steps will result in acquiring more clients, easier appointment scheduling, fewer "no-shows," and improved public perception of Christian counselors.

Learning objectives:

Participants will:

1) evaluate their existing marketing to potential clients (cards, phone message, website) and plan enhancements that increase professionalism, Christlikeness, and client inquiries.
2) design a phone worksheet used with potential clients to assist counselors in distinguishing ideal clients/referrals, discussing fees, procedures.
3) develop e-mail templates to incorporate into their counseling practice to help counselors retain clients, manage scheduling, and decrease "no-show" rates.

P: Position yourself correctly and professionally with potential clients by first evaluating and enhancing your marketing.

- Remember—marketing is simply telling people what you do, over and over.
- Basic marketing tools:
  1) Website
     - Professional
     - Ethical
     - Attractive to your "ideal" client population
     - Clear description of how you incorporate Christianity into your counseling (if applicable)
     - Easy to navigate
     - Contact information provided on each page (email/phone #)
     - Color photo of you smiling (taken by a professional photographer)
     - Fees, payment methods, and insurance discussed
     - Directions and map to office provided
     - Downloadable forms
     - Links to online resources
     - Recommended books with Amazon link
     - Store (if you have CD's or books to sell)
  2) Answering machine message
     - Call and listen to your own message
       - Professional
       - Warm, "smiling" voice
       - Brief but informative
  3) Business cards
     - Professional
     - Attractive to your "ideal" client population

        - Provide all contact information
            - Phone numbers, email, fax, website
- If on vacation:
    - Automatic "out of office" response on email
    - Change phone message to "out of office" message
    - Let officemates know your vacation plans
        - If they take messages for you from potential clients, ask them to tell people you are on vacation.

R: **Respond professionally** to contact from potential client

- Get back to potential clients within 24 hours if possible.
- Even if client contacts you first through email, **always** talk to potential clients on the phone prior to scheduling a first session.
    - ***"Ten minutes of your time now can save you hours of future trouble."***
- This is the start of your relationship with a client.
    - Professional
    - Warm, "smiling" voice
- Give yourself adequate time for phone call (at least ten minutes)
- Consider the call a "mini-intake session"
- Listen carefully with your "3rd ear."
    - Holy Spirit's direction
    - Intuition
- Use phone worksheet to acquire/share all needed information
    - You need to know:
        - Is this person an "ideal client" for you?
            - Presenting problems interest you
                - "Just to make sure that I would be the right person for you to see, could you tell me in 60 seconds the concerns that are bringing you to counseling?"
            - Competent to treat client's issues
                - Know your "automatic rule outs"
            - Compatible personality types
                - Does this person sound like someone you want to work with?
            - Person can afford your fees
                - Out of pocket, insurance carrier, church benevolence funds, EAP, sliding scale
        - How did this person find you?
            - ID Referral sources
                - Clue to whether you want to work with this potential client
                - Networking with other professionals
            - ID marketing that is effective
    - Potential Client needs to know:
        - You are a warm, empathetic, professional with competence in treating particular issue.
        - May want to know that you are a Christian.
        - Days and hours that you see clients.
        - Location of your office.
        - Your fees.

        - NOTE: A professional discusses fees without apology or hesitation.
        - What type of payment you accept
            - Cash, checks, credit/debit cards, Health Savings Acct card
        - Full payment at time of service or other arrangements
            - EAP, church benevolence funds
            - Sliding scale (if applicable)
    - Whether you accept insurance, panels you are on, copays
        - Cover this last, and you may find that potential clients are willing to pay for your out-of-network services out-of-pocket because they have connected with you by this point and want to work with you.
- If you want to see this person as a client:
    - Offer to schedule them ASAP
        - Leave a couple of open slots each week for new clients you want to get in quickly.
    - Explain parking arrangements, waiting room procedure, registration forms
    - Ask for email address and phone numbers
    - Give them additional contact information in case they have more questions or need to reschedule.
    - End with "I'll look forward to meeting with you on Tuesday, October 12th, at 3 p.m."
- If you don't want to or cannot see this person as a client:
    - Refer person to another therapist or agency.
        - Have phone numbers ready.
            - "After hearing your specific concerns, I think you'd be better off working with another therapist who … (has more availability, has experience working with __________, accepts your insurance, has a lower fee, etc.) Would you like some recommendations?"

E: E-mail new client within 24 hours.

- Immediately email a map and directions to your office.
    - Include link to website with instructions on how to download forms (Client Information, Consent for Treatment, etc.) for completion prior to first session.
        - Directs clients to website in case they haven't seen it yet.
- Clients now have your email address.
    - Easy way for them to contact you with questions before or after sessions.
        - Will significantly improve client retention.
- Prior to each appointment, e-mail reminder of appointment.
    - Convenient way for them to contact you if they need to reschedule.
        - Eliminates playing "telephone tag" with clients.
        - Will significantly decrease your "no-show" rate.

How Does Your Business Card Rank?

Take the following test to see how well your card ranks.

Presents a positive, interesting and professional image
__yes __no

Features an attention grabbing and professionally designed logo that is unique to your business
__yes __no

The logo 'visually' defines what you sell at a glance
__yes __no

Typeface and text size is easy to read
__yes __no

No more than two typefaces are used in the design
__yes __no

Good use of color to present the image of your business
__yes __no

Color design is consistent with other marketing materials
__yes __no

E-mail, website address, and possibly social media are featured
__yes __no

You act upon every opportunity to present your business card
__yes __no

Card has been updated and improved within the past year
__yes __no

Each staff member has his or her own personalized business cards
__yes __no

The following questions may not apply to Mental Health Professionals

Back of card is used for additional information
__yes __no

Benefits and features are described in branded catch phrase
__yes __no

Features all services you offer to your customers
__yes __no

You receive comments from others such as, "What a great card!"
__yes __no

Others often ask more about the business after viewing your card
__yes __no

SAMPLE FORM: Initial Phone Call with Potential Client

Client's name:
Contact info:
Dates of contact:

"Hello, this is _______________with the _________ Counseling Center. I received a message that you called about counseling?"

"Just to make sure that I would be the right person for you to see, are you in a location where you could you tell me in 60 seconds the concerns that are bringing you to counseling?

Presenting problems:
Am I interested in this client? Yes/No
Am I competent in this area? Yes/No
How did they hear about me?
My automatic rule outs are:
Do I want to work with this person? Yes/No

Working hours:
Do those hours work for this person? Yes/No

Fees and Insurance: $____ an hour
Can this person afford my fee out of pocket? Yes/No
Explain payment options (Cash or check, do or don't accept credit or debit cards)

Will be using insurance? Yes/No
Explain insurance procedures or that insurance is not accepted/full fee paid up front.

Do you want to hear about our assistance funds that are available to clients who can't pay the full fee? Yes/No

Other sources of financial assistance: Church benevolence funds, EAP, family

"Would you like to schedule an appointment at this time or think about it some more and get back to me?
NO: Recommend future email or call to set up appointment.
YES: Schedule appointment (Date and time:)

Discuss parking, waiting room procedures.

"If you are comfortable using email, I can email you directions and a map to our counseling center. In that email, there is a link to our counseling center website. If you click on it, you can go to our website and download the Client Registration Forms to fill out and bring with you. They aren't very long—just three pages—but if you bring them with you when you come, we can go ahead and get started with your session. If that's not convenient, I'll give you the forms to fill out when you arrive."

Ask for email address ( )

"If you need to reschedule or have questions, just email me back or call the center at 555-1234. I look forward to meeting you on ________________(date) at ___________(time)."

Follow up: Entered appointment on calendar _____ Emailed map to client _____

TO REFER OUT:
"After hearing your specific concerns, I think you'd be better off working with another therapist who … (has more availability, has experience working with __________, accepts your insurance, has a lower fee, etc.) Would you like some recommendations?"