

BUSINESS SUPPORT TEAM

Free Private Practice Setup Checklist

A therapist-specific roadmap to building a professional, ethical and organised private practice.

Starting private practice should feel exciting – not overwhelming.

Behind every successful clinic or therapy business is a framework of compliant systems, client processes, financial organisation, documentation, and day-to-day operational structure that keeps everything running smoothly.

This premium checklist has been created to help therapists set up with confidence, clarity, and professionalism from the very beginning.

- ✓ Avoid missing critical setup steps
- ✓ Build strong ethical and operational foundations
- ✓ Create systems that save time and reduce overwhelm
- ✓ Set your practice up professionally from day one

1. Legal, Ethical & Professional Essentials

Professional registration confirmed

Insurance in place

Professional body obligations checked

GDPR/data protection reviewed

Secure record keeping system chosen

2. Clinical Documentation & Client Policies

Intake forms created

Consent forms prepared

Confidentiality policy written

Cancellation/payment policy established

Clinical note templates ready

3. Finance & Business Operations

- Business bank account opened
- Payment systems set up
- Invoicing process created
- Pricing structure confirmed
- Tax/bookkeeping system chosen

4. Client Journey & Admin Systems

- Booking diary selected
- Automated reminders set
- Client onboarding workflow built
- Secure communication channels chosen
- Follow-up/waitlist process in place

5. Marketing & Visibility

- Website or landing page live
- Service descriptions written
- Professional bio complete
- Directory listings completed
- Referral networking started

Why Business Support Team Is Different

This is not generic administration support.

Business Support Team provides therapist-specific operational support built around the unique needs of private practice and clinic environments – managed by a qualified therapist and experienced practice manager with a deep understanding of ethics, confidentiality, compliance, client sensitivity, and the practical realities of clinical work.

Support is designed to give therapists back time, create organised backend systems, and ensure their practice runs professionally behind the scenes.

READY TO SET YOUR PRACTICE UP PROPERLY?

Private Practice Setup Support | Therapist VA Support | Ongoing Practice Management

Enquire about bespoke therapist operational support from Business Support Team.

Business Support Team – informed operational support for ethical, organised and sustainable therapy practices.

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