



Professional Practice Building - Part 1
Session 9: Succession Planning for Your Counseling Practice:
Managing the Expected and the Unexpected

Webinar Follow-up Question and Answer Session with Lynell Howard

Question from Marlene Travis

In selecting your practice's name, have you found it best to NOT include the word "counseling" within? Counselors have told me clients avoid using that term in payment mode (e.g., check writing) so others do not know they have gone to a counselor.

Answer from Presenter

The great thing about naming a practice is that you have much flexibility to choose what fits your plan or scope of services. If you think you may want to eventually expand your practice to include other services beyond counseling, you should consider that long term goal. If your concern with putting the word "Counseling" in your practice name to further protect the confidences of your clients, you may wish to consult with your bank to see what options there are for depositing checks made out to your full business name and/or a shortened version of your business name (Century Counseling Services vs CCS). You may also find that with some electronic payment methods (Stripe, PayPal, etc.) you are able to set the name that will appear on your client's/customer's bank statement in association with the charge for your service.

Question from Marlene Travis

In creating a professional will, I am hesitant to include all privacy information in one place. What might you recommend as a method to safeguard this information from being unethically accessed?

Answer from Presenter

Just like with a personal will, a professional will should be safeguarded so that it is not tampered with, lost, and/or destroyed. The information contained within is sensitive, so storing it in a protected place, with limited access by others is important. Additionally, there should be stipulations specified in your professional will that indicate when the directives contained in the document are activated. For example, in the event that you are hospitalized, hurt, injured, delayed in travel, etc. Consult with an attorney through your malpractice insurance to discuss the options that may be available to you for developing the conditions you would like/need in your will and the methods for safeguarding the document.



Question from Allen Vosburg

What is the main focus, in your opinion, of what is needed to start a successful practice?

Answer from Presenter

There are several things that I believe are necessary for starting a successful practice. These begin with a vision for what you would like your practice to operate by and become known for. Identifying the goals and scope for your practice will help to direct your path and prevent you from operating as a “catch-all” and taking on the clients just for the sake of having clients/income. Having the necessary skills to provide ethical, professional, and quality care to clients is important, not only for securing your initial client base, but for developing a referral-based practice. This leads nicely into the next necessary focus, developing referral sources, either from local organizations, among your peers, with third party payors, if necessary, and from others that you network with is important to the success of your practice. Finally, the location you choose and it’s accessibility to your client base will also help in your success.

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