

**PRACTICE
MANAGEMENT:
CLIENT AND FINANCIAL RECORDS**

**CREATING A PROFESSIONAL PRACTICE
MAY 16-17, 2007**

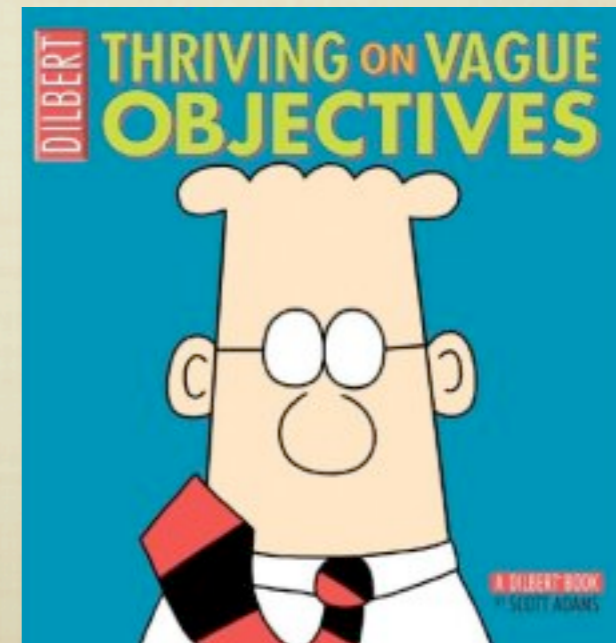
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WORK MANAGEMENT

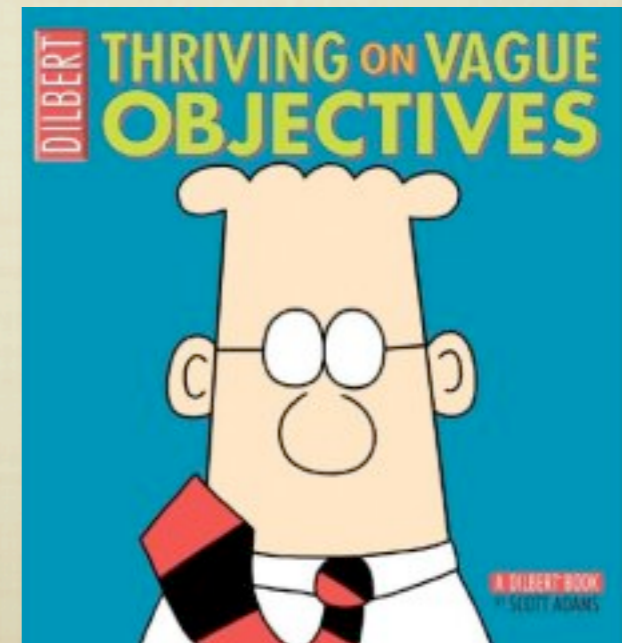
WORK MANAGEMENT

☑ WHY HAVE A SYSTEM FOR MANAGING WORK?



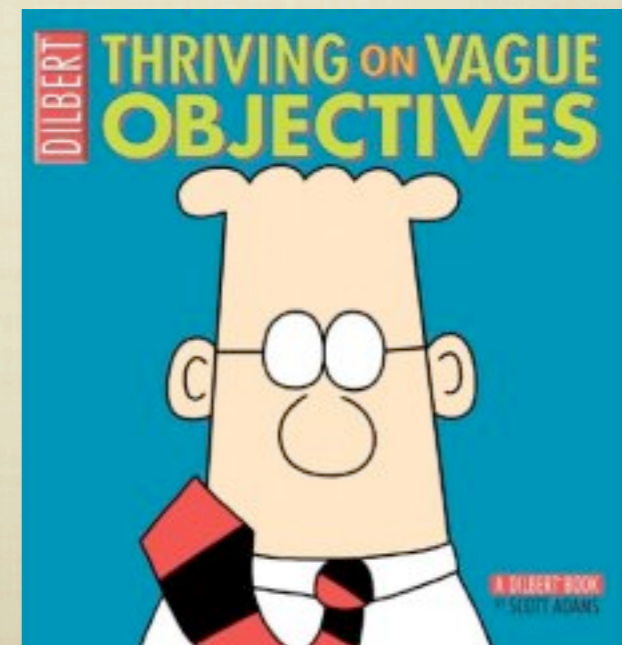
WORK MANAGEMENT

- ☑ WHY HAVE A SYSTEM FOR MANAGING WORK?
- ☑ SUSTAINS PROFITABLE OPERATION OF BUSINESS



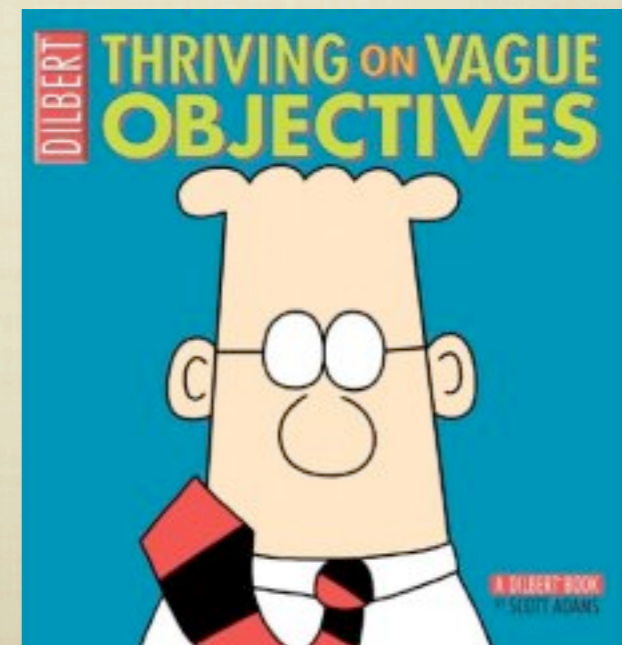
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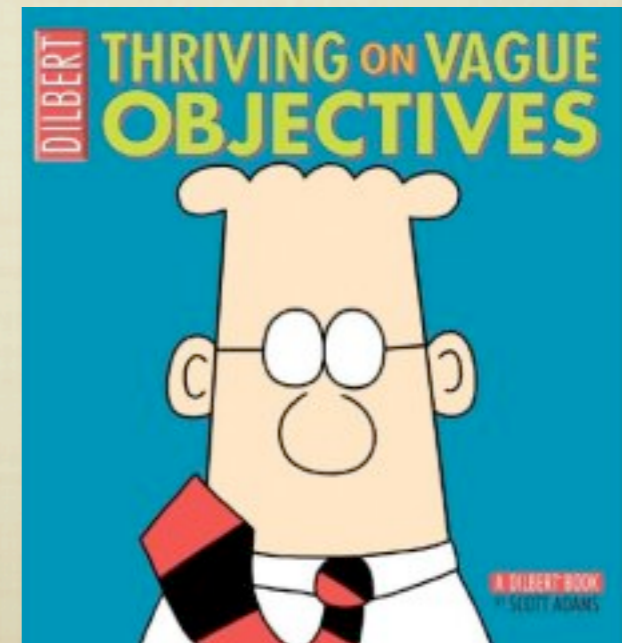
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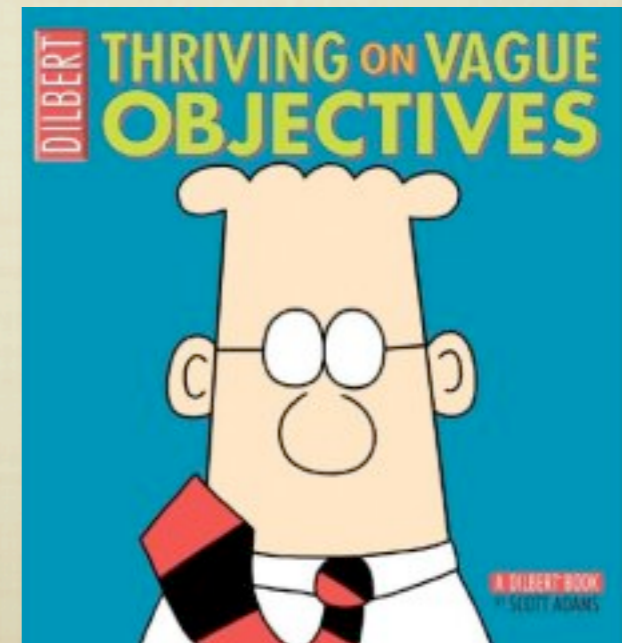
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 - ☑ EXUDES PROFESSIONALISM
 - ☑ REDUCES STRESS



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- **DATA READILY ACCESSIBLE WHEN NEEDED**

- **DATA EASILY RECOVERED FROM LOSS OR DAMAGE**

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- **ALLOWS QUICK ENTRY FOR PRACTICALITY**

- **PROVIDES SUFFICIENT NOTICE FOR TIME-SENSITIVE EVENTS**

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- **PROVIDES SUFFICIENT NOTICE FOR TIME-SENSITIVE EVENTS**

- **EASY TO USE**

SYSTEM SHOULD BE...

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- PORTABLE

- ALLOWS MAXIMUM FLEXIBILITY FOR WORK/LIFE MANAGEMENT

SYSTEM SHOULD BE...

- **PORTABLE**

- **ALLOWS MAXIMUM FLEXIBILITY FOR WORK/LIFE MANAGEMENT**

- **PUBLISHABLE**

- **TAX REPORTING**

- **SCHEDULE SHARING**

SYSTEM MAY BE...

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- ELECTRONICALLY-BASED
- PAPER-BASED
- A COMBINATION OF THE ABOVE

- RECOMMENDED READING: GETTING THINGS DONE,
DAVID ALLEN

ITEMS TO CAPTURE

ITEMS TO CAPTURE

- TECHNICAL SESSION INFORMATION
 - INTAKE QUESTIONNAIRE
 - CONTACT/FAMILY INFORMATION
 - HEALTH/MEDICAL HISTORY
- ONGOING SESSIONS
 - SOAP NOTES
 - RECOMMENDATIONS
 - PERSONAL ANECDOTES

ITEMS TO CAPTURE (2)

- **GENERAL BUSINESS MANAGEMENT**

- **APPOINTMENTS**

- **CLIENT SESSIONS**

- **ADMINISTRATIVE TASKS**

- **PROMOTIONAL/MARKETING FUNCTIONS**

ITEMS TO CAPTURE (3)

- INCOME
 - SESSION PAYMENT INFORMATION
 - METHOD OF PAYMENT
 - DISCOUNTS, REFERRAL CREDITS, MULTIPLE-SESSION PACKAGE TRACKING
 - GIFT CERTIFICATES
 - MONETARY AMOUNT OR SERVICE TYPE
 - DATE OF DISTRIBUTION
 - REDEMPTION STATUS

ITEMS TO CAPTURE (4)

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- **EXPENSES: “ORDINARY AND NECESSARY”**
 - **FIXED MONTHLY**
 - **PROFESSIONAL AND ADMINISTRATIVE**
 - **AUTOMOTIVE**
- **MARKETING & BUSINESS DEVELOPMENT**
 - **CONTENT ASSEMBLY**
 - **FREQUENCY OF DISTRIBUTION**
 - **ACTIVITY COST AND EFFICACY**

IMPLEMENTATION

- GENERAL ADMINISTRATIVE ITEMS

IMPLEMENTATION

■ GENERAL ADMINISTRATIVE ITEMS

ITEM	PAPER	ELECTRONIC

IMPLEMENTATION

■ GENERAL ADMINISTRATIVE ITEMS

ITEM	PAPER	ELECTRONIC
“INBOXES”	• SNAIL MAIL	• EMAIL • VOICE MAIL

IMPLEMENTATION

■ GENERAL ADMINISTRATIVE ITEMS

ITEM	PAPER	ELECTRONIC
“INBOXES”	• SNAIL MAIL	• EMAIL • VOICE MAIL
CONTACT INFORMATION	• ADDRESS BOOK • FILE FOLDERS	• PIM SOFTWARE • CUSTOM DATABASE

IMPLEMENTATION

■ GENERAL ADMINISTRATIVE ITEMS

ITEM	PAPER	ELECTRONIC
“INBOXES”	● SNAIL MAIL	● EMAIL ● VOICE MAIL
CONTACT INFORMATION	● ADDRESS BOOK ● FILE FOLDERS	● PIM SOFTWARE ● CUSTOM DATABASE
SESSION (SOAP) NOTES	● 3-RING BINDER	● WORD PROCESSOR ● TEXT EDITOR ● CUSTOM DATABASE

IMPLEMENTATION

■ GENERAL ADMINISTRATIVE ITEMS

ITEM	PAPER	ELECTRONIC
“INBOXES”	<ul style="list-style-type: none">● SNAIL MAIL	<ul style="list-style-type: none">● EMAIL● VOICE MAIL
CONTACT INFORMATION	<ul style="list-style-type: none">● ADDRESS BOOK● FILE FOLDERS	<ul style="list-style-type: none">● PIM SOFTWARE● CUSTOM DATABASE
SESSION (SOAP) NOTES	<ul style="list-style-type: none">● 3-RING BINDER	<ul style="list-style-type: none">● WORD PROCESSOR● TEXT EDITOR● CUSTOM DATABASE
FOLLOW-UP SYSTEM	<ul style="list-style-type: none">● INDEX CARDS, SORTED CHRONOLOGICALLY	<ul style="list-style-type: none">● PIM SOFTWARE WITH ALARMS

IMPLEMENTATION (2)

- TAX-RELATED ITEMS

IMPLEMENTATION (2)

■ TAX-RELATED ITEMS

ITEM	PAPER	ELECTRONIC

IMPLEMENTATION (2)

■ TAX-RELATED ITEMS

ITEM	PAPER	ELECTRONIC
ACTIVITY JOURNAL	<ul style="list-style-type: none">● EXPENSE LEDGER● MILEAGE LOG	<ul style="list-style-type: none">● PIM SOFTWARE● SPREADSHEET● GOOGLE MAPS

IMPLEMENTATION (2)

■ TAX-RELATED ITEMS

ITEM	PAPER	ELECTRONIC
ACTIVITY JOURNAL	<ul style="list-style-type: none">● EXPENSE LEDGER● MILEAGE LOG	<ul style="list-style-type: none">● PIM SOFTWARE● SPREADSHEET● GOOGLE MAPS
INCOME & EXPENSE	<ul style="list-style-type: none">● PAPER LEDGER● FILE FOLDERS BY CATEGORY	<ul style="list-style-type: none">● FINANCE SOFTWARE● SPREADSHEETS

IMPLEMENTATION (2)

■ TAX-RELATED ITEMS

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ACTIVITY JOURNAL	<ul style="list-style-type: none">● EXPENSE LEDGER● MILEAGE LOG	<ul style="list-style-type: none">● PIM SOFTWARE● SPREADSHEET● GOOGLE MAPS
INCOME & EXPENSE	<ul style="list-style-type: none">● PAPER LEDGER● FILE FOLDERS BY CATEGORY	<ul style="list-style-type: none">● FINANCE SOFTWARE● SPREADSHEETS
PAPER EVIDENCE	<ul style="list-style-type: none">● ACCOUNT STATEMENTS● FILE FOLDERS	<ul style="list-style-type: none">● SCANNER/RECEIPT DATABASE

RESOURCES

- TIME/RESOURCE MANAGEMENT:
 - GETTING THINGS DONE: [HTTP://WWW.DAVIDCO.COM](http://www.davidco.com)
 - GENERAL ADMINISTRATION (BM 390 - 410)
 - [WWW.SOHNEN-MOE.COM/FORMS.PHP](http://www.sohnen-moe.com/forms.php)
- PUBLIC SCHEDULING AND CONTACT MANAGEMENT
 - [WWW.MYRECEPTIONIST.COM](http://www.myreceptionist.com)
 - [WWW.BOOKINGCALENDAR.COM/HOME.PHP](http://www.bookingcalendar.com/home.php)
 - [WWW.MASSAGEBUILDER.COM](http://www.massagebuilder.com)
- RECEIPT MANAGEMENT
 - [HTTP://WWW.RECEIPTWALLET.COM](http://www.receiptwallet.com)