

Thank you so much for taking time to invest in yourself and in trusting my private practice material. Let's get started.

One thing you should know about me, Juan Santos, "I am very action oriented". Maybe this is part of my origin as a Dominican 😊

STEP ONE:

On a sheet of paper answer the question: "Who are the people that I help?"

Examples include:

- "I help divorce parents build healthy co-parenting skills"
- "I help single mothers manage their frustrated adolescent"
- "My ideal clients are families that fight more then they laugh"
- "My ideal clients seek my services when they have experienced pain in their relationship"

STEP TWO:

On the same sheet of paper write down other professionals "near your office" that are prone to provide their services to the client profile you described in STEP ONE.

You are going to locate these professionals by researching. Start with your zip code and a specific professional. Be sure to utilize search engines such as google, Bing or yahoo.

For instance: If your answer to STEP ONE was "I help single mothers manage their frustrated adolescent". You could enter your zip on your online search engine and type in a "pediatricians in your zip code".

Each professional that you find should be written down on the Professional Referrals Form. This form can be found by [click here](#)

The goal is to hold a list of no less than **100** professionals.

I like the number 100 because it allows so much room for error and failure. All you need is a handful of referrals. **5 referrals can build your practice month after month.**

I've had it happen and I've seen it happen in other practices!

As you complete your search for one professional or zip codes - continue to add more.

Potential professionals include:

- **Chiropractors**
- **Nutritionist**
- **Nurses**
- **OBGYN**
- **Primary physicians**
- **Physician assistance**
- **Attorneys**
- **Paralegals**
- **Psychiatrist**
- **Barbers**
- **Hair Stylist**
- **Counselors or Psychologist that support your potential clients.**

STEP THREE:

Scroll down to page 5 to view an easy to follow template when mailing potential referral sources. Please note that your template can be used for more than one professional referral.

STEP FOUR:

Add marketing content to each envelope you send. I encourage you to have two things in each one.

- A business card (that is professional and sharp. I like using vista print. They always have sales and tons of discounts).
- A rack card.

This is a small flyer that you can utilize. I encourage you to have your picture, logo, brief 2-3 sentences about your practice, specialties/nitch, location, and phone/fax number. If you have a group practice, you are welcome just to go with the logo. The reason I like the picture is that people can desire your services right away without even knowing you.

Take a professional picture that really pulls your best assets. This is definitely a great investment to make!

STEP FIVE:

You can personally choose to use pre order address labels or print them off when mailing. I always handwrite some of the letter. My mother always told me that when someone handwrites a letter it means that it comes from the heart.

I do not handwrite the entire letter – just the portion described in the template and the content of the envelope.

You can honestly go in any direction you want. I do not have strong statistics yet.

STEP SIX:

Wait 30 days prior to you reaching out. After 30 days reach out via. Email first.

Be sure to follow-up with the professional in reference to receiving the letter and to scheduling a meeting with you.

After you have emailed and had no replies - call.

It is important to always have one end game. Instead of saying email, text, stop by, or call me. Give one. Call me (xxx) xxx-xxxx.

STEP SEVEN (maintenance):

At this point you are at one of two positions in your practice:

- **The fish is on the line**

Make sure to invest in your professional referral sources as they are the source to your success.

- **The fish are NOT biting**

If you have received no contact yet, it's okay. You are not at a lost. Remember, failure is okay. We fall down – we learn – we get back up.

- ✓ **Increase your geographical reach and your types of professionals in STEP TWO. Be creative – do not just use professionals that are in the medical field. Think of anyone that will provide a service to your ideal client (client's parent(s)). Once you have done that start back over.**

Did the marketing plan help?

Email me juansantos@santoscounseling.com – attention private practice - and let me know today. My goal is help your private practice journey!

PS: Hopefully you are off to a great start. I do want to let you in on a little secret. I'll have more supportive resources that can be added to this platform and the “step by step behind the scenes marketing plan”.

Logo

Business name

Your name and credentials

“short mission statement or something that will grab attention”

(ALL CONTENT ABOVE THE LINE SHOULD GO IN YOUR HEADER)

(AT YOUR FOOTER ADD YOUR NAME – ADDRESS- PHONE)

Greetings (name of the professional or office),

I, your name, the owner and lead clinician of your business, wanted to personally reach out to you to provide your staff and clients with our counseling services.

A three sentence statement describing your business and what you can do for the professional and his clients. You can also add in your nitch/specialties.

I think that our practice fields complement each other as we both focus heavily on wellness. (you can take out wellness and add something that is specific to the professional you are sending this letter out to)

When would be a good day and time to talk over coffee? The treat is on me 😊

After you print the paper. Write in your own handwriting a personal one sentence statement and signature. For instance, “Thank you so much Mr/Mrs _____ for reading this letter and giving me a call – (xxx) – xxx-xxxx”.

Respectfully,

Name and credentials

Business name

Office location

Phone

Fax

Email

Website