

13. Business & Ethics

Business & Marketing Class Notes

I. General Concepts

- A. Evolutionary art in an involutory world
 1. Value proposition; authenticity of deeper causes
 2. Do what you love, love what you do
 3. Creatively seeking ways to add value
 4. Business may go against the grain of your original motive
- B. Self-assessment: check your blueprint
 1. What are your resources
 - a) Money
 - b) Relationships
 - c) Special Talents
 - (1) Writing, Speaking
 - d) Knowledge & Competence in Specialties
 - e) Recognition in specific communities
 2. Stressors
 3. Personal Assessment Questions
 - a) Do I really expect to have money
 - b) Am I really valuable? Do I expect people to value me?
 - c) Feelings re: money, power, influence, responsibility
 - d) Do I really think it is possible to make a difference?
 - e) Do I really feel capable and ready?
 4. Money is good
 - a) Watch for underlying poverty beliefs
- C. Outside is a reflection of the inside
 1. Do you really know your current income and outflow?
 2. Budget? Personal debt?
 - a) Order in home finances
 - b) Feng Shui (check back left corner of rectangle)
 2. Good big things begin as good small things
 - a) Watch out for grandiosity!
 3. Commitment
 - a) What commitments have you made
 - b) how are they going?
 - c) Ambivalence about Polarity?
 - d) Doubt about effectiveness?
 - e) Doubt about your effectiveness with it?
 - f) Confidence sells
- D. Reality follows expectations
 1. Trust, build it up organically
- E. If you love something give it away
 1. Free sessions to influencers
- F. Don't look for gold in a silver mine
 1. Match desires & needs with positioning statement
- G. Embrace yang
 1. what happens in your body re: bold action
 2. what happens re: promoting your business
 3. Teaching
 4. More than one source of income
 - a) sessions, classes, products, writing
- H. Relationships
 1. If you are having a problem, are you in isolation with it?
 2. Have a buddy or a team
 3. make contact with gatekeepers and influencers
 4. Build on existing relationships
 - a) Clients who have had good experiences
 - b) Medical people receptive to a relationship
- I. Product Quality
 1. Commitment to constant improvement
- J. Diverse sources of income

II. Marketing Concepts

A. Three P's

1. People: Relationship is supreme!
 - a) Identify the customer population
 - (1) People who are likely to need your service
 - (2) An audience that you resonate with, based on your own history and natural relationships; who do you know and hang out with?
 - (3) Where your wound is, may be your way in
 - b) Find the gatekeeper to the population
 - c) Create personal relationships with gatekeepers
 - d) Look at where you came from and contact people on that same pathway
2. Problem: How to add value!
3. Product: Don't lead with Product, it follows!
 - a) Quality

B. Positioning Formula

1. "Initial Positioning Formula":
For (target customers) who (need or opportunity), the (name) is a (category) that (#1 compelling reason to buy). Unlike (primary competitive alternative), our product (primary differentiator).

C. Planning

1. Fail to plan = plan to fail
 2. Outline of a plan
 - a) Mission: what is your intention
 - b) SWOT: assess situation realistically
 - c) Goals: 3-5 broad, measurable areas of focus
 - d) Strategies: 3-5 action tasks for each goal
 - e) Infrastructure: what resources or support is needed
 - f) Measurements: how will you know if it's working?
 3. Formal planning sessions
- #### D. Outreach
1. Practice saying what you do ("the elevator test")
 2. Simplicity is more important than detail
 3. Custom fit for specific audience
 4. Public speaking
 - a) Introducing Polarity to new audiences (role play)
 5. Public writing; having your name in print makes people think you are an expert
 - a) Case histories
 6. Advertising
 - a) Lowest priority; it takes 27 exposures to make an impression... Often used when there is resistance to other options
 - b) Most people get help through word of mouth
 - c) Target the audience, not broadcast unless you really have the resources
 - d) Get help with design and placement if it is not your skill area
 - (1) face looks toward text
 - (2) Lines are 32 characters or less
 - (3) Easy to read font
 - (4) Flush left text, bullets

E. Compliance with the state: Unlicensed Psych status, CAP

1. Participate in groups & coalitions, associations

F. Product Life Cycle dynamics

1. Early adopters need education and experience

G. Pricing issues

Practice Management Class Notes

Tax issues

- Rules about expenses
- Schedule C
- SE Tax estimated quarterly payments based on prior year
- Deductibility of expenses
- Computer Programs

Right to Practice strategies

- Political awareness
- Participation in coalitions
- Fed JGRC Legislative Package at www.adeptsys.com/federation
- Colorado Unlicensed Psychotherapist status

Bookkeeping

- Superiority of computer programs (Quicken, etc)
- Maximize chart of accounts link to Schedule C

Scheduling

- 90 minute, 75 minute, 60 minute
- See the clock as a friend (embrace yang, again)

Pricing

- Not too low or clients will not perceive benefit
- Donations box for student sessions
- Sliding scales

Session Notes

- Energy based language to shield clients
- Intake forms
- Recognition effect

Insurance reimbursement

- Primary care person's sponsorship
- Need for notes of each session

Liability insurance

- Sources: APTA, ABMP, other
- What if I just don't do it?

National Organizations

- APTA
- CSTA/NA
- ABMP
- NCBTMB

Referrals

- Psychotherapy
- Structural work
- Medication

Supervision

- Taking responsibility, don't leave it to chance or others