

www.cassduffill.com

Practice Assessment & Planning Workbook

FOR YOUR 90min PRACTICE
GROWTH INTENSIVE



Designed to help you prepare for your session
and get the most value from our time together.

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PRE-SESSION PLANNING GUIDE

Congratulations on booking your Practice Growth Intensive.

This workbook is designed to help you step back from the day-to-day demands of running your practice and take an honest look at where things currently stand.

The more clarity you can bring into our session, the more focused and valuable our time together will be.

This isn't homework.

It's simply a chance to reflect on what's working, what's not, and where you'd most like support.

Bring your completed workbook to our session and we'll use it to create a practical 90-day roadmap tailored specifically to your practice.

I look forward to supporting you.

Cass xo

SECTION ONE

CURRENT PRACTICE SNAPSHOT

What's working well in your practice right now? Think about clients, referrals, income, marketing, systems, confidence, or anything else that's creating momentum.

SECTION ONE

CURRENT PRACTICE SNAPSHOT

What's currently frustrating you about your practice? What feels difficult, inconsistent, overwhelming or unclear?

SECTION ONE

CURRENT PRACTICE SNAPSHOT

What's been taking up the most time or energy in your practice lately? Is it helping grow your practice, or distracting you from what matters most?

SECTION ONE

CURRENT PRATICE SNAPSHOT

What are your top three priorities or goals for the next 90 days?

SECTION ONE

CURRENT PRACTICE SNAPSHOT

If our session could solve one problem for you, what would it be?

SECTION TWO

TIME, CAPACITY & PRIORITIES

**On a scale of 1-10, how satisfied are you with your practice right now?
Why?**

SECTION TWO

TIME, CAPACITY & PRIORITIES

What parts of your work do you enjoy most?

SECTION TWO

TIME, CAPACITY & PRIORITIES

What tasks do you avoid, procrastinate on, or wish someone else could handle?

SECTION TWO

TIME, CAPACITY & PRIORITIES

How many hours per week do you currently spend on

Seeing clients

Admin

Marketing

Business planning

Other areas?

SECTION TWO

TIME, CAPACITY & PRIORITIES

What feels most out of balance right now?

SECTION THREE

PRACTICE FOUNDATIONS

Momentum comes from clarity and solid structure. Let's look at your core structure and what you can build from.

**What's working well in your practice model right now?
(Services, pricing, systems, client journey, marketing)**

SECTION THREE

PRACTICE FOUNDATIONS

What feels messy, inefficient, outdated or ineffective?

SECTION THREE

PRACTICE FOUNDATIONS

Describe your ideal client - who they are, what are they struggling with, what are they actively looking for help with?

SECTION THREE

PRACTICE FOUNDATIONS

What services or offers do you most want to grow over the next 12 months?

SECTION FOUR

CLIENTS, REVENUE & GROWTH

We'll use this to identify where to focus for consistent, sustainable revenue.

How would you describe your current client flow?

Consistent Up and down Slow Growing At Capacity

Why do you think you're experiencing that client flow?

Where do most of your clients currently come from?

SECTION FOUR

CLIENTS, REVENUE & GROWTH

What revenue goals do you have for the next 90 days?

SECTION FOUR

CLIENTS, REVENUE & GROWTH

What do you believe is the biggest obstacle preventing you from reaching those goals?

SECTION FIVE

SNAPSHOT

Use this quick checklist to see where your practice currently is. It will allow you to easily see the areas that are working well, and those that need some focus or change.

Business Area	Strong	Need Attention
Client Attraction		
Marketing		
Revenue & Pricing		
Practice Direction		
Systems & Processes		
Time Management		

Add any other thoughts below:

WRAP UP

FINAL FOCUS

What would make this session a success for you?

PREPARE FOR THE SESSION

Do your best to complete this workbook before your session and bring it with you. You might like to email a copy to me at cass@cassduffill.com. Don't worry if it's not finished, we can work through it together on the call.