Client Retention Checklist

This checklist covers each stage of the therapy process with specific tasks.

You have worked so hard to attract your ideal clients! Following these steps will help you and your clinicians keep your clients & make sure they get the best support you have to offer.

Initial Contact

✅ Reasonably quick response time to initial call or email
✅ Scheduling them as soon as possible (same or next week)
✅ Clearly communicating details on fee and/or insurance
✅ Set expectation for weekly therapy sessions
✅ Make a good personality & skillset match with a therapist

Starting Therapy

✅ Comfortable and enjoyable waiting room experience
✅ Therapist building strong connection in first session
✅ Setting specific expectations for therapy, i.e. weekly sessions
✅ Get commitment to schedule next and/or future sessions
✅ Automated reminders from the EHR
✅ Sending a feedback form within a week of the first appt.

Ongoing Therapy

✅ Set clear goals for the therapy
✅ Ongoing check-ins, reassessment & some obvious progress
✅ Responsive communication with client in between sessions

It is also important to pay attention to what happens at the end and even after therapy.

Ending Therapy

✅ Going through an overview of their progress
✅ Creating a relapse prevention plan and/or aftercare plan
✅ Discussing when the client might need/want to return to therapy

After Therapy

✅ Keeping in touch with the client through a regular email newsletter
✅ One month check-in by email or text