HIPAA Client Intake Checklist for Therapists

Find where your client intake is leaking leads. 5-part self-audit — under 5 minutes.

1. Attract — Are you easy to reach?

Make it simple for the right people to raise their hand.

- ■ New prospects can contact me in under 10 seconds (chat, simple form, or SMS).
- ■ When someone calls and I miss it, they get an automatic text reply within 1–2 minutes.
- ■ All ads, social posts, and emails send people to one clear “start here” page.
- ■ Every new inquiry is automatically captured with name, email, and phone in one system.
- ■ I don’t worry that leads are slipping through cracks I can’t see.

2. Nurture — Do leads stay warm?

Keep momentum going while you’re delivering for current clients.

- ■ Every new lead receives a welcome text or email within 5 minutes of reaching out.
- ■ I have at least one follow-up sequence (3–7 touches) for people who don’t book right away.
- ■ My follow-up messages give value, not just “Are you ready yet?” check-ins.
- ■ Leads get gentle reminders if they stop replying instead of going cold and disappearing.
- ■ I can quickly see who opened, clicked, or replied, so I know who to focus on next.

3. Close — Is it easy to say “yes”?

Remove friction between “I’m interested” and “I’m in.”

- ■ Prospects can book directly into my calendar without back-and-forth messaging.
- ■ Every booked call automatically receives a confirmation and at least one reminder.
- ■ I use a simple one-page summary or proposal that clearly explains my offer and next steps.
- ■ After each call, leads receive a follow-up that recaps the call and gives a clear next step.
- ■ Open proposals and “thinking about it” leads receive automatic nudges, not just mental to-dos.

4. Cheerlead — Do happy clients fuel growth?

Turn great work into ongoing referrals and proof.

- ■ I automatically ask for a review or testimonial after wins or key milestones.
- ■ Reviews and testimonials are easy to leave (one link, no complicated steps).
- ■ Past clients receive occasional check-ins or resources so they don’t forget about me.
- ■ I have at least one reactivation / win-back campaign for old leads and former clients.
- ■ I make it easy for clients to refer friends and colleagues.

5. Measure & Refine — Do your numbers tell a story?

Know what’s working so you can do more of it.

- ■ I know how many leads I get each month and where they come from.
- ■ I know my show-up rate for booked calls and my close rate for qualified leads.
- ■ I can see new vs. repeat client revenue without digging through spreadsheets.
- ■ I review my numbers at least once a month and make one change based on what I see.
- ■ I can clearly answer: “Is my marketing working?” without guessing.

Scoring: 0–5 unchecked = your engine is solid, just tune it. 6–10 = automation can free up hours every week. 11+ = leads are leaking at multiple stages — you need a system.