FolarraStudio

Private Practice Planner

schedule · bill · grow

PRINTABLE · CLIENTS, JOBS & MONEY

This Planner Belongs To

for counsellors, coaches and therapists in private practice

BUSINESS NAME _____

OWNER _____

PHONE / EMAIL _____

SERVICE AREA _____

STARTED ON _____

How to use this planner

- Print the whole planner once, then print extra copies of the pages you use most, such as the Enquiry Form and Client list pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Fill in a client profile for each new client and log every job on the day.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

My business word for this year

Why I love this work

Contents

tap a title in the digital planner to jump to it

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Enquiry Form

details for every new client

CLIENT _____ PHONE _____

ADDRESS _____ EMAIL _____

DATE _____ REFERRED BY _____

Reason for contacting

Availability

Payment / insurance

Follow-up

- [ ]
- [ ]
- [ ]
- [ ]
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- [ ]
- [ ]

Client List

everyone you work with

CLIENT	PHONE	EMAIL	SINCE	NOTES

Client Admin Cards

the details that matter

CLIENT ID

START DATE

SESSION DAY

FEE

PAYMENT METHOD

SESSIONS TO DATE

ADMIN NOTES

CLIENT ID

START DATE

SESSION DAY

FEE

PAYMENT METHOD

SESSIONS TO DATE

ADMIN NOTES

CLIENT ID

START DATE

SESSION DAY

FEE

PAYMENT METHOD

SESSIONS TO DATE

ADMIN NOTES

CLIENT ID

START DATE

SESSION DAY

FEE

PAYMENT METHOD

SESSIONS TO DATE

ADMIN NOTES

Session Log

every job, recorded

DATE	CLIENT ID	TIME	TYPE	FEE	PAID
					☐
					☐
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Services & Prices

what you offer

SERVICE	PRICE	TIME	NOTES
Initial consultation			
Standard session			
Extended session			
Couples session			
Late cancellation			

Weekly Schedule

the week at a glance

WEEK OF _____ NOTES _____

TIME	MON	TUE	WED	THU	FRI	SAT	SUN
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
13:00							
14:00							
15:00							
16:00							
17:00							
18:00							
19:00							

Enquiry Log

new client enquiries

DATE	INITIALS	SOURCE	BOOKED	FOLLOW UP	NOTES
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Billing Tracker

invoices and payments

MONTH	CLIENT ID	SESSIONS	BILLED	RECEIVED	OUTSTANDING

Practice Goals

grow a sustainable practice

Caseload goal

Marketing

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Training & CPD

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Self care

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Invoice Tracker

get paid on time

INVOICE NO.	CLIENT	DATE	AMOUNT	DUE	PAID
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					☐

Income & Expenses

money in, money out

MONTH _____ GOAL _____

DATE	DESCRIPTION	CATEGORY	IN	OUT

TOTALS _____

Yearly Overview

the business at a glance

YEAR _____ GOAL _____

MONTH	JOBS	INCOME	EXPENSES	PROFIT	NEW CLIENTS
Jan					
Feb					
Mar					
Apr					
May					
Jun					
Jul					
Aug					
Sep					
Oct					
Nov					
Dec					
Total					

Notes



FolarraStudio

Thank you!

Thank you for choosing FolarraStudio. I hope this planner helps your business run smoothly and grow. If you enjoy it, tell a friend about folarrastudio.com.

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