Group Practice
Performance

PRE-WORK

Client Retention as a Leadership Strategy

Measuring, Mindset, and Monitoring

If you're a group practice owner, or even a therapist paying attention to your calendar and revenue, you've probably come to realise that your practice's financial health and success is not only a result of marketing and new leads. In fact, relying on new clients to fill your clinic's calendar is not financially or energetically sustainable!

Enter client retention. This session uses a four-part framework for leading client retention: Track, Target, Train, and Tweak. The pre-work starts with your beliefs about retention, then moves to your numbers and your leadership. You'll build on your answers during the session, and Tweak is the focus of the wrap-up.

The pre-work takes about 35 minutes, with most of that time spent building your dashboard. Please have your answers open during the session. I'll ask you to draw on them in the chat. You won't be asked to share anything you'd prefer to keep private.

TRAIN

Your Beliefs About Retention *8 minutes*

1 Which of these statements, if any, feel true to you?

- ☐ "Clients know what they need and will come back when they're ready."
- ☐ "Talking to clinicians about retention puts money ahead of care."
- ☐ "Retention is a clinical skill, so it's the clinician's job."
- ☐ "My clinicians are contractors, so I can't set expectations about this."
- ☐ "If a clinician is good, retention takes care of itself."

For any statement you checked, write one sentence about how it affects the way you lead.

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2 Where did your current beliefs about retention come from? Consider your clinical training, past supervisors, and your own experience as a clinician.

TRACK

Build Your Dashboard *15 minutes*

Retention numbers are most useful when you can see them in one place, compare clinicians side by side, and return to the same view each month. Pulling them by hand from appointment reports is slow, which makes regular review hard to sustain. A dashboard gives you a consistent baseline to measure change against, and it's the starting point for setting benchmarks with your team.

The prompt sheet walks you through building a retention dashboard in Claude using your Jane data. The webinar replay shows the process step by step. If you use a different EHR, export your appointment data as a CSV and adapt the prompts.

- ***Prompt Sheet*** (Google Doc)
- ***Webinar Replay*** (Zoom recording)

> ***Before uploading any data,*** remove client names and other identifying information, and follow your privacy obligations.

Fill in the practice-wide, lowest clinician, and highest clinician columns from your dashboard. Blanks are useful information too. You'll complete the last column in the next section.

Metric	*Practice-wide*	*Lowest clinician*	*Highest clinician*	*Acceptable to me*
Retention rate				
Rebook rate				
Early dropout				
Average sessions per client				
Cancel rate				

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Metric	*Practice-wide*	*Lowest clinician*	*Highest clinician*	*Acceptable to me*
Unscheduled rate				
Session interval				
Consultation conversion rate				

Tracking barriers. Check any that apply.

- ☐ I find tracking overwhelming
- ☐ I don't know how to pull reports from my EHR
- ☐ I don't have a regular time set aside to review them
- ☐ I worry clinicians will feel monitored or judged
- ☐ I've tried tracking before and didn't keep it up

TARGET

Reflect on Your Numbers *7 minutes*

1 Which number surprised you most?

2 Where is the largest gap between clinicians? What explanation have you been using for that gap?

3 For each metric, write the number that would feel acceptable to you in the last column of the table. Then choose two or three of those numbers and explain why you chose them. Where did that sense of "acceptable" come from?

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4 Which number would you most like to improve?

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TRAIN

Your Leadership *5 minutes*

> Client retention matters on three levels. Clinically, clients who leave therapy early are less likely to reach their goals. Financially, every client who drops out is a caseload spot to refill, with the marketing, intake, and admin time that comes with it. For your team, clear retention expectations give clinicians a shared standard and the support to meet it.
>
> Many practice owners treat retention as the clinician's responsibility alone. When expectations stay unspoken, clinicians are left to figure it out individually, and owners are left frustrated by numbers they haven't addressed directly. The questions below look at where retention sits in your leadership right now.

1 Have you set clear expectations with your team about client retention? If so, what are they?

2 Is client retention an ongoing part of your conversations with your team? Consider team meetings, supervision, case consultation, onboarding, and one-on-one check-ins.

If yes:

- Where and how often do these conversations happen?
- What's working?
- What isn't working, or feels harder than it should?

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If no:

What's getting in the way? Check any that apply.

- ☐ I'm unsure what to say or teach
- ☐ I expect pushback from some clinicians
- ☐ I don't have a structured place for these conversations
- ☐ I'm uncertain about my own retention as a clinician
- ☐ Our onboarding doesn't address retention
- ☐ Other: _____

What would need to change for these conversations to start?

BRING TO THE SESSION

Your Questions and Situations

1 One question you want answered during the session.

2 One conversation with a clinician about retention that you've avoided, or that didn't go the way you hoped.

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