Starting Out: Tips On Being An Independent Occupational Therapist

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Deciding to work for yourself in any profession is often an exciting but daunting prospect. Most OTs seem to say they started independent work confident in the professional services they could offer, but had little business acumen to support themselves on their journey. Knowing the right people to ask for advice when you need it isn’t always easy! This guide offers some tips and tricks straight from independent OTs’ experiences of working for themselves. They’ll hopefully provide some food for thought and they might even help save you a little bit of time and money along the way!

COTSIPP (The College of OTs Independent Practice) also provide a very comprehensive start up pack on how to be an independent OT and for anyone looking to venture out into private work our advice is that another sensible first step would be to join COTSIPP and consider attending one of their take the leap days.

“Occupation is as necessary to life as food and drink”
(Dunton, 1919)
“Set some realistic targets & goals to help guide and measure your success and identify areas for improvement....”

“Just what we were hoping the report would be… a very professional service...”

Disclaimer
This guide is designed to act as an aide for OTs considering setting out into independent practice. It is by no means an exhaustive rule book and Inclusion.Me Ltd does not accept any responsibility for the use of the information contained within this guide, or for any omissions.

Our thanks to the following OTs for their invaluable help with this guide....

- Matthew Box
- Walter Brazil
- Jen Gash
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- Vivienne Chamberlain
I’ve met a lot of entrepreneurs over the past few years and they come in all shapes and sizes, but there is one thing they ALL seem to have in common. It’s this:

THEY DID IT AND AFTER THEY’D DONE IT, THEY WISH THEY’D DONE IT EARLIER.

I’m glad I took the leap, but I wish I’d had the courage to jump a bit earlier in my career. I certainly wish I’d planned it a bit better at the start, so that the point I’m at now might have been a smoother journey.

When I started working for myself I loved it! It re-ignited my passion for OT, it gave me the chance to develop my professional skills and at the time of the arrival of our first child it gave me the work life balance I’d craved. 7 years down the line I’ve added another child, I’ve become a company and I’ve learnt more as an OT & in business than I thought possible. We’ve even been fortunate enough to win the odd award along the way, but unfortunately that work life balance isn’t maybe quite as even as I previously enjoyed and most of the time my kids now think I’m some distant relation who turns up stressed and grumpy just before bed time. But it certainly doesn’t need to be that way.....
If your tempted to step out into being a private OT, think about what you’re going to offer & plan how you’re going to do it. Think goals, aims & objectives but with some grown up stuff like insurance, money & legal costs thrown in. Discuss it with whomever you can and make sure you plan your journey properly (you wouldn’t start travelling to Scotland without a map so why start a business without a business plan)? Then do it, try it out and see if it’s for you....There are lots of ways you can get into independent practice & it might just be the best thing you’ve ever done. Then again you might think it’s not for you and you prefer the safety of a regular job, with a steady monthly wage and holidays. Either way I bet you’ll be glad you did it on some level and I’m pretty sure you’ll wish you’d done it earlier!
What Makes A Good Independent OT?

Working as an OT in private practice is a very worthwhile challenge, leaving you scope to choose the type and level of work that you want. Casework can be varied and diverse and you get to work to client’s goals away from the sometimes restrictive frameworks of statutory services as well as working on behalf of statutory services often. Key to independent practice is a strong footing in practice with sound assessment and goal-setting skills, because you will be expected to work in isolation of management support and make accurate independent decisions on complex case-work. Working within the parameters of a framework of expertise, you will need to be strongly experienced to work well within this field. It is vital to ensure you have a supervisory support to ensure your practice is strong and keeping up with changes in practice knowledge with CPD needing to be even more focussed on keeping practice issues up to standard.
Some lessons learnt:

- Don’t waste money on expensive advertising. Costs can spiral, getting the right message and look can take up a lot of time & effort and; from our experience, the benefits are limited. Instead why not try using your local media by offering to write a free piece on an issue of local interest that you’re an expert in (for example accessibility or local care services)? Free publicity is generally gold dust but you may have to knock on a few doors to get any. Don’t be afraid to keep knocking though and try to make yourself stand out from the crowd (something we OTs aren’t normally that comfortable with!).

- Having a website is a good thing, but if it looks terrible or Google doesn’t know it exists then is it really going to benefit you? Wordpress offer some great free blog/website options with SEO (Search Engine Optimisation) built in. As a general rule if you’re going to pay someone to design a website for you...you get what you pay for!

- It’s unfortunately not unheard of to have difficulty getting paid..... Make sure you have a good set of legal T&Cs and know the processes you should be following (e.g chase debts in writing the moment they’re due). Don’t be afraid of using the small claims court: www.gov.uk/make-court-claim-for-money/overview or www.moneyclaim.gov.uk/ are really worth checking and offer some invaluable advice.

“Focus on what you’re an expert in........”

Walter Brazil: Independent OT & Associate Director Inclusion.Me
At OTCoach, we really understand the world of Occupational Therapy and really understand Occupational Therapists. We are a rare breed indeed; with a unique skill set, high standards and the ability to transform lives. Many OTs are now working privately (setting up businesses, projects and social enterprises) which present us with some new challenges.

Coaching and mentoring are widely seen in business as essential to developing and sustaining a thriving business. It is a very powerful process, which often works swiftly to unblock situations, move through difficulties and promote purposeful action. The “Return On Investment” from coaching has been clearly shown, over and over again.

Coaching helps develop a clear vision and plan for your business, identify strategic goals and the action needed to move towards them. Personal coaching helps ensure that a happy and healthy OT is at the heart of a business, which can often be stressful and complex.

The challenges that coaching helps include:
- Developing a clear vision and value proposition for the business
- Generating clients and income
- Developing marketing plans
- Preventing burnout and tackling difficulties
- Supporting & developing innovative projects and products
- Improving performance and work flow

As a provider of support to others, OTs often feel they should be able to “sort it ourselves”. We are so good at problem solving for others, but we find taking time to support ourselves and accept help quite difficult. So why not have a free consultation session and find out how coaching can help you?

Email jen@otcoach.com or visit www.otcoach.com
How Do Independent OTs Maintain CPD?

“Regular supervision from the companies I complete work for......enabling shadowing experiences from prospective students....reading OT News”

“Social media can be a great way of connecting with other OTS..... twitter #OTalk”

“Reflected on my work... writing a blog!”

“Having a mentor has been invaluable.....”

“A few CPD resources/tools:
- http://www.cot.co.uk/cpd/cpd-ilod-and-hcpc
- http://www.cpdol.co.uk

Did you know that you can access discounts on OT Coach & Inclusion. Me professional support services via our OT associate schemes? Contact us on 01892 704065 or email info@inclusion.me.uk for more details!

Feedback on Inclusion.Me’s mentoring services:

“Well informed, full of ideas and constructive feedback which has helped with my CPD as an independent practitioner”

www.inclusion.me.uk/professionals_portal

“Peers, COTSIPP groups & the COT mentoring service.......”

“Attend regular courses.....exhibitions.... research information & interaction with other professionals”

“Article writing and maintaining a CPD portfolio”

“Peer, COTSIPP groups & the COT mentoring service...”
Marketing

We asked 40 Independent OTs how they market themselves and these were the top 5 answers (with the 3 most important & beneficial highlighted in green):

1. Word Of Mouth (100%)
2. Networking (100%)
3. Website (80%)
4. Linkedin (80%)
5. Email marketing (30%)

Surprisingly only a quarter of respondent OTs used social Media (Twitter & Facebook) with far less using Mailchimp (under 10%) and with a similarly negligible number considering joint marketing.

Inclusion Tip: Embracing any form of free marketing and advertising is a must for someone working for themselves and OT is no exception. Twitter, Facebook, Linkedin and Mailchimp are all free and if used properly they can make a huge difference to the way you portray your brand and services. More than half the population of the UK use 1 form of social media, if you’re not using them to build stronger relationships with your customers, or to recruit new clients, you’re missing out. It’s FREE marketing…..invest a bit of time in understanding how they could help you and get using them! Not sure where to begin? Why not start off by having a look at our free social media guide!

“Develop joint ventures and build relationships....”

“The internet has become such a part of everyday life that there is barely a business that doesn’t have at least some kind of web presence”

“Keeping to deadlines and running a tight ship are REALLY important....manage your diary & it will help build your reputation!”

“Success will come. If you do a good job people will want to employ you...”

“Don’t under estimate the importance of networking. It may not immediately reap rewards but if you are fair, transparent and honest it will be invaluable in the future”

“Make sure you really understand how your customers communicate & use this information to help guide your marketing plans”
Independent Tips & Tricks:

“Keep calm & carry on……”

“Establish a network of professionals who can support, help & be a sounding block; practice being proactive”

“Reputation is everything….don’t cut corners or compromise your professional values”

“Don’t just do the basics well, do a holistic assessment to show your value”

“Think carefully about your price & don’t forget about planning, evaluation, write up, travel time, etc”

“Make up contracts prior to carrying out work to secure funding & ensure private clients agree formally to your charges.”

“Always, always give out business cards…”

“I found a gradual start to taking private work while still locuming gave me security of income whilst I built up contacts. You then have to take the leap at some point & have faith there will be enough work……”

“Make plans for client cancellations…”


“Once you have made the decision to take the leap, don’t give up…. persevere”

“Think carefully about your price & don’t forget about planning, evaluation, write up, travel time, etc”
The Basics

• Get a good set of Terms & Conditions - they are worth their weight in gold!

• Insurance - you have to have it & whilst there’s more than one company that can provide cover out there everyone we know of seems to always end up back at the same point: BAOT include cover up to a certain level as part of membership, otherwise try Balens......www.balens.co.uk (COTSIPP have negotiated a discount for members!)

• Data protection - make sure you know what you have to do: www.ico.org.uk

• Money/Finances: most accountants will offer a free 1 hour consultation.....when we started we went to see a few and got lots of free advise before deciding how to manage our accounts. You can do it yourself with the help of a few spreadsheets, a bit of time and lots of patience. Alternatively, you can have help from an accountant for an all inclusive set fee. There’s also some great, very cost effective financial packages out there....we use Freeagent and it’s been a lifesaver!

• Make sure you make a business plan at the begining of your journey, whilst you still have the time and energy to invest in writing one.....they’re invaluable in helping you along your journey and with planning for the future!

• For further details regarding Inclusion.Me’s full range of professional support services, offered by OTs for OTs:

  www.inclusion.me.uk/professionals_portal
A bit about Inclusion....

- Inclusion was formed in 2009, the brainchild of a couple of independent OTs with a passion for our profession & a belief in accessibility.
- Our turnover & profits have risen year-on-year and in 2012 we were chosen as the sole OT & Reablement Service provider for the City Of London.
- In 2013 we were fortunate enough to win a local business accelerator award which enabled us to access an Aladdin’s Cave of business & marketing brains to learn from.
- 2014: We have just won 4 more business awards, helping us to develop & evolve our range of OT services and strengthen our brand, which has been built upon the cornerstones of quality assurance, expertise & trust balanced alongside a strong belief in demonstrable value for money to our clients.

“Keep your focus but be creative....we’re OTs - it’s what we’re good at!”
Inclusion has a team with over 30 years combined experience in Occupational Therapy, The Equality Act (Previously The DDA) and Vocational Rehabilitation.

At Inclusion we pride ourselves on the superb value for money of our services but most importantly the happiness and satisfaction of our clients.

Recent clients include Selfridges, Nike, Kent Occupational Therapy Bureau (Paeds & adult services), The City Of London, Guinness Trust, Pinnacle PSG, Phoenix Community Housing, Thanet Council, H&F & RBKC Occupational Therapy departments, Staying First HIA, The European Inn, SC Healthcare, The Salvation Army, LBL Social Services and The Theatre Royal, as well as numerous private clients, case management companies, small & large businesses and adaptation service providers.

Contact Inclusion today to talk about our independent OT services & to see how we can support you in developing your work within the OT private sector.

More information about our services is available on our website at www.inclusion.me.uk

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