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Marketing and branding for counseling interns and residents in private practice

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Marketing and Branding for Counseling Interns and Residents in Private Practice

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Abstract

For interns and residents in mental health counseling beginning their careers in a private practice setting, building a full-time caseload of clients is challenging. The process of marketing and branding outpatient psychotherapy services is not generally covered in clinical training programs, leading to a gap in practical knowledge upon departure from higher education. Since the COVID-19 pandemic, rates of behavioral health disorders have increased, leading to a sense of urgency to providing care for communities in need. Effective marketing and branding of services allows for clinicians to work with populations they are most well suited to serve, and potentially allows clients to expedite the process of finding a therapeutic match. Discussions in the field surrounding ethical and legal considerations are ongoing, prompting counselors to stay up to date on best practices for marketing their services. More research is needed on marketing and branding trends within the field, and the its implications for counselors and clients.

Introduction

Since the beginning of the COVID-19 pandemic, counselors and mental health professionals have seen a startling increase in behavioral health disorders, with individuals motivated to seek mental health treatment at a higher rate than in previous years (Wang, et. al., 2020). However, potential clients are routinely faced with barriers that prevent them from seeking accessible treatment. Many individuals are challenged with high out of pocket fees and limited numbers of available clinicians (Blunt, et. al., 2020). To alleviate some of these issues, many mental health professionals have shifted their practice to include online therapy alternatives, sliding fee scales, and advocating the expansion of insurance benefits to cover counseling services (Whaibeh, et. al., 2020). In the private practice setting, clinicians have the independence and flexibility to meet these needs in a way that larger organizations are unable to (Brennan, 2013). However, one limitation of private practice is finding ways to reach potential clients and differentiating themselves from other helping professionals in the community (Wendler, 2016). As an intern or resident, building a caseload on top of developing counseling skills can feel daunting. The purpose of this paper is to provide tools that new therapists can use to attract potential clients that will be a good fit for their practice.

Mental Health Needs in the Current Era

On December 7th, 2021, the U.S. The Surgeon General's office published a *General Issues Advisory* on the current mental health crisis seen among youths and adolescents since the onset of the COVID-19 pandemic. Before the pandemic began, mental health challenges were already the primary cause of disability and poor life outcomes within younger generations, with one in five adolescents between the ages of

three to seventeen having a diagnosed mental health disorder. From 2009 to 2019, persistent feelings of hopelessness or sadness among high school students increased by 40%. Between 2007 and 2018, death by suicide rates increased by 57% (Curtin, 2020). Preliminary estimates indicate that more than 6,600 adolescents died by suicide in 2020 alone (Curtin, 2021).

The Opioid Epidemic

Mental health professionals have long been aware of the high comorbidity rate of mental health disorders and substance abuse. The detrimental effects of COVID-19 on mental health have led to a spike in drug overdose deaths. According to the Center for Disease Control, there were over 70,000 deaths in 2019 in the US alone, bringing the total deaths since 1999 to over 840,000.

As of early 2022, the data on opioid overdoses since the pandemic has not yet been published. However, preliminary findings discuss the potential impacts of public health centers being forced to divert resources from harm reduction services to the response to COVID-19. In Kentucky, Emergency Medical Services reported a 50% increase in suspected opioid overdoses and deaths (Slavova, et. al., 2020). Along with economic distress and social isolation, this created conditions where those already challenged with substance abuse experienced a sharp decrease in institutional support along with deviations from normal living conditions.

Healthcare Insurance and Mental Health Treatment

The impacts of COVID-19 on mental health do not discriminate, placing additional burdens on vulnerable and marginalized groups. The increased demand for

mental health services in the United States has created new challenges for clinicians seeking accessible solutions to meet this need.

For much of its history, outpatient psychotherapy has been considered a luxury service, reserved for those with the financial means to pay out of pocket. It wasn't until after the end of World War II that insurance companies began covering some inpatient psychiatric care. Following deinstitutionalization, most psychiatric hospitals were replaced with community-based mental health care, and insurance companies saw little incentive to cover services supposedly already provided by the public sector (Barry, et. al., 2010).

Over the past three decades, mental health care has received more benefit coverage by insurance plans, but is accompanied by strict requirements that can be unanticipated barriers to seeking behavioral health care (Barry, et. al., 2010). After the COVID-19 pandemic began in early 2020, the need for expanded mental health care services became increasingly apparent. In response, according to the 2021 Employer Health Benefits Survey by The Kaiser Family Foundation, 39% of companies with 50 or more employees made changes to increase behavioral health care benefits for workers. Despite these changes and the expansion of behavioral health benefits in the Affordable Care Act, many Americans experience difficulty connecting with providers covered by their insurance networks and cite lack of coverage as the primary barrier that keeps them from getting the care they need (Blunt, et. al., 2020; Reisinger Walker, et. al., 2015).

De-Stigmatization of Mental Health Treatment for Younger Generations

Browsing content on social media sites such as Instagram and TikTok begins to demonstrate the shifting attitudes towards mental health within today's adolescents and young adults. From "mental health influencers" to individuals discussing their personal journeys with mental health, the openness surrounding seeking behavioral health treatment appears to be a net positive.

As daily life migrates further into virtual spaces, so has therapy. Since 2020, there has been a rapid increase in demand for telehealth services, online platforms, and public directories listing local mental health professionals. Along with the ability to safely access services during the context of a pandemic, telehealth platforms have extended the capacity of care for rural areas and those who may not have reliable access to transportation (Whaibeh, et. al., 2020).

For mental health counselors serving outpatient clients, providing virtual appointment options has now become non-negotiable (Whaibeh, et. al., 2020). For many practitioners in larger group practices and organizations, this transition was challenging but fruitful, allowing referral flows to be redirected. For many smaller organizations and those operating in independent private practices, there were distinct benefits and drawbacks.

Private Practice

Private practice is commonly defined as a professional who is self-employed, or operating independently of a larger organization or institution. While many see private practice as consisting of only one clinician, the conditions that are unique to this setting

can also be seen in smaller counseling groups or agencies where practitioners operate independently in many capacities (Brennan, 2013).

While this allows for professional freedom and flexibility that many counselors find appealing, there are also challenges in connecting with potential clients, building a full-time caseload, and managing accompanying administrative tasks. One of the barriers many counselors cite that prevents them from going into a private practice setting is the uncertainty surrounding marketing and branding their services to their communities (Wendler, 2016). In the digital age, there are ways to effectively and inexpensively market mental health services using existing online services and platforms.

Recent advances in healthcare technology make tasks like scheduling, billing, and securing protected health information (PHI) simpler for clinicians interested in practicing independently. Companies like SimplePractice, Therapy Notes, and other competitors offer personalized "client portals" that exist within a secure cloud network. This allows counselors and their clients to access and store treatment related materials while potentially lowering overhead expenses related to administration tasks.

Part of what makes private practice appealing to both clinicians and clients is the ability to differentiate services. Clients are often looking for a therapist who is well versed in their presenting clinical concerns, has personal experience with an aspect of their identity, or offers a particular therapeutic modality. Clients also want to know if the counselor accepts their health insurance plan or if a sliding scale fee is available (Wendler, 2016). The ability to market according to these dimensions allows clients to pursue more personalized care. According to research, one of the highest predictors of

success for therapeutic outcomes is the goodness of fit of the therapeutic relationship (MacDougall, 2002).

Some limitations for marketing and branding while in a private practice setting are new clinicians not knowing where to begin in this process, and the unpredictability of building a caseload. Residents and interns in counseling have spent the majority of their training within the context of a university or higher education program, and often do not have a firsthand understanding of the community they will be serving. Additionally, by joining a small practice of established clinicians with steady referral streams, many are unfamiliar with the ways in which marketing and establishing yourself as a new practitioner is done online.

Transitioning to a private practice setting often comes with months of slowly building a caseload and referral sources. Larger practices or organizations are typically well established in the community, with a predictable flow of new and returning clients. The risk of not coming into a placement with a guaranteed caseload is often intimidating for new counselors, and getting the word out about services they are offering involves some knowledge about how to market and brand themselves.

Marketing and Branding

Due to a paucity in the peer reviewed literature, information specific to marketing and branding of counseling professionals is limited. A similar, yet distinct profession of life coaching was consulted for information regarding marketing and branding as well as the general field of professional marketing.

Marketing is typically described as the activity, institutions, and processes for creating, communicating, delivering and exchanging offerings that have value. (Brunswick, 2014). When considering how to market a good or service, professionals often consider the Four P's, product, price, place, and promotion (McNamara, 2022). Central to marketing is the concept of building a brand, which the American Marketing Association defines as "a name, term, design, symbol, or any other feature that identifies one seller's goods or service as distinct from those of other sellers" (AMA, 2017).

When beginning work with a new client, mental health professionals are taught the importance of building rapport in order to develop trust and security within the therapeutic relationship (MacDougall, 2002). Marketing is a way to begin building rapport before the client enters the counselor's office. Effective branding establishes the groundwork for what the client will experience, accomplish, and take away from their treatment (McNamara, 2022).

As more individuals seek therapy, the number of providers and available interventions increases (Wang, et. al., 2020). For a client unfamiliar with the process of psychotherapy, they will gravitate towards a practitioner who speaks to the challenges they are facing, avoids unnecessary clinical language, and shares how they can help (McNamara, 2022).

Legal and Ethical Implications in Online Marketing

The 2014 American Counseling Association outlines several implications for advertising services to clients in their code of ethics. Counselors must represent themselves truthfully and accurately to potential clients in any marketing materials

(ACA, 2014). For new clinicians, this includes clearly disclosing intern or residency status, as well as sharing supervisor contact and licensure information. It is important to not exaggerate professional qualifications in the wording on advertising materials, or promise outcomes such as a cure or healing as a result of pursuing therapy (Gottlieb, 2012). Counselors may also not use testimonials from other clients to market themselves, and are encouraged to think carefully about using quotes or recommendations from other clinicians in a public manner (ACA, 2014). When practicing in a more independent setting, it is up to the clinician to hold themselves to a high ethical standard and seek consultation often (ACA, 2014). It is helpful to regularly reference the code of ethics in relation to marketing and branding, and remember that licensed counselors are held to a different standard than other professionals such as life coaches or social workers.

A current topic in the discussion of advertising and mental health treatment is the use of social media by counselors. In 2017, the American Counseling Association released an article discussing considerations for advertising on social media platforms. The line between personal and professional image can become blurred, as well as boundaries surrounding the maintenance of client confidentiality (Natwick, 2017). The ACA recommends developing a social media policy that is included in informed consent documents, as well as thinking intentionally about how to present both public and private personas online (Natwick, 2017).

Workshop Outline

The following table outlines a two-hour long workshop aimed at interns, residents, and new clinicians beginning a placement in a private practice setting. The learning objectives for participants are to become familiar with setting relevant branding

practices, learn ways to implement strategies in an ethical manner that prioritizes clients' needs, and encourage the exploration and integration of clinician's interests and unique counseling style into branding and marketing decisions. It combines a variety of learning styles including lecture, discussion, and experiential activities.

During students' classroom training, they are taught about improving mental health, goal setting, and developing empathic relationships (MacDougall, 2002). These skills are transferable to building a caseload and establishing themselves as a helper in their community. This workshop intends to integrate core concepts from both the marketing and behavioral health fields. Experiential exercises such as role-playing an initial client contact, naming their ideal client population and clinical issues, or reflecting on their motivations to enter the counseling profession allows clinicians to explore their personal approach to their work. These activities not only serve clinicians well in a branding capacity, they also allow for increased awareness around how they can better serve clients in any clinical setting.

This workshop can be given to new graduates or counseling students nearing the end of their graduate training and considering internship or residency placement options. Since marketing and branding is an underdiscussed topic in most counseling programs, this could be the first time students are exposed to this topic in depth.

Table 1: Outline of Workshop

Topic + Time	Learning Objectives / Description	Learning Style / Activity	Materials
Introduction / Overview 5 mins	• Speaker introduction • Background • Workshop goals: 1. Participants will become more familiar with branding practices specific to private practice settings. 2. Participants will learn ways to implement branding strategies in an ethical, intentional way that benefits potential clients. 3. Participants will explore their own unique interests and counseling style and use this to	Lecture	PPT

	inform branding and marketing decisions.		
Beginning as an intern / resident in private practice 2 mins	• Unique challenges of marketing yourself at a small practice • "Where do I start?"	Lecture	PPT
How does marketing / branding help clients? 2 mins	• Accessibility • Normalization of seeking services • Allows clients to save time, meet their needs more quickly	Lecture	PPT
How do our clients find us? 2 mins	• Word of mouth • Referrals • Online directories (e.g. Psychology Today) • Websites via search engines • "Traditional" advertisements	Lecture, audience participation	PPT

Word of Mouth 2 mins	• Definition: When individuals talk about the services you provide to friends, family, or other community members with no financial incentive. • Difficult for beginning therapists to build momentum in this way.	Lecture	PPT
Referrals 2 mins	• Clients are directed towards our services from other professionals (e.g. other therapists, CSBs, PCPs, schools, spiritual centers, psychiatrists, wellness practitioners, universities) • Identify who is most likely to refer your "ideal client" to you,	Lecture, audience participation	PPT

	send introduction emails, letters, business cards, or call to see if they have a referral list. • Limitations		
Online Directories 2 mins	• Increasingly more common • Psychology Today, etc. • Budget for monthly fees • Developing a strong profile	Lecture	PPT
Websites 2 mins	• Inexpensive hosting sites • Search engine optimization, blogging and article writing • Essential information to provide	Lecture	PPT
"Traditional" Advertisements 2 mins	• Types of traditional advertising	Lecture	PPT

	• Typically, less cost effective, more applicable for clinicians wishing to scale their practice • Not as ideal for interns and residents, focus less energy here.		
What to focus on as an intern or resident 5 mins	• What are your strengths and interests? • Developing a "brand" aesthetic • Considering ideal client, clinical passions	Lecture	PPT
Discussing strengths and interests 15 mins	• Why did you become a counselor? • Who do you most want to help? • Who is your "ideal client?"	Pair discussion, share in large group	Exploration questions

Ideal Client Role-Play 20 mins	• Partners share the profile of their ideal client. • One partner embodies client presenting issue (initial phone call / contact simulation) • How do you relate to the "client," what do you say, how would you explain your work? • Partner feedback, clinical style impressions	Pair discussion	Outline of role play exercise
Synthesizing findings into a brand 10 mins	• Potential clients want approachable language, style • Speaking to the ideal client's "pain points."	Lecture, participation	PPT, examples
Developing a Psychology Today profile	• Three paragraph outline (pain points, how	Lecture	Screenshot examples, PPT

15 mins	therapy can help, how to contact / about you) • Photos • Video intro • Number of specialties, client focus, treatment approach • Identity • Supervisor's info, disclosing resident / intern status • Finances, modes of therapy offered		
Other online directories 5 mins	• List other online directories, translate PT info	Lecture	PPT, screenshots
Social Media 10 mins	• When is it ethical, or appropriate? • Building professional profiles • Ethical implications	Lecture, discussion	PPT, discussion questions

Connecting with Population(s) of interest 10 mins	• Volunteer your time • Host free workshops • Reach out to other professionals via email	Lecture, discussion	PPT
General ethical guidelines 15 mins	• What does the code of ethics say about advertising / marketing? • Dual relationships, caution against "business agreements" • No promises, marketing within expertise • Testimonials • Selling products	Lecture, discussion	PPT, quotes from ACA Code of Ethics
Ethics of sharing supervisor information, disclosing resident or intern status to clients	• Practicing within the scope of your current training and knowledge • What does being an intern or resident in counseling mean in Virginia?		

7 mins	• Discussing the role of a clinical supervisor with clients • Importance of sharing pre-licensure status and supervisor contact information on marketing materials, intake paperwork, and informed consent documents.		
Addressing / exploring core beliefs, imposter syndrome 20 mins	• Therapists may be uncomfortable seeing themselves in business or marketing role • Observing and exploring resistance • Connections to money, self-worth, value • Where did you feel imposter syndrome	Pair discussion	Discussion questions, facilitate exploration of process

	come up during this workshop?		
Managing common marketing anxieties as an intern / resident in private practice 15 mins	• Client flow • Creating a growth timeline • Coping methods for managing expectations • Ask for support	Lecture	PPT
General tips and takeaways 5 mins	• Pick a couple strategies that fit your style and invest more time in those. • Check in with ethical practices regularly • Anxiety / imposter syndrome • What makes you a unique counselor in your community?	Lecture	PPT

Reflections 5 mins	• What are you taking away from today's presentation? • Reactions and impressions	Discussion	PPT, discussion questions
References and additional resources	• List references used, resources to learn more	Lecture	PPT

This content can be modified to be presented in both an in person or online format. If held virtually on a platform like Zoom, facilitators will use breakout rooms to create small groups and partner discussions when needed. If held in person, participants would ideally transition into a luncheon or other unstructured networking time following the workshop. Building relationships among clinicians can help build reciprocal referral streams, allow counselors to find support with other likeminded professionals, and discuss current topics pertaining to the counseling field. Facilitators will be available to answer questions and provide additional resources when needed.

Summary

As the demand for behavioral health treatment services increases following the COVID-19 pandemic, it is important for counselors new to the field to connect efficiently with clients in need (Wang, et. al., 2020). Without the backing of a large organization,

beginning clinicians in private practice often struggle to build and maintain a caseload (Wendler, 2016). Effective marketing and branding materials are essential in meeting the needs of our communities.

In order to share pertinent information regarding advertising that is not widely taught in graduate programs, the outlined workshop would be a developmentally appropriate way to get interns and residents started in marketing their practice. Additional research is needed to explore marketing trends, ethical and legal implications, and best practices as the field of mental health counseling continues to expand and change over time.

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