

From Start-Up to Success: Building a Sustainable Independent Advocacy Practice

Fillable Worksheet / Healthcare Advocate Summit / September 2, 2025

1. Business Model Sketchpad

Use this space to sketch out or revisit the foundational elements of your advocacy business.

1.1 Your Niche / Target Clients:

1.2 Core Services You Will Offer:

1.3 Your Value Proposition (Why clients choose you):

1.4 Delivery Format (in-person, remote, hybrid):

1.5 Preferred Fee Model (hourly, flat rate, packages):

2. Business Development & Operations Checklist

Check what youve already done and star items to strengthen or revisit:

☐ Define services and pricing

- ☐ Choose a business structure (LLC, sole prop, etc.)
- ☐ Register business name / obtain EIN
- ☐ Open business bank account
- ☐ Set up contracts / service agreements
- ☐ Secure liability insurance
- ☐ Develop confidentiality & HIPAA-aligned policies
- ☐ Choose scheduling and invoicing tools
- ☐ Set up secure communication systems
- ☐ Create referral and marketing strategy
- ☐ Develop or update website
- ☐ Prepare intake and onboarding documents
- ☐ Evaluate scope creep policies / rate justification
- ☐ Identify key performance indicators (KPIs)

Notes for items to strengthen or revisit:

3. Personal Growth Planning Notes

Reflect on key actions you want to take post-workshop:

3.1 Marketing or Networking Actions:

3.2 Business Systems or Tools to Reevaluate:

3.3 Legal, Ethical, or Compliance Next Steps:

3.4 Professional Development or Peer Support Goals:

Tip: Use this worksheet to guide your business decisions over the next 3060 days.

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