THE WORKBOOK AT A GLANCE

The Independent Practice Workbook

Practical Tools, Examples, and Templates for Planning, Opening, and Running Your Practice

The book explains what matters and why. This Workbook is where you put it to work for your own practice. Its thirteen sections follow the chapters of The Business Behind the Practice and take you through the same decisions, this time with your own numbers, your own space, your own team and your own timeline. Each section shows a worked example first, so you can see what a useful answer looks like before you write your own.

PART I — BEFORE YOU COMMIT		
1	**Practice Readiness**	Find out where you stand before you sign a lease, borrow money or leave your current position, and decide what can move forward now and what has to wait.
2	**Opening Practice Design**	Decide what sits at the center of the practice, which services belong on opening day, which ones wait and what has to be true before each one is added.
3	**Financial Boundary** Financial Boundary and 12-Month Ramp Model (Excel)	Know what the practice can safely carry before you commit to anything hard to reverse. That number has to come from the business.
4	**Space Decision**	Write down what the opening practice requires, so every property is measured against the same answers.
5	**Lease Decision** Lease Cost Calculator (Excel)	See the total obligation across the term, not only the monthly payment, and know what should be clear before you sign the letter of intent.
6	**Business Foundation Map**	Put formation in order and give every link an owner, a trigger and the document that proves it's done.
PART II — BUILDING IT		
7	**Project Control** Project Control Workbook (Excel)	Decide who keeps the project moving, which numbers in the budget are real, what a change really costs and when to buy.
8	**Workflow and Systems** Workflows, account list and downtime plan	Map how a patient moves through the practice, then use that journey to choose systems, keep control of them and have them ready before the first patient.
9	**Opening Team Plan** Staffing Plan, job descriptions and hiring resources	Turn the work into roles: what stays with you, what goes outside, how much time each role needs and when each person starts.
10	**Financial Controls** Monthly Financial Review and Purchase Approval Form	Follow the money from what the patient owes to what reaches the bank and the books, and know what to review each month.
11	**Opening Demand Plan** Patient Source and Inquiry Tracker (Excel)	Break your expected patients into sources, give each one a path into the practice and tie every promise to readiness.
12	**Opening Readiness Decision**	Keep your dates separate and finish with a documented opening decision: the date, the services you open with and who made the call.
13	**The First 90 Days** First 90 Days Tracker (Excel)	Keep apart what you expected, what the practice is showing you and what you decide to do about it, then review what to protect, what to correct and what to leave alone for now.

Be honest in these pages. The answers you write here are the ones your practice will be built on.

Ready to put the book to work?

The Independent Practice Workbook is available in paperback and ebook at **sollvantage.com/book**. Every copy includes the SollVantage Digital Resource Library at no additional charge: 21 financial models, calculators, templates and checklists in Word and Excel, each tied to the section it supports.

If you'd like help applying it to your own practice, SollVantage works with physicians and healthcare practitioners from the first decision through the first 90 days. Start a conversation at **sollvantage.com/contact**.

About the author. Cristina Soll is the founder of SollVantage, LLC, and has spent more than 30 years working alongside physicians and practice owners.