Circuits for Success

Vol. 23 •Issue 8 • Page 48
Circuits for Success
Using the computer to organize your consulting business

By Rhoda P. Erhardt

Occupational therapists have always been interested in both low-tech and high-tech equipment that can enable and empower their clients to participate as fully as possible in the mainstream activities of life. Until recently, however, we have focused primarily on clinical applications of technology, rather than its usage in management of our own professional activities.

Private practitioners in particular are now finding themselves involved in a wide variety of projects in addition to clinical practice, such as presenting workshops, publishing and creating new marketable products. Computer software programs can track, schedule and document these activities, saving time and preventing errors by automating many functions with calculations and scripts created by the user.

Gaining Proficiency

It's hard to believe I wrote my first book on a typewriter, and had to retype all of it every time I made changes. My own experiences with computers began in 1981 when I purchased an Apple II +, giving me the opportunity to explore three primary types of software programs: word processing, drawing and database. I used the word processing for all my clinical reports, proposal submissions for conferences, lecture notes, published journal articles, chapters, etc. The drawing program was great for creating overhead transparencies for teaching and poster presentations. But I used the database only for a file of contacts (names and addresses).

It wasn't until 1992, when I moved from Fargo, ND, to St. Paul, MN, that I had the good fortune to meet a wonderful tech person at a computer users group meeting. She helped me set up my business software using the database program I already owned.

When I described my work projects and what I needed, she designed an amazing program that I have been using ever since. Since her fees were reasonable, I was able to get her to return from time to time to polish the program, teach me how to use it and how to expand it myself. She taught me so well that I was then able to develop a new set of integrated database files for Camp Avanti, a sensory integration camp in Hudson, WI. Still later, I worked with Suzanne Morris, a speech pathologist, to use that same software to create a developmental feeding model for the Gerber Corporation as part of our work on the company's feeding advisory board.

I gradually added other useful software and hardware to meet other needs: finances, photo editing, desktop publishing, a scanner, a CD burner and DVD duplicator. I finally replaced my old overhead transparencies with presentation software (Power Point). With some programs, I was able to teach myself with manuals and online help; for others, I needed assistance from my computer-savvy grandchildren or my favorite computer tech guys.

Practitioners who are not confident in their current skills should know that I had no formal training or special classes. At age 60, my brain was able to create new synapses, and still does at age 75! Joining local computer user groups is probably one of the wisest decisions I made, not only for my own learning process but also for networking.

So here's how you can organize your professional business, using as an example FileMaker Pro, a powerful cross-platform application available in both Macintosh and Windows formats. I did not select this program; it was bundled with the computer I bought at the time.

Consultations

By the time most therapists decide to begin their own businesses, they have spent years working with individuals and families within government, non-profit and/or private agencies. Some have found opportunities during this time to use supervision and consultation as well as direct-service models. These invaluable experiences prepare them for roles as consultants in private practice.

Word of mouth brought me contracts from more than 40 agencies (schools, clinics, hospitals and corporations) during a period of almost 30 years! How did I manage to document and track all the details for each contract? I used FileMaker Pro.

Let's begin by viewing the Main Menu of a file I named Business Activity.

Note that each area of my business is listed as a button which, when clicked, links to a submenu.

For example, the Consultation Menu links to these listings:

- Find Next Invoice Number: This script does an automatic calculation by sorting all records by invoice number.

- Enter New Consult: Another script navigates to a data entry layout for entering needed information. It also links to a separate Contacts File, so that when I enter a new name in the Business Activity file, the program's Lookup function automatically inserts all the information into that record without having to retype it, a huge timesaver. The information usually includes name, agency, department, address, phone and fax numbers, e-mail, etc.

- Outstanding Invoices: This script finds unpaid bills and displays when they were due.

- Mark off Paid Invoices: The fields include invoice number, amount due, date paid, amount paid and remaining balance.

- Find Consult: By entering the name of an existing agency, this script automatically brings up the record. From this layout I can navigate to an -Invoice form or back to the Main Menu.

Next, from the Main Menu I can click on General Business Menu, where calculations give me important financial information, such as gross income sorted into types of activity (consultations, presentations, products, publications), as well as an additional way to reach Outstanding Invoices and Mark off Paid Invoices.

Presentations

This submenu contains some of the same buttons as our previous submenu (Find Next Invoice Number, Mark off Paid Invoices, etc.), and added features that help us track the process leading to presentations at workshops or conferences.

For example, when I decided to submit my workshop proposal, "Hand Preference and Handedness: Relevance to Practice," for the 2007 AOTA conference, I began with the Proposal Checklist button. The listings include the following fields (and many others) for entering the dates when:

- Proposal is sent.

- Proposal is accepted or rejected (accepted!).

- Hotel reservation is sent.

- Airline ticket is purchased.

- Expenses are paid (in this case, reimbursement for handouts).

- Presentation is added to my vitae (in print and on my web site).

This system was invaluable when I was juggling several presentations each month, especially workshops that required much more correspondence with the organizers. The Compile Vitae button converts selected fields into text to update my Curriculum Vitae.

Product Development/Marketing

The Product Menu is the most extensive one I have, because as the years went by, more and more products were developed. The core products were 21 instructional videos that I had started producing in 1981, with professional help. I gradually learned to shoot and edit my own videos.

FileMaker Pro proved to be invaluable in many ways, not only for record keeping, but also for the actual production process. For example, to create the Normal Components of Hand Preference video (Erhardt, 1999), featuring 5 of my grandchildren, I created a new database, titled NCHP, with two layouts: Scenes and Show.

This screen shot of the Scenes layout shows 8 of the 113 scenes coded on the master tape, with descriptions, starting and ending times, and scene length. This information was crucial to edit the show.

The screen shot of the Show storyboard shows the last four scenes in the edited show, with the audio voiceover matched to each scene and the final calculation of the show's length.

At first, I paid a local company to duplicate and label my videos. Eventually, when DVD format became popular, I converted my master videos to DVD, purchased a DVD duplicator and CD burner, and with the help of the Internet found the most economical way to package the video programs and to create my own labels and enclosures.

If you have products to sell, be alert for marketing ideas and low-cost advertising. For example, each contact you make can go into your Contacts file. This includes people who have e-mailed questions about different topics and those who have previously ordered products. Then, when it is time to advertise a new product or announce a new catalog, you can simply e-mail this type of message to all the names in that file:

Responses can then be tracked and documented in your database.

Important! Always send blinded addresses (bcc) in respect for their privacy.

Other cross-marketing ideas include:

- Always package a catalog and current workshop schedule with each shipment of products.
- Distribute catalogs at workshops.
- On your Web site provide your vitae, presentation schedule, list of publications, downloadable catalog and free samples of products. (A future article will describe how to build and maintain your own OT Web site).

Publications

This menu button leads to the invoice layout only, because tracking writing projects is primarily a matter of folder organization, unless you are the editor of a book with multiple authors.

Several years ago I was asked to do just that. In order to keep track of my authors for the book Parent Articles about NDT (Erhardt, 1999), I designed a new database file with radio buttons to document when each activity was completed. This example of the authors activity list in progress shows records of a few of the 45 authors, with tentative chapter titles.

Occupational therapy practitioners who find themselves struggling to organize multiple projects should be aware of the possibilities for database software tracking methods.

References available at www.advanceweb.com/OT or upon request.

Rhoda P. Erhardt, MS, OTR/L, FAOTA, has a private practice in the Minneapolis/St. Paul area, consulting with health agencies, educational systems and national corporations, and lecturing throughout the world. At the April 2007 AOTA conference in St. Louis she is presenting a workshop on the topic of hand preference. Readers who have questions or need computer support may contact her by email at rperhardtdtdp@att.net or visit her Web site: www.ErhardtProducts.com.