THE SERENE SOURCE · FREE GUIDE

01

The First-Client Readiness Checklist

Everything you need in place before welcoming your first client, without the administrative overwhelm.

By Julie Bradshaw · theserenesource.com

You have trained, practised, and listened to the call. Now comes the part no certification covers: building the quiet structure that lets you hold space with confidence.

Work through this checklist at your own pace. Each box you tick is one less thing pulling your attention away from the client in front of you.

Your foundation

The essentials that make your practice real and protected.

- [ ] Choose your practice name and check it is free to use in your area and online
- [ ] Register your business as your location requires (sole proprietor, LLC, or local equivalent)
- [ ] Open a separate bank account for practice income and expenses
- [ ] Arrange professional liability insurance suited to your modality
- [ ] Confirm any local licensing, permits, or scope-of-practice rules that apply
- [ ] Keep copies of your certifications somewhere easy to find

Your offerings and pricing

Clarity here makes every conversation with a client easier.

- [ ] List each service with its length, format (in person or remote), and price
- [ ] Decide on packages or series, if you offer them
- [ ] Write a cancellation and late-arrival policy in plain, kind language
- [ ] Choose how you will accept payment (card, transfer, cash) and test it
- [ ] Decide whether you need deposits or pre-payment for first sessions

Your client paperwork

Gentle structure that protects you and helps clients feel safe.

- [ ] Prepare a client intake form (contact details, health notes, intentions)
- [ ] Prepare an informed consent and liability form reviewed by a professional
- [ ] Write a short session-preparation note to send before the first visit
- [ ] Create an aftercare note to send after each session
- [ ] Decide where completed forms will be stored securely and for how long

Your booking and communication

So clients can find you and say yes easily.

- [ ] Set up an online booking tool with your services, hours, and buffers
- [ ] Create a professional email address that matches your practice name
- [ ] Write a welcome email clients receive when they book
- [ ] Set up automatic reminders 24 to 48 hours before sessions
- [ ] Decide your response time for messages and share it gently

Your space and your energy

The sacred container your clients will feel the moment they arrive.

- [ ] Prepare your physical or virtual session space and test the lighting and sound
- [ ] Gather supplies: linens, cleansing tools, water, tissues, a clock you can see
- [ ] Plan a simple opening and closing ritual for each session
- [ ] Block time between sessions to reset yourself and the room
- [ ] Choose one practice that keeps you grounded during busy weeks

Your visibility

A simple, honest presence is enough to begin.

- [ ] Create a simple website or landing page with your offerings and booking link
- [ ] Write a short bio that sounds like you on a good day
- [ ] Add a clear photo of yourself so clients know who they are meeting
- [ ] Tell ten people you trust that you are open for clients
- [ ] Ask your first clients, kindly, for a testimonial you may share

A gentle next step

You do not need everything perfect to begin. You need enough structure to feel steady, and the willingness to refine as you grow.

Want this done for you? The Serene Source offers ready-made client forms, starter kits, and landing pages for holistic and energy practitioners.

theserenesource.com

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