

*Music Therapy* **CEO** *Project*

A self-paced, online podcast-style course | Approved by CBMT for 5 CMTE credits

# Course Guidebook

Module Summaries, Questions for  
Consideration & Action Steps

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# *The Music Therapy CEO Project*

A 5-credit CMTE Course for Music Therapy Business Owners

## **Introduction & Overview**

### **Why are we creating this course?**

We, Rachel Rambach & Katey Kamerad, are the owners of Music Therapy Connections, LLC. We have been in business for over 10 years and through our experience have learned many very important lessons. Our goal in creating this course is to teach you what we've learned so far and help pick you up wherever you are in this journey so we can grow and develop together.

Throughout the course, we are sharing the tools that we are currently using in our business as well as the questions we have been asking ourselves every day to help us continue growing our business.

### **What is a CEO?**

By definition, a CEO is: "a chief executive officer, the highest-ranking person in a company or other institution, ultimately responsible for making managerial decisions."

It's a simple definition, but in this course we want to focus more on the CEO mindset than the technical definition. Instead of growing our responsibilities, we are focusing on who we are as business owners. This course focuses on working on ourselves.

### **Before you dive in, please know:**

No two businesses are the same. How you use this course and content will look different than how any other business owner will. Your answers to each of the questions we pose should be unique to you and your business. Take these ideas, tools, and questions and apply them in whatever way makes the most sense for you and your business.

### **Course Description**

This course is a set of tools for you to use at any stage of your business. It is designed to serve as a guide for music therapy business owners at any point in their entrepreneurial journey who want to continue to grow their business,

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improve their CEO mindset, embrace their role as a visionary, and strengthen their team, no matter how large or small.

Through podcast-style conversational discussion, we offer practical tips, concrete exercises, and questions for you as the CEO to consider as you take steps towards shaping your ideal business.

## **Learning Objectives**

- Participants will develop effective means for communicating with colleagues and staff regarding professional issues. (BCD IV.B.7)
- Participants will develop strategies for strengthening working relationships with colleagues and staff. (BCD IV.B.8)
- Participants will assess current manner of supervising staff and identify additional techniques for providing quality supervision. (BCD IV.B.11)
- Participants will define and build upon his or her unique strengths related to business ownership. (BCD IV.B.16)

## **Course Outline**

- I. Introduction & Overview
- II. Start Where You Are
- III. Cast Your Vision
- IV. Embrace Your Strengths
- V. Build Your Team
- VI. Create a Company Culture
- VII. Conclusion
- Post-Test & Evaluation

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## **Set yourself up for success!**

There are several important questions and actions steps at the end of each section that we encourage you to take the time to do throughout the course.

Print the materials and set aside more than just listening time so you can apply the content being shared to your own unique business. Take whatever time you need to answer the questions during and at the end of each section. The work you do during this course will only benefit you in the future.

## **You should walk away with:**

- Short & long-term goals
- Ideas for tracking those goals
- Clearly identified roles
- Ideas for growing/redefining your business
- Strategies for communicating with your team
- Tools for identifying your strengths and the strengths of your team members
- Ideas for implementing your strengths

**Take the time now to prepare the materials you needs and get ready to dive into this course!**

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## **Start Where You Are**

Each person taking this course will be starting at a different point. No matter where you are, though, this course is for you! We want to pick you up wherever you are on this journey and help you move forward.

Start this section by recognizing the space that you are currently in, how you have gotten to where you are, how far you have come, and where you are headed.

### **What is the difference between a boss and CEO?**

A **boss** is:

1. Any person who owns a business.
2. A person who employs or superintends workers; manager.
3. A person who makes decisions, exercises authority, dominates, etc.

A **CEO** is:

1. A chief executive officer, the highest-ranking person in a company or other institution, ultimately responsible for making managerial decisions.
2. The visionary of the company.
3. Manages aspects of a business that cannot be delegated:
  - A. Setting strategy and direction
  - B. Modeling and setting the company's culture, values, and behavior
  - C. Building and leading the executive team
  - D. Allocating capital to the company's priorities

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We want to encourage you to be the CEO and visionary in your business instead of the person doing EVERYTHING. This has been a journey for us over several years, as we have previously been stuck in boss mode. We have had to actively (and on an ongoing basis) ask ourselves the tough questions to move ourselves forward.

Other people can fulfill some of the tasks you are currently doing in your business. *Take a moment to identify a few of the small tasks you may be able to hand off to another team member (this can be as simple as watering the plant, like we mentioned).*

As business owners, we were trying to do everything ourselves and far beyond the point at which we should have started delegating. One reason WE were providing all of the services & communication within our business was in order to protect our brand.

We handled the onboarding of all new students/clients to maintain control over correspondence, and felt obligated to be service providers for ALL new classes and offerings.

As we assigned simple tasks to other team members, delegation became easier and we learned that, often, other people can complete the needed tasks more effectively and efficiently than we can.

## **Lessons learned:**

- Delegation works, even though it's scary.
- Other people can do some things better than we can.
- We wasted a lot of time and energy by not delegating.
- Other people can help our brand grow because they have more time and energy to put to the tasks they have been assigned.

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## **Mistakes we made that you can learn from:**

- Not establishing a systematized workflow as we started building our team from day one meant that each tasks took longer than it needed to and led to frustration.
  - As we worked with our team to create a clear workflow and set processes, everything start moving much more efficiently.
- By being more people management focused instead of process focused, we were taking the authority/power away from our team members to do what they do best.
  - When we gave individuals the authority to do their work under the specific guidelines we created together, task were completed much more easily and with better quality.
- Not setting clear expectations (for everyone) up front of exactly what was required of each position led to hurt feelings, disagreements, missed opportunities, and poor communication.
  - After clearly defining our roles and setting expectations for ourselves and our team members, our overall company culture improved.

## **Steps to moving from boss to CEO**

- Pinpoint what isn't working for you in your business
- Develop new systems and strategies to address issues
- Delegate tasks to other team members
- Celebrate how far you've come

## **Celebrate how far you've come**

We are by no means perfect as a business or as business owners, but we are always making progress and learning as we go. It is easy to get focused on what isn't working and lose sight of the progress you have made, understanding that the little things make the biggest difference.

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Business moves quickly, and with so much to do, we forget to celebrate what we've already done. The downside of not celebrating your progress is always feeling behind the curve and always chasing your definition of success based on others who are ahead of you in business.

This is why we celebrate our accomplishments on a regular basis, and at least 1-2 times per year we make an extensive list of our successes.

**Continue to the next page for Section 2 action steps and questions for consideration.**

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## Action Steps & Questions to Consider

Take time now to complete all of the questions and actions steps associated with this section before moving on to section 3.

### Where are you right now?

- Complete the PDF we have provided.
- Where are you on your journey from point A to point B.
- Consider how far you have come since the first moment you thought about starting a business.
- Draw what your journey has looked like and highlight a few key moments along the way.

Use the following space to make a list of things you have accomplished throughout your music therapy journey and within your business. What big or small things have you accomplished?

- **Over the entirety of your business/career...**

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- **This year...**

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- **This month...**

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- **This week...**

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- **And what is something you have achieved today...**

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**List 3 things that you would like to change/improve in your business.**

1. \_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_



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**Identify 3 tasks you can delegate to another team member or that you can use an online assistant for:**

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_

# Where Are You Now?

A

Inception  
Creation

WE ARE HERE

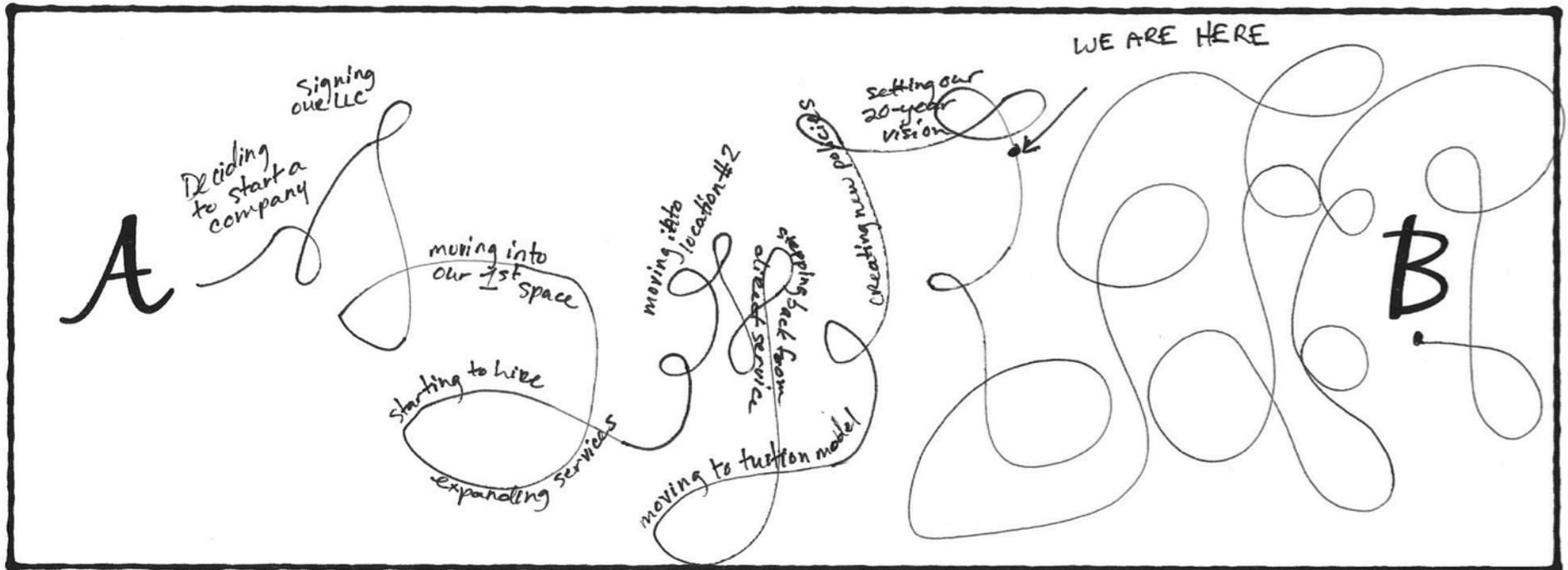


B

ideal ending  
dream company

Consider: How far have you come from the first day you thought about starting a business?

Maybe there journey from point A to point B looks more like a scribble or roller coaster instead of a straight line. All of the ups and downs have value in this journey. Take a moment to quickly draw what your journey looks like. Highlight some key moments or turning points throughout your drawing. What needs to happen in order to reach point B?



# Where Are You Now?

A

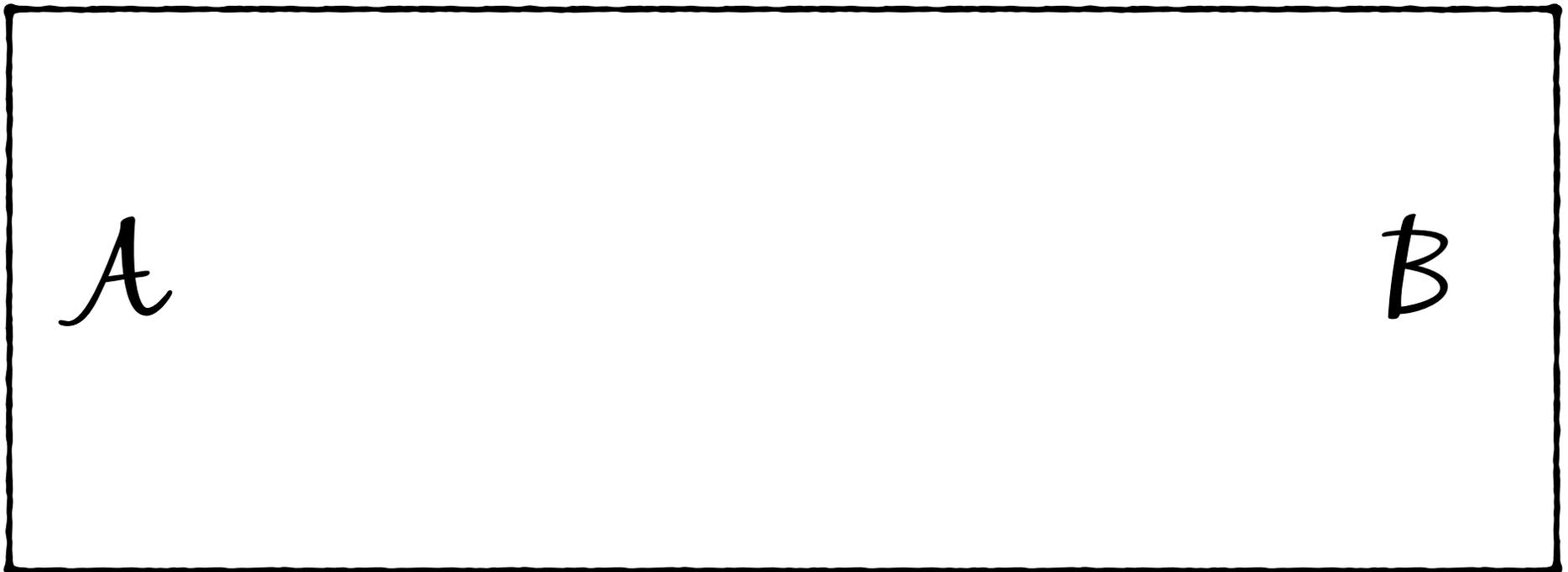
B



**Inception  
Creation**

**ideal ending  
dream company**

Consider: How far have you come from the first day you thought about starting a business? Maybe there journey from point A to point B looks more like a scribble or roller coaster instead of a straight line. All of the ups and downs have value in this journey. Take a moment to quickly draw what your journey looks like. Highlight some key moments or turning points throughout your drawing. What needs to happen in order to reach point B?



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## **Cast Your Vision**

### **Be Different**

It's okay for your business to be different. In fact, if your business wasn't different, there wouldn't be a market for it. You need a business that meets the needs specific to you and your community.

Because your business stems from who you are and what you want, you should be a little selfish in creating it. Your business needs to be something you love and are excited about. Find the things that make you and your company unique and build upon those as your strengths.

Stop looking at what everyone else is doing. Just because other people are doing something doesn't mean it's right for you AND just because someone else isn't doing what you are doesn't make what you are doing wrong.

Of course, there are standards that all businesses need to meet, but the things that make you unique and that make you shine will attract others to your business.

### **How We've Learned That Lesson**

In the past, we have felt pressured based on what we know about other music therapy businesses and how they look from the outside. When you see other businesses from the outside, you are seeing only the best parts of their business and what they want you to see.

When you look at social media or at someone's website, you often only see their successes instead of what's behind the scenes. BUT, it's so important to know that what makes you different or what is possibly controversial about your business, makes you unique.

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Here are a couple ways in which our business, Music Therapy Connections, is different/unique:

- We as music therapists teach lessons and lead non-music therapy specific groups and classes.
- $\frac{3}{4}$  of the people who walk through our doors are non-music therapy clients.
- We have 8 lesson instructors. Our sign says “Music Therapy” but that’s not exclusively what we do.
- We created our own early childhood curriculum rather than use one that has already been established and used by other music therapists.
- We have a non-music therapists managing scheduling and new student/client onboarding communication.

## **Look for inspiration, but avoid comparison.**

As you identify your unique strengths and work toward growing your business, it’s important to avoid comparison to others while still seeking inspiration.

Some of the places we draw inspiration from include:

- Other established music therapy practices as well as new business that are thinking outside the box.
- Other business owners outside of the music therapy world.
- Businesses we patronize.
- Local business who know about our community.
- Online leaders who put out inspiring content.
- Other blogs, podcasts, books, videos, etc.
- Our own clients and community because those are the people we serve.

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## **The Comparison Trap**

We only see the outside perspective of other businesses; we don't know what's going on behind the scenes...

You never know what someone is going through, despite outside appearances. We are a good example of that. In the past, even though we were a business that other music therapists have aspired to, we had our own issues and shortcomings.

For a good example, listen to “**The Summer We Didn't Get Paid**” podcast episode.

We are all still learning and often failing, but we know that we experience growth through our experiences. When you try to emulate other music therapy business owners, you sell yourself short by not using your unique skills and strengths.

You often only see the highlight reel, the instagram feed, the edited videos, and the polished products. Take a moment to recognize that there is a lot that goes on behind the scenes that you never see.

Gain inspiration from others, but don't get stuck comparing yourself/your business to someone else's online presence.

## **Designate a CEO day each quarter.**

At least once a year (preferably every quarter), we designate a CEO day. We created this day in order to take a step back from our everyday business operations and instead focus on the big picture.

We try to take an objective look at our business from every angle and plan for what we want the future of our business to look like.

When planning a CEO day, here are some of the things we keep in mind and some things for your to consider:

- Who -
  - Your CEO day could be just you or could include another team member, a partner, a mentor, a family you work with, etc.

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- Other voices, either inside or outside of your business, can provide insight, new perspectives, and ideas.
- What we cover -
  - Achievements
  - Goals
  - Big themes/projects/contracts
  - Future planning & vision casting
  - Issue Resolution and creating strategy
- How we make the most of our time -
  - We have a Google Drive folder where we store all of our meeting notes
  - We set a date several months in advance
  - Together, we create a meeting agenda
  - We prep for our meeting by brain dumping our thoughts/ideas into our agenda ahead of time
  - During our meeting we take detailed on every item we discuss
  - Action steps are the most important part of the process. After our meeting we create a list of action steps each of us will be working on.

## **Create Measurable Goals**

Creating measurable goals is a skill that is practiced. These are a few things that we have learned over the years about goal setting.

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- The goals you create don't have to be perfect.
- You can jump around when forming goals (starting at the beginning, end, or middle).
- Be sure to look at all the angles when forming your goals. How will your goal impact you in your business, your personal life, financially, and how will it impact your growth?
- Your goals have to be based on what makes sense for YOU!!!
- Goals can be monumental or very small. No matter the size of your goal, write it down!!
- Remember that goals can change.
  - Reassess based on time and experience. What makes sense right now?
  - Understand that you have no idea what your life will look like in 1, 5, 10 years. Your goals will shift as your life and business both change.

## **Track Your Goals**

“You attract what you track.” We fully believe in the power behind that statement! Every week we are tracking our goals in a very measurable way.

Though not all goals can be tracked short-term, most have elements that can be. Even when looking at the big ethereal goals you have, create action steps with measurable goals and trackable pieces so that you can see visible progress on an ongoing basis. Break your goals into trackable pieces.

We have a weekly business meeting on our calendar for nearly every Tuesday of the year. The first item on every meeting agenda is titled “Numbers”. We have broken our big goals down into small trackable pieces that we update on a whiteboard on a weekly/monthly basis. For example:

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- Our BIG GOAL - Growing enrollment over 3 years
  - What we track - Student/client additions and retention (monthly)
- Our BIG GOAL- Increase number of classes we offer
  - What we track - Class and group enrollment (weekly)
- Our BIG GOAL- Increase passive income
  - What we track - Product sales (per launch with daily or weekly tracking)

One other method we use for tracking our goals is keeping weekly meeting notes. When we create our weekly agenda, several items are copied and pasted from one week to the next so we can track those things each week.

## **Do the Mindset Work**

The most important part of casting your vision and goal setting is doing the mindset work.

What do you want for yourself and your role within your business?

This answer is different for every business owner and changes as your role and personal life evolves. Coming back to this question on a regular basis is so important and helps inform how you approach your CEO day. Answering this question (and often sharing it with others) on a regular basis helps inform how you make the decisions within your business.

You are not just a music therapist or boss. You are the creator, founder, CEO, owner, partner, etc. OWN it! Say it out loud! Tell the world.

**Continue to the next page for Section 3 action steps and questions for consideration.**

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## Action Steps & Questions to Consider

Take time now to complete all of the questions and actions steps associated with this section before moving on to section 4.

**What makes your business different/unique? Write a description for your business that highlights the unique aspects of what you do.**

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**Where do you get inspiration? Are there other businesses (MT or not) or people that inspire you? Why?**

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**Set a date for your first CEO day ( \_\_/\_\_/\_\_\_\_ ) and start creating your agenda in a separate document.**

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**Write 2 big questions you would like to address in your CEO meetings.**

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_

**Create goals for this quarter with achievable outcomes.**

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**Begin creating an action plan addressing one thing you would like to change in your business.**

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**Start a document and begin brainstorming your 1, 5, 10 and even 20 year goals. Establish one method for tracking your goals.**

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## Embrace Your Strengths

We all have things that we are good at and things that we aren't so good at. Being able to determine your strengths can help inform the future of your business. Most of us start our businesses by doing most everything. However, that isn't a good way to maintain a successful business if you want to grow in scale.

When moving into the next phases of growth and delegation in your business (no matter the size of your company), know that there are always things you can delegate and there are always solutions. You *don't* have to do it all.

### Giving Up Control

We understand that it's hard to give up control, especially in the business that you have personally created and grown. To help you on this journey, recognize the following:

- You have learned and done so much, often out of necessity.
- You grow attached to doing things YOUR way.
- It's hard to trust that other people will be able to meet your standards.
- BUT, some people are better at certain tasks than you are - it's okay to admit and embrace that!
- In our business, realizing our unique strengths has been a game changer. It took time to make this realization and even longer to act upon it but it has changed our world.
- Giving up control takes practice and isn't a perfect process.
- Take it one step at a time and give yourself grace.
- Continue to push yourself along each step of the journey.

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## Define Your Strengths

Even though you are running a music therapy business, your clinical strengths are very different from your CEO skill set. Business administrative skills are also very different from CEO skills. Here are a few ideas for helping you define your strengths in any of those categories:

- Ask for feedback from several different people across a variety of settings.
- Talk to other people online, in your community, in your business, etc.
- Take on objective perspective. Try to be as objective as possible when looking at what you are currently doing within your business.
- Even if you're good at something, if you don't enjoy it, that doesn't mean you have to continue doing it.

## Define Your Strengths: Music Therapy Clinician

Ask yourself the following questions as you brainstorm and make your list of strengths.

- What are you good at?
- What do you like to do?
- Where can you grow?
- What is not for you?

Resources:

You can reference both the AMTA & CBMT websites to help gain insight regarding your clinical skills.

- <http://www.cbmt.org/>
- <https://www.musictherapy.org/members/officialdocs/>

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## **Define Your Strengths: Business Owner**

- What are you good at?
- What do you like to do?
- Where can you grow?
- What is not for you?

One of the most helpful things we did when developing our roles at Music Therapy Connections, was to create a list of business tasks we needed to complete on an ongoing basis. We discussed each tasks and decided our roles based on our individual areas of strength.

We included our original list for you to use as a reference and inspiration in creating your own task list. Reference the list you create when answering the questions listed above.

## **Use your strengths as the foundation for growth.**

Remember that this is your business and you get to decide what direction to take it! While your strengths should be at the center of your business, there may still be things that need to be accomplished that aren't necessarily your forte.

Consider, what areas outside of your strengths need to be addressed and filled in order to continue improving and growing your business? In answering this question ourselves, we have delegated several tasks and brought on team members that can better fill the roles we struggle with or don't have interest in.

Here are just a few examples:

- Clinically - Katey's strengths/interests are not in working in school settings or in individual 1:1 ongoing sessions. We brought on additional team members who enjoy providing services to those individuals.
- Clinical services and teaching lessons - We brought in additional team members to teach less as Rachel scaled back over time in order to concentrate on early childhood services and business building.

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- Documentation - We used our team's knowledge, experience, and outside perspectives in order to find company-based solutions.
- Scheduling - Our studio manager came up with a way to manage everyone's schedule in an easy and accessible way.

## **Moving Forward**

What can you outsource that is outside of your strengths and things you WANT to be doing?

Use your knowledge and experience to create templates and systems which then allow you to outsource those parts of your business in a successful way. Don't let your weaknesses define you or hold you back. Use them as an opportunity to improve your business by bringing in someone who's an expert.

**Continue to the next page for Section 4 action steps and questions for consideration.**

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## Action Steps & Questions to Consider

Take time now to complete all of the questions and actions steps associated with this section before moving on to section 5.

### Create your own administrative checklist.

- List all of the ongoing tasks within your business.
- Determine what you like doing.
- Determine what you feel confident doing.

### Determine at least 3 tasks you can delegate to another person or find a better solution for.

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

### Visualize what your ideal clinical workload looks like and begin brainstorming ideas of to make that happen.

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## {Example} Administrative Tasks

This is the list of tasks we originally created to determine our roles at Music Therapy Connections. While this list has evolved over the years and our individual responsibilities have shifted, the overarching roles we outlined using this list have remained the same.

We encourage you to use this document as inspiration for your own list as you outline your strengths and what you want to be doing within your own business.

<b>Administrative Tasks</b>	<b>Katey</b>	<b>Rachel</b>
Developing Policies and Procedures	X	
Oversee Budgetary Planning and Activities	X	
Website and Online Development		X
Social Media Management		X
Scheduling	X	X
Employee Hiring & Orientation	X	
Community Outreach & Advocacy	X	X
Fundraising		X
Advertising		X
Stocking Supplies	X	
Customer Services	X	
Billing/Invoicing		X
Managing Employees	X	
Course/Class/Product Development		X
Technology Development		X
Legal and Contract Management	X	

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## Build Your Team

When we started this journey, we were both sole proprietors, each working on our own and doing ALL of the things within our individual businesses. We were the clinicians, the administrators, the CEOs, etc. In saying this, we want you to know that being a CEO doesn't require having a big team. By simply starting/owning a business you are a CEO. Own it.

Though every team and business is unique, some things about being a CEO will never change. The definition of CEO that we most identify with is:

- “a chief executive officer, the highest-ranking person in a company or other institution, ultimately responsible for making managerial decisions.”

For another take on what a CEO really is, check out this CEO Job Description:

<https://www.steverrobbins.com/articles/ceojob/>

As a CEO, there are certain tasks you cannot hand off. You are the visionary and the person making and implementing the big decisions. Internalize the word *visionary*. Through the decisions that you are making in your business, you are bringing your vision to life. You get to choose the direction of your business.

Do the mindset work. Though the term CEO can have negative stigma connected, we want you to take that title and make it yours. Take the power associated with the term CEO and learn to love it for what it really means. Own that you are the person creating your incredible company and making your dreams and ideas come to life through the decisions you are making.

## Team Breakdown - Executive Team, Contractors, and Employees

To give you a better idea of our business structure and how we function, here is a quick breakdown of our team.

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- Business Heads: Katey and Rachel
- Administrator/Studio Manager (employee): Becky
  - Tackles scheduling, new student/client on-boarding, management of day-to-day office happenings
  - Paid weekly salary
- Music Therapists (employees): Laura & Alisabeth
  - Provide music therapy services
  - Complete office tasks as assigned and as needed
  - Paid weekly salary or hourly dependent on position
- Music Lesson Instructors (independent contractors)
  - Provide individual lessons based on their schedules
  - Contractor provides an invoice of services and is paid monthly

## **Business Structures**

Though we each began with a sole proprietorship, Music Therapy Connections is an LLC partnership.

When determining your business structure, recognize that you have several options.

- Sole proprietorship, partnership, llc, s-corp, corp, non-profit, etc.

Each business structure has its own unique characteristics. Be sure to research which business structure best meets your needs. Take time to speak with an attorney and an accountant when making this choice.

These two services, though an extra start-up expense, will help you make an informed decision regarding your business and will help ensure that you protect yourself and your personal assets.

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We decided to form an LLC for several reasons, but primarily because an LLC provides division between personal and business assets and offers us a little protection.

## **Growing Our Team**

We knew from the beginning that we would want to bring on team members. We were unsure of how that would look as we developed our business, but knew that we wanted to leave space to grow.

As we developed/grew our team we began delegating administrative tasks and service provision to those additional team members. After first we experienced some serious growing pains. All of our personal income had been based on our direct service provision. By assigning services provision to another team member, we initially lost income because we were paying someone else to do the work we had been doing ourselves.

However, we knew that delegating service provision was something we needed to do in order to be more profitable long-term. By delegating tasks and services, we've given ourselves the time and space to focus on our business development, thus making our business more profitable in the long run.

The choices you make regarding the growth/development of your team and business must be unique to your journey. You have to do what is right for your business and in this season. Understand that having growing pains is a necessary part of owning a business. Growing and developing a team is an ever-evolving process that requires patience, persistence, and an open mind.

As you work toward developing your team, please take time to research employment guidelines both nationally and within your state. Beyond that, set yourself up for success by creating clear guidelines for yourself and for your team members. Identify the roles/expectations you want a new team member to fill. When in doubt, consult a professional and seek advice.

**Continue to the next page for Section 5 action steps and questions for consideration.**

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## Action Steps & Questions to Consider

Take time now to complete all of the questions and actions steps associated with this section before moving on to section 6.

**What does being a CEO mean to you? Take time to write out your definition. Write out several key words and responsibilities that you think fall under the heading of CEO.**

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**Define your team and your business structure. Is the business structure you are currently in one that you want to stick with or evolve further? What does your team look like at this moment vs. what is your vision for your team?**

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## **Create a Company Culture**

Creating a good company culture is something we have been very focused on, especially in this past year. When we started our business, we were more focused on dealing with daily to-dos, tackling the immediate needs of our business, and dealing with issues as they arose.

As our company has evolved, we have been able to take a step back to work on building our team and growing a company that our team wants to be an active part of. We have wanted to create an overall feeling and an environment our team enjoys working in.

By request of our team, we started working toward building a better company culture by creating clearly defined roles. As our business has evolved, so have the roles of our team members. We have developed team positions to meet the current needs of our business, and along the way the lines that define the roles of our team members have gotten a little blurry. Creating clearly defined roles has made things much more clear not only for our team members but for us and in our roles as business owners.

Our document that defines our roles:

- Is very in-depth
- Covers who serves each role and specifically what each person does
- Defines roles at every level of our business
  - CEOs
  - Studio Manager
  - Music Therapists
  - Lesson Instructors
- Answers questions and lets teams members know who can answer their questions in the future.
- Is shared with every one of our team members
- Sets expectations for both the job the employee is doing and for what they should expect of their team members

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Having our roles clearly identified has allowed for less grey area, miscommunication, and hurt feelings. Our defined roles create consistency and clear expectations for everyone.

## **Play To Your Strengths**

We know that not everyone is good at everything. We all have strengths and want to ensure that our team members are not only working to their strengths but enjoying the work they are doing. Every team member has their own unique talents and by taking time to identify and use those strengths to their maximum potential, you will only enhance your business.

When defining your team members' roles, take time to also identify the strengths of your team members. Ask your team members how they feel about their roles and ask them to identify their own personal strengths and interests. Including our team members in those conversations also helped to make them feel more empowered in their position.

## **Getting & Staying on the Same Page**

To ensure that we all stay connected, communicating clearly, and on the same page, we established a few practices that we implement on an ongoing basis.

- Monthly employee meetings
  - Our team creates an agenda together (using shared google docs)
  - Team members control the direction of the meeting
  - These meetings serve as an opportunity to:
    - Check-in on current happenings/events/projects
    - Identify what is coming up on our calendar
    - Celebrate current contributions and successes
    - Plan Events
    - Brainstorm and come up with new ideas
    - Talk about issues within the business/space
    - Identify opportunities for improvements/growth
    - And more...

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- Yearly employee evaluations/goal setting
  - Employee evaluations include:
    - Self-assessment forms
    - Peer reviews from contract locations and individuals receiving services.
    - Goal setting (both personal and professional)
    - Planning action steps to achieve goals
    - Recognition of success and identifying areas for growth
    - Encouraging opportunities for personal and professional development
    - Opportunities for raises or changes in position based on conclusion of evaluation.
  
- Weekly music therapy supervision meetings
  - We take 1-2 hours every week to meet with our team of music therapists.
  - This is not only a benefit to employees but to our business. By supporting the growth of our team, we are supporting the growth of our business.
  - Providing this space helps them to feel supported and engaged in professional development.
  - Our supervision space is a safe place for team members to discuss not only professional issues, but personal issues that are impacting their professional work.
  
  - In our supervision meetings we tackle:
    - Mindset work...because:
      - Success is mostly mindset.
      - Fostering development of their own person is important in developing their clinical strengths.
      - Personal experience impacts professional development.
      - Being willing to be open with team members and work on their level will provide overall transparency and foster continued growth.

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- Issues that arise within clinical work/sessions
- Challenges specific to different settings
- Ethics and best practices
- Development of clinical and musical skills
- Professional development
- Brainstorming new ideas and interventions
- And more!

## **Beyond Clinical Work**

We involve our team in discussions regarding our business and provide opportunities for them to get involved in opportunities outside of clinical work. Involving team members in the business helps them see the purpose of what you do (as a business owner) and why things are the way they are. It helps provide insight and transparency. Beyond that, giving them the opportunity to create or do something outside of clinical work gives team members a sense of ownership and builds excitement.

Our team members provide insight and perspective regarding issues and ideas within our business.

- We are not in our studio every day.
- We are not in every session.
- We don't see everything that happens.
- We don't see how the community at large responds to our services at contract locations.

Because our team is so active and often sees/experiences more interaction with customers than we do, they provide the feedback that helps our business develop and can provide ideas/solutions we would never consider on our own.

Some examples of changes we have made thanks to our employees, include:

- Handbook & policies revisions
- Getting a stool for the bathroom
- Developing standard email communication
- Creating standard documentation

We often see our primary job as bosses as providing support and leadership. We listen to our team and to what people ask for/want because we know that every request and conversation comes from a place of honesty and vulnerability.

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We welcome ideas/requests and discussion of issues as they arise. We want our team members to feel comfortable approaching us and asking questions. Their input has and will continue to make a huge impact on the future of our business.

The more transparent we have been in sharing the ins and outs of our business (including our business finances), the more our team has been on the same page. Providing some of the details about the financial status of our business and our business goals helps everyone work toward the same goals and with a better understanding of why or business functions the way it does.

## **Communicating With Our Team**

Our methods of communication have evolved over the years. We used to rely heavily on email, but now email members of our team very infrequently.

We stay on the same page by:

- Using shared docs & online communication apps.
  - Slack
    - It is a free tool available on a computer desktop or via app on a phone or tablet.
    - Slack is like group messaging but better!
    - You can attach files, create docs, etc.
    - It is searchable.
    - You can “channels” where different groups of people can communicate or for different issues.
  - Shared google docs & folders
    - We have shared folders for different parts of our business.
    - Different folders are shared with different groups of team members.
    - It is searchable.
    - We can all work on a single document at the same time.

We have established boundaries, guidelines, and expectations regarding all use of technology in order to help our whole team communicate more effectively.

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- Phone and text usage
  - Not for regular business communication.
  - For emergency or personal use only.
  - This creates boundaries and separates work from personal life.
- Expectations for responding to communication
  - We expect our team to respond to messages during business hours.
  - We encourage our team to set “snooze” times on notifications.
  - We expect all communication to be kept professional both in person and on slack.
- In-office communication
  - We have a shared office space.
  - Team members can reference a shared google doc to know when they can/can't use space.
  - Team members are expected to use Slack as the primary means of communication so they do not interrupt lessons or sessions.
  - All team members know that MTC is a safe-space and that they must respect the confidentiality of all client communication.

## **HR Ins and Outs**

As our business has developed, we have evolved our HR practices. The most impactful step we have taken along our journey was creating a detailed employee handbook. This handbook is updated regularly as things continue to evolve in our business.

It serves as a guide for answering all questions and handling any issues that arise in our business. Having detailed policies regarding every aspect of our business helps keep everyone informed, on the same page, and can even help prevent issues before they arise.

When developing or revising your own employee handbook, please understand that:

- Ours was heavily influenced by what current team members had to learn on the job. We asked our team members questions as we developed our handbook in order to create the policies best suited to the future of our team.

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- EVERY HANDBOOK IS DIFFERENT! Do not copy and paste another handbook from the internet without editing and thoroughly reading.
- This is a working document that evolves as your business does.

Some of the other ways we attempt to set our team up for success include:

- Providing a thorough training.
  - We have a long training checklist.
  - The training is specific to the needs of the team members.
  - Opportunities for observation are provided.
  - Our training continues to evolve as our team members provide feedback.
- Setting clear expectations at the very beginning of each new position.
- Providing detailed information regarding the roles & responsibilities for every team member.
- Creating opportunities for team fellowship including social events like holiday parties.

**Continue to the next page for Section 6 action steps and questions for consideration.**





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### SELF-EVALUATION FORM

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Job Title: \_\_\_\_\_ Review Period: \_\_\_\_\_

Please complete the questions listed below and return to your supervisor prior to your performance evaluation. As you complete the form, consider your own personal performance as it relates to your current job description and expectations for the review period.

1. Do you understand the requirements of your job? Yes \_\_\_ No \_\_\_ If no, what aspects of your job need clarification?

2. List the expectations for the review period and assess how well you have succeeded in meeting each expectation. Attach a separate sheet if necessary.

3. What changes in duties or priorities did you face during the review period and how did you handle them?

4. What are your strengths (the things you do well) and how do you put them to use in your position?

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5. What are your weaknesses (the things you don't do so well) and how do they impact your job?

6. What would help you enhance your performance (training, equipment, etc.)?

7. What are your expectations for the coming evaluation period?

8. How would you rate your overall performance for this review period?

Exceeds Expectations \_\_\_ Meets Expectations \_\_\_ Below Expectations \_\_\_ Unsatisfactory \_\_\_

Please explain your response:

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**9. (If Applicable)** After reviewing the music therapy standards of practice and completing the music therapist self assessment, consider the following questions: What skills do you feel you can continue to develop? Where are areas you feel you excel? What music therapy related skills do you feel need improvement?

**10.** Describe at least 3 professional goals for the upcoming review period and create an action plan for achieving those goals.

**11.** Describe at least 1 personal goal for this upcoming review period and create an action plan for achieving that goal.

**12.** Other comments/concerns/questions:

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### 2018-2019 PEER REVIEW

Please rate the following items on a scale of 1-4 and answer each question to the best of your ability. If you are unable to answer a question, fill the space provided with N/A.

-----  
-

**1. The employee completes all duties assigned and provides services in a professional, timely manner while meeting the high-quality standards of the company.**

Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations
1	2	3	4

Does the employee complete all tasks and duties as assigned? Are all duties and services completed in a professional, timely manner while meeting the quality standards of the company? If so, can you provide examples of qualities provision of services? If not, how can the employee improve their provision of services or completion of assigned duties?

**2. The employee exhibits leadership qualities in all settings.**

Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations
1	2	3	4

Does this employee exhibit leadership qualities in the roles they play in the company or through their provision of services? If so, can you provide examples of how they positively contribute through their leadership or provision of services? If not, how can the employee improve their leadership skills?

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### 3. The employee demonstrate a commitment to interpersonal relationships and exhibits appropriate interpersonal skills.

Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations
1	2	3	4

When this employee works with coworkers or on-site staff, what interpersonal skills do they demonstrate? Have you experienced any problems with them interpersonally? How would you recommend that the employee improves their interpersonal and relationship building skills?

### 4. The employee demonstrates effective problem solving abilities and commitment to self-improvement.

Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations
1	2	3	4

Does the employee effectively solve problems? If so, what are the skills that they have demonstrated in solving problems and arriving at solutions and improvements? If less than proficient in problem solving, in what areas of problem-solving would you recommend that the employee work to be able to improve their skills?

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**5. The employee appears motivated by their work-related tasks, job, and relationships and demonstrates this through the dedication to the success and growth of their clients and within the completion of their everyday tasks.**

Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations
1	2	3	4

Does the employee appear to be motivated by their work-related tasks, job, and relationships? How does the employee demonstrate that they are motivated and committed to success and growth of their clients and within their workspace or within the company? Have you experienced any difficulties with the level of the employee's motivation?

**6. The employees methods and approach to accomplishing their job are effective, efficient, and continuously improving.**

Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations
1	2	3	4

Are the employee's work methods and approach to accomplishing their job effective, efficient, and continuously improving? Are there areas of improvement that you would recommend for this employee that would help him accomplish their work more effectively? Or, are there areas of improvement that would help you accomplish your work more effectively?

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## **Conclusion**

Throughout this course, we have shared several questions that can help guide the future of your company and help you discover your CEO mindset.

Everything addressed in this CMTE can be made part of your detailed business plan. We created a very detailed business plan when we started our business and refer back to it on a regular basis, using our mission statement and original goals to help inform our decisions.

Your business plan does not need to be a formal document that is ready to share with others. Instead, your business plan can be something just for you, to help keep you accountable and working toward your goals.

These questions and action steps we've shared in each section should help you start the documents that will help you move forward and grow in your business and formally create documents you can use in business planning and with your team.

We hope you are walking away from this course feeling excited. Use that excitement to get started making changes now!! Know that your business and your role will continue to evolve. Continue to ask yourself these questions and change/refine your answers as you and your business experience growth. Remember, your goals are not set in stone and will shift as your business does.

Thank you for taking time to complete this course!

Don't forget to complete the **post-test & final evaluation**.

If you have any questions or need clarification on any information provided in this course, please contact us at [info@musictherapyconnections.org](mailto:info@musictherapyconnections.org).

# [ BUSINESS NAME AND LOGO ]

## BUSINESS PLAN

[Date]

[Contact Name]

[Contact Phone Number]

[Contact E-mail]

[Business Website Address]

### Company Overview

- Emphasize your products, services, & offerings.
- Describe your location.
- What you intend to charge.
- Provide a brief history/overview of changes in business.

### Business Description

- Create a succinct description appropriate for a website/social media.
- Who does your business serve and how?
- Describe your services.

### Mission Statement

- Define your purpose.
- Why does your business exist?
- Your mission statement should be attainable but also inspiring.

### Vision Statement

- Project your vision for your business.
- Align your vision with your business goals and values.

### Major Business Goals

- Clearly define your major goals for your business.
- These should be attainable but also push yourself out of your comfort zone.
- Create a timeline for achieving your goals.

## **Values Statement**

- Create a values statement that is meaningful and inspiring to you.
- Play to your strengths.
- Use inspiring language.

## **Products & Services**

- List each (or each group) of your products and services.
- What makes your business unique?
- Use language that identifies those unique services.

## **Business Structure**

- Which legal structure have you chosen for your business?

## **Business Environment**

- What is the size of the market you serve?
- What challenges or competition do you face?
- Is the field you are in currently growing or receding?
- What industry changes do you see on the horizon?

## **Customer Profile**

- Describe your ideal customer.
- Who is your target demographic?
- Where are they? How do you find them?

## **Business Strategy**

- How will your business achieve its goals?
- How will you meet the expectations of your customers?
- How will you sustain a competitive advantage in the marketplace?

## **Online Presence and Strategy**

- Include a description of your online program/presence goals.
- Identify key steps to increase online presence, findability, and interaction with consumers.

## **Marketing Plan**

- How will you reach your target demographic?
- List your marketing goals.
- Develop the communication strategies and tactics you'll use.

### **Immediate-Term Goals**

- List your goals and objectives along with a strategy to achieve those goals.
- Create a timeline for each for your goals/objectives.
- Include an analysis of the strengths and weaknesses of your business capabilities.

### **Exit Strategy**

- In the event that you need to leave your business or dissolve your company for any reason, how will you do so realistically?

### **Plans for Major Change**

- What changes are you making in order to achieve your goals?
- How will changes impact your business?

### **Financial Review**

- Outline the pricing for your business along with billing practices.
- Create financial forecasts and identify financial milestones.