

The Caseload Reflection Worksheet

Looking Beyond Client Count

Purpose

This worksheet is designed to help therapists look beyond the total number of active clients on their caseload and better understand the patterns influencing session volume, retention, continuity of care, and overall practice sustainability.

The goal is not to judge your numbers.

The goal is to understand the story they are telling.

As you move through these reflections, approach your practice with the same curiosity you bring into the therapy room. Notice patterns before jumping to conclusions. Look for themes rather than isolated events. Consider what may be working well before focusing on what needs improvement.

Part I: Understanding Your Caseload

Current Caseload Snapshot

Total Active Clients: _____

Average Weekly Sessions Completed: _____

Average Monthly Sessions Completed: _____

Desired Weekly Session Goal: _____

Current Difference Between Goal and Reality: _____

Reflection

When you look at these numbers together, what stands out most?

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Part II: Looking Beneath the Numbers

Session Frequency Breakdown

How many clients currently attend:

Weekly: _____

Biweekly: _____

Monthly: _____

“As Needed” or Inconsistent Frequency: _____

Have Not Been Seen in 30+ Days: _____

Have Not Been Seen in 60+ Days: _____

Reflection

What patterns do you notice?

Which clients remain highly engaged in treatment?

Which clients appear to be drifting?

Part III: Identifying Signs of Drift

Review your caseload and note any clients who may be showing early indicators of disengagement.

Check all that apply:

- Increasing gaps between sessions
 - Multiple recent cancellations
 - Repeated reschedules
 - No recurring appointment established
 - "I'll contact you when things settle down"
 - Attendance has become reactive rather than planned
 - Loss of therapeutic momentum
 - Goals no longer discussed regularly
 - Difficulty reconnecting to previous work each session
 - Other:
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Reflection

What themes are emerging?

Part IV: Retention and Continuity

Consider the clients who have remained engaged and consistent.

What appears to be supporting continuity?

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- Recurring appointment times
 - Weekly attendance
 - Strong therapeutic alliance
 - Clear treatment goals
 - Progress visible to the client
 - Regular discussion of frequency and consistency
 - Strong scheduling systems
 - Other:
-

Reflection

What are your most engaged clients doing differently from your least engaged clients?

Part V: Scheduling Systems Review

Current Practices

Do most clients have recurring appointments?

- Yes
- No
- Sometimes

Do you discuss treatment frequency during onboarding?

- Yes
- No
- Sometimes

Do you discuss attendance patterns when you notice drift?

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- Yes
- No
- Sometimes

Do clients generally schedule proactively or reactively?

- Mostly Proactively
- Mostly Reactively
- Mixed

Reflection

Where might stronger systems improve continuity?

Seasonal Pattern Reflection

What seasonal patterns tend to affect my schedule?

- Summer slowdown
- Holiday hush
- School breaks
- Client vacations
- Therapist vacations
- Other: _____

Part VI: Therapist Reflection

Private practice is often viewed through the lens of growth: more referrals, more clients, more visibility, and more marketing. Yet many scheduling challenges are not acquisition challenges at all. They are engagement challenges.

Reflect on the following:

What is my practice currently asking for?

- More referrals
- Better retention
- Greater consistency

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- Stronger onboarding
- More recurring appointments
- Clearer expectations around frequency
- Improved scheduling systems
- Greater confidence discussing continuity of care
- A combination of several factors

Reflection

If I could improve one thing over the next 90 days, what would create the greatest impact?

Final Reflection

A full caseload and a sustainable caseload are not always the same thing.

As you look at your practice today, what story is your calendar telling that your caseload report may not be showing?

What is one action you can take this month to strengthen engagement, continuity, or therapeutic momentum?
