**DRAFT Initial Email for Assessment Request  
Strategic Practice Solutions**

Dear [Insert Name],

Thank you for requesting your complimentary practice assessment.

I’d like to schedule a time convenient to your schedule when we can review your responses and cover the following:

1. **Desired Outcomes**: I’d like to understand what prompted you to request our practice assessment in the first place. There are no ‘accidents’ in life or business and I’d like to know what you’re hoping will happen as a result of completing and submitting your information.
2. **Conversation Not Presumption:**I’d like to ask questions to better understand the situation you’re in now and want to be in the future. Of course, that works both ways. So I’m inviting you to ask any questions of me as well.
3. **Actionable Goals**: I’ll assume personal responsibility to present **at least 3** actionable recommendations from our conversation that will help you move closer to where you want your practice to be in the future.
4. **Next Step(s)**: I’d like to end by identifying anything you feel I might be able to do to help you grow your practice and, if so, you tell me what that looks like so we can work out a way to make that happen — 100% your call.

**Summary of Meeting Highlights**:

You will receive my 3 actionable recommendations in writing within 2 days of our meeting.

If I do not hear from you in the next few days, I’ll be sure to reach out so we can schedule our practice assessment meeting.

Sincerely,

Tricia Casasanta  
Strategic Practice Solutions  
586.804.4491