

Webinar Title: Practice Productivity: Save 10 to 15 Hours Weekly
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Delbar: Hello, and welcome to today's webinar, *Practice Productivity: Save 10 to 15 Hours Weekly*. This topical webinar is paid for by Zanda, formerly Power Diary, an all-in-one practice management system that helps practices thrive. Some important points before we get started. Damien Adler, the presenter for today's webinar, has a working relationship with Zanda. As such, he has both a financial and an intellectual interest in the webinar content. The purpose of this presentation is to provide a balanced view on how practitioners can save time and increase profitability. APA does not endorse any products or services. The content was created by Zanda and does not reflect the views of APA or its editorial staff. Email advertising @apa.org to learn more.

Next, this program does not offer CE. However, we will email everyone watching live today a certificate of attendance. Certificates will only be issued to those who watch for a minimum of 45 minutes. A recording of this presentation will be emailed to everyone in two weeks' time. The recording will include the presentation slides. During our time together, you will be on mute. You can communicate with us using the Q&A box located on your webinar screen. The Q&A box is enabled for attendee interaction with submitted questions. Attendees can view all submitted questions and upvote those they find important. This helps the presenter identify questions that many attendees want answered. A link to the presentation slides will be posted in the chat box of your webinar screen. If you missed them, don't worry. We'll email them to you with the recording.

Now, let me introduce our presenter, Damien Adler. Damien is a registered psychologist and entrepreneur, and the co-founder of Zanda. He has a background in health administration and has previously held senior positions in the public health sector. He later founded a successful private psychology practice where he discovered his passion for using technology to make life easier for health practitioners. Welcome, Damien.

Damien Adler: Thank you very much, and thank you for having me. Just to give a very brief background to why I'm here and where I'm from. As Delbar mentioned, I'm a psychologist operating in Australia, and my wife and I built a private practice. Really, during that time, we were able to scale it up, and we sold it a few years ago, but we were running it for about 15 years. We really got a firsthand insight into the difficulties of running practices, also the joys of running practices. What we're able to see and what we experience is that, initially going through education and studying and preparing to be a psychologist, we thought the hardest part would be, of course, the clinical work. As I'm sure many people watching now realize that, in fact, that's not the case, that often it's the administrative side, and it's the running of a practice.

Really, that affects people. We really wanted to solve that problem initially for ourselves and for people within Australia, because we thought that there would be lots of great software products out there that would be available in different countries. We thought maybe it was just Australia that didn't really have a great solution. We quickly discovered once we started, originally the company was called Power Diary, and we rebranded to Zanda about six months ago.

Originally, we started in Australia, and we had this philosophy of let's make practice management as easy as possible and try and streamline everything that we can so that practitioners can focus on practicing and providing the therapy, the reasons that we all got into the health space, and try and automate and manage practices as best as possible using software and technology. What we discovered once we launched was that really, it was a global shortcoming that we found, so very quickly after we started and launched originally in Australia, that around the world, we started attracting customers, and now Canada and the United States are our fastest-growing markets.

In fact, my team literally a few minutes before we went live on this sent me an update from G2, which is, if you're not familiar, the world's largest software rating platform. Our latest, we are now in the Top 5 global top rated medical practice management systems, and just heard this for the first time, we are now rated number 1 easiest to use medical practice management software. That came in to me literally about 10 seconds before we went on air, so lovely to be able to share that with you today. That's really, as a very quickly a bit about where I've come from, that this is a-- it's grown organically, this idea, we've got to make things better, started off in Australia, and now we are all over the world. We really appreciate the support and enthusiasm that everyone has embraced.

Just very quickly, what we'll be looking at today looking at what a sustainable practice looks like, evolving admin, what we call the MBA productivity mindset, and the components to that. Then we'll be looking at how to once-ify your processes, and finally, the benefits of increasing your admin efficiencies. I won't go over the overview too much, I'm just going to get straight on into it. As a very start, what I'd like to just remind everyone is the idea, because I think as practitioners, we sometimes either feel uncomfortable with this side of things, or we don't think about it enough, but a practice obviously is a business. In any business, we have income sources, and usually in health practices, in psychology practices, they're actually fairly limited.

When we look at the majority of where income comes from, it tends to be direct consultation. That's direct exchange of time, of course, for money, assessments, and report writing. We have that. Then, of course, out of our income, we have a bunch of expenses. We have clinician salaries, admin salaries, operating costs, and all the things that you'd be familiar with. One of the biggest costs outside of clinician salaries, of course, is the administration and the overhead that goes with it. There's lots of operational overhead that goes with running a practice. Clearly, the more we can reduce operating costs, reduce those expenses, then the greater the profit. We know, of course, that's vital to the health of any business and any practice, but also incredibly important for the well-being of the practitioners involved and the practice owners.

Okay, so we need to be sustainable. When we think about a global thing, we want to think about it in terms of what does it actually mean to be sustainable. Consistent profit, okay. We can't be worried about whether we're breaking even or risk, worst case scenario, where we've had practices that are in financial distress because of a bunch of things that have occurred, so we need to make sure that there's a healthy profit, consistent. Okay, the second element to healthy practices we've found is that clinicians are well-supported by the administrative processes. What we tend to find is that you see burnout reduce and you see retention of clinicians improve substantially

when they're really well-supported by the administrative process, because we know that the administration is a significant burden for practitioners.

The more that we can reduce the admin that is required of practitioners, whether that's ourselves, if we're in a solo practice, great. It applies equally, in some cases, may be more, because we have a limited time resource. If we're also engaged in employing practitioners within our practice, then ensuring that they are well-supported by the administrative processes, we can see that that improves the productivity of that practice, but also improves retention of those clinicians. They will actually stay at an organization, at a clinic or a practice that pays less, but they feel well-supported from an administrative point of view than going to a practice where they might get paid a bit more, but they have to do more of the admin themselves, or it's more clunky, the administrative process. We can see a direct correlation there.

Third element of a sustainable practice is making sure you've got the right people doing the right jobs effectively and efficiently. I won't labour that point because I'm going to cover that a little bit later in a different way. What that means is that we need to evolve our admin and evolve our practice as it grows. That's going to be a takeaway or a bit of a theme I want to mention today, is that I'm going to go through a bunch of different ideas and a way of thinking about practices and money practices. What makes sense to you will vary, right? What I'd really encourage you to do is to take away what makes sense to you at this point in your practice. Different things make different sense at different times in your business development.

Depending on where you are and what your goals are, those things will be different. Some things are immediately applicable, and some things might be applicable down the track, and that's perfectly fine. One of the pre-questions, we got a bunch of pre-questions sent through, which I've printed out and gone through, but one of the questions that we got was about how do I implement the things that we're talking about today, which is a great question. What I would say is you implement based on what makes sense to you and what's achievable for you right now. Just start with the things that are doable now, and then you can always scale it up and do other things later on.

As your practice grows, we need to evolve and we need to be constantly looking at a process of delegation and making sure constantly re-aligning what things do I need to do, what things the admin team need to do, but also what things can a system do. If you've got a practice management system, what things can it do and to be able to automate and take a load off, whether it's you personally, if you're in solo practice, or if you do have admin and support staff, what things can you end up delegating to a system. Okay, so we've framed this around what we call the MBA productivity mindset. Where this came from, I co-developed this with our head of strategy, Fiona, who, in fact, has an MBA. One of the things that we noticed is that there was a correlation between a few factors.

What I noticed from running a practice and scaling our practice, so we had a group private psychology practice. We noticed what things work there. Then over the years now, we've had Zanda for, it must be 13 years or something. Working with practices all over the world, we've gotten to see and work firsthand and see what works and what doesn't in practices all over the world, and we see themes. Then Fiona, in her previous professional life, she's got an MBA, like I said, and she used to work with

some of the really large global consulting companies. She would go in and provide consultation for really large companies. What we noticed is that there are actually themes that are taught in the MBA that really apply, and that a lot of successful practices were doing intuitively. We thought it was a really good way of framing it.

That's what we're going to do today, talk about this MBA productivity mindset. There's four components of that, building your playbook, leveraging other professionals, automation, and finally, what we call once-ify. Okay, so building the playbook, let's look at what that looks like. It's really about understanding that your business, your practice, is a system that produces outcomes. Any business is actually, you can look at it through that lens. It's just a system of people doing certain things, and then there are outcomes at the end of that. You could apply that to any kind of business that you see that there's a bunch of inputs and there's an output.

In practices, what we say, of course, is the inputs are that you've got the expertise, you've got the psychologist providing services, and the outputs are benefits to patients in delivering a clinical service or some sort of, sometimes it's products, sometimes people doing workshops and other things as well, but there's an output. Then it should also produce profit, as we talked about. Then a playbook really is just a manual to how your business operates, what does that system look like, and capturing as many elements of that into a playbook, into a way that makes it replicable. The idea is that, over time, you learn lots of things that work and don't work. I would say as a psychologist, I find that we often write things down in a particular way, which I think sometimes have a tendency to be perfectionistic, but I think that also can work really well for us.

The more that we're able to capture what are the processes and build a playbook, it means that the system can run far more reliably, the business can run more reliably, and it reduces a lot of the thinking that is required, or new thinking, having to think things through and learn the same thing over and over. If you think about employing new team members, the way in which you don't need them to learn by the mistakes you've already made, you can actually have them learn. I think that they shouldn't have to make the mistake themselves that you might have made. The more that they can learn from your past experiences and capture that in a playbook, the better.

Here are admin tasks that we find people do that make some of the biggest impact in terms of running their practice and reducing their inefficiency, or improving efficiency. Time-batching tasks. Bringing light tasks together and doing them all in one go. This may be certain times a day that your admin respond to emails or you do, if it's you doing it personally. It may be other tasks that involve things that you get an efficiency from doing it in one block instead of task switching. We know, of course, that when we switch tasks, there's a switching cost, so by batching tasks, we get a significant improvement in efficiency. Whether that's debt collection or making pull-offs or doing things, batching them together, hugely effective.

Create schedules to simplify routine tasks. These are things like making sure that there are routines that keep your practice operating. Instead of things being done ad hoc when you notice something isn't right, but having schedules that operate within the practice that you do routinely, whether that's daily, weekly, monthly. That can be relating to doing your book work. It can be related to maintenance and the presentation of your clinic. It could be even restocking supplies that you may have,

but keeping it to a routine means it becomes very predictable, you don't end up with finding your run out of things and become short of things. We find that when practices do that, even when they're a solo practice, we see significant improvements.

Keeping a list of commonly used supplies to simplify reordering. Prioritizing payments of essential services. Developing policies for things like your phone hours and communicating your availability. Developing clear policies about your fees and payments, and having that all documented. Creating appointment blocks with your breaks, so you've got very clearly planned schedules for practitioners based on what their preferences may be, or if it's yourself, based on your own. Getting everything that you use to operate the practice written down and available for your team or for yourself if you're running solo, so that you keep to a schedule.

Now, in the different ways that you can do this, some people will use Google Docs or something like that to capture it. In Zanda, a couple of times throughout where we've got the features that Zanda does, I'm going to just mention them so that you can go to that, but there are other ways to do it. In Zanda, we have a built-in manual. We believe in this approach so much that we actually have built a manual into the Zanda platform so that team members that have access to your Zanda accounts, the admin team, and other practitioners can click on it. If they want to check on something about payment policies or billing, invoicing, late payments, whatever it might be, then you can actually have that captured there.

We even find things like, and in fact, in our practice, we learnt this the hard way. We didn't originally have a dress code, for instance, because we thought that it's common sense, people will dress professionally and so forth until, we once hired a practitioner, a psychologist who presented very well in an interview and then turned up for the first day of work and was not wearing what we would consider appropriately professional clothing. We realized that even for things that seem obvious, by having them captured in a practice manual that you can have people go through before they start and orient, it means that you don't have to do that over and over.

Now, to make things easier in Zanda, we actually have templates. I think there's about 100 or so different policies and procedures and things that we have pre-written in there, so people can actually-- it's a bit overwhelming starting from scratch sometimes. We actually pre-built it, and we find people go in there and then they just edit it to match the policies, or they tweak it to match what they want. That makes a huge difference. Even if you're not using Zanda, you can use Google Docs or use something that's just available to other people within your practice and makes a huge difference.

Number 2, leveraging from other professionals. I think as practitioners, we are very good problem solvers, but that can also sometimes work against us. We need to leverage other professionals as much as possible. The first thing we need to think about is that time is money. It's a saying you often hear, but let's think about it in our context. People will sometimes view their own time essentially as free. They don't put enough value on it and think, "Well, if I get someone in to do that task, I could do it myself, I can save some money." The chances are that your billing rate is much higher than the person that you can hire to do that job.

When there is an economic argument, make sure you focus on that and think, "Okay, if I was billing for this time, and seeing a patient instead, does it make sense that I am doing usually a lower value activity and spending my time on that?" Economically is the first one, the reason to do it. The second one is enjoyment and life. I really believe, like you, the more you can focus on things that you enjoy, the more enthusiasm, energy, excitement you have about what it is that you do. If something you really don't like doing, then getting another professional to do it. Finally, the third reason is that often a focused professional will do it better than what we could do it.

Bookkeeping is a great example. I could sit down and go through and do bookkeeping. I hate it, I don't like doing it, I avoid it if I'm being honest about it, and I'm not going to do it as effectively or as efficiently as someone else. Very early on after we started our practice, we originally thought we'll do it all ourselves, quickly hired, even when we were very small and it felt like we couldn't afford it, we hired a professional bookkeeper and accountant to take care of all of that for us. We kept the same team throughout the time that we had the practice. Okay. Yes, so outsource anything that's taking you away from seeing clients, evaluate, and re-evaluate, I'd say, you and your team members' capacity.

I think we can sometimes underestimate or pigeonhole as well, what our team members are capable of. If you're in a group practice, then there may be skills and things within that make sense that you delegate to other practitioners. There might be certain types of work or things that some do better than others. Also, with administrative staff, what we've found is that often, administrative staff are incredibly skilled and skilled at things outside of just the admin work that may be as part of their formal job description. What we found, for instance, is that we, in our psychology practice, would work with often larger companies and provide their employment assistance programs to those companies.

I used to go out and meet with those companies and essentially do a bit of a presentation about what we could do and what we could offer. What we found is that one of our admin team was a very good, **[unintelligible 00:22:52]** friendly person. She knew all about the practice. She'd been with us for quite a few years. I think I took her along a couple of times to help, but then realized she can actually run them herself. In fact, she has the record. She landed the biggest contract that we ever got at our practice, and she did it solo. That was with a confectionery company. I won't name them, but you would know them in the States as well. We landed a contract with them.

It really opened my eyes up to this idea of leveraging other professionals isn't just about thinking in terms of outsourcing things that are maybe even come to mind, like accounting, but also some of the things that you might do that could go to other team members. A couple of principles, though, for delegating, because it doesn't always come naturally to us, we've got to remember to use our energy wisely. Remember that your time's not free. Delegate to those that are better or faster than what you are. Do what you're best at. Be patient. What I mean by that is that when you delegate, I think we've got to understand that they might do it slightly differently, or they may not even do it quite as well.

You might be quite practiced at it, or they might have a quite slightly different approach, but you've got to evaluate, and this is how I'd view it, is that if I delegated

it and they did it at 85% of how I did it depending on the task, but that was still a win, right? Because if I was doing it, that means I'm only adding 15% to whatever that task might be. That's not a lot. I could focus on something else and add 100% to it because if I'm doing a task that no one else can do, that I'm truly the best person to do it, then I'm adding 100% to that. In my mind, that's better than spending my time to gain an extra 15%. Think about it in terms of that law of diminishing returns that we can put more and more effort in and only get tiny little bits of gain versus focusing on something else.

Being patient means understanding that it might take someone a little time to get up to speed. Stick with it. Don't have that knee-jerk reaction sometimes. I've seen this so many times with practices that we work with for Zanda, and they've been talking to them about these things that sometimes wind up almost in a coaching role with some of our practice, where they'll try, it's like delegation, it doesn't work the first time. Then they're like, "Oh, you see. You can't get good people. You've got to do it yourself if you want a job done right," and all those kinds of things that we can easily go to. Just take a breath if something doesn't work, look at what you can do better to help that.

This is where that previous step we were talking about, having a practice manual, having a playbook, makes a big difference because then your knowledge is captured somewhere, and other people can refer to it. Do be patient and give it a little bit of time. Finally, use principles and processes. This is really important when it comes to delegation. If you can teach people the principle that is driving your thinking, they can apply that principle intelligently. Whereas if you teach that it's just the robotics of just do this, and there's no room in there for them to use their own judgment, what you'll find is they're coming to you all the time for questions because as soon as something falls outside of what you've specified, they won't know what to do.

If you teach people the principle of what you're trying to achieve, they'll be able to apply that principle flexibly to anything that they're doing and still operate in a way that's consistent with what you're trying to achieve. If in your playbook, you have a principle of customer service, principle of patient experience, and you might have some things listed there. Something comes outside of that, a scenario pops up. If your team understand the principle, what's important to you, then they will make up a solution that is consistent with that without needing to come to you. That's great for you, great for the practice, great for the patient, but also great for them because they get to be somewhat autonomous. They get to use judgment. They get to use their skill and expertise, and they feel better about that.

In terms of leveraging other professionals, there's some things we've covered here already, but marketing, advertising services, property maintenance, landscaping, cleaning services. In fact, when we first set up our practice, we had very little money. We'd set up a new-- we'd actually bought a building and we were very nervous about that. To save money, literally I and my wife and family painted the inside of the building and all the rest of it. That made sense for us at the time, but it took a long time, a lot of effort. When it needed to be repainted years later, okay, there's no way when looking, and I understood the use of time better and the use of money, there's absolutely no way in that circumstance. I was like, "Okay," and we got, of course, professional painters in to do it, and I focused on other things that added more value.

Anything that you can think of where you're not the best person to do it, then see who you can get in.

Okay. Number 3 is around automation. This one here, of course, is something that it's an endless pursuit. Excuse me, I've got a frog in my throat. Automation, we really want to-- Each time we have to stop and think about something, it uses our time, uses our brain power. It distracts, it also introduces a risk of failure. What we want to do as much as possible is automate and so set up a set-and-forget for repetitive tasks. Think about everything in your practice that could be automatic or is a predictable need. Thinking about deliveries that you might get into the practice, any regular things that you have to think about, or that ever catch you off guard in the simplest things, like, and as silly as it sounds, but people running out of paper in their practice. That's predictable, right?

You can actually set up pre-orders so that those things are arriving at your practice automatically on a schedule. It's many of the tasks that you can put on and autopilot means that it's less for you to think about, but also less for your team, less overhead, and better advantages. Okay, so things to do. A lot of these things I'm trying to get you to think about, like giving you ideas to get your brain going. You'll find other things that are relevant in your practice. There's a suggestions to get you thinking, but we don't have time, of course, to go through a full everything possible. This is really the idea behind it is to get your thinking.

Office supplies, photocopier maintenance, flour and fruit deliveries, if you have things, having laundry services, clean services coming in, things like alarm systems, replenishing any other stuff that you need, the consumables that occur within your practice. In our practice, we have everything that you can imagine automated. The only one that we actually didn't automate in this list is some of our office supplies. There's a funny but as a side note here, we had some admin team members that like going out of the office and going to an office supply store and getting things. When we're looking at automating, and we would walk through everything, we obviously identified that as something that time has been spent. They really enjoyed doing it.

We talked to them and we said, "That's fine, you can keep doing it that way." We knew it was an inefficiency, but we balanced it against their enjoyment of the role. That was something that they just looked forward to doing during the day, it got them out of the office, so we didn't actually automate that. When you're doing these things, you keep that human side to it. If there's some things that, for whatever reason, you think, "I don't want that automated," or it doesn't make sense to you, that's fine, but then you're at least aware of it, and you know that you're balancing that against other interests. When you've got everything else automated, you've actually got the time and the space to be able to do that, so you don't need to think about it.

Now, when it comes to practice management, there are a whole bunch of things that you can automate. In fact, one of the things that we have just launched, and we launched it after we had submitted this presentation to the APA, so we didn't have it in here, but I can now mention it because it is out live, but we now have AI note taking. Automating the taking and writing of clinical notes, which we could see we'd automated so many other things and allowed so many other things that we would allow practitioners to automate with Zanda, but we could see, of course, clinical documentation is such a big one. We've been working on it for some time. We had

to, of course, do it in a way that complies with all the privacy laws, that is secure, that complies with HIPAA, and so forth.

We did all that. That is now out live for people and the feedback has been amazing. We've actually had people comment. They said, "I'm in tears. Why didn't I have this years ago? I'm so happy. I'm not doing this, not having to spend hours and hours doing notes." That's a huge one that we have there. If your practice management software offers that, then obviously make sure it complies with the rules, but definitely use that if you're comfortable, because the amount of time it saves is unbelievable. In our case, it will actually get a transcript. You'll listen and get the transcript of the session, and then it will grab that and put it into any template that you like. Any clinical note template and session notes, any of that, you can have your own custom templates, and it will get that content, put it straight in there, so great. If your software has it, definitely look into it and use it because it's a game-changer.

Other things you can do. We have automations. It's a function where you can go into and just set up what would you like to automate. Things like automating intake forms, utilizing online booking, sending recalls and follow-ups, all that can just be set and forget. Of course, appointment reminders, appointment confirmations, invoicing and fee collection can all be automated so that it either bills based on stored credit card details or it sends out invoices for payment, or you can prepare the insurance claims if you're depending on what practice that you're operating, but that can all be automated within the practice so that you're not manually processing claims. You can actually just, like in Zanda's case, you can click on a button and submit it through the clearinghouse, and off it goes.

Additional things like automating session tracking, any out-of-office emails, anything you can think of can be automated. The more that you can think about that within your practice context, just think about things that you do over and over, whether you do it or an admin person does it, and then work out what you can do to automate that. There's an endless list. Like I said, we don't have time in today's presentation to go through it all, but I want to get you thinking about it because we notice that practices that do really well they're really good at automation. We can see it at our end too, that they maximize use of all the automation features, and they're the practices that are growing and running really well when we talk to them.

Okay, fourth component we're going to talk about is this once-ify. Once-ify, this means designing a process that you only need to perform once to achieve the same outcome. These are examples where you think about training. Instead of demonstrating multiple times, let's say, to new team members and giving them an orientation and teaching them how to do certain things and how your practice runs, film a video, document it in your manual, anything like that, that you find that you just have to do over and over. The other thing is once-ifying your thinking. What I mean by this is, and I just came up with this, it was really annoying, but I would find every time we had seasonal holidays, I would need to record a message for our answering service, and need to put autoresponders on, and think.

It was so silly, but initially, I didn't have a standardized script. Each time, a seasonal holiday, I would have to think what I want to say again and what was the important thing we need to include in that message about what to do in emergencies and so forth. Then realized that the amount of thinking I was doing over and over, just such

a waste of time. By documenting, putting that in your playbook so that you're once-ify, you only have to do it that one time, and then you can go back to that template over and over again. Same with new team members. If you are onboarding either admin team members or onboarding clinical staff, if you, instead of explaining everything individually, develop and put that, just record it, and then let them watch that and just ask you questions if they need to.

It's amazing the efficiency and, in fact, improved quality because you're less likely to forget things. It's a more consistent approach to it. Things you can once-ify, so creating checklists. If you think about opening, closing, weekly cleaning, as I said, onboarding, recording of video for tasks or processes, templates. Writing and templates, not just note-taking, which I think is fairly, I guess, people have their kind of templates they use, but things like letter templates, SMS, and email templates. I used to find like if we had a debt collection issue or we had something that was a response to a request for information, and so forth, a response to subpoenas and things, that is thinking that we end up doing, if we're not careful, over and over again.

We think about, "How do I write this email to respond to this tricky question," or something. Once you get into the mindset of once-ifying and you recognize when you're doing it the first time, you go, "Is it possible I'd ever have this question again or this scenario?" If the answer is yes, then save it as a template. Then it's amazing. The next time you're sending a tricky debt collection letter or follow-up with insurance or something, and you've got a script there, it's amazing how efficient and how easy it is to do when you think, oh, you thank your former self for having the foresight for doing it. Like I said, writing scripts for answering services.

Then other things that might seem silly but are actually worth doing, finding and keeping some quality services that you can rely on. If you have things that are needed to operate your practice, so electricians and plumbers, and contractors, and things, so having a list of those in the manual or in your playbook means that when something happens, you have a plumbing issue, these things happen, of course. Then either yourself or team know exactly who to contact.

We used to leave our practice, we'd go over and my wife and I and family would sometimes go to France for the summer because it's lovely over there and it'd be winter here, but we could actually leave the practice with a manager in place, with a playbook in place, anything that would come up, they'd have an answer. They'd know what plumbers, what services to use. It really allows that delegation, but in a way that's done how we like it, and you wouldn't get random things like surprise bills from a new contractor that charges a lot. Think about what makes sense for you and anything you find you're doing in a repetitive way, or your team are, once-ify and you will never look back.

Okay, finally, I've got this slide here about What Will I Do With My Free Time. When you put those things in place, and like I say, "Do what makes sense to you at the stage and phase that you are at," okay? Sometimes, what we'll see in practices is that there can be nervousness. Let's say when you're looking at automation, that admin staff see that some of the roles that they were doing are now being automated. Using their practice management system, if you're using it really efficiently, and you automate a lot of these things, then sometimes that can create a little bit of nervousness about, "Well, what is my role going to be?"

One of the things to really understand is that you can choose to have less team members on. That's perfectly reasonable decision to make, but you also can utilize your admin team for better value-added tasks. I was saying before, often admin team members have a lot more skills on what they're currently able to demonstrate because they're doing repetitive tasks that can be automated. Once you free up that, if you choose to keep the same level of staffing, you can actually get them doing things that add more value. For instance, we had our, I think I gave the example before, someone that went out and was helping us get contracts, and other team members who would do the base research and draft articles, that we could hand out.

Handouts, like clinical handouts that we could hand out to patients, and allowed us to build up a big library of things, resources that we could use. Also had team members help draft presentations and things that we might've been giving, and do the background research. Those things were super high value because obviously, at the end, we needed a psychologist to review and sign off and finalize, but a lot of the base grant work was actually able to be done by an admin team member. It added value, added quality to their enjoyment of work, and a win-win all around.

Other obvious things you can do. Generate more revenue for your practice. That makes sense. If you've got more time, you can put that straight back into consulting. If all the team members are using AI notes, for instance, it massively reduces the overhead of an appointment because it's all done. People can often responsibly and ethically see more patients because they don't have that same level of admin overhead. Wonderful way to go. Often people have a desire to create a course, write a book, and often they've got a particular interest, and they've got something to say. We actually have a book coming out on this very topic we're talking about today, because we get so many requests for this content.

We're like, "Let's put it all into something." That's something you can do when you've got so many things automated and systematized that it frees you up mentally. Of course, from a practical point of view, you can review your management, you can do more debt collection if that's an issue, and spend time, but so many practices don't end up following up on debts. With more time, they actually can get to those things and that makes a huge financial improvement to their practice. Things like performing basic SEO, although I would suggest using experts for some of that.

Of course, finally, and I would say most importantly, and what I'd encourage most people to do first off, if they've been lacking this focus on family time. You don't need to put that extra time back into the practice, put it into family time, making sure that you're getting a healthy amount of sleep, and you're pursuing the activities and the joy, the stuff that brings you joy and happiness. That then the day leads to a happy practitioner, a happier you, a happier practice, better outcomes for patients, and certainly improves the longevity and sustainability of that. On that, I will hand back. I think Delbar is going to pick up here and take us through any questions, but that finishes the thing that I wanted to cover today. Hopefully, that's gotten your brains thinking about how you can streamline the way that your practice operates.

Delbar: Brilliant, thank you, Damian. We have a few questions for you to answer. We have one from the chat box to start. Is the AI able to produce intake notes? Can it transcribe phone calls?

Damian: It can, but it needs a way to listen. If you did it on speaker, like if you had your phone on speaker, then it will be able to do that. It will be able to listen and transcribe that. Then if you have an intake template, which you can create, we have them pre-built, but you can also modify it or create your own, it will then look at each of those heading titles, what content you have covered, and it will get the content from the transcription and it will put it straight into that, but it will also put it in appropriate format, appropriate language, and you can give it guidance.

You can say, "Hey, I like my notes like this. I like using dot points, or I like using a lot of patient quotes," or whatever might sort of match your style. You can actually give it that instruction at a sort of settings level, so you don't have to tell it every time. It will know that, and it will apply that. Then, if you get the draft of notes and you're like, "Oh, I want a bit more detail, or I want that summarized," there's a chat with it. Once it produces a note, you can actually chat, and say, "Actually expand on that, or include more quotes, or remove some quotes," whatever you like.

You can refine it however you like, and the AI will do it all for you. We keep an eye on how many revisions a note takes. That gives us an idea of how well it's getting it straight off. There's very few revisions statistically. That's amazing. The AI is producing a note using a template and getting it right most of the time without needing changes, but changes are super easy.

Delbar: Brilliant, thank you. We have another question asking, how do I balance working in my business and working on my business?

Damian: It's a really, really good question. This is something that is universal **[unintelligible 00:46:49]**. What I think is really important, and I've seen people try different ways, but the way that I think works most successfully is blocking out and quarantining time on whatever frequency makes sense for you, that is work on your business time, because what tends to happen is people get so caught up in the day-to-day of the clinical work and working in it that they never step outside of it. It's like, "Oh, well, I'll get to it." It's like, they almost feel like working on their business, they need to do with leftover time. Of course, no one ever has that.

Scheduling and blocking out some time in your schedule that says this is work on the business time. For me, I think when I started out early on, I think we had, it might've been every Friday afternoon that we'd block out. To them, it was purely for work on the business. Now, as time goes on, you can adjust the frequency of that. We've had practices where the practitioners are so overbooked. They're really-- they've got big waiting lists and they're so overbooked that they feel like it's impossible. What we'd sort of say and what we've done with them is saying, "Look, just start with whatever you can do, even if it's a few hours a month." That's what you can do to begin with.

Block that out, dedicate that time to that, and protect that time. Don't let anyone book appointments in there. Then you can slowly expand that out. As things progressed, it ended up being every Friday I would spend working on the business or on the practice at that stage. Then slowly change the ratio of clinical time to working on the business. Of course, what happened is you start getting a return on working on your business. You get more efficiency or you're employing people, whatever that looks like, which then has a positive snowball effect because then you get a little bit of

relief. You're less busy, which gives you more time to work on the business, and you get a positive cycle occurring.

Scheduling it and protecting that time is the key. Just start with whatever you can do. If you're listening today and think, "Oh, there's so many things." Just start with one or two things, like grab something and make that your focus for this week or this month. Don't need to take it all on. Just pick one and start there, and then slowly build it up. Before you know it, the benefits of that will have accumulated.

Delbar: Wonderful. We have someone else who asks, "Could you elaborate more on the principles and processes part that you discussed in the delegation tasks slide?"

Damian: Yes. Let's see how to think about this. I think there's a tendency sometimes to write instructions that are very procedural. That can be helpful in the right context. A good idea might be, let's say, maybe a debt collection policy. If someone has an outstanding invoice in a practice, you might write out steps of, "Okay, on day one, the system's going to automatically send this. Day three, the system will send a reminder," whatever it might be, a week or a month, whatever your terms are. Then you might step out, "Okay," and then on the fourth day, you give them a call and you say this.

That's very procedural, and that's hugely helpful. There's nothing, absolutely nothing wrong with that. If you don't have something that talks about the principle of debt collection, or the principle of your no-show, it means that in reality, when a person is performing those steps, if they don't understand the principle, they only understand the steps. As soon as something happens that's outside of the script they've got, they won't know what to do. For instance, with the debt collection, if the person on the phone was to say, "Look, I've got a financial problem right now, but I'm going to come in on whatever day and pay."

If you don't have a principle about, "What is the principle in terms of flexibility and patient welfare, and that balance between the commercial interests and the patient interests, that what is reasonable and ethical for us to do?" If that principle isn't articulated and a patient says that to an admin person, throws a curveball at them, they won't know how to answer it. When you give a principle and say, "This is the principle we take that, it's important from a commercial point of view that we collect. However, there are some circumstances where we are going to be generous or we're going to waive a bill or we're going to do something." If that principle is understood by everyone who's performing that function, it means that when something comes and is a curveball, they'll know how to respond to that drawing on the principle.

Another perhaps more accessible example would be if we said, "The principle is that when people walk into the practice, when patients walk into the practice, that they have a positive experience, it feels friendly, it feels welcoming, et cetera." Now, it means that if that principle was really well understood by the team, that means that if there is something that violates that, it will be detected by the team without you having to deliberately say. For instance, if the flowers looked wilted, you had flowers on the front desk and they looked wilted, a team member would understand that violates the principle of it looking fresh and warm, and welcoming.

If a team member understands the principle and someone comes in and they feel a little bit flustered and they're a little bit unsure, they're a bit nervous perhaps it's their first appointment, and the team know the principle that everyone should sort of feel warm, welcome, safe, and so forth as a principle, then they know then what to do. They'll know that, "Okay, what do I need to do to make this person feel warm, safe, welcome, et cetera." Without it needing to be, it's not then a procedural step-by-step. It's not about the greeting or a script that they say when they walk in. They know the principle that they're trying to achieve.

What you'll find is you have those principles already in your head. I bet you nearly every person watching this right now has very clear principles of what they're trying to achieve in lots of areas. Maybe not everything, but a lot. We often don't communicate those principles, or we assume that they're common sense. We assume that everyone, of course, people would know that patients should feel this way when they walk in. Chances are that something that we understand is important, that's a function of our training and our background, and our personality.

It may not be intuitive or obvious to everyone else. Articulating the things that are in your mind that you may even think are so straightforward or so-- just so obvious, means that your team can respond in a way that's consistent with those principles without you needing to specify in every circumstance how they should act. Then you'll get a lot less of those like, "Why did they do that?" Kind of moments. That usually happens when those principles are not shared, not understood, even though you think they should be.

Delbar: Wonderful. We have another question that asks, "What are some strategies for doing a quick mental reset to sustain productivity instead of trying to push through fatigue?"

Damian: We could do a whole workshop on that. There are different things for different people, I think. I'll just talk about what I use, but it varies for different people. For me, a mental reset, I can either achieve it in one or two ways. One is a change of environment and a change of activity. I'll even do it in the context of the work I'm doing now, but I definitely used to do it in clinical practice as well. Change of environment, so I'd get out, I'd go for a little walk, or I'd sit outside or sit away. There's something that changed that and where there was low stimulus.

That, it was one that was a go-to. If that wasn't available for me, I would use mindfulness. That, again, people have different views about what mindfulness is and what works for them, what doesn't. I'm not suggesting a one-size-fits-all, but for me, taking a few moments, sort of focusing on what I'm thinking, feeling, what's causing me stress, those sorts of things, I would find very helpful. Probably the third thing that I think is, our brain is going to only hold so much. If we find that there's too many things going on, it's not just that simple, getting it down on paper or your phone notes feature, whatever you use.

When our brain has a bunch of stuff on the go, or things we're worried about, or things to do on that to-do list, it doesn't want to forget. In trying to help us, it keeps bringing it to the forefront, and that just increases cognitive load. I just think of it as outsourcing that memory to whatever you use. I'll use a combination of my phone notes, I'll use sometimes pen and paper if that's what's convenient, but just get it out

of my brain and go, "Okay, that's all safe somewhere, my brain knows that's all there. Then I can focus on what's at hand." A combination of those three things I'll usually find is helpful. Of course, the first thing is recognising when you're feeling that way and that you need to do something.

Delbar: All right, looks like we have time for maybe one or two more questions. Somebody asks, "Any advice for those trying to start a practice?"

Damian: Yes. We actually do a lot of work with people starting practices, and it's often-- people change practice management software to us midway through, that's very common, but also when people are first starting practices, they're often looking for software. We often join their journey, with them at that time. I think there's probably a few key things to think about, but really to get really grounded about what you want your practice to be, what you want it to do for you, what the goals are. My wife's a psychologist also. We have that saying of, "Start as you mean to go on." We use that a lot in lots of different things.

It applies to starting practices, is to spend that time initially and writing it down. What it is? What are you looking for professionally? What are you looking for in terms of time commitment? What are you looking for from a financial return point of view? Are you looking to grow a practice or are you looking to be a solo practitioner? Getting those things really clear because once you've got that, everything else then starts to slot in. Any other decisions that you make often be guided by those principles. At a very base level, I would start with that. The next thing I think is really around, speaking to if you've got friends, colleagues, and so forth that have practices, is speaking to them to get a bit of guidance. If you can get a local mentor or someone that is happy to help you, that can be really useful in terms of giving you confidence.

If you don't have that locally, you can also use some of the Facebook groups. If you search, you'll find that it's often support groups, not in support in terms of therapy, but groups of professionals that are in private practice and that are going through similar sorts of things in different stages of the journey. We see a number of those, and we interact with a number of those around the world, and they're really helpful because people are often happy to mentor. People have been in practice for quite some time, know exactly what that's like, and you can really draw on the experiences of others. That makes a huge difference. In fact, not to try and push the-- I try not to turn these into an ad, but in all seriousness, on our website, if you go to our blogs, we actually have a whole bunch of articles going into some of the things I've talked about today. We really, our passion, you can tell what we love doing is helping practices. We write a lot of content on trying to help. If you go to our website and have a look, you should be able to find some really good resources there, and lots of-- we have a webinar back catalogue as well that you can watch. It's all free. Hopefully, you can really gain some things out of there because that's part of what drives us outside of the actual technical side of the software.

Delbar: All right. Thank you so much for joining us, Damian, and thank you to all of our listeners for your participation. We'd also like to thank Zanda for making this webinar possible. A recording of this presentation will be emailed to everyone in two weeks' time. The recording will include the presentation slides. As soon as the webinar has ended, a short survey will appear on your screen. Please take the

survey and give us your feedback. We thank you for your attention and hope you have a great day.

[01:01:22] [END OF AUDIO]