

TOPICAL WEBINAR FOR APA MEMBERS

An Educational Resource from Zanda

Increase Practice Productivity:

Save 10–15 Hours Weekly

MAY 21, 2025

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Attendance

- No CE credit will be offered for this webinar.
- A “Certificate of Attendance” will be emailed to live attendees only.
- You must attend for 45 minutes to receive the certificate.

Recording

- A recording of this presentation will be emailed to everyone in 2 weeks' time.
- The recording will include the presentation slides.

Have a Question?

- You are on mute. Communicate using the **Q&A box** in the webinar screen. Attendees can view and upvote on submitted questions in the Q&A box to help presenters identify popular topics.
- Presentation slides will be posted in the **chat box** of your webinar screen.





Damien Adler

Presenter

- **Damien Adler**
 - *Registered Psychologist in Australia*
 - *Head of Customer Success, and Co-Founder of Zanda Health*

What We'll Be Covering Today



- 1 What Sustainable Practices Look Like
- 2 Evolve Your Admin
- 3 The MBA Productivity Mindset
- 4 Build Your Playbook
- 5 Leverage Other Professionals
- 6 Automate Tasks
- 7 Once-ify Your Processes
- 8 Benefits of Increasing Admin Efficiency

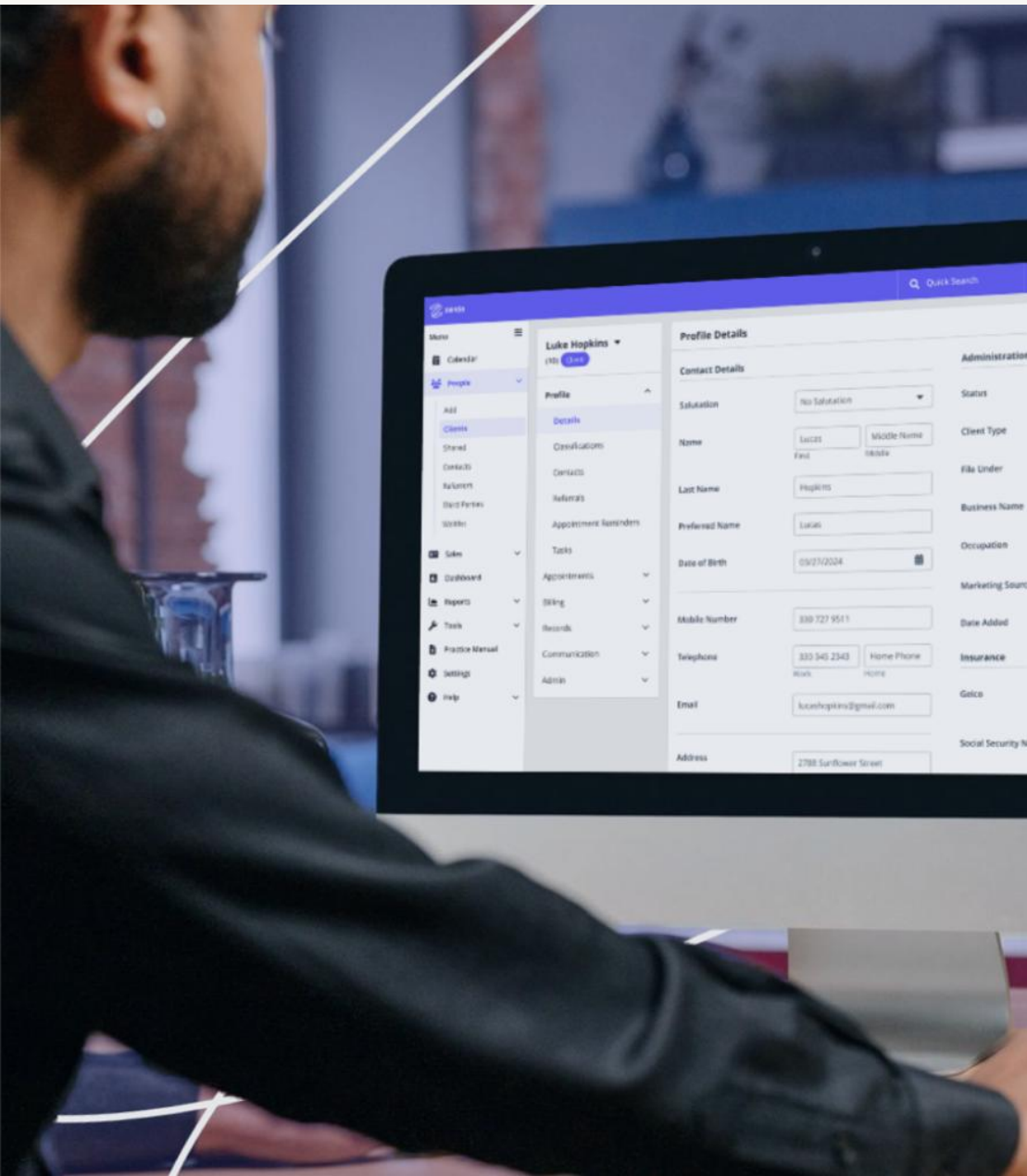
Income - Expenses = Profit

Income Sources

- Patient consultations and services
- Assessments
- Report writing
- Telehealth services
- Group services
- Product sales
- Workshops / e-courses

Expense Sources

- Clinician salaries
- Administration salaries
- Operating costs
- Rent
- Phone and internet utilities
- Office supplies
- Advertising and marketing costs
- Insurance



What a Sustainable Practice Looks Like

A sustainable practice makes a **consistent profit**

Clinicians are **well-supported** by administrative processes

The **right people** are doing the **right jobs** effectively and efficiently



Evolve Your Admin

Different things make sense at different times in your business development

As your practice grows, it's essential to **evolve how you do admin**

Do you have the **right people** doing the **right things**? What's the next task you can delegate now?

The MBA Productivity Mindset



1. Build Your Playbook

“Good order is the foundation of all good things.”

Edmund Burke



Build Your Playbook

Your business is a **system that produces outcomes**

Your playbook is the **manual to your business system**

You want to capture your learnings to **make processes repeatable**

Build Your Playbook

Admin tasks you can build into your playbook today:

- Time batch tasks
- Create schedules to simplify routine tasks
- Keep a list of commonly used suppliers to simplify reordering
- Prioritize payment of essential services
- Develop policies for your phone hours and clearly communicate availability
- Develop policies for fees and payments
- When you receive payments from larger organizations, factor in payment cycles as a cost
- Create appointment blocks with breaks; use that time to write notes between sessions

2. Leverage Other Professionals

“Great vision without great people is irrelevant.”

Jim Collins



Leverage Other Professionals

Time is money (opportunity cost)

Consider **outsourcing duties** that take you away from seeing clients

Evaluate your and your staff's **capacity**

Delegate certain tasks to experts

6 Principles for Delegating

1 Use your energy wisely.

4 Do what you're best at.

2 Your time is not free.

5 Be patient.

3 Delegate to those that are better or faster.

6 Use principles and processes.

Leverage Other Professionals

You can leverage **other professionals' expertise** for:

- Marketing and advertising services
- Property maintenance (e.g., landscaping, cleaning services)
- Accounting and bookkeeping
- Utility services (e.g., electrician, plumber)
- Virtual reception services

3. Automate

“Automation is cost-cutting by tightening the corners and not cutting them.”

Haresh Sippy



Automate

“Set and forget” repetitive tasks

Arrange **automatic deliveries** with providers you regularly order from

Put tasks on auto-pilot and save yourself the trip

Create a process/system to catch tasks that fall through the cracks



Automate

Admin tasks you can automate:

- Replenishing office supplies
- Photocopier maintenance
- Flower and fruit deliveries
- Laundry services
- Cleaning services
- Alarms and physical locks
- Replenishing refreshments (e.g., coffee, water cooler)

Automate

Practice management tasks you automate:

- Automate intake forms
- Online bookings
- Email and SMS communications and appointment confirmations
- Invoicing and fee collection
- Automate session tracking with session pack templates
- Out-of-office emails and answering machine messages
- Online payments
- Customer recalls

4. Once-ify

*“Work hard, and you will earn good rewards.
Work smart, and you will earn great rewards.”*

Matshona Dhliwayo



Once-ify

Once-ify: To design a process that you only need to perform once to achieve standardized outcomes

Training: Instead of demonstrating multiple times, film a video

Thinking: Instead of drafting a new message every time, write a script for answering machine messages (e.g., Christmas and Easter holidays)

Once-ify

Example tasks you can once-ify:

- Creating checklists (e.g., opening & closing, weekly cleaning, onboarding)
- Recording a video of tasks/processes
- Creating templates (e.g., note-taking templates, letter templates, SMS & email templates)
- Writing scripts for answering machine messages
- Finding a quality service you can rely on (e.g., electrician, plumber)
- ***What do you need to once-ify?***

What Will I Do With All My Free Time?

When you increase admin efficiency, you can:

- 💡 Utilize your admin team for better value-add tasks
- 💡 Generate more revenue for your practice
- 💡 Research blog articles to write
- 💡 Create a course
- 💡 Develop pitches for contracts
- 💡 Review management
- 💡 Perform debt collection outreach
- 💡 Perform basic local SEO (e.g., keeping your online business profiles current)
- 💡 Or family time, focus on health, sleep in, binge a series...

Audience Q&A

Final Thoughts

- A recording will be emailed to you in 2 weeks. It will include the presentation slides.
- Take our survey immediately after the webinar has concluded.

Thank You!

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