

**LIVE WEBINAR**  
 Tuesday, June 6, 2023  
 4:00 PM (Eastern Time- US)

**Hidden Strategies to Smart-Work Scaling**

**3 Insider Tips to Therapist Growth with Virtual Support**

Live Discussion with Hosts **James Marland & Dr. David Hall**

**Replay Available After**

[www.PsychMaven.org](http://www.PsychMaven.org)

In the Chat (far left tab on the side right of the video), introduce yourself & share your City/State (or Province)

Also, see our Polls (middle tab by video) and let us know some of your goals and what you might see as some barriers

1

## You're in the right place if...

- ✓ You have “ever” considered how virtual support could help you in your work as a helping professional.
- ✓ You are completely new to using virtual support and want some starting idea OR if you are already using a VA but would be interested in more scaling ideas with the help.
- ✓ You want to use your time and professional giftings more efficiently.
- ✓ You want to hear about ways to scale up without simply working harder.

2

# Here is what you will learn by hanging out today...

- ✓ **3 specific ways** that virtual support can offer dynamic scaling solutions to therapists and helping professionals in different areas of work.
- ✓ If you stay to the end of the hour, you can get a PDF download of the [webinar slides](#), and access to other [bonuses](#) and [special offers](#).
- ✓ For those who are with us live, there will be Q&A time to answer your questions about different areas of virtual support.

3

## S. David Hall, PsyD (LMFT, LPC-MHSP)



Co-Owner & Clinic Director of [Haven Counseling Center](#) in Knoxville, TN. As well as the creative lead for [PsychMaven](#), a group that provides clinical continuing education and business/career development resources for behavioral health professionals.

[www.PsychMaven.org](http://www.PsychMaven.org)

## James Marland, MAM, MBA

Owner and Principle of [Course Creation Studio](#), which provides resources and services to therapists and other professional helping in creating new revenue stream with online course, podcasts, and other digital products.



[www.CourseCreationStudio.com](http://www.CourseCreationStudio.com)

4

What are your biggest fears  
when hiring a virtual  
assistant using AI, or  
implementing Automation?

5

What dreams do you have  
when it comes to  
hiring a virtual assistant  
using AI, or implementing  
Automation?

6

# Defining “Virtual Support”

- Virtual Assistants (VA's)
  - Professionals who provides a range of administrative, technical, or creative services to clients from a remote location. Utilizing digital tools and platforms. Their costs are often less than other support options because they can be less than fulltime, and they may work in other countries with favorable currency/cost-of-living exchange
- Automations
  - Software driven solutions that manage appointment reminders, office check-ins, and phone systems, without having to manual repeat certain tasks
- Artificial Intelligence (AI)
  - Computer systems that can utilize learning, reasoning, and self-correction and can add this to the automation process

7

What is a problem that would be solved in your office with the application of an assistant, an automation, or AI?

8

## Three Scarse Resources Maximized by Assistants, Automation, and AI:

- Time
- Focus
- Energy

9

## Insider Tip #1 Therapy Practice Management & Support

- VA services can provide:
  - Intake coordination
  - Scheduling Management
  - Insurance Filing and Billing
- Key Automations can provide:
  - Email & Text Appointment Reminders
  - Virtual Reception and Client Check-In
  - Automated Payroll Service

10

# Determine Your Needs

- Begin by identifying the specific tasks and responsibilities you want your virtual assistant to handle.
- Consider the skills and expertise that would be valuable in a virtual assistant for your therapy group practice.
- Reflect on the pain points and challenges your therapy group practice currently faces.
- Do a Time/Task Audit to uncover tasks that suck up your time
- Do a crush/cringe Audit for tasks that drain your energy
- Do a survey of staff or have them do a time audit to involve them in identifying tasks that could help everyone

11

# Delegate Tasks Progressively

- Begin by assigning smaller, less critical tasks to your virtual assistant to help them become familiar with your practice's workflow.
- Gradually increase the complexity and importance of tasks as they gain confidence and demonstrate their capabilities.
- Take a balanced approach of expecting gradual growth without expecting a 100% perfection

12

# Trust but Verify

- Regularly review your virtual assistant's performance to ensure they meet your expectations.
- Provide constructive feedback and guidance when necessary. Encourage open communication and address any concerns or issues promptly.
- Employ project management and monitoring tools to keep track of the virtual assistant's progress and productivity.
- Establish a clear line of communication with your virtual assistant and encourage open dialogue.
- Schedule regular check-ins to discuss their work, address any concerns, and provide feedback.

13

## Insider Tip #2

# Social Media Management & Marketing

- VA services can provide:
  - Responses to social media posts and emails, creation of original posts and graphics, etc.
- Automations can provide:
  - Schedule cross-platform post (Hootsuite, Repurpose.io)
- AI can provide:
  - Writing marketing copy, provide marketing research, etc.

14

# VA Management of Social Media Best Practices

- Clearly define tasks and expectations
- Establish a communication plan
- Use a Project Management board
- Provide access with limitations
- Train and onboard effectively
- Start with small projects to build confidence and trust
- Monitor and review their work

15

# Using Automation to manage Social Media

- Set clear goals and objectives
- Choose the right automation tools
- Maintain a consistent brand voice
- Schedule posts strategically
- Engage with your audience
- Regularly review analytics

16



# Using AI with Social Media

- Content generation
- Caption writing
- Content brainstorming
- Content variety
- Grammar and editing
- Hashtag research
- Social media responses
- Collaborative content creation

17

## Insider Tip #3 Podcast & Online Course Production

- VA services can provide:
  - Video/Audio Editing, graphic creation, guest scheduling.
- Automations can provide:
  - Scheduled podcast release dates, funnels and deadlines for course sales, automatic/schedule emails
- AI can provide:
  - Writing copy for presentation slides or podcast episodes, provide research resources for topics.

18

# Using a VA for Podcast & Online Course Production

- Clearly define tasks and expectations
- Provide detailed instructions and resources
- Use project management tools
- Use templates and forms
- Give lead time and deadlines
- Maintain regular communication
- Ensure data security
- Monitor and provide feedback

19

# Automation for Podcast & Online Course Production

- Schedule Newsletters
- Schedule Social Media
- Apps and software to schedule guests
- Google forms to capture guest information and store it on a spreadsheet
- A lead magnet funnel that automatically enrolls new subscribers to a welcome e-mail drip series that ends in an offer

20

# Using AI for Podcast & Online Course Production

- Transcription and Captioning
- Content Editing and Enhancement
- Automated Translations
- Voice and Chatbot Assistants
- Content Ideation
- Outlines
- Scriptwriting Assistance
- Fact-Checking and Research
- Summarize transcripts into blog posts and social media content

21

About to get to the access for the slides...

...and for some more thoughts how to get the most out of virtual support

22

# Making Light The Load

The Entrepreneurial Therapist's Masterclass to Maximizing Your Margins with Virtual Support, Automations, and AI

with James Marland

PsychMaven

## Premium Online Course

Open Enrollment Closes June 14, 2023

23

## Making Light The Load

The Entrepreneurial Therapist's Masterclass to Maximizing Your Margins with Virtual Support, Automations, and AI

- ✓ The complete **start-to-finish guidebook** for therapists and other helping professionals looking to get the most out of virtually support to truly scale their impact and lessen their workload.
- ✓ The course is broken up into **9 mini-course modules**, so you can get to the information as quickly and simply as possible and not waste any time finding what you need.
- ✓ And if you enroll in the course and decide it is not what you wanted, PsychMaven has a 30-Day full refund window after purchase.

24

## 9 Mini-Course Modules

- ✓ Building a Strong Foundations For Success with Your Virtual Assistant
- ✓ Maximizing Your Virtual Assistant: A Guide to Choosing the Right Tech
- ✓ Unlocking the Potential of Remote Work: Tips for Managing a Virtual Assistant
- ✓ Online Security Best Practices for Virtual Assistance
- ✓ Ensure quality every time: Creating Your Practice Standard Operating Procedures
- ✓ How to assign work: Delegation and Decision-Making Best Practices
- ✓ Plug and Play Job Descriptions for a Virtual Assistant
- ✓ Trouble in Paradise: Problem Solving Common Issues when Managing a Virtual Assistant
- ✓ Scaling tools of the future: Utilizing AI and Automations

25

Common virtual support courses for therapists are over **\$700** and do not cover areas of support around none-practice like online course management.

....this pilot program of the course is being offer for **great price \$\$\$** for our beta group

26

## Making Light The Load

The Entrepreneurial Therapist's Masterclass to Maximizing Your Margins with Virtual Support, Automations, and AI

Current Open Enrollment Closes on **June 14, 2023**,  
to get lifetime beta-launch access a single payment of:

**\$217**

(**First 10** people to Enroll to a Content-Input Consultation Call)

Enroll at **no risk**, there is a no questions/full-refund policy  
within **30-Days of Purchase** (Course Goes Live- July 14, 2023)

[Virtual.PsychMaven.com](https://Virtual.PsychMaven.com)

(Webinar Replay and Handout Download at the Link Above)

27