

Case Study

Thriving Therapy Practice Streamlining Administrative Processes Administrative, Operational, & Project Support

Project Overview

Jennifer Sneeden, LMFT is a six-figure psychotherapy coach who specializes in helping other psychotherapists build wildly successful six-figure private practices. Jennifer's business was a single-led entity with no administrative or operational support in place. Despite having been in existence for years, with increased success year after year, Jennifer was still hesitant to hire an assistant.

Challenges

Jennifer was overwhelmed with the backend of her operations and the many balls she was juggling starting to fall through the cracks. She needed someone to help her streamline all of the backend processes, support her clients, and manage the day to day operations so she could focus on servicing current clients, getting new clients, and creating amazing products and training programs.

Solution

Utilizing our administrative, operational, and project support services, Gwendolyn did an in-depth assessment of Jennifer's backend processes and client support functions to clearly understand the strengths and weaknesses of the business. Gwendolyn then worked with Jennifer on implementing processes, policies, and systems to increase her effectiveness with current clients, implement strategies to obtain new clients, and to give her peace of mind.

Result

The plan resulted in the implementation of an electronic customer relationship management system with marketing automation features. This new system helped Jennifer merge all the multiple systems she was using to manage clients and track leads into one system. Using this new system, she was able to manage clients, quickly engage new leads, manage events, process payments, and market to both existing clients and new clients all from one place. The plan also included implementation of a client support tier, where now client concerns, questions, etc. are managed and only urgent items reach Jennifer's attention for review and action. Our work with Jennifer resulted in many new clients, development of two new training programs, increased revenue and profits, and Jennifer taking a stress-free; worry-free vacation for the first time in 17 years!

"Gwendolyn is amazing! She has worked wonders for my business, and I HIGHLY recommend her services. Gwendolyn has systemized my business in a way that has positioned me for tremendous growth this year. I never could've done this without her."
– Jennifer Sneeden, LMFT