

Choosing the right practice

Using Practice Management software in your business can help you be more organised, improve the management of clients, appointments and financial information, and increase your revenue while also reducing the amount of time you spend on administration and paperwork. Choosing the right practice management software, however, can be overwhelming, and all too often busy practice owners end up putting it into the “too hard” basket. But by focusing on a few key areas, the task of finding the right software for your business can be made much easier.

Why do I need practice management software?

Without practice management software therapists typically manage the different elements of their business using separate manual systems. These often include various combinations of a paper diary, or generic calendar system like Outlook, a client list (either in Excel or on paper), physical client files, a Word template or receipt book, and a manual system for recording sales. While this can get the job done, it usually results in the therapist spending too much time on managing basic administration tasks. Practice management software is designed to provide therapists with one system that can integrate and manage the different elements of their business more easily and efficiently.

To Cloud or not to Cloud ...

There are two types of Practice Management Software to choose from, “On Premise” and “Cloud-based”. On Premise software is physically installed on your computer, while Cloud based software is run on a centralised group of servers (“the Cloud”) and accessed via the internet from your computer or phone.

While there are advantages and disadvantages to both, advances in internet availability and speed mean that Cloud based systems have become the increasingly dominant method of providing software. In fact, a survey conducted by McKinsey & Company (the global management consulting company) found that eighty per cent of large businesses surveyed in North America had already or were planning to move to Cloud Based systems.

The advantages of On Premise software is that no internet connection is required, and also traditionally, On Premise software was faster to use. The downside, however, is that the software and information is physically located on an individual computer, meaning that it is vulnerable to loss unless manually backed up, can only be used if you have access to the computer on which it’s installed, and is difficult to scale if you have multiple therapists or locations. Additionally, On Premise software often can become outdated as new updates need to be downloaded (or sent via snail-mail) and physically installed on your computer.

Cloud based software overcomes a number of these issues. As the software is accessed via

internet it is available to multiple users at the same time. In addition, any updates released by the software company are automatically available to all users. Cloud based software is also typically backed up and secured by the software company, leaving one less thing for the therapist to worry about.

The downside of Cloud based software, however, is that it relies on users having internet access, and therefore it may not be suitable for therapists in excessively remote areas with limited land or mobile based internet. Also, while many Cloud based systems are almost as fast as On Premise software, it is worth checking where the Cloud based servers are physically located. If they are outside Australia, the software may feel sluggish to use as information has to be sent from your computer to another country and back again each time click on something.

What features do I really need?

The needs of each practice vary widely, however there are some core features that you could expect from most practice management systems. These include:

- a calendar for appointment bookings,
- a client database allowing you to store client information,
- invoicing and receipting functions,
- sales and financial reports,
- and automatic SMS or email appointment reminders.

Some systems offer additional functions that can be handy. These include:

- capacity for clients to manage their own bookings via a Client Portal,
- ability for clients to automatically confirm or cancel their appointments by replying to their SMS reminders,
- group SMS or email sending functions for newsletters or special offers,
- and letter writing templates and tools to make communicating with referrers and clients easier.

Any practice management software you are considering should have a range of security and safety mechanism in place to protect your sensitive client information. Don’t be afraid to ask the software provider for details about these measures.

management software

How do I decide?

The best thing to do is to start a trial with a few companies and take them for a test drive. Most will offer a free trial without having to provide any credit card details. Assuming they have the features you need, pay close attention to which software you find the most intuitive and easy to use. When you first login the basic functions such as making appointments, adding new clients, generating invoices and running reports should be immediately obvious and simple to do. Using a system that is intuitive will make it easier for you to get started, as well as reduce the time spent training others later.

In weighing up your options there are a few traps to watch out for.

1. First be on the look-out for any lock-in contracts, minimum terms or cancellation fees. Generally these types of arrangements are being phased out, however there are still some out there.
2. Second, ensure that the company is well established. While new start-ups are often launched with a burst of initial funding and enthusiasm, a few years later both of these can be in short supply. Research by the University of Tennessee found that only 37 per cent of new technology companies were still operating after four years. Selecting a software provider that is well established not only helps ensure the safety of your data, but also minimises the inconvenience and disruption of having to change systems later.
3. Finally, check your data export options if you decide to leave the software provider. Your business data belongs to you. Ensure that if you leave you can download or be provided with a copy of your information. Ideally this should be free, but if there is a charge ensure that it is reasonable.

How do I get up and running?

The key to getting started is to keep it simple. Begin by setting a date to switch over. It is often useful to finish with your existing system on a Friday and then start using your new system on Monday.

If you have a spreadsheet of existing clients ask your new software provider to import them for you (or you may be able to import them yourself). Next add your future appointments to the new system. If you didn't have a client list to import the process of adding your future appointments should also create new client files for your current clients.

Finally add the list of services that you provide and your fees. You are now ready to start. Once you are up and running there is always more time to explore the advanced features your software offers.

The right Practice Management Software will make running your practice easier giving you more time to grow your business and enjoy a better work-life balance. Enjoy!



Damien Adler
Co-Founder Power Diary



BY FOCUSING ON A FEW KEY AREAS, THE TASK OF FINDING THE RIGHT SOFTWARE FOR YOUR BUSINESS CAN BE MADE MUCH EASIER.