

Tasks To Delegate



Here's a list of many things you can delegate in your group practice.

It's not comprehensive, but it will give you some ideas. Feel free to mentally check off the things you've already delegated and give yourself a pat on the back!

Billing and Insurance

- Insurance credentialing
- Updating credit card information
- Checking benefits for potential clients
- Following up on unpaid client balances
- Tracking down unpaid insurance claims
- Sending monthly invoices or statements to clients
- Verifying co-pays collected vs. appointments completed

Email and Calendar Management

- Adding new business contacts to your database
- Reading and responding to your business emails
- Scheduling and rescheduling your personal clients
- Covering your phone and email while you're on vacation

Intake and Tracking Metrics

- Responding to all new referrals
- Creating and updating waiting lists
- Calculating monthly conversion rates
- Matching referrals to the best clinicians
- Updating key performance indicators (KPIs)

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Client Management

- Setting up new clients in your EHR
- Sending intake documents to new clients
- Running reports for missing or unlocked notes
- Responding to client requests for rescheduling
- Responding to secure text messages with clients

Social Media Management

- Scheduling regular posts
- Creating social media images or videos
- Monitoring and responding to comments
- Researching content to post on your accounts
- Repurposing your existing content for social media

Content and Email Marketing

- Helping you grow your email list
- Scheduling your email newsletter
- Designing branded email templates
- Uploading and formatting blog posts
- Adding subscribers to your email list
- Creating graphics for your blog posts
- Providing monthly reporting and statistics
- Proofreading blog posts or newsletter content

Other Stuff

- Bookkeeping
- Website design
- Tax preparation

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Other Stuff (continued)

- Human resources
- Payroll preparation
- Reviewing contracts
- Managing paid advertising
- Screening potential new hires
- Supervising pre-licensed therapists