



# Automation Made Simple

**BUILDING A LONG-TERM SUSTAINABLE  
PRACTICE**

@shinewithsheema

# Hi! I'm Sheema



Hey, I'm Sheema 🙋

I'm a therapist, marketing professor, and business coach for clinicians. Over the years I've seen one big truth: the therapists who thrive aren't the ones working the longest hours — they're the ones who build practices with consistent systems.

This guide is about automation — and how it supports Practice, the 4th P in the Brand Builder. Because when your practice runs smoothly in the background, you show up with clarity and confidence out front.

A woman with long, wavy brown hair is sitting at a white desk. She is wearing a light-colored top and olive green pants. To her left is a silver laptop with the Apple logo. To her right is a small potted plant. The background is a light-colored wall with vertical panels.

**“AUTOMATION  
IS A  
THERAPIST’S  
SECRET  
BUSINESS  
SUPERPOWER”**

# 01



## AUTOMATION AS PART OF “PRACTICE”

Most therapists focus on their clients, their clinical work, and maybe their marketing... but your practice itself is the product. The smoother and more consistent your systems are, the more professional (and sustainable) your business feels.

### Why Automation Matters for Therapists

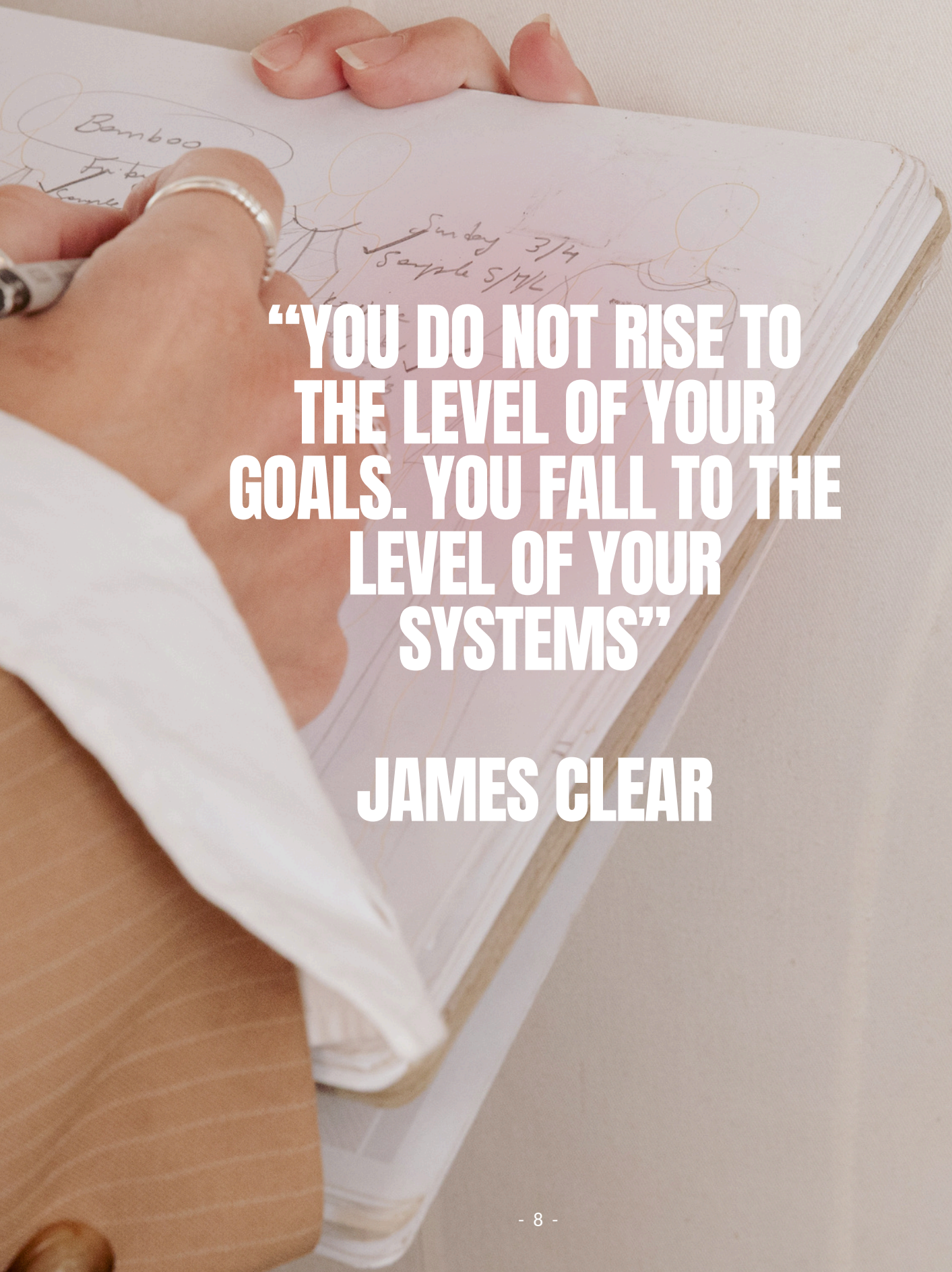
- **Consistency builds trust.** When every client or supervisee gets the same seamless onboarding, reminder emails, and follow-up, it signals professionalism. You're reliable — not scattered.
- **It reduces mental load.** Automation frees up your brain from the constant “Did I send that? Did I forget someone?” chatter. Your energy goes where it belongs: therapy, supervision, growth.
- **It saves real time.** Think of automation as an assistant you don't have to pay. It handles repetitive tasks in the background while you rest or see clients.
- **It supports scalability.** Want to grow into groups, courses, or supervision programs? Automation makes sure you don't collapse under admin chaos.

# 02 EVERYDAY EXAMPLES OF AUTOMATION IN YOUR PRACTICE

Many of us probably already have some automation in our practice already! The way a client books their session, fills out their consent forms, our billing and note-taking are all activities that we can automate!

- **Booking & Scheduling:** Automated booking systems (like Jane, Calendly, or Acuity) allow clients to book without email tag. Integrated reminders reduce no-shows and keep your calendar tidy.
- **Payments & Invoicing:** Clients pay automatically at booking or right after sessions. No awkward fee reminders or chasing invoices.
- **Onboarding & Intake Forms:** New clients receive intake paperwork instantly when they book. Completed forms are stored securely in your system before the first session.
- **Groups & Supervision Waitlists:** Spots fill up? Automation moves people into a waitlist instead of losing them. Confirmation emails are sent automatically, so everyone feels supported.
- **Marketing & Follow-Up:** A new supervisee downloads your free resource → they're tagged in your email list. A simple nurture sequence introduces them to your services and invites them to work with you.





**“YOU DO NOT RISE TO  
THE LEVEL OF YOUR  
GOALS. YOU FALL TO THE  
LEVEL OF YOUR  
SYSTEMS”**

**JAMES CLEAR**

# CLIENT EXPERIENCE & SYSTEMS

Automation to set up:

- Session Reminders → Reduce no-shows with automatic email or text reminders.
- Intake Forms → Send forms to new clients instantly after booking, so they're completed before the first session.
- Invoicing → Automate invoices and receipts to keep payments smooth and stress-free.
- Reusable Email Templates → Build a library of onboarding, follow-up, and rescheduling emails so every client gets consistent communication.
- 

Customized Intake Forms → Design forms that reflect your modalities and therapeutic approach, so you gather the right information from the start.



Save time. Get Organized. See more clients.



# MAKE IT A SEAMLESS EXPERIENCE FOR CLIENTS FROM WHEREVER THEY FIND ME.

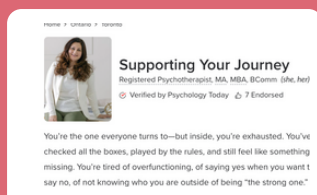
From a Psychology Today profile → to my website → to booking directly in JaneApp, every step is clear and connected.

Because here's the truth: if the process feels confusing or full of barriers, clients may never complete the booking. A streamlined system makes it easy to say yes to working with you.

## TRAFFIC SOURCES

- INSTAGRAM POSTS / STORIES\*
- EMAIL LISTS
- PSYCHOLOGY TODAY
- REFERRALS
- BLOGS
- FIRST SESSION

## PSYCHOLOGY TODAY PROFILE



[Psychology Today Profile](#)

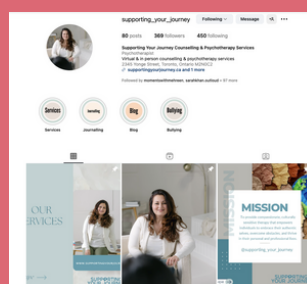


Email: [info@supportingyourjourney.ca](mailto:info@supportingyourjourney.ca)

## WEBSITE



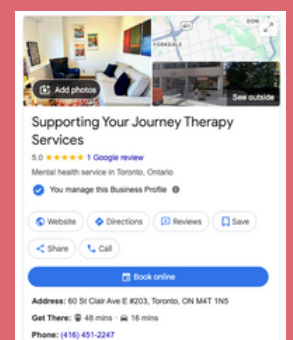
[Supporting Your Journey Website](#)



## FIRST SESSION



[First Session Profile](#)



# AI CLIENT NOTE-TAKING

Klarify isn't a tool for everything — and I get that it's easy to feel unsure about integrating AI into therapy. Here's the honest, specific way I've woven it into my workflow:

## Generating Session Notes Efficiently

After each client session, I upload the audio (or a recording) to Klarify. In seconds, it processes it securely and delivers a structured draft — whether you use SOAP, DAP, BIRP, or a customized template. That takes the hardest part of documentation off my plate.

## Respecting Privacy & Ethics

Klarify is built with top-tier privacy in mind — it's HIPAA, PHIPA, and PIPEDA compliant, entirely Canadian-hosted, and does not use your data to train its AI models. That means your client conversations remain private and confidential.

## Saving Time — Noticeably

It's a leap from spending 10+ minutes writing notes to having a solid draft in about 2 minutes. It's like a weight's been lifted — and it's especially helpful when caseloads get busy

## Ensuring Clinical Oversight

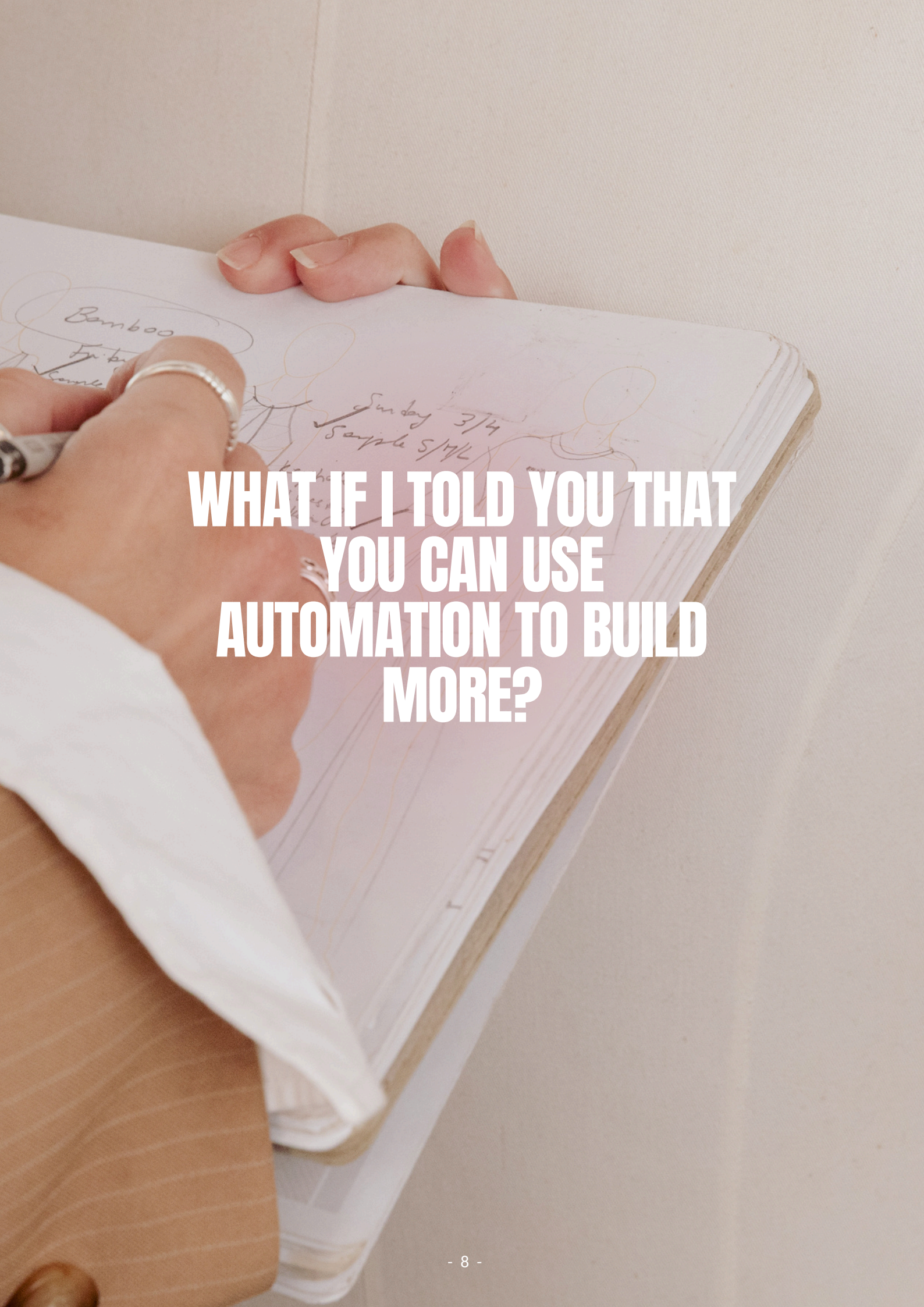
I always review, refine, and personalize the AI-generated notes. The ethical use of AI means the clinician remains in control, ensuring accuracy and maintaining my clinical voice.

**SAVE WITH CODE**

**SHEEMA25**



**klarify**



**WHAT IF I TOLD YOU THAT  
YOU CAN USE  
AUTOMATION TO BUILD  
MORE?**

# GENERATE MORE INCOME WITHOUT INVESTING MORE TIME

**E-BOOKS  
GROUP THERAPY PROGRAMS  
SUPERVISION SIGN UP  
COURSES  
TEMPLATES**



# EXAMPLES OF WHAT I CREATED



Free Guide with valuable KPI Information as a lead generator for my tool

## Tracking Transformer Tool



Sheema's Tracking Transformer Tool

## 5 Metrics That Matter in your Therapy Practice.

A free guide for therapists ready to turn their data into decisions. You didn't become a therapist to feel buried in numbers...

But knowing the right KPIs? That's how you protect your energy and your income.

### What you will get in this FREE Guide

- Inside this FREE workbook, you'll:
- Discover the 5 Key Performance Indicators (KPIs) every therapist should track
  - Learn how to analyze trends and understand what your data is really telling you
  - Use guided worksheets to reflect on your clinic performance, retention, income, and more
  - Turn insights into real actions to grow your practice sustainably

Created by Sheema Khan – therapist, marketing professor, and data geek – this guide is practical, no-fluff, and designed specifically for mental health professionals.



Downloads the Free Guide and provides some valuable insight over email

# DBT GROUP SIGN UP

**6-Week DBT SKILLS GROUP**  
Ready to Feel More in Control of Your Emotions—Without Feeling Like You're Too Much?

Join our 6-Week DBT Skills Program and learn proven tools to manage stress, set boundaries, and build emotional resilience. This isn't just another group. It's a compassionate space to slow down, learn powerful DBT skills, and finally feel like yourself again—with guidance from a licensed therapist who gets it.

6-Week DBT Skills Group  
Skill Building Worksheets  
Supportive Group  
Therapist-Led Ps  
Practical Tools yo

Welcome back Sheema.

**Book an Appointment**

< Back to Booking Page

**Group Therapy Sessions Sessions**

Select a session to view available appointment times for all registered psychotherapists:

**Group Therapy Screening Session**  
30 min This session is to determine if you are eligible to join the group therapy session that is currently active.  
Please contact us to book this session, 4164512247  
Info@supportingyourjourney.ca

Can't find a time?  
[View all registered psychotherapists](#) or [add yourself to the wait list.](#)

**Dialectical Behaviour Therapy Skills Group**  
www.supportingyourjourney.ca

- A place to collect emails of people interested in DBT Group
- Market the group on IG / Facebook

I will get an email that someone is interested in learning more, and will book a 20 minute screening call to ensure that they meet the requirements.

All the materials of the Group will be added to a separate portal that the can log in to that there is no back and forth over email.

The contents can be updated and everyone gets the same updates.

Emails can be sent as reminders for homework, etc.

This can be replicated with Supervision Groups!

# Meet My Tech Stack

01

## JANEAPP

Automates bookings, reminders, intake forms, and payments so your schedule runs itself.

02

## SYSTEME.IO

Collect Emails and Organize Groups

Collect Payment

Passive Income Opportunities

03

## KLARIFY

Transcribes and drafts session notes in minutes, keeping your documentation consistent and secure.

REMEMBER SHEEMA25 TO SAVE!

04

## CANVA

Streamlines your marketing with reusable templates for posts, guides, and presentations.

Bulk Create your content

# USING SYSTEME.IO

**E-BOOKS**  
**GROUP THERAPY PROGRAMS**  
**SUPERVISION SIGN UP**  
**COURSES**  
**TEMPLATES**



# Automating Your Groups & Supervision Sign-Up

Contact me: [hello@shinewithsheema.com](mailto:hello@shinewithsheema.com) | [www.shinewithsheema.com](http://www.shinewithsheema.com)

## Using Systeme.io

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### What's Included in the FREE PLAN

Feature	Included (Free Plan)
Contacts limit	2,000
Sales Funnels	3 funnels, ~15 steps each
Blog & Posts	1 blog, unlimited posts
Courses & Students	1 course, unlimited students
Community	1 community, unlimited members
Automations, Tags, Campaigns	1 each
Upsells, A/B tests, Coupons, etc.	1 each
Emails sent	Unlimited
File storage	Unlimited
Custom domains	1
Affiliate program	Yes
Payment integrations	Stripe & PayPal
Support	24/7 Email

# How to Automate Your Groups & Supervision Sign-Ups in Systeme.io

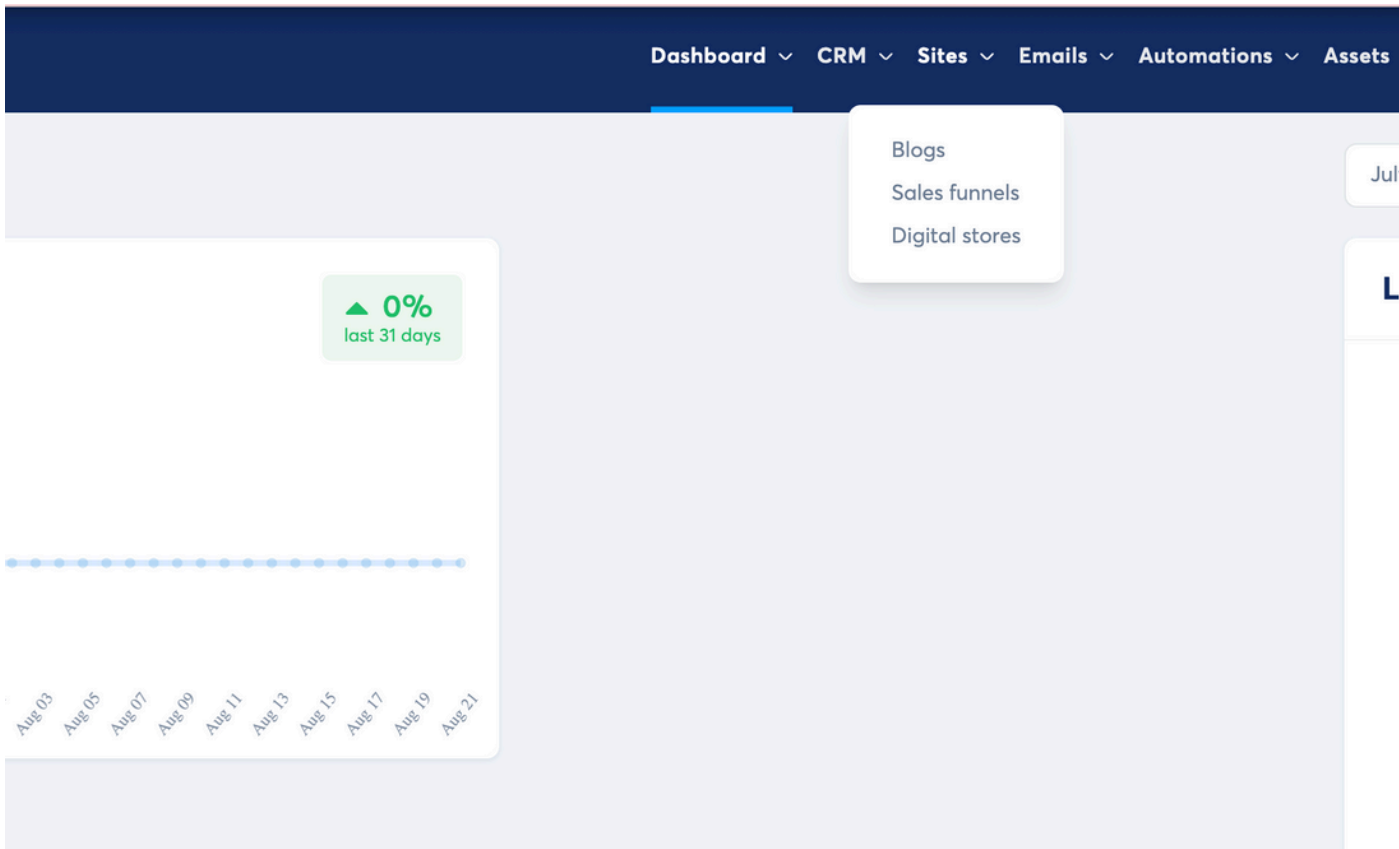
## Step 1. Create a Free Account

- Go to [systeme.io/new?sa=sa02386918328021eaa979da7ca6490eebfeca0a17](https://systeme.io/new?sa=sa02386918328021eaa979da7ca6490eebfeca0a17)
- Sign up on the free plan (no credit card needed).

## Step 2. Create Your Funnel Page

- From your dashboard, click Sites → Sales Funnels → + Create


- A pop-up window will appear → Name Your Funnel (Example: Supervision Group Signup)
- Choose “Build an Audience” (best for sign-ups & waitlists).
- Click Save




Supervision Group Sign Up

bytesized.systeme.io ✕ ▾


Choose your funnel goal\*




**Build an audience**  
Collect email addresses and build your email list



**Sell**  
Sell a product or a service



**Custom**  
Build a custom funnel from scratch



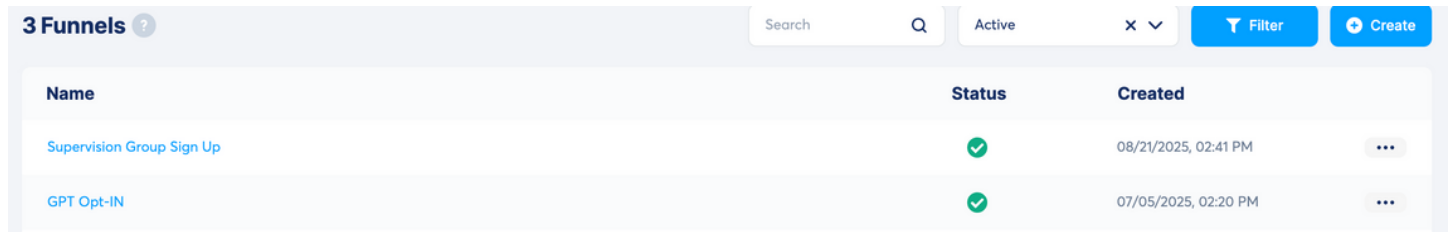
**Run an evergreen webinar**  
Run evergreen webinars to automate your business

Currency

Canadian Dollar ✕ ▾

### Step 3. Add a Sign-Up Form

- Inside the funnel, choose a page template.
- Drag in a Form Block → Add fields: Name + Email.



The screenshot shows a user interface for managing funnels. At the top, there is a header with '3 Funnels' and a search bar. Below the header is a table with three columns: 'Name', 'Status', and 'Created'. There are two rows of data in the table, both with a green checkmark in the 'Status' column and a date in the 'Created' column. A 'Create' button is visible in the top right corner.

Name	Status	Created
Supervision Group Sign Up	✓	08/21/2025, 02:41 PM
GPT Opt-IN	✓	07/05/2025, 02:20 PM

### Step 4. Automate Confirmation & Waitlist

- Click Automation Rules inside your funnel.
- Rule 1: When form is submitted → Send confirmation email.
- Rule 2: When group capacity is reached → Add tag "Waitlist" → Send waitlist email.
- (This way, new people automatically go to waitlist instead of clogging your inbox.)

### Step 5. Set Your Domain

- Using the Systeme.io domain → Fastest to set up.
- Example: yourpractice.systeme.io
  - Great for testing, quick launches, and freebies.
- Using your own domain → Professional branding. Example: groups.yourpractice.com
  - Builds client trust, boosts SEO, and looks polished.

👉 Pro tip: Start free on the Systeme.io domain, then integrate your custom domain once you're ready to scale.

### Step 6. Test Your Funnel

- Submit a test sign-up yourself.
- Check: Did you get the confirmation email? Does waitlist tagging work?

## EXAMPLES FROM SHINE WITH SHEEMA

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I have included examples of 3 different types of pages - opt-in, download free guide, or sales page.

- Sign up to get more updates: <https://www.shinewithsheema.com/newscce>
- Free KPI Tracking Guide: <https://www.shinewithsheema.com/kpiguide>
- Purchase the Tracking Tracking Transformer:  
<https://www.shinewithsheema.com/trackingtransformer>

## EXAMPLES FROM MY SUPPORTING YOUR JOURNEY

- Affordable Therapy Waitlist - I wanted my intern to start off with a list of people to reach out to, without having to go back and forth over email:  
<https://www.supportingyourjourney.ca/affordabletherapyprogram>
- DBT Group Therapy Sign up - Back and forth on group logistics can be difficult and time-consuming - this sign up sheet does not guarantee them a spot, however it puts them on the list of people to have screening calls with on Jane:
- Mental Health Facilitation Workshop - Full payment taken on this site:  
<https://www.supportingyourjourney.ca/twmregistration>

# Want to skip the overwhelm and get coaching and support while you go through this process?

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Your free guide will show you how... but if you'd rather save hours and avoid the tech headaches, let me help you set it up. For a limited time - this is \$97! Don't walk - run!

## What You'll Get for this INTRO OFFER \$97

- ✓ A ready-to-use Group + Supervision Sign-Up Funnel in Systeme.io
- ✓ Waitlist + confirmation emails pre-built for you
- ✓ Step-by-step walkthrough so you can make small edits yourself
- ✓ Bonus: Bi-Weekly Group Coaching Calls for 12 Weeks, starting September - December.

Learning new software when you're already busy with clients can feel overwhelming. That's why I created this \$97 shortcut: I'll give you the exact funnel, emails, and automation you need—so you can:

- Get supervisees signed up without stress
- Never lose someone to a messy waitlist again
- Focus on therapy, not admin chaos

## Ready to launch your automation system without the overwhelm?

Not techy? Don't worry. I've done the heavy lifting for you. You'll just need to connect your account (free or paid) and tweak the text for your practice.

No complicated coding. No hours of Googling.

⚡ Limited: This \$97 offer is only available right after downloading the free guide. It will be offered for a limited time. The price will go back to up \$147 14 days after you download this guide.

[Link to Introductory Offer:](#)

