

AI AUTOMATION AUDIT

Kestrel Physio & Pilates

Where AI fits in your business, what to automate first, and how to bring your team with you.



PREPARED FOR

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XSIV AI, Gold Coast

PREPARED BY

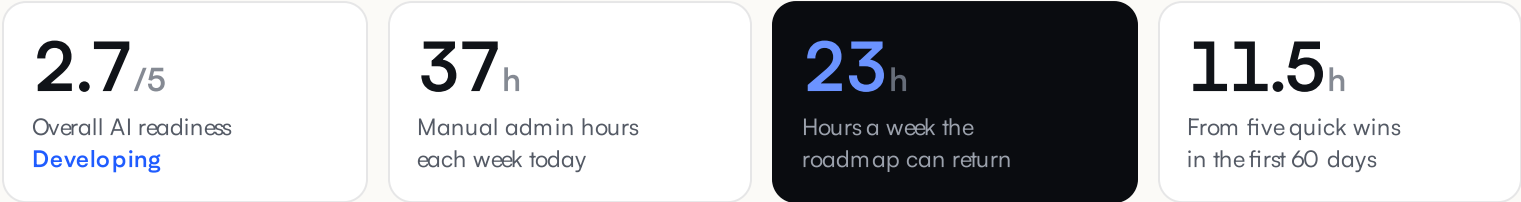
DATE

October 2026

01

At a glance

Kestrel Physio & Pilates is a well run clinic with a team that wants to use AI but hasn't been shown how. Around 37 hours a week go into admin that a person pushes forward by hand. Just over half of that can be handed to simple, safe automation, freeing the front desk and clinicians to spend more time with patients.



What we found

- Strong leadership intent and good core systems, but information is re keyed between them.
- The biggest time sinks are clinical notes, new enquiries and follow ups.
- Three of nine staff already use free AI tools at work without guidance. There is no AI use policy yet.
- The team is curious and wants training. The main worry is mistakes with patient information.

What we recommend

1. **Put safe foundations in place first.** An AI use policy and a business AI workspace in week one.
2. **Start with five quick wins** around enquiries, intake, follow ups, reviews and recall. Low risk, visible results. Our proposal (page 08) prices this as the Growth package.
3. **Train the team role by role** so the tools feel like theirs, then pilot note drafting with one physio.

 No roles are removed in this plan. The time returned goes back into patient care, faster replies and the work the team says it wants more time for.

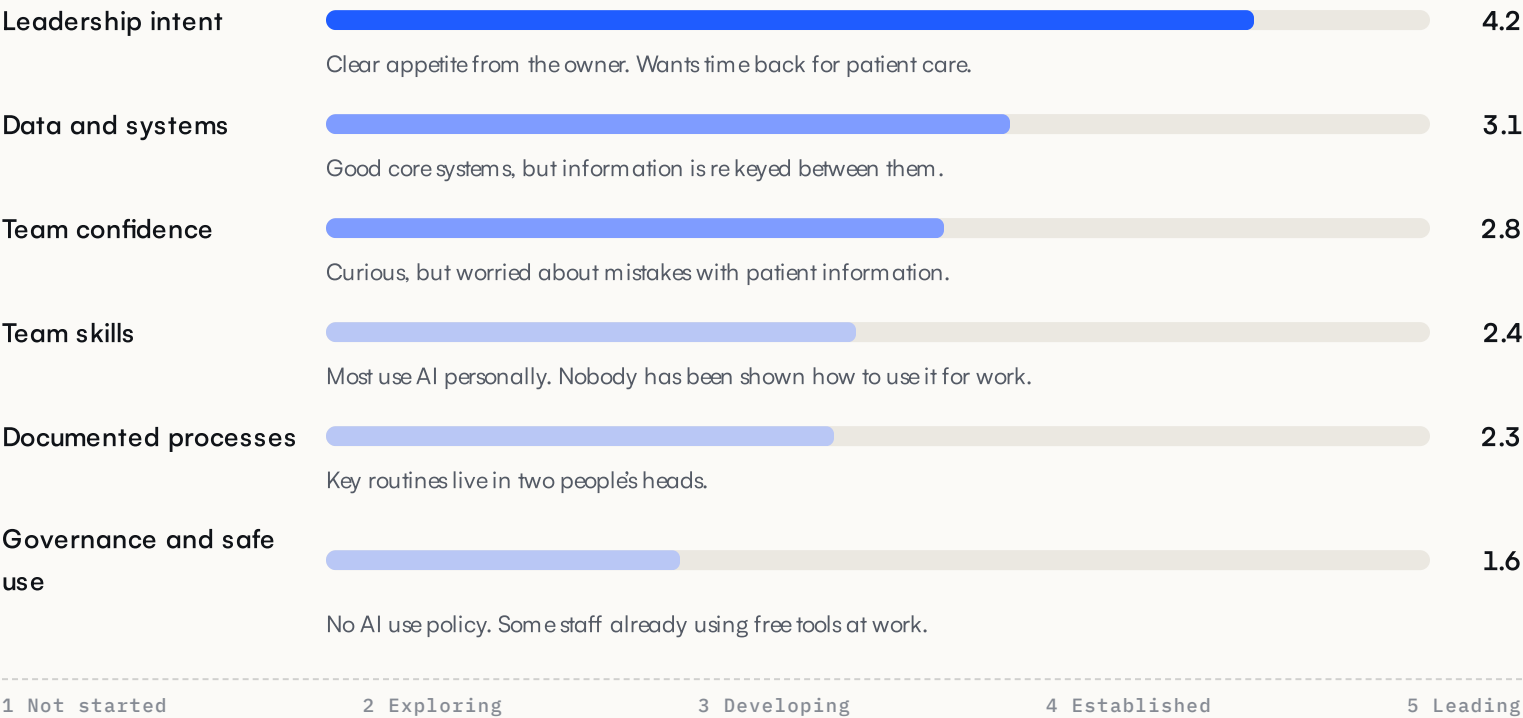
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How we assessed the business

7	10	9	9 of 9
interviews with owners and staff	workflows mapped step by step	software tools reviewed	team readiness surveys returned

Over two weeks we spoke with the owner, clinicians and front desk, mapped each workflow from first contact to final invoice, reviewed the practice system, accounting, email and booking tools, and ran a short anonymous survey on skills, confidence and concerns.

Readiness by area (score out of 5)



Tools we reviewed

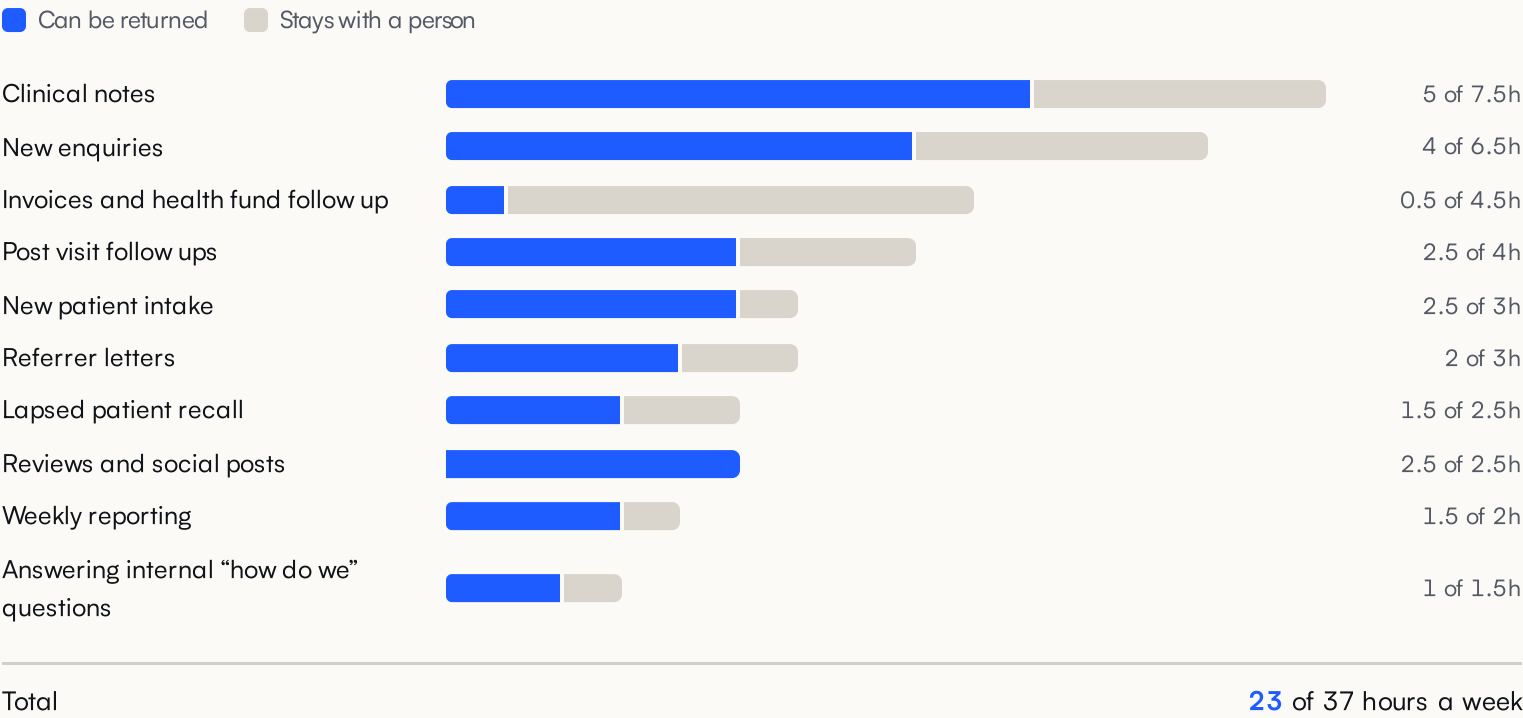
- Practice management system
- Online booking
- SMS reminders
- Accounting (Xero)
- Email and calendar
- Website enquiry form
- Shared drive
- Social media
- Google Business Profile

🔗 The systems are sound. The gaps are in how work moves between them, and in how the team has been supported to use AI safely. Both are very fixable.

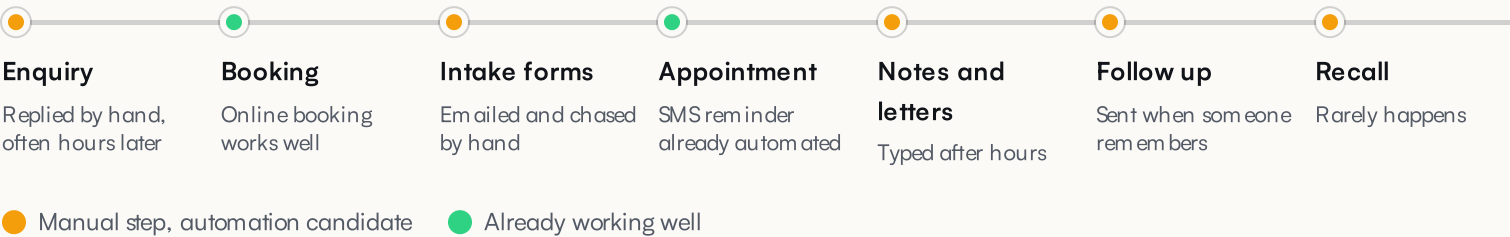
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Where the time goes today

Hours per week spent on each workflow by hand, and how much of it the roadmap can return. The rule we use is simple. **If a person is manually pushing each step forward, it’s a candidate.**

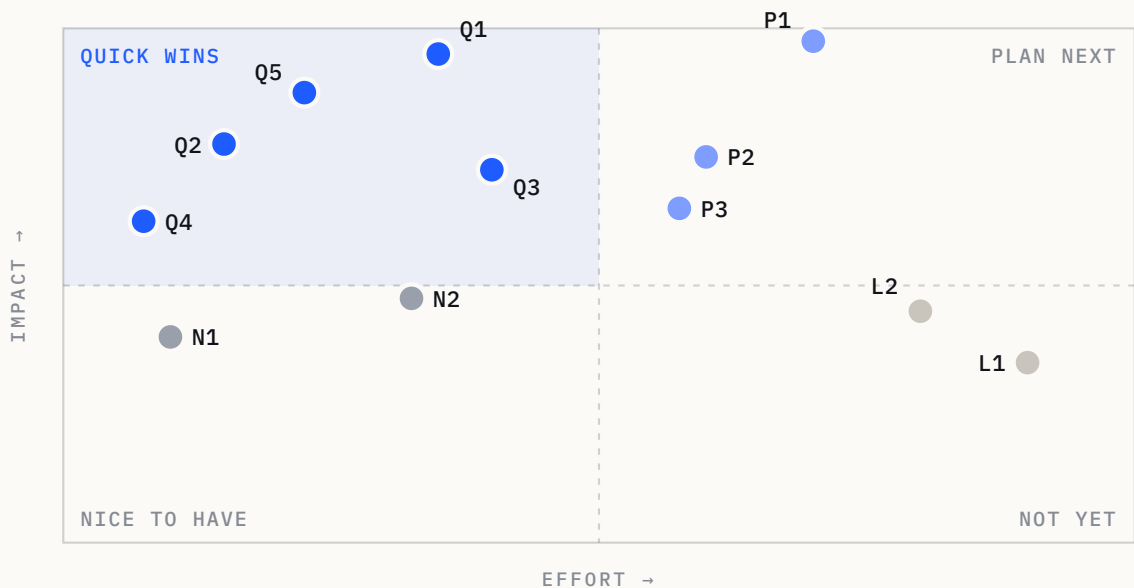


The patient journey, today



🎯 Three workflows, clinical notes, new enquiries and invoicing follow up, take 18.5 hours a week, half of all manual admin time. That’s where the biggest gains sit.

04 Opportunities, ranked by effort and impact



#	OPPORTUNITY	PRIORITY	HRS/WK	RISK	HUMAN CHECKPOINT
Q1	Enquiry replies drafted by AI, booking link included n8n, Claude	QUICK WIN	4	Low	Front desk approves every reply
Q2	New patient intake pack and form reminders n8n, practice system	QUICK WIN	2.5	Low	Front desk checks incomplete forms
Q3	Post visit check in with home exercise reminder n8n, practice system	QUICK WIN	2.5	Medium	Physio approves templates; concerns flagged to a person
Q4	Google review request after the third visit n8n	QUICK WIN	1	Low	None needed; opt out respected
Q5	Lapsed patient recall sequence n8n, practice system	QUICK WIN	1.5	Low	Practice manager approves the list monthly
P1	Clinical note drafting from the physio's dictation Vetted health scribe tool	PLAN NEXT	5	High	Clinician reviews and signs every note; patient consent
P2	Referrer and GP letter drafts from notes Claude (business plan)	PLAN NEXT	2	Medium	Clinician edits and sends
P3	Weekly practice dashboard built automatically Make, Xero, practice system	PLAN NEXT	1.5	Low	Owner reviews weekly
N1	Social post drafts in the clinic's voice Claude (business plan)	NICE TO HAVE	1.5	Low	Practice manager approves posts
N2	Team knowledge assistant for policies and procedures Claude project	NICE TO HAVE	1	Low	Practice manager owns the source documents
L1	AI phone receptionist Not recommended yet	NOT YET	None	High	Revisit in six months
L2	Automated health fund claim reconciliation Not recommended yet	NOT YET	0.5	Medium	Revisit when integrations mature

05

Quick wins in detail

Each quick win is low effort, low risk and visible to the team within weeks. Three of the five are shown here.

Q1 Enquiry replies drafted by AI

QUICK WIN

TODAY

Enquiries arrive by web form, email and Instagram. Front desk replies between patients, often hours later. Around 40 a week, about 10 minutes each.

WITH AI

Each enquiry is logged automatically and an AI assistant drafts a warm, accurate reply using the clinic's own service information and a booking link. Front desk reads, tweaks if needed, and sends with one click.

SAFEGUARDS

No clinical advice in replies. Drafts never send without approval. Only the enquiry text is shared with the AI tool, on a business plan.

⌚ About 1 week to build and test ✓ 4 hours a week, faster replies

Q2 New patient intake pack and reminders

QUICK WIN

TODAY

Front desk emails intake forms by hand and chases missing ones by phone the day before.

WITH AI

When a new patient books, the intake pack goes out automatically, with reminders at 48 and 24 hours. Incomplete forms are flagged to front desk the evening before.

SAFEGUARDS

Forms stay inside the practice system. The automation only sees booking status, never clinical detail.

⌚ 3 to 4 days ✓ 2.5 hours a week, fewer late starts

Q5 Lapsed patient recall

QUICK WIN

TODAY

Patients who stop mid plan are rarely followed up. The owner estimates dozens each quarter.

WITH AI

Each month, patients with an unfinished plan and no booking in 45 days receive a friendly, personal check in inviting them back. Replies go straight to front desk.

SAFEGUARDS

Practice manager approves the list before it sends. Easy opt out. No health details in the message.

⌚ 3 days ✓ 1.5 hours a week, plus recovered appointments

ALSO IN THE QUICK WINS

- Q3

Post visit check in with home exercise reminder

2.5 h/wk
- Q4

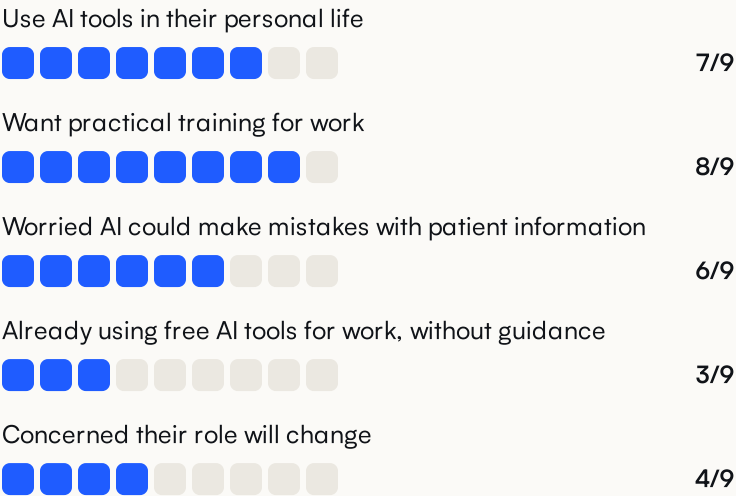
Google review request after the third visit

1 h/wk

06

Your team, and keeping it safe

Team readiness survey (9 responses)



|

"I'd love to get my Friday afternoons back from notes."

|

"I just want to know what I'm allowed to use it for."

|

"If it answers the easy emails, I can actually look after people at the desk."

Anonymous survey comments.

Risks and how we manage them

- Health information is sensitive information under the Privacy Act.

No identifiable patient details go into general AI tools. Clinical tools must be vetted, with patient consent and Australian data handling confirmed.
- Staff already use free AI tools without guidance.

A plain English AI use policy in week one, plus a business workspace so people have a safe option.
- AI drafts can be confidently wrong.

A person approves anything a patient or referrer will read. Templates reviewed by a physio.
- Key routines live in two people's heads.

Every workflow we build is documented, with a named owner and a simple way to switch it off.

Training recommendation. Two short sessions for the whole team, then role based sessions for front desk and clinicians, with two AI champions supported inside the clinic.

07

Your 90 day roadmap

DAYS 1 TO 30

- AI use policy agreed and explained to the team
- Business AI workspace set up with clinic context
- Quick wins Q1 and Q4 live
- Training session one, AI in plain English and safe use

DAYS 31 TO 60

- Quick wins Q2, Q3 and Q5 live
- Role based training for front desk and clinicians
- Baseline measures compared with week one

DAYS 61 TO 90

- All five quick wins running and tuned
- Scope the P1 note drafting pilot and P3 dashboard
- Day 90 review of results against the baseline

AFTER DAY 90

- Plan next items P1 to P3, quoted and agreed separately
- Revisit the phone receptionist and claim reconciliation in six months
- Refresher and new starter training

How we'll measure success

Hours on admin Tracked in week one, then at 30, 60 and 90 days.	Enquiry reply time Median time from enquiry to first reply.	Intake forms complete Share of new patients arriving with forms done.
Patients returning Recall replies and rebookings each month.	Google reviews New reviews per month.	Team confidence The readiness survey, repeated at day 90.

 At day 90 we review the results together against the week one baseline. Anything beyond the quick wins is only quoted and agreed after that review.

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Our proposal

We recommend the **Growth package**. It delivers every quick win in the roadmap, with the foundations and training to make them stick.

ITEM	REF	TYPE	PRICE
Foundations	Foundations	AI use policy, business workspace, team session	\$1,950
Enquiry replies drafted by AI	Q1	Standard workflow	\$2,450
Post visit check in	Q3	Standard workflow	\$2,450
New patient intake pack	Q2	Quick win workflow	\$950
Google review requests	Q4	Quick win workflow	\$950
Lapsed patient recall	Q5	Quick win workflow	\$950
Role based training for front desk and clinicians	Training	2 half day sessions	\$1,700
Individual prices			\$11,400
Growth package saving			-\$1,450
Growth package			\$9,950
Audit fee credited (booked within 30 days of the debrief)			-\$1,500
Upfront investment			\$8,450

TIMING
All five workflows live within 60 days, in the order set out in the roadmap.

PAYMENT
50% on acceptance, 50% when the workflows go live.

NOT INCLUDED
Plan next items (P1 to P3), which we quote separately after day 90.

Keeping it running

RECOMMENDED
Care **\$550**/month

- Hosting and running your automations on a dedicated n8n server we manage
- Monitoring of every workflow
- Fixes when connected apps change
- Platform and security updates
- Up to 2 hours of changes a month
- Quarterly check in

OPTION
Partner **\$1,050**/month

- Everything in Care, including hosting
- Monthly advisory session
- A new small workflow each quarter
- New starter training
- AI policy kept current as Australian standards arrive

AI SEATS, PAID DIRECTLY AT COST
about **\$240**/month

- 6 AI assistant seats at about \$40 each
- In your name, so you own the accounts and your data
- Automation hosting is included in Care, so there is no separate automation bill

Prices in AUD, excluding GST. Care plans run month to month after a 3 month minimum. A lighter start is also available. The Launch package (\$4,950) covers Foundations, the quick win workflows Q2, Q4 and Q5, and one training session.

09 Investment and return

\$19,430

Total cost in year one including care and AI seats

\$37,485

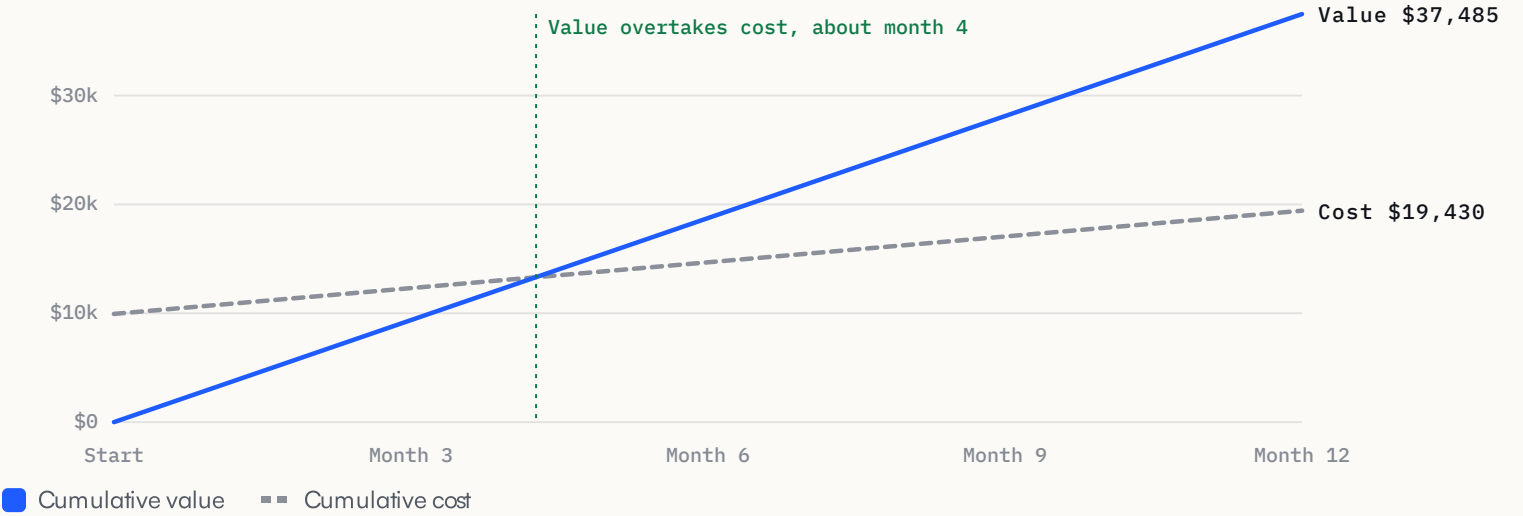
Estimated value each year

~4 months

Estimated payback, audit included

4.0x

Return from year two, when only care and AI seats remain



YEAR ONE	AMOUNT
Audit fee (already paid)	\$1,500
Upfront balance (Growth, less audit credit)	\$8,450
Care plan with automation hosting, 12 months	\$6,600
AI seats, 12 months (paid directly)	\$2,880
Total cost	\$19,430
Admin time returned	\$23,805
Recovered appointments from recall	\$13,680
Net benefit in year one	\$18,055

ASSUMPTIONS

- 11.5 hours a week returned by the five quick wins, valued at \$45 an hour over 46 working weeks.
- Recall brings back 4 patients a month for 3 visits at \$95.
- Without any recall revenue, payback is still about 8 months.
- Plan next items would add a further 8.5 hours a week, and are not counted here.

Estimates are based on time reported by the team. Actual results are measured against the week one baseline. Prices in AUD, excluding GST.

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Your turn. Find the low hanging fruit in your business

You don't need to be technical to spot automation opportunities. Take ten minutes with these questions. Each "yes" is a candidate worth writing down.

- ☐ Where does someone copy information from one system into another?

☐ What gets forgotten or delayed when the business is busy?

☐ What questions does your team answer over and over?

☐ Which report does someone assemble by hand every week or month?
- ☐ What message do you send more than five times a week that is basically the same each time?

☐ Which follow ups depend on someone remembering to do them?

☐ Where do forms, documents or payments need chasing?

☐ Where do enquiries wait hours for a first reply?

QUICK WORKSHEET

TASK DONE BY HAND	TIMES A WEEK	MINUTES EACH	HOURS A WEEK
For example, replying to new enquiries	40	10	6.7

Tasks that are frequent, repetitive and low risk are usually your quick wins.

Want this report for your business?

The audit is a fixed \$1,500 for new clients (normally \$3,000), and it's credited in full if you go ahead within 30 days.

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