

Episode 16:

How to use a VA to reduce overwhelm with Tracey Clarke, Virtual Administration

Shabnam 0:05

Welcome to the Psychology of Case Management podcast: the show that helps you use psychological ideas to strengthen your relationship with your catastrophically injured clients and their professional networks, so you can achieve more for your clients and feel more fulfilled in your role.

0:20

Welcome to this week's episode. I'm Dr Shabnam Berry-Khan, and today I am going to be talking about something that feels very real to me – and what I hope will be a way out if you're feeling similar feelings to me. Burnout, and not working to your optimal level, is something that happens a lot to us in the Personal Injury world, partly because of the nature of the work we do. But I think it's also because, sometimes, particularly if you're a smaller outfit or you're not used to having extra support around you... as someone who was raised professionally in the NHS, having extra support was a bit of a luxury. And so as I've moved into private practice, and as I talked to other case managers and other practitioners in the Personal Injury world, we realise that crikey, it's something we have to learn how to stop ourselves from feeling, which is the overwhelm, the burnout: knowing how to work optimally. And it's really occurred to me recently just how I need to think about myself as a business, and how I need to get the support in for me and the business in order to be the best I can be. And that sometimes means thinking about an assistant... and sometimes, now, in this modern world, a virtual assistant! This is all mind-blowing for me and has been for a little while, until I committed to it. So I feel like this is an episode of a little bit of history of how I've been doing this work, but also that it's a really important aspect of how we can remain sustainable in the work we do. Because there is support out there to help us be sustainable in the work we do. So today's episode is with Tracey Clarke, Director of Virtual Administration, who offers virtual assistant support to case managers and other people working in Personal Injury. So, welcome to today's episode, Tracey Clarke!

Tracey 2:29

Hi. Thank you for inviting me along!

Shabnam 2:32

Thank you so much for agreeing to do it. Tracey. I love your service! And other people who do services like you, I have to say, you've been an absolute godsend to me. But before we get into what it is exactly that you do. Tell us a little bit about you: who is Tracey Clarke, and how did Virtual Administration come about?

Tracey 2:53

Oh, okay, goodness!

Shabnam 2:57

In a nutshell!

Tracey 2:59

Well, we've been going for 15 years. And we've got a lovely team of currently 13 virtual PAs scattered all over the country. And basically we decided to niche market probably about 10 years ago, and concentrate on specialising in looking after case managers and independent therapists. And it's worked out to be the best thing, I would say it's that 80/20% rule: 80% of all our new enquiries come word of mouth. It's kind of like a big grapevine within the case management/therapy industry: people just tend to, if they like you, they pass you on. And it's the same with case managers, as well with the solicitors: if they like it, they come back and pass you on. So yeah, like I say, we've been going quite a while. And we really do make a difference to the lives of case managers, giving them back their time instead of spending evenings and weekends... well, staring at a screen.

Shabnam 4:02

Yeah, well, that's always welcome in my world! And so you've come from a background of administration. What's your journey to the point of 15 years ago, when you started up Virtual Administration?

Tracey 4:16

Yeah, totally. Well, my background is working in local government.

Shabnam 4:20

Oh, I didn't know that! Ha!

Tracey 4:22

Yeah. I've always been in administration, as high as I possibly could working for one of the chief execs as their PA, got fed up with all the portfolio office politics within local government, and decided to take the leap and set up my own business 15 years ago. And think about it: a good 15 years ago, virtual PAs were really not heard of. And it was very, very new. So it was quite a challenge to go out and talk to companies and I suppose I spent most of my time educating people.

Shabnam 4:54

Gosh, yeah, that's true, actually. I didn't think about that. So, 15 years ago, yeah, the concept of working virtually online was quite pioneering then.

Tracey 5:07

Yeah, it was. It really is. And it's strange, when you talk to people: they either immediately get it straight away and they jump on board, or they're like "Oh, not sure about that." They still like that idea of having the person in the office sat near them where they can see them – where they can see them working. But I think since the pandemic and everything, and more and more businesses are now working from home, it's got rid of that myth. And we're all doing the same: we're all working from home world cramming our days full of more and more zoom meetings, instead of having to go travelling to see people. But we're tired. We are more and more tired.

Shabnam 5:46

Yeah. So have you seen a bit of an increase in referrals? Since the pandemic?

Tracey 5:50

Yes I have, most definitely. Yeah, it's a bit of a mix, you're going to have some case managers, independent therapists that are more working at home and will do a bit more of their admin. But I am seeing more and more – especially case managers – either get established, take on more associates... they never refuse a client. The solicitor will say “Can you take this one? This one's a little bit of a tricky one, you know, but I'm sure you manage it!”

Shabnam 6:21

Flattery gets you everywhere.

Tracey 6:23

So you never turn the work down. But then all of a sudden, like you said at the very beginning, you soon become overwhelmed, and think “How on earth am I going to fit all this in?” So that's where a friendly virtual PA comes in.

Shabnam 6:37

Yeah, right. ‘Case management’ is not exactly a household name of a profession. And 10 years ago it was obviously something that you thought you would get involved in. So case managers and independent therapists is your sort of specialism now. There must have been something about working with people in personal injury and people in the case management world that you thought, “Bloody hell, these people need virtual administration. What were you seeing 10 years ago?”

Tracey 7:08

Yeah, I was very, very lucky 10 years ago. I started working with a children's neurophysiotherapy company, and she'd only been going a couple of years so we grew in parallel, really. And I was intrigued, you know, all our clients were coming through case managers, solicitors. And basically, she introduced me to a couple of OTs and I realised that this is a bigger world than what I originally thought, started looking at the case managers, and I started going along to a couple of the BABICM CMS UK events, and could see a gap in the market. Do you know what, even up to now I can go to quite a lot of conferences and events, and I never come across many virtual PAs. I've not come across anybody that's in our arena, which I'm really, really surprised. So, yeah, I definitely thought with the case managers, because the work that they do is very administrative-heavy. All the work that they do, like, for example, all the copying and pasting of emails on to Q-note, that is so administration-heavy, and it shouldn't be done by the case manager. No way. It's an administrative task. It's definitely something that can be delegated and passed on.

Shabnam 8:25

Yeah, right. So you must have been seeing this from 10 years ago, and thinking, gosh, this could actually make people's lives more efficient, allow for a better work life balance, actually could be cost-effective, dare I say? So talk us through that a little bit. So what is it that people say to you, that is a benefit of having a virtual administrator?

Tracey 8:53

Absolutely. I mean, if you think, the case management industry is very female-based. I can go to an event and look around the room. And I would say 80% of the people in that room are women. And there's a lot of them that have got kids, young kids, busy lives: running a business, running the kids, going through

lockdown with all the home teaching and everything like that. The impact on the business is ginormous. But I would say, just to give you as a typical kind of an example, from monetizing the time for a case manager. Let's take a typical case manager that's got a caseload of about six or eight clients. They can quite easily get 200 emails a day, very easily. And if you think your job of managing those emails, responding to them, never mind the idea of having to put all these emails into Qunote, because they've all got to go in. And 200 emails in a day can take at least a couple of hours. So over a week, that's five hours; over a month, that's 20 hours. That soon gives you an idea of how much time the admin is chewing up your professional time when you should be doing what you do – what you do best.

Shabnam 10:15

Yeah, right. So, I'm not going to do try and do the maths, but that's a fair chunk of the week, basically, that we do spend on administrative tasks that can be outsourced, effectively... to streamline a job for ourselves, that is more in line with why we're doing what we're doing. Because I don't know anyone who's going to ever say – and I could be wrong, so very happy to hear feedback – who is ever going to say that doing Qunote is the highlight of their day... or even neutral. I think most people are in the “God, it's a chore” kind of camp. And presumably Qunote is available... I mean, there'll be equivalents for independent therapists. Qunote is the thing that case managers use, and there will be an equivalent for the independent therapist, but we'll use Qunote as shorthand for ‘client management system’ or whatever. For me, it's been the bane of my life, doing Qunote. And even when I only had one or two associates working with me, it just became a much bigger issue: for them, for me. And so to outsource it, suddenly, everyone's a lot happier. And everyone's more efficient in the work they do because they are focusing on the actual work, and offloading the extra bits to a VA.

Tracey 11:50

Completely agree!

Shabnam 11:52

But Qunote is only one example of the work that you can do. For those who in that space at the moment where they're thinking, “I don't know if a VA is for me. I'm a sole trader, if you like, I'm on my own. I don't have any associates. Yes, I am that person who's got that 6-8 client caseload.” There may be someone who thinks “Qunote is not... I'm one of those people who are kind of neutral about it.” What else is it that a virtual PA can help us with when we are thinking about, say, case management or even independent therapy work? What can we give your guys, your ladies... or men? I'm assuming they're all women, actually. That was a bit... is your team mostly women?

Tracey 12:41

I have got Glyn! Glyn is one of our team members. But you are right, I would say the majority of our team are female. But as to the different kinds of tasks, goodness... I would say one of the bigger jobs is the proofreading and formatting of reports. If you're a case manager, and you're putting together a report, and you've got all this information coming from the physio, the OT, the neuropsych, the speech therapist, and they're all sending it in different versions, different formats, different fonts, and you've got to pull it together in one report that looks great. You got to put all your costings and everything, that's a big meaty job. But if you can just literally chuck it all together in a document, send it to your virtual PA and say “Can you sort that out?” Wow! That's a big tick in the box. Because if you think – no disrespect – it's something I always say to all our therapists and case managers, you're a professional in what you do, you can't be expected to be an expert in admin, you can't be expected to touch-type, you can't be expected to be able to type up a document as quick as we can. So let us do it! We're the ones that are going to make your life easy. And it's the same, for example, if you're chairing an MDT meeting on zoom, and you're going to

record it, and you want the minutes typing up. I know of some case managers that will sit there afterwards or on an evening and slowly type it up, and I think oh, my goodness me, that is... something that a virtual PA should be doing. It's quite straightforward. And think about, especially as you guys start more to go out, you know, travelling, going to see your clients, out on the road, you're not checking your emails. Why not have your virtual PA check your emails, respond on your behalf, even if it's just a response saying, "Shabnam, she's out in meetings all day. She'll come back to you later on this evening or tomorrow." Respond to those new enquiries, send out your terms and conditions and your pricing. Get your virtual PA being your right-hand man, so you can concentrate on the bigger stuff.

Shabnam 15:02

Do you know, I never actually thought, even though I've got an admin lady... I'm a bit of a control freak, though. But I know, as well, and I'm going to out myself a little bit, I know that comes from a place of not wanting to let go, because... it's taken me a long time to get to that sort of mentality that I'm worth helping, that I'm worth getting help for... you know, my job is to help other people. I don't sometimes then think about how I might need the help. And I've got sneaking suspicion some of my colleagues in the helping professions might have a similar mentality. Some have gotten over that, and that's amazing for them, and I suspect those are the ones that are coming through your referral streams. But for those who are kind of stuck in that space, slightly, or find it really hard to ask for help, because it triggers maybe something about how we feel about ourselves... which by the way, is not reasonable or sustainable in running a business, whether you're a sole trader or with other people. Actually asking for help is part of maybe why people don't think about or reflect on the work that they're doing – and I'm saying that from personal experience – don't reflect on the work they're doing to see how help can be used, to then be able to come to a service like yours, to say "Can you help me?" Does that make sense?

Tracey 16:28

It makes absolutely perfect sense, most definitely. I think you're absolutely right. There are going to be, yeah, like you say, case managers, therapists, a lot of them out there that most certainly feel that "I'm running my own business. I should be doing this. I should be spinning all these plates. Yeah, definitely. Everybody feels "It's my baby, it's my reputation. Yeah, I'm frightened to death of giving it to somebody else, just in case they make a mistake." And I think you've got to get over that. I always remember, going back, when I would.. I mean, I've not been working as a virtual PA in my own business for about four years. But before then, I was: I was looking after about five or six different clients. And for me, personally, it took quite a while for me to pass on these wonderful clients onto other team members. Because they were used to me, they were used to what I did, and it's your baby, again. You've got to realise, as well, the biggest thing you got to realise is: not everybody's going to do something the exact same as you. They're going to do it differently. It doesn't mean to say it's right or wrong, or better, or... I think sometimes you've got to accept certain things and move on.

Shabnam 17:45

Yeah, 100%. I did an episode on the impostor syndrome, and one of the strategies... I don't know if you heard that one. But one of the strategies was: aim at six out of... not *aim for* six out of ten, but as long as it is 6/10 good enough, then the chances are... you'll probably end up getting better than that. But as long as it's 6/10 good enough, no one's really going to notice, whether it's then 7, 8 or 9, or 10 out of 10. Well, 10/10 is impossible, we know that. But there is something about as long as it's getting the job done, and it's compliant and achieving what needs to be achieved, sometimes that can be more important than trying to aim for something to be amazingly right. And maybe with your... which is driven, perhaps, by your own needs. In my case, like I mentioned earlier, wanting it to be – because it's my baby and I want it to be micromanaged... actually letting that go. Because, actually, what is the loss to you by not asking for help, not allowing yourself to aim for that, say 6/10 if that's a metric that makes sense to people, particularly when most of your clients sound like they're women, they probably have family commitments; there's that

sort of mental load that we often talk about... actually, what are you losing then? For me, I just wasn't able to spend as much time with my family, and that's really sad. That became very sad point, a real lowness for me, but it was a battle to accept that by asking for help, that challenge on myself was possibly less of a problem than what I was actually losing by not spending time with my family. So it was better to ask for help.

Tracey 19:43

It is so true. I hear so many people, so many therapists, case managers say that the kids: all they see is the back of mum's head, staring down at the screen. Mum's not so cheerful. She's a bit snappy, she's always busy, always saying "Just give me a minute. Give me a minute, two minutes, and I'll come and see," you know, and then 10 minutes later, they're still sat there. So yeah, I am definitely seeing that. And I think, as a case manager or therapist – or anybody that's running a business, really – if you're growing, and you've got the drive to want to grow, any business mentor or coach, whoever, will say to you: you must have some time out of your business once a week, to just look at everything, have an overview, look at everything. It's massively important. We get so squashed, time-consumed: you've got a diary, you block out some time, you have a solicitor that says there's something going to court, you've got to go and put your time in. You've got to be really strong and make sure you put some proper time aside in your week, and stick to it. Don't move it, don't put something else in the space. Otherwise, you're going to be a busy fool.

Shabnam 21:07

Yes, I suppose that's true, at the end of the day. And, actually, having a VA allows that dream to be lived that bit better, because we are all so time-poor. I think you hear that so often, don't we? So what is it that stops us from getting the support of a VA – or, possibly... I don't know if it's worse, but possibly the alternative... but some people may experience *having* an administrative support person in place, maybe someone who's an associate at another organisation, or perhaps, I don't know, like a lawyer who has access to an assistant but perhaps, doesn't quite know how to use that assistant, as well. So I'm curious for those people who are kind of thinking "Oh, I don't know how to use an assistant," if you've got any ideas, any tips, maybe to help those people with that sort of mindset, what I call the 'sole trader mindset'. That I've got to do everything: I can't possibly think about stopping to offload, or to train someone up to take on the work that I need them to take on. What would you say might be helpful for them to start that journey of decreasing the workload to, effectively, a team like yours, where there is skilled support available, literally waiting at the sidelines to be called in?

Tracey 22:42

I think it's a very, very, common thing, and we all do it – even me. It's like putting an email together: instead of training somebody or showing somebody how to do, it's far quicker for you to do it yourself. We all do it, don't we? To be honest with you, when I'm trying to... I've got an interested therapist, case manager coming on board, and I'm trying to reel them in. And I can absolutely guarantee the thing that's stopping them is that because they feel that they've got to put some precious time aside to hand it over, train somebody up. They don't realise how fast we can pick it up and take it on. I think that's what stops a lot of people: they think that they just haven't got time. They haven't got five minutes to just stop and just have a conversation with you, for them to tell you what they need. And all it takes... it can be five minutes, but I think people are just so consumed that they just don't feel it. But, as to tips, I think one of the biggest things really, is actually to admit that you're struggling. That's the first thing: admit to it. I have come across people where they feel that they have to be seen to be frantic, to be running around at 90 miles an hour, to show that they're running a business. And it's like, "No, I want to see it the other way. I want to see a really calm person that's doing amazingly well, super-organised, doesn't have to be running around like a headless chicken."

Shabnam 24:26

So there's something about self-reflection in that, and being honest about how this work, as it currently stands, is affecting you. Gosh, that's quite a big question. But a very, very helpful tip, actually. Thanks for sharing that one. Yeah, I think that's a really good one. Right up my street, as a psychologist. See where everything is and see how it's impacting on you, honestly, and with absolute truth.

Tracey 24:58

Yes, absolutely. And the other big tip that I say to so many people, and we all do it, especially if you're setup at home, and you've got couple of screens: you'll have one screen that's set up for your emails, that are constantly staring at you, and you'll have your other screen that you're working on. And what I say to people, and I try and do it myself: check your emails first thing in the morning, and then turn them off. And don't look at them until 11 o'clock, 12 o'clock. And just allow yourself to concentrate on that piece of work that you're doing, whether you're having to pull a report together, whether you're having to look at some funding or something... Don't let your emails distract you, because you're jumping around; your brain, your mind can't concentrate on more than a few things at a time. So that piece of work, that report that you're working on, is not getting your 100% commitment, because you're busy looking out of the corner of your eye, staring at those emails that are dropping in: you know, those 200 emails that come in every day, that just drop in like water. Be hard on yourself. It's really hard, turning your emails off, because you have this idea in your head: Oh my God, something's going to come in that's screaming urgent! And it's the same with your emails that go to your phone. I wonder how many people who are in business dare go to the supermarket or the post office and leave the phone at home?

Shabnam 26:35

It's like you were in my head yesterday! It's really hard, it's really hard!

Tracey 26:45

And if you think back – I'm not being awful – before mobile phones, we did: we didn't think about it! So why is it now that we feel "Oh my God, I must respond to that email!" The biggest thing that I always say to our team members, when I bring a team member in – and the reason I do it is because I made a rod from my own back when I started working for different people – "If you respond to emails at a fast pace, that person's going to get used to it."

Shabnam 27:14

Expectation management...

Tracey 27:15

Expectation management. And then one day you don't respond fast enough, they'll say "Ooh, what's the matter? You're not on your game. So, I think it's great being super-organised and being efficient, but just be careful..."

Shabnam 27:32

Okay, thank you for that. Have you got one more for us, because these are gold!

Tracey 27:40

Okay! If you are seriously thinking about wanting to take a virtual PA on, and you're not 100% sure of what tasks you want to pass on, to just keep a notebook and keep it over a week. And just jot down the tasks that you do in a day. And put a bit of time at the side, as to how long you're spending on them. And then have a bit of reflection time and look at them and see where your time is being swallowed up. And be really, really brutal and ask yourself "Right, out of all these tasks here, what do I really hate doing? What really chews my time up? What is it that I look at and I think Ugh! Dread! Ugh! I'd much rather go and play with the kids and make some cookies in the kitchen, than go and sit and look at your Qunote and do emails?" So take a bit of time out and just have a track of the jobs that you do over a week, and where it's really interesting to see where your time gets swallowed up. Because when you're doing a task, unless you put a proper timer on and time yourself, you don't realise how long it actually takes.

Shabnam 28:45

Yeah. But actually that serves two purposes, then, doesn't it? Because one purpose is that it tells you what you could potentially actually offload to a virtual assistant, if you ever decide to go down that route – which I suspect you might do, after a brief analysis like that. Because it'll be quite clear: these are the things I do; this is a typical week for me. Off you go. So you know roughly what it would then also... the second thing is how much that would roughly cost. And then you could do that – like you said – that cost analysis of "This is what I could be doing instead," which is not only more beneficial – maybe, financially – but it's also beneficial from a quality of life and quality of *working* life perspective. And it's worth doing that. I did that. I've got to say, I did that. And I was absolutely... and I think about... it was either an odd week, or this is typical, but it was about 20-30% of my week was spent on admin. Probably closer to 30. And it didn't feel like a particularly admin-heavy week. But I was just thinking, gosh, that's a lot of my time. That's... what's 30%? It's about two days. If I did it, if our work was like that, and it was purely in one block, it was about two days of solid work. And I'm thinking, gosh, if I was doing actual, real, 'proper' case management work in the sense of the skill set that I have, that's two days extra work, effectively.

Tracey 30:25

It sure is. Or it's a Friday afternoon that you decide not to work.

Shabnam 30:30

Or it's a Friday afternoon! Yes, exactly. Or go to the hairdresser, or whatever. Amazing, amazing! Well, I'm sold, frankly. And I just think it's really... because you know, the sustainability of the work. So this whole podcast series is around being sustainable, allowing us to give our efforts and our energies into the work which is fundamentally building and maintaining relationships with our clients and our colleagues. Not to be overwhelmed and burdened by admin or other tasks that could be outsourced to someone else, that allows us to have a life that is more in line with our values, more in line with a work/life balance that fits, and actually, if you want to bring in costs, is probably cost-effective as well. So it's kind of a win-win situation, to really spend that... did you say about week, probably, a week or two just to do that analysis on breaking down your time?

Tracey 31:34

Definitely.

Shabnam 31:35

Excellent! Well, I think it's great. And what you've done for me, Tracey... we were talking about how to think about kind of what can be offered to case managers, and how it works, and thinking about how a

virtual PA can help. You've done a really helpful document that you're happy for me to share with our audience?

Tracey 31:58

Absolutely.

Shabnam 31:59

...which is really, really helpful. So I'll put that in the shownotes, and people on our mailing list will get that. If people want to get hold of you, Tracey, how can they do that? What are your contact details?

Tracey 32:12

Yeah, sure. Most definitely my email address, which is tracey@virtual-administration.com, or they can pick up the phone and give me a ring: I'm on 07939 935755.

Shabnam 32:30

Amazing. And your website? Is that a good place to go as well? To get a little bit more information?

Tracey 32:36

Yeah, absolutely. It is literally www.virtual-administration.com. And there is a ton of information on there, a wealth of information: loads of articles, covering all sorts of areas.

Shabnam 32:50

Yeah. And I know you hang out on LinkedIn.

Tracey 32:53

Yes, I do. I love LinkedIn.

Shabnam 32:55

I know, I know! You're great. We often have a little chitchat, don't we? Are you on anything else – are you on Facebook, or Insta...?

Tracey 33:05

Do you know, I'll be absolutely honest. I did start using it, back in the day, using Facebook and Twitter. But over time, I've realised that people... Facebook isn't a major place I got to. Twitter, I do put posts out, but I don't do a lot of work on it. I feel that LinkedIn is the place.

Shabnam 33:27

Yeah, I agree. It's where it's at. Brill! Ah, Tracey Clarke, thank you so much for spending some time helping us think through how case management can be made that bit more enjoyable, and more productive, I

guess, and less overwhelming by the simple, yet effective use of a virtual administrator. All right, well, thank you so much for talking today. And no doubt I'll see you on LinkedIn.

Tracey 33:56

Wonderful. Thanks ever so much for having me.

Shabnam 33:59

Not at all, and thank you all for listening. We'll catch you next time. Bye for now!

34:11

Before you go: if you enjoyed the episode today, I'd really appreciate it if you could rate it on whatever platform you're listening on, and share and like on your social media profiles. Word of mouth is the best way for us to grow and to be a continuous resource for all. And if there's any topic you wish for us to cover, please drop us a line on our website. Thank you so much for all your support.

Guest: Tracey Clarke, [Virtual Administration](#)

Presenter: [Dr Shabnam Berry-Khan](#), Director of PsychWorks Associates

Editor: [Emily Crosby Media](#)

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