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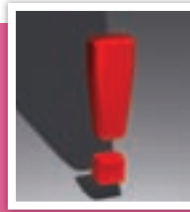
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THE PATH TO BECOMING VIRTUAL



Interview by Helen Gerlach, MInstAM, Editor, The Professional Administrator

I asked Kate Bacon, MIPA of 'Pier to Peer Coaching' and Janet Walker, MIPA and Virtual PA for Business and Charity Executives what they think about becoming a Virtual PA and what the first steps are for somebody who may be thinking of going into this side of the profession.

Q: What is the typical path, if there is one, to becoming a VA?

Kate: there isn't a typical path really. Everyone needs to have a minimum of five years of senior experience as a PA, Executive Assistant or Office Manager. I wouldn't suggest becoming a VA if your experience to date has been that of administrative assistant, for example, without too much responsibility. You need to feel entirely confident in your skills as a PA, enabling you to be proactive rather than reactive, before setting out on your own.

In recent years, people who have specialisms in other areas have been calling themselves VAs, i.e. those with knowledge of internet marketing including social media, which is good, as it widens the perspective of what a VA does.

Janet: One particular VA forum in the USA has very strong views on what makes a VA. They feel that being a VA principally means providing across the board administrative support. However, the definition has widened a little bit and evolved in the UK; we generally believe that a VA can offer the services that they want to offer (c:f Stacy Brice, American entrepreneur, and pioneer of the Virtual Assistance profession and www.stacybrice.com).

Kate: You could say that Virtual Assistants have created a Business Model for many freelance business owners, who work virtually with clients from their own home office, regardless of profession.

Q: What are the benefits and disadvantages of being a VA?

Kate: For me personally, the benefit is that in owning my own business I have developed a more flexible way of working than the one I had previously i.e. than when I worked in the corporate world. I have developed new skills in business strategy, marketing and accounts (as well as receiving International Coach Federation accredited coach training through working

with a client) and my levels of confidence as I built those skills, increased to a point in 2006, where I felt that I could pass what I've learned on to aspiring VAs – and 'Pier to Peer Coaching' was born. Ultimately, creating your own unique business that entirely fits your life is the biggest benefit in my opinion.

The most challenging part of being in business yourself (whatever you do) is the potential unreliability of income as it will peak and trough. I do however, feel the advantages outweigh the disadvantages ten-fold. To be sure of generating a good income (similar to the salary of a senior PA in a major UK city like London) you of course, need to devote a proportion of your time to marketing, even when you feel you are currently at capacity. Since you are offering a flexible service to clients, this also means that they can choose how much they use your services – which can change from month to month if you are not working a set number of hours each month.

I have heard some horror stories about other VAs who have experienced problems with slow paying clients – and this tends to be when they undertake pieces of work and are not building an ongoing relationship with clients. As a VA, you only bill clients for time spent on specific tasks carried out on their behalf – so this needs to be considered when initially working out pricing for services. You are extremely unlikely to be billing for 35 hours a week – and of course you need to factor in time for your own business development, marketing and administration.

Janet: For me, the main advantage is working flexible and part-time hours so that I can have more time for family and friends because, in my last, very pressured job, this was a part of my life that really suffered. I have set up Broadband at my mother's house 100 miles away so that I can visit her regularly and know that this way I can keep work going. Knowing that I could also help her out in any emergency and still keep up with client work is a great added relief. In addition, I really appreciate the opportunity to assist people I have actually chosen to work with and to decide which admin services I want to offer.

Kate: Yes, one of the biggest benefits in setting up as a VA is improving your life/work balance. A lot of people don't want to have the stress of a high-level job and the hassle that comes with a long (or even short) commute. When you are self-employed, you can choose the hours you work (although you will probably want to be available at least some of the time in regular working hours). This means that you can balance your family/home life with your work and create a better balance. Another small advantage of being self-employed is that you are also likely to make some significant savings on your "working" wardrobe, since you can choose how you dress in your own home office - although you'll still want to retain some "professional" clothes for client meetings and networking!

Of course there are a host of benefits from the client's perspective as well, which it might be interesting to talk about, since readers may decide to encourage their bosses to work with a VA, instead of temporary staff, on specific projects where additional support is required that can be completed off site.

Q: So, what are the benefits of working with a VA?

Kate: Flexibility is probably the greatest asset. The client will only ever be charged for time spent working on their behalf, so instead of having a temp in the office who is perhaps, only busy half the time, the client can be assured that a VA is a cost-effective business solution. Not having to provide office space or equipment is useful, especially for smaller companies, and of course there are no related costs from tax, National Insurance, holiday or sick pay and other staff benefits.



A VA will get to know their client's business in detail so in effect the client has their own virtual PA who can be called upon as and when required!

Janet: There are huge benefits for the client, particularly as having a VA is very cost-effective as Kate has already mentioned. Usually VAs like clients to retain their services on an ongoing basis (via an advance monthly retainer). As I work mostly with charities, they often prefer to contract me on an ad-hoc basis. I firmly believe in working together with longer-term view and this means that my clients are able to cut back or increase my work with them, according to their budgets.

Q: What are the key strengths needed to be a VA?

Kate: As an obvious starting-point, you'll need to have excellent PA skills and will be required to develop excellent business skills such as marketing, book-keeping, business development and so on. You also need to be able to work competently without supervision, on your own and most importantly, enjoy working on your own - which means being highly motivated. Another key skill is proactivity - your clients will really value you being able to offer solutions to their problems. Many clients also find that bouncing business ideas around with their VA enables them to see their business in a broader context, which is extremely useful.

Janet: I have found that you need to be extremely flexible in juggling client work. One of my clients needs my help in complex diary management which can be really challenging because your client's clients assume that you are there on site with your client, without being aware that you may have never met! Last-minute cancellations of meetings may also mean that you have to work quickly to rearrange appointments at the very time you had actually planned to be handling another client's work. You need to be able to organise, very carefully, the various projects of all your clients simultaneously and prioritise according to the importance of each task and the deadlines agreed.

Q: What do clients look for in their VA?

Kate: First and foremost they are looking for a trusted partner for their business who can fully support their administrative needs.

As a VA, you may not have known your clients personally before you worked with them, in which case they won't have known you either. In all instances I would highly recommend that you have a watertight VA agreement with your client to ensure that all aspects of your working together are covered.

I have developed my business through recommendations and referrals - so through people I know rather than through potential clients simply finding my website - so there is already a level of trust between us. To give an example of this, I have been granted access to client bank accounts and credit cards so that I can make payments on their behalf - which means that there has to be an incredibly high level of trust between us.

Janet: Confidentiality is very important and forms part of most VAs' client contracts. Another quality that you need as a VA is empathy and it is also helpful if you are able to share your clients' values and beliefs. Knowing other VAs or PAs within the client's industry is also valuable, for example, achieving key meetings for your client through your own good relationships.

If you work in a niche area, you can be seen as an expert in your field and your client benefits from your ability to introduce him/her to your own contacts. This is all part of the partnership between a client and VA which often leads to good friendships and, as Kate has said, to a high level of trust between those who work remotely from each other.

Q: What would you say are the main priorities you need to think about when looking at the path to becoming 'virtual'?

Kate: I would say the number one consideration is to allow plenty of time to build your business. If you lose your job, it is considered that you generally need three months salary as back-up. As a self-employed person you are looking at something a little longer - six months would be more usual. I would also advise (if at all possible), negotiating with your employer to move your employment from say, full-time to part-time, then part-time to VA. This will be a more viable option than if you were to go straight from full-time employment to being a VA. If this isn't an option, then look at other methods to finance the transition, for instance savings, or of course it's possible to take out a bank loan. In the latter case, you would need to provide a full business plan to even be considered by lenders.



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Janet: I agree. I had already left my previous job so we had built this situation into our household budget, which is something that not everybody is able to do. I would also strongly urge anyone thinking of becoming a VA to investigate moving from full-time to part-time work in the first instance, if at all possible.

You do need to make sure you have the right equipment although there are varying degrees of 'virtuality'. Some people have space for paper storage and filing cabinets, whilst others just prefer to use their computer with a printer attached and not much more. One thing that is vital, is to have a good shredder. Any documents that are printed out will need to be disposed of in a confidential manner. You will also want to ensure you have a system in place to back up your computer files.

Your 'virtual' working environment is very important as it definitely affects and influences your mood and well-being. You need to have a good space to work in, ideally a separate room or a 'garden office' so you can shut the door on it all at the end of the day. It's an important skill to be able to say "no more" and switch off to avoid the blurring of home and office boundaries. This is why I use a mobile phone that I can turn off when I am not working!

Kate: Use and develop your network – and this includes friends, colleagues, family, previous bosses and more. When you first start out as a VA, then on an ongoing basis as part of your marketing, email everybody to ask for referrals.

On-line forums are great and inexpensive ways to contribute to conversations and at the same time obtain recommendations. I'm part of an online forum for coaches which has proven a valuable link to my niche market over the years.

There are many business networking groups that meet face to face which is another way to build relationships with potential clients. I'm a member of the Athena Network (www.theathenanetwork.com) which is invaluable. So be passionate and talk with enthusiasm about your business. Contacts can appear from the most unexpected sources – I took one from striking up a conversation with a fellow-passenger on a Venetian waterbus and another from a Christmas party! Swap business cards and make the most out of every occasion to network like crazy.

Remember, the key to networking is often what you can do for others rather than what they can do for you – referring on trusted business contacts is a great way to add value to your network who will more readily refer you as a result.

Janet: Training is another area which I think is fundamentally important. I find that there are usually two kinds of VAs – those who take time to do it themselves by researching and by asking for advice on forums such as The Society of Virtual Assistants: www.societyofvirtualassistants.co.uk which is an excellent resource and community for both new and established VAs, and those who want to be able to start their business quickly and get going. I chose the second path and took part in Kate's training course, finding it very enjoyable, helpful and cost-effective. It had me up and running as a VA within a couple of months.

Kate: Mentoring and coaching for VAs is something that I consider to be essential as self-development is a key to developing your business. Even with the best PA skills and experience if you don't have the experience of setting up and developing a business you are likely to flounder.

There are different methods of training available for aspiring VAs. I've found personally that providing core materials that cover all aspects of business start up in a variety of formats (eBook, audio expert tele-classes, online community) together with one-to-one coaching over the phone have



been most effective. I also offer a self-study eCourse – and would only recommend that to the highly motivated!

I also believe that it is important to 'walk the talk' and have done a lot of learning myself. This includes attending coaching workshops and supervision, to developing business skills that I've used directly with clients as well as in my own business – for instance keeping up with the latest trends in social networking.

Q: If you had to give one piece of advice to a potential VA what would it be?

Janet: The one piece of advice I would give, would be to keep up with all your contacts. For example, one of my clients is the husband of someone I worked with for just a few weeks 30 years ago! I've kept in touch with them from time to time ever since. He was self-employed and interested to know of my new VA business so I thought he might possibly recommend me to others. Six months later, however, he changed direction, joined a charity in a senior position and contacted me himself to ask for my help with three large projects, which was a wonderful surprise. It shows that you need to devote time to keeping up contacts, even with people you have worked with for years, as well as with friends and acquaintances. You never know where your next client is going to come from. I personally am not so keen on the idea of 'networking' for its own sake as I just naturally tend to make, and keep in touch with, lots of friends around the world anyway and the fact that most of my work has happened to come to me in this way is really unintentional!

Kate: Think carefully about whether you have the motivation and drive to go out on your own first. If you can say "yes" to that then I would say just "go for it!" If you really want to develop yourself, just do it! I've set up two different businesses over the last seven years and it's hugely satisfying to know that this is entirely due to my own hard work.

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