

THE PRODUCTIVE THERAPIST

Amazing Virtual Assistants for Therapists

The Therapist's Ultimate Guide to Working with Virtual Assistants

From hiring to firing : how to create an amazing working relationship with a virtual assistant

Hi, I'm Uriah Guilford. I'm a therapist, group practice owner and the creator of The Productive Therapist.

This guide is meant to walk you through the things you need to know to successfully work with a virtual assistant, whether this is your first time or you are a veteran.

Without further ado, let's get into it.

Table of contents

1. Ideal characteristics of an amazing virtual assistant
2. Quick Tips on Hiring
3. Setting expectations in the first 90 days
4. Finding your ideal communication channels
5. Creating super clear tasks
6. Setting up the technology to improve your collaboration
7. Finding your working rhythm
8. Identifying the tasks you should delegate
9. Learning to trust & let go
10. Systems that allow you to set it & forget it
11. Documenting all procedures (don't skip this!)
12. How to give constructive feedback

13. When to fire your virtual assistant

Ideal characteristics of an amazing virtual assistant

Ideally, you want someone who is highly competent and a pleasure to work with.

A rockstar virtual assistant will not only complete the tasks you assign, they will anticipate your needs and help your business grow. They are committed to your success and become a crucial part of your team.

These are the qualities I look for in a mental health virtual assistant:

- Personable and friendly
- Communicates clearly (written/verbal)
- Very comfortable with technology
- A skillset match with the tasks I need help with
- Good at managing their time and multiple tasks/projects
- Coachable & willing to learn
- Able to manage confidential information
- Confident problem solver
- Motivated self-starter
- Willing to treat my clients as VIPs
- Humble, hungry & smart (emotional intelligence)

Some of the obvious necessities for a virtual assistant include access to a quiet and professional place to work, high speed internet, a capable computer and a smartphone.

These things earn some bonus points:

- Someone located in your time zone
- Bi-lingual (if that is important to you)
- Knowledge of psychology and counseling or prior work in the mental health field
- Specialized skills, such as graphic design, marketing automation, QuickBooks, etc.

Quick Tips on Hiring

Here are some quick tips on hiring a good mental health virtual assistant.

There are basically three ways to go when you are looking for a virtual assistant.

1. Use a virtual assistant company
2. Hire a company to match you with an individual VA
3. Do the recruiting and hiring yourself

There are actually a ton of virtual assistant companies to choose from, which is wonderful, but also makes it tough to choose. There are a couple benefits to using a VA company like [Belay Solutions](#), [UpWork](#), [Mhoodle](#) or The Productive Therapist.

They manage and support the relationship you have with your assistant. They have a team of VAs versus an individual (think vacation and sick time coverage). They are also less likely to disappear and leave you hanging

You can also use a matching company like [Great Assistant](#) to help you find the right person. This can help speed up the process of recruiting and hiring, which can honestly eat up a bunch of your time.

Lastly, you can do the legwork and find a virtual assistant yourself. There are a ton of freelance virtual assistants out there. You can put out a job posting, whether on job sites like [Indeed.com](#) or on directories like the [International Virtual Assistants Association](#).

I actually did this one time and was totally overwhelmed by the number of applications!

However, if you are willing to do the work this can be a good option. You just have to really vet the person and make sure they will meet your needs.

Dedicated or shared virtual assistant?

Most virtual assistants are shared, meaning they work for several businesses. If you can afford it and need the support a dedicated virtual assistant may make sense. Then you have to make the call about when it might make sense to hire someone local to work in your office, which comes with some definite benefits and some real drawbacks.

How much should you pay?

The price range for virtual assistants can vary quite a bit. You can get a VA from the Philippines for very cheap, while U.S. based assistants can cost between \$20 and \$60 per

hour, depending on their specialized skills.

You definitely get what you pay for. I have had \$18/hr assistants who were reasonably competent, but not amazing. I also had a \$55/hr assistant who was absolutely worth every penny.

Here is my suggestion: find the best virtual assistant you can afford & start small if you need to.

Hiring great team members is hard!

At the end of the day you have to trust your gut and your intuition when choosing the right virtual assistant. You may not find the right person the first time, but it is absolutely worth it to do your homework and choose wisely.

Pro-tip: Have the potential candidate perform some tasks for you prior to hiring. This allows you to learn about their ability to follow directions and pay attention to details. It can give you a sense of what they might be like to work with.

You can assign them a quick research project. They could look at your social media accounts and/or blog and propose some changes they might make to improve your content. You could also make them go through an online assessment to test their skills.

Setting expectations in the first 90 days

Working with a virtual assistant is different from having an assistant in your office. You can't pop into their workspace and have a quick chat or check up on their work by walking down the hall.

For these and other reasons it is super important to set clear expectations and over-communicate, especially in the beginning.

Be crystal clear on . . .

The tasks you want completed.

Any info they need to complete the tasks.

Exactly when you expect the tasks to be finished.

I find that it is incredibly helpful to have written procedures and processes whenever possible. The more work you do upfront on this the less time it will take to get your VA trained.

Make sure to over-communicate, especially when you are starting to work with a VA. Don't assume they know what you want. This is a great way to avoid unnecessary frustration.

Managing your own expectations:

Here are a couple things you need to know.

- It takes time to adjust to working with a VA
- When you are training your VA your productivity will temporarily dip
- It may be frustrating and stressful at times
- You also need to have reasonable expectations about what is possible and how quickly things can get done!

However, if you put in the time and energy having a great virtual assistant will be a game changer for your business and your life.

It is also a good idea to set up a 90 day probationary period that allows you and your VA to know what to expect from each other.

The probationary period:

First 30 days: Work on establishing trust and basic communication.

Next 30 days: Focus on business processes and procedures. Get clear on how things are being done and talk about ways to be more efficient using your virtual assistant.

Last 30 days: dialing in the communication and procedures and finding a new rhythm.

Finding your ideal communication channels

There are two main things you need.

1. A way to communicate tasks
2. A way to confirm when they are completed

This could be as simple as using email or text messages.

Or, you can use specific software for task tracking and/or project management. I worked with a VA successfully for 5 years using only email!

Now, I much prefer video chat and screen sharing using free software like [Zoom](#).

(If you don't know already, I am a huge software nerd and love trying new products, even when it hurts my productivity!)

I also use [ToDoist](#) to track tasks with my team and [Quip](#) to share documents and collaborate through online chat.

Your mental health virtual assistant should be able to integrate into your current systems and they can make suggestions to improve the way you work together and get things done.

Here are some other good options.

Project & Task Management Software:

- [Trello](#)
- [Asana](#)
- [Basecamp](#)
- [ToDoist](#)
- [AirTable](#)
- [Quip](#)

You can find a ridiculous amount of other options right [HERE](#).

Creating super clear tasks

This might seem painfully obvious, but I had to include it.

You have to be super clear on what the task is and when you want it completed.

The essential ingredients of a well written task:

- Begins with a single-step verb (see link below for more info)
- Includes important details
- Uses simple words
- Short and to the point
- Includes a due date and time allotted for completion

Example:

Bad: Improve referral tracking spreadsheet

Better: Add columns to referral tracking spreadsheet

Best: Add phone number and referral source columns to referral tracking spreadsheet by Wednesday

Here is a fantastic break down of writing clear tasks from the website [Clever Checklist](#).

A task is a statement of vision and intention. The more clearly we write our tasks, the more clearly we think. Clarity in writing tasks is a useful practice. – Kourosh Dini

Setting up the technology to improve your collaboration

You can improve your collaboration and overall productivity by making sure you are using technology to your advantage.

There might be some different boxes to check depending on the tasks you are sharing, but here are some examples:

- Giving your VA access to your passwords, ideally using [LastPass](#) or something similar
- Adding them as a scheduler and/or biller in your EHR
- Giving them an extension on your virtual phone system
- Assigning them a unique email address
- Adding them as a user on your [GSuite](#) account
- Creating a shared task list
- Giving them access to your Google calendar

These things usually happen in the setup phase during the first 30 days of working together.

The more attention you give to creating clear systems using the appropriate technology the smoother your working relationship will be!

Finding your working rhythm

Once you have done the upfront work of hiring, training and integrating a VA there is a beautiful thing that happens.

It's called rhythm.

You get into an efficient workflow and an enjoyable relationship that helps propel your business forward. It can truly be amazing!

This can even improve over time as you really get to know each other.

Here are 5 things that can help your working rhythm.

1. Standing check in meetings – Monday mornings can work nicely
2. Friday status reports – close the loop with an update about what was completed and what still needs to be done
3. Staying consistent with the systems you created – stick to the plan and communicate if you make changes to procedures
4. Giving your virtual assistant positive reinforcement, i.e. say nice things regularly! This truly goes a long way.
5. Give regular constructive feedback – vital to an effective working relationship, you can't be afraid to give and receive feedback.

Give yourself a well deserved pat on the back when you achieve a state of flow with your virtual assistant!

Identifying the tasks you should delegate

And now we get to talk about the wonders of delegation. My favorite topic.

Here is a rule of thumb. If you can teach someone else to do a task, you probably shouldn't spend your time doing it.

I could write a very long essay on the topic of delegation, but this course is meant to be short and to the point. So here is just what you need to know!

What you should absolutely keep doing – the things you love and only you can do.

What you should absolutely delegate – everything else!

That really does sum it up. The tricky part is when there are tasks that you actually enjoy, but really shouldn't keep doing.

Sometimes we want to get the quick and satisfying rush from completing small tasks. It makes us feel accomplished, but doesn't really further the mission.

The more you grow, the more you need to delegate. If you can work through your control issues (talking to myself here) and your anxiety it can even become fun. 😊

Learning to trust & let go . . .

Finding a great virtual assistant is tough, but learning to let go of control might be even harder!

You are likely successful because you are competent in many areas of your life and business. You have learned to juggle all the tasks and you are pretty darn good at it.

But, there is only so much of your time and energy to go around.

And, you want to grow your business and make more money.

The truth is you have to let go of some things and trust someone else to handle them.

My friend John Clarke, therapist and business consultant, has some good tips on this very topic.

He suggests the following 5 things to keep in mind:

1. Admit that you have superhero syndrome (you can do everything)
2. Identify your worst fear and how you would manage it if it happened
3. Look at the error in your own business (mistakes are normal and to be expected)

4. Start small & delegate a couple tasks
5. Just give it some time

Systems that allow you to set it & forget it

Have you heard of these three tips for productivity?

- Eliminate
- Delegate
- Automate

Sometimes you have to eliminate tasks and/or projects that are just not essential. Next you delegate anything that you don't really need to handle yourself. Lastly, you can go about the work of automating absolutely everything you can

Setting recurring tasks

The most obvious tip here is to make sure and set up recurring tasks for you and your virtual assistant.

In my practice, my assistant does payroll every other Monday, does insurance billing every other Friday and calculates my metrics on a weekly basis.

All of these things automagically pop up on her task list each week. Neither of us have to think about it. It just happens.

This is pretty easy to accomplish with most task or project management software. Set it and forget it, or I guess I should say remember it. 😊

Scheduling email newsletters & social media posts

You can delegate the task of scheduling your email newsletter and social media posts to your virtual assistant. Then the nifty software, for example [Buffer](#) or [MeetEdgar](#) automates the rest.

So simple, but so helpful.

I like the idea of batching my content creation. In other words, writing all the blog posts and email newsletters for an entire month and then scheduling them to post at specific times.

This truly helps with productivity and staying on a consistent publishing schedule.

Credit card payments

One of my favorite features of SimplePractice is the ability to use autopay. The system automatically charges my client's credit cards overnight after the last session. Of course this is only for private pay clients, but it is one less thing for my assistant or I to do.

Any way you can use technology like this will be beneficial no matter how small the time savings.

Reminders to follow up on emails

I don't know about you, but I can easily forget to follow up with people if they don't respond to my emails. That is why I use Boomerang for Gmail to return emails to my inbox if someone doesn't respond.

I also use it to return emails that I don't need to handle now, i.e. credit card payments. This is a handy bit of software that I would want to live without.

You get the point ...

I could keep adding things to this section, but I think you get the idea. Anything that can be automated, likely should be.

Documenting all procedures (don't skip this!)

There are few things that will help your business run smoother than creating and documenting clear procedures.

Unless you are a little strange like me, this is not the fun stuff of starting or growing a business. LOL.

The good news is that you can get your VA to help you create and/or refine your procedures.

Basically, anything that you or your team does on a regular basis should be clearly documented.

This includes . . .

- Insurance billing
- Call scripts for your receptionist
- How to open up or shut down the office
- Handling no-shows and late-cancels
- What to do with cash and check payments
- Hiring new associates
- Annual reviews for employees
- How to track referrals
- Guidelines for handling your calendar and scheduling appointments
- Fill in the blank . . .

I challenge you to sit down and make a giant list of everything in your practice that is a recurring task. Then put a check mark by each item that actually has a written procedure. This will quickly show you that you have some work to do.

I'm still working on my list!

How to give constructive feedback

Giving constructive feedback to your virtual assistant is absolutely necessary. In fact, the growth and success of your working relationship depends on it.

You must be clear about your needs and wants.

And, let them know when they are making too many mistakes, not following your directions or acting unprofessionally.

I am a recovering people pleaser and rather conflict avoidant, so this is tough for me. However, I have grown a ton in this area and I am proud about how well I give constructive criticism.

Here are a couple of tips to consider when things are not going as planned.

1. Take a look at yourself first

As a therapist, you can understand the importance of self-awareness and personal responsibility. I have learned to look at myself first, especially when I am annoyed or unhappy with my virtual assistant. What have I done to contribute to the problem? Have I been clear on my expectations? Do whatever you need to do to understand your role in creating the problem.

2. Take a look at your systems

Are the issues due to a breakdown in your systems or a lack of well-defined systems? If I have not designed clear systems and expectations for my assistant to follow, then I can blame her for not doing things correctly. This is why I love recording video walk-throughs of recurring tasks. This is an important step before you start the conversation about identifying and solving the problems.

3. Start the conversation soon and own your stuff

Don't wait to have the difficult conversation. Don't silently hope that things will just get better. When you do initiate the "talk" start with owning your part in creating the situation. This will likely help lower their defenses and create the possibility that you can work together to find some solutions.

4. Communicate clearly without shame or blame

When it comes to actually giving the constructive feedback be exceptionally clear and stick to the facts. Tell them exactly what your expectations are and where they fell short. Try to avoid taking things too personally, but make sure to express any emotions you have so that they really understand. Of course, it will always help the process if you work to avoid shaming statements, finger pointing and condescending comments.

You likely know how to do all of these things, but actually putting them into practice can be challenging.

5. Be honest with yourself and your assistant when it is time to move on

If there is a lack of improvement and communication issues that you just can't seem to solve, you have to take a hard look at whether or not it is worth ongoing time and effort.

When to fire your virtual assistant

It's a nasty four letter word – FIRE. This is the main reason I thought it would be a bad idea to become a boss!

I don't know about you, but I tend to be pretty understanding and forgiving. I give people the benefit of the doubt and I usually blame myself for errors that are made.

However, you will know it in your gut if it is time to fire your virtual assistant.

- The same mistakes keep repeatedly happening
- You have given clear feedback, but it doesn't seem to produce change
- Your VA has a bad attitude or lousy work ethic
- Maybe they just don't have good attention to detail
- They might be making critical mistakes that actually cost you money
- They seem unable or unwilling to actually follow your directions closely
- You find yourself often frustrated at your VA for one thing or another

You get the idea.

I'm all for putting in the time and effort to make the relationship work. Sometimes you want to give up, but you shouldn't. However, making the move to switch to another VA or a different option may absolutely be the right call.

The saying “hire slow and fire fast” seems to ring in my ears.

The good news is that your VA is likely a 1099 contractor so you don't to worry as much about legal issues. Check the contract you signed and find out how much notice you need to give. Make sure you do it right and consult with an employment attorney if you need to.

Congratulations. You made it to the end of this guide!

I truly hope this was helpful, whether you have previous experience working with virtual assistants or this is your first time considering it.

You've now seen how the right virtual assistant can support you in growing your practice – whether through handling your new client inquiries, taking care of general admin tasks or managing your digital marketing.

So many articles and blog posts just give you more things to add to your “to-do list” and those things never get done.

Imagine being able to get support from someone who is already trained and available to make your life easier as your business hums along.

That's what my team and I do.

Want to learn more?

Click [HERE](#) to check out our services and [HERE](#) to peek at our pricing.

Thanks!

Uriah Guilford