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Why Surveyors Need Virtual PA Support: Managing Calls, Appointments and Reports

For first class professional & administrative support for your business

Enquire today



Surveying is rarely a desk-based profession.

Whether you are carrying out a building inspection, valuing a property, measuring land, advising on a commercial lease, managing construction costs or dealing with a party wall matter, much of your working day can be spent away from your desk.

The problem is that your business does not stop when you leave the office.

Potential clients still call. Existing clients need updates. Appointments need arranging. Documents need chasing. Reports need sending. Quotations need following up.

For a small surveying practice, trying to manage all of this personally can quickly become a significant administrative burden.

A **Virtual PA can provide the practical administrative and telephone support needed to keep enquiries, appointments and client communication moving while you concentrate on surveying work.**

What happens to your business when you’re out surveying?

A survey appointment might take an hour or two, but the disruption to your working day can be much greater.

You may be travelling to a property, carrying out the inspection, speaking with the client or agent and then travelling back. During that time, your telephone may go unanswered and emails can begin to build up.

For an established surveying practice, these interruptions can be frustrating. For a smaller practice trying to win new business, they can be particularly costly.

A potential client may simply call another surveyor if they cannot get through.

An estate agent may need to arrange access to a property quickly. A commercial client may need a valuation appointment confirmed. A contractor may be waiting for information. A previous client may be calling for an update on a report.

None of these tasks necessarily require a qualified surveyor to deal with them personally.

They do, however, require somebody to take responsibility for them.

How surveyors can stop missing new business while on site

Telephone answering is one of the simplest ways to improve the way a surveying practice handles enquiries.

Instead of a prospective client reaching voicemail while you are inspecting a property, a Virtual PA can answer the call professionally, establish what the caller needs and take the appropriate action.

Depending on your instructions, they can:

- Take details from new enquiries
- Identify the type of surveying service required
- Explain your basic availability and process
- Arrange a callback

- Schedule an appointment
- Pass urgent matters directly to you
- Take messages from existing clients
- Deal with routine administrative queries

The important point is that the caller receives a response rather than simply being left wondering whether anyone will call them back.

For many surveying practices, this can make the difference between an enquiry being progressed and a potential client moving on to another firm.

Virtual PA support for surveying practices

Surveyors work across a wide range of specialisms, but many face the same administrative pressures.

A **building surveyor** may spend much of the day travelling between properties and carrying out inspections.

A **residential surveyor** may be dealing with home surveys and property-related enquiries.

A **commercial property surveyor** may be managing appointments, landlords, tenants, agents and lease-related correspondence.

A **valuation surveyor** may need to coordinate property access and communicate with clients, lenders or other professionals.

A **quantity surveyor** can have significant amounts of documentation, correspondence, quotations and project administration to manage.

A **land or measured building surveyor** may spend long periods working on site, making it difficult to respond to calls and arrange the next job.

A **party wall surveyor** may be coordinating appointments, notices, communications and documentation between several parties.

The technical work differs, but the administrative challenge is often remarkably

similar: **the surveyor is busy doing professional work while the business continues to generate calls, emails and paperwork.**


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How a Virtual PA can manage survey appointments

Appointment management is another area where professional administrative support can save considerable time.

Surveying appointments are rarely as simple as booking a meeting in a diary. Access may need to be arranged with homeowners, tenants, estate agents, property managers, landlords, contractors or other professionals.

A Virtual PA can act as the administrative link between the surveyor and the people involved.

They can help with:

- Booking inspections and consultations
- Confirming appointments
- Rearranging appointments when necessary
- Coordinating access arrangements
- Sending appointment details
- Managing cancellations
- Maintaining your diary
- Scheduling follow-up calls
- Reminding you about important appointments
- Communicating with clients and other contacts

This means you can arrive at your next appointment with the relevant information already organised rather than spending time trying to coordinate everything yourself.



Reports create another administrative workload

Producing the professional report is the surveyor’s responsibility.

But everything surrounding the report can consume valuable time.

Documents may need to be received and organised. Clients may need to be contacted. Reports may need to be sent. Follow-up questions may need to be logged. Invoices may need to be issued. Additional appointments may need to be arranged.

A Virtual PA cannot replace the professional judgement or technical expertise of a qualified surveyor.

They can, however, help manage the administrative process around your professional work.

For example, once you have completed a report, your Virtual PA could help with the administrative follow-up, such as confirming delivery, recording outstanding actions,

arranging a further appointment or reminding a client about information that is still required.

This creates a clearer separation between **professional surveying work and administrative work**.


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The administrative burden of running a surveying practice

Running a surveying business involves considerably more than carrying out surveys.

There are new enquiries to handle, appointments to organise, clients to communicate with and documents to manage.

There are also quotations, invoices, diary management, telephone calls, emails and follow-ups.

For a sole practitioner, this often means doing everything personally.

For a small practice, it can mean qualified surveyors spending part of their day performing tasks that do not require their professional expertise.

The problem is not necessarily the amount of administration involved in any one task.

It is the constant interruption.

Five minutes answering a call. Ten minutes rearranging an appointment. Another few minutes responding to a client email. Then another interruption while you are trying to complete a report.

Individually, these tasks seem insignificant.

Across a working week, they can become hours of lost productive time.

Do you need a full-time administrator?

Not necessarily.

For some surveying practices, the workload may not justify employing a full-time member of administrative staff.

A Virtual PA provides an alternative model.

You can have access to professional administrative and telephone support without necessarily taking on the cost and commitment of another full-time employee.

This can be particularly useful for:

- Sole practitioners
- Small surveying firms
- Growing practices
- Specialist surveyors
- Surveyors covering a large geographical area
- Practices experiencing increasing enquiry volumes
- Firms that need telephone answering but not a full-time receptionist

The support can be structured around the actual needs of your business rather than requiring you to create a permanent administrative position.


HSE Schedule
Field Schedule
Surveyor CRM
Surveyor CRM — Job Scheduler
Jobs
Appointments
Sites
Clients
Maps
Reports
October 2024
Jobs & Appointments
Job #10234
Boundary Survey
Manchester
Scheduled: 21 Oct 09:30
Job #10235
Topographic Survey
Salford
Scheduled: 21 Oct 09:30
Job #10235
Topographic Survey
In Progress
Completed
Scheduled
New Job
Assign Surveyor
SURVEY TEAM
LAND REGISTRY DOCS
SURVEY REPORTS
MANCHESTER
SITE PLAN
PLOT 7B
FIELD 7B –
FIELD SURVEY
FIELD NOTES
LEVELLING –
SITE SURVEY NOTES
Job Checklist
Equipment Check
Call client – confirm access

What should remain with the surveyor?

A Virtual PA should support your surveying business, not attempt to replace your professional role.

Technical assessments, surveying judgements, valuations, reports and professional advice remain with the appropriately qualified surveyor.

The Virtual PA deals with the administrative layer around that work.

That might mean answering the telephone while you are on site, arranging the next inspection, communicating with a client, managing your diary or following up an outstanding enquiry.

The objective is simple: **keep administrative tasks moving without taking the surveyor away from work that requires their expertise.**

Contact us to discuss your needs

Our most recent posts

Virtual PA Services offers a wealth of useful information related to its services. We have prepared several articles that might help you to make the right decision when it comes to hiring a Virtual PA.



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