

Are You Suffering from Compassion Fatigue?



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12.04.19 in Marketing & Practice Management

When you take care of others as part of your job, you frequently hear about ongoing suffering, which can take its toll in the form of burnout and secondary traumatic stress. For advisors, burnout may result from your external environment, including a fast-paced schedule, long hours, and not enough time in the day to spend with every client. This burnout may then lead to secondary traumatic stress, which is internal and occurs when you reach the point where you just can't take it anymore. Sound familiar? If so, you may be suffering from compassion fatigue.

Here, we'll identify the signs of compassion fatigue, discuss strategies for managing it, plus take an insightful look at how one advisor learned to help his clients navigate through difficult times while maintaining his own mental health.

Know the Signs

You may not think of yourself as a caregiver, but you are. You work with your clients to help them secure a sound financial future, which requires understanding their needs, helping them make the right investment decisions, and keeping them on course. This last task isn't easy, particularly when markets are volatile and fear and other negative emotions creep into your clients' decision-making process. Of course, if you had only a single client's concerns to address, these responsibilities would be manageable. But when one becomes several? Beware of compassion fatigue.

The signs of compassion fatigue include difficulty concentrating, insomnia, physical and mental fatigue, burying your emotions, feelings of hopelessness, frequent complaining about your work or your life, excessive use of drugs or alcohol, overeating, poor self-care, and denial. According to the Compassion Fatigue Awareness Project, "denial is one of the most detrimental symptoms." It prohibits those experiencing compassion fatigue to accurately evaluate how stressed they actually are, which can be a roadblock to getting the help they need.

A personal assessment. If these signs sound all too familiar, you may want to rate yourself on the Professional Quality of Life (ProQOL) Scale. The ProQOL measure is a free tool designed for those who help others as part of their daily lives. It measures both the negative aspects of helping others (compassion fatigue) and the positive aspects of those responsibilities (compassion satisfaction).

To take the assessment, you simply rate each statement on a scale from 1 to 5 (1 = never and 5 = very often) based on how you've felt about your work in the past 30 days. Some of the statements include: "My work makes me feel satisfied," "I feel worn out because of my work as a [helper]," and "I feel as though I am experiencing the trauma of someone I have [helped]." After rating each statement, you will receive a personal score; based on that score, you will fall into one of three categories: compassion satisfaction, burnout, or secondary traumatic stress. (You can learn more about these categories by visiting proqol.org.)

Once you know the signs, how do you manage it? Fortunately, there are resources and strategies to help.

Fight the Fatigue

There are proven techniques that can help you work through the symptoms of compassion fatigue. Many focus on finding the time in your day for you and being kind to yourself.

Diet and exercise: Eat well and exercise, even if it's just a walk to begin or end your workday.

Hobbies and leisure activities: Find something you enjoy—and spend time doing it.

Accountability partner: Ask someone you trust to partner with you on self-care commitments. In turn, be that individual's accountability partner and provide the ongoing support he or she needs.

Gratitude: Take the opportunity to reflect on things you're thankful for. For some, this practice can be as simple as writing down three things they are grateful for each day.

Success stories: Identify one success story every day and celebrate it!

Verbal expression: By letting others know what you need verbally, it will be easier for them to deliver on your expectations.

Personal boundaries: Share with others what works for you and what doesn't.

This last point deserves a bit more discussion. Setting boundaries will help you conserve your resources and energy, as well as protect yourself from feelings of resentment, anger, and fatigue. The best way to determine your personal boundaries is to assess your needs. For example, how much alone time do you require daily to renew yourself? How much support do you need to care for clients? Once you have a clear view of your boundaries, create a plan that allows you to care for others with gentleness and patience.

One Advisor's Experience

Now, let's look at how compassion fatigue has played out in real life. David Young, founder and president of Clarion Wealth Management Partners, shared his experience. His story helps shine a light on how difficulties in your clients' lives may start negatively affecting your own life if not properly managed.

Young had been working with a couple for many years when he found out that the husband had been diagnosed with cancer. After learning the specifics of the situation, he promised his personal and professional support as their medical team worked on a treatment plan. Young reflected:

"I felt the familiar weight of responsibility that settled somewhere between my heartfelt concern for their spiritual and physical well-being and their financial well-being given that, should he pass away, their financial position was not yet at the place where their financial security was assured."

Over the course of a year, Young worked with his clients to review their financial situation while preparing for the what-ifs. But it became evident during a meeting the following year that the husband had declined significantly. After reviewing their documentation, Young could not let them leave without asking a difficult question: "What are your plans if/when you pass away?"

Despite their circumstances, the couple hadn't yet considered the funeral or burial. Young guided them through the various arrangements, including the do-not-resuscitate order and other pertinent end-of-life decisions. Sadly, his client passed away shortly thereafter.

In the next year, Young and his team helped the widowed client with her estate. This included numerous meetings to educate, reeducate, and navigate financial decisions on topics from budgeting and bill paying to whether she was going to stay in her home.

Although Young experienced the symptoms of compassion fatigue when serving many clients through the years, it was especially evident to him in this situation. He recognized that something was amiss when he became short with his staff or his family prior to or immediately after meeting with this client. Sometimes, he was even impatient with the client—and Young realized he had to increase and fortify his boundaries.

Young emphasized the importance of keeping things in perspective. He periodically reminds himself of why he does this work, and he keeps the end goal in mind: an educated, peaceful relationship that is mutually beneficial. He also practices deep breathing and plans and shares his meeting agenda ahead of time. By doing so, he and his clients can be on the same page, accomplish their goals together, and mentally prepare for any potential obstacles that may arise.

Care for Others While Caring for Yourself

There is honor in helping others, but there are limits to how much you can give. It may not be possible to embrace every technique discussed here. If you can commit to doing just one and adding others over time, you can continue to deliver on your commitment to caring for your clients while also caring for yourself.



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