



Being Proactive Without Overstepping

“The questions business support professionals are asking”

Practical answers on confidence, ownership, speaking up, new executives and knowing where the line is.

Before we start

There is a very particular moment most of us in the business support profession know well. You spot something, you can see a better way, you may even know exactly what you would do. Then the doubt arrives and I bet, just like me, you asked yourself; is it my place?

I have worked as an Executive Assistant for many years and I still recognise that feeling. I have also tried enough approaches to know that being proactive is not about charging ahead, proving yourself, or taking every decision alone. It is about judgement.

This Q&A pulls together the questions people ask me most often. I am sharing the answers I would give in a coaching session, along with the wording I have found useful in real working relationships.

A useful reminder: suggesting something is not the same as overstepping. Checking first is not weakness. Acting is not always the most senior response. The right move depends on context, trust and risk.



1. How do I become more proactive without overstepping?

Start with what you can see, not with what you think you need permission to become. Proactivity usually begins with something small: a repeat issue, a delay, a question that keeps coming up, or pressure landing on the same person every week.

My first move is to separate noticing from acting. You are allowed to notice. You are allowed to think. You are allowed to form a view. The decision is how far you should go next. If you have enough context and it sits within your remit, act. If you are missing context, check. If you can see a sensible route forward but do not own the decision, suggest it.

What you could say

"I've noticed this keeps coming up. I think there may be a simpler way of handling it. Can I run an idea past you?"

Ask yourself: Am I holding back because I genuinely lack context, or because I am worried about being seen as too much?

2. How do I know when to act and when to check first?

I use a very simple check before I move: Do I understand the outcome? Do I have enough context? What happens if I get it wrong? Have I handled something similar before?

If the risk is low, the outcome is clear and you have dealt with something similar before, you may already have enough to act. If there are people, money, reputation, sensitive information or wider business consequences involved, checking first is often the better decision.

The goal is not to get everything into ACT. Good judgement means choosing the right response.

What you could say

"I'm happy to take this forward. Before I do, is there anything I need to know that would change how you want it handled?"

Ask yourself: What is the real risk here if I act without checking?

3. How can I speak up more confidently in meetings?

Do not wait until you can deliver the perfect contribution. That is often what keeps people silent. Go in with one point, one question or one observation you want to make.



I also find it easier to speak when I stop thinking, 'I need to sound senior,' and instead ask, 'What information do I have that could help this conversation?' Your job is not to impress the room full of people. It is to add something useful.

If you are still building confidence, prepare your sentence before the meeting. That is great preparation.

What you could say

"Can I add something I've noticed from my side?"

Ask yourself: *What is one useful thing I know that may not yet have been said in the room?*

4. What if I'm new in the role and haven't built trust yet?

Being new does not mean you have to sit back and wait for instructions. It does mean you are still learning the boundaries. In the early days, I would spend more time in CHECK and SUGGEST than ACT.

Use that period to learn what matters to the people you support, how they make decisions, what they want visibility of, and what they are comfortable delegating. Every sensible suggestion gives them information about how you think. Every agreed action builds your runway for the next one.

You do not earn trust by pretending you already know everything. You earn it by showing good judgement with what you do know.

What you could say

"I'm still learning how you like things handled, but I've noticed something. Would you be open to a suggestion?"

Ask yourself: *What have I already learned about how this person prefers decisions to be made?*

5. How do I become more proactive with a new executive?

Treat the beginning of a new partnership as a reset, even if you are very experienced. What worked beautifully with your last executive may not be right for this one.

Rather than asking broad questions such as 'How can I support you better?', bring specific observations. If you notice they are spending time on something you could reasonably own, name it. If they repeatedly ask for the same information, create a better way of getting it to them. Then agree the boundary.

The aim is to move from repeated permission to agreed ownership, one area at a time.



What you could say

"I've noticed you're spending quite a bit of time on this. I could take ownership of it going forward if that would help. Would you be comfortable with that?"

Ask yourself: *What is one recurring task or pressure point I could discuss taking ownership of?*

6. How do I suggest an idea without sounding critical or pushy?

Talk about what you have noticed, not what somebody has done wrong. That small change matters.

'I've noticed we are chasing this every Friday' opens a very different conversation from 'This process is inefficient.' One is an observation. The other can sound like a judgement.

Then add why it matters and a sensible next step. You do not need a super polished business case every time. You need enough thinking to make the conversation useful.

What you could say

"I've noticed we're chasing the same information each week and it is delaying the update. I have an idea that might make it easier. Would you be open to me trying it?"

Ask yourself: *Am I describing the problem, or judging the person or process behind it?*

7. How do I take more ownership without taking on everybody else's work?

This really matters. Becoming more proactive shouldn't become a reward for being capable when you inherit everyone else's unfinished work.

Before you take something on, ask whether ownership makes sense for your role, whether you have capacity, and whether the responsibility is actually yours. Sometimes the proactive move is to clarify ownership rather than absorb the task.

I have learned that being helpful and being endlessly available are not the same thing.

What you could say

"I'm happy to help move this forward. Can we clarify who owns it once the immediate issue is resolved?"

Ask yourself: *Am I taking ownership because it makes sense, or because I am the person who usually rescues it?*



8. What if I can see a better way of doing something, but nobody has asked me to change it?

You do not need to always redesign the whole process before anyone knows you are thinking about it. Start smaller and understand why the current process exists. There may be history, regulation, system limitations or stakeholder needs that are not obvious from where you sit.

Then bring the observation and the idea. If it is low risk, you might offer to test a small version. That gives people something real to react to without forcing a change on them.

What you could say

"I've noticed this takes several steps every time. Before I go any further, is there a reason we do it this way? I have an idea that could simplify it if there isn't."

Ask yourself: *What might I not know about why the current process exists?*

9. How do I offer help in a way that genuinely reduces pressure on my executive?

'Is there anything I can help with?' sounds helpful, but it gives the other person another decision to make. A stronger offer is specific.

Notice the pressure. Name what you could take. Explain the outcome. Make it easy for them to say yes, no or not yet.

The best support often comes from reducing decisions, not creating another question for your executive to answer.

What you could say

"I've noticed you're spending time pulling these updates together every Thursday. I can collect them and send you a one-page summary by 3pm if that would be useful."

Ask yourself: *What decision or piece of work could I make easier for them this week?*



10. What if I suggest something and they say no?

Then you have information you did not have before. A no is not proof that you overstepped. It may be about timing, priorities, risk, budget, preference or something you could not see.

If the relationship allows it, ask one sensible follow-up so you can learn from the decision. Then move on- you do not need to defend every idea you raise.

I would much rather make a thoughtful suggestion that is declined than train myself never to contribute because I am scared of hearing no.

What you could say

"No problem. That helps me understand the boundary. Is there anything you'd like me to keep an eye on instead?"

Ask yourself: *What can I learn from the answer without turning it into a judgement about my capability?*



A quick way to decide what happens next...

When you are unsure, use this as a simple check rather than trying to force every situation into action.

WAIT	CHECK	SUGGEST	ACT
I don't have enough information yet.	I have an idea, but I need clarity first.	I can see a sensible way forward and can recommend it.	I have the context, trust and authority to move it on.

The goal is not to get everything into ACT. The goal is to choose the right response for you.

Take this away with you

- Being proactive does not mean acting on everything all the time.
- Checking first can still be the right move.
- Suggesting an idea is not the same as overstepping.
- Good judgement comes from context, trust and knowing your remit.
- If you spot something, do not just sit on it. Work out what the next sensible move is.

Two questions to take back to work

What are you currently waiting to be told to do that you already know needs attention?

Where have you already earned enough trust to take a little more ownership?



A note from Jodie

I have spent years testing what works in real executive support relationships. The thing I keep coming back to is this: confidence is useful, but judgement builds trust between you.

You do not need to become a different kind of person to be more proactive. Start by noticing more, thinking a little further ahead, and being willing to raise what you see in a useful way.

If you want help applying this to your own role, career or next move, that is exactly the kind of work I do through Aspire & Achieve mentoring and career coaching.

The Assistant's Edge | jodiemears.com