

Assistant's Guide:

How to Work, Grow, and Succeed



Why We Made This Guide

Being an assistant is awesome. You gain exposure to new ideas, build neural and social connections, and open tons of opportunities for career growth — from product and project management to business assistance and even COO roles.

To make the most of these opportunities, it's not enough to just be a good assistant or do your job “well enough.” You must stand out — to deliver consistently exceptional results.

We wrote these principles as a summary of our experience and a practical guide — how to work in a way that helps you grow and achieve success as an assistant.

You'll find a lot of tough statements and high expectations here. Following them isn't easy, and this path isn't for everyone. But if you choose it, you'll be able to reach career milestones you'll genuinely be proud of.

The 14 Commandments

This is your second Bible.

1. Take ownership and stay in control.

The courier messed up? It's still your responsibility — not the delivery service's, not the courier's, not Mercury in retrograde.

2. Think differently.

Can't solve a task head-on? Hack it — find another way. There are no unsolvable problems; if something doesn't work, it just means your approach isn't right yet.

3. Think first, then ask.

In 99% of cases, you can find any information yourself without bothering others. Ask yourself three times whether you've really done everything possible before asking for help.

4. Don't lie. Own your mistakes and learn from them.

If someone points out your error, don't defend yourself — analyze it and explain how you could've handled it better next time.

5. Don't waste time on tasks AI can do for you.

6. Never wait — act.

Always take a proactive stance. Sent materials that need approval? Ask for a quick review. The partner's employee isn't replying? Call or message their manager.

7. Eliminate “force majeure” from your life.

If you mess up because of personal issues (helping a friend's cat give birth, no internet, waiting for a courier, etc.), ask yourself if it's worth the lost work. If not — cut out those distractions while you're on the job.

8. Do every task as if it were for yourself or someone you love.

No sloppiness, shortcuts, or half-hearted work allowed.

9. Respect the people whose tasks you handle.

They give you the opportunity to grow on your own path.

10. Figure things out on your own.

No one will spoon-feed you what you can learn by yourself.

11. Be meticulous — double-check everything.

Don't rely on luck, people, or "Venus in Jupiter." Anything that can go wrong with your task will go wrong — it's your job to foresee and prevent it.

12. Keep growing.

Never stay still. Read books and research, take courses, talk to experts, attend conferences and seminars. Growth doesn't just happen at work — you grow outside of it and apply that growth inside it.

13. Seek and master tools that make you more efficient.

Spending three hours transcribing a meeting when you could edit an AI transcript in ten minutes is just stupid.

14. If you constantly feel miserable at work — quit.

Being an assistant isn't for you. If you don't, chances are 99% you'll still quit eventually — just after a lot more suffering, stress, and resentment. If you're struggling but not ready to quit — get a grip, stop whining, and get back to work.

Digital Profiles

Here are the rules that will make anyone see you as a true professional.

Use profile photos in a smart casual style.

Choose a username you wouldn't be embarrassed to share.

Always include your full first and last name in any account.

In your bio, write what you'd normally put in your résumé.

Fill out your profile completely — all required and optional fields.

If the platform has international users, write your name in Latin letters and complete your profile in English.

You can use emojis (corporate or neutral ones) in your name if it fits your company's culture.

Using a nickname like @red_pussy, naming your account Beauty Queen, putting a cat photo as your avatar, writing that you have suicidal thoughts in your bio, or adding 🤔 after your name — is the professional equivalent of showing up to a meeting with your boss wearing a bathrobe.

Task Tracker

Your sacred temple. Without it, you'll drown in your tasks — even if you think you won't.

Every single task that comes your way must be recorded in your task tracker. If logging a task takes more time than completing it, that's a sign you need automation — not an excuse to skip it. Set up integrations between the platform where you communicate with your boss and your task tracker.

Your tracker should either have a built-in time tracker or integrate with one. Once a month (ideally more often), review where your time goes and find ways to optimize tasks that take the most of it. If you don't, another assistant will complete the same tasks 100 times faster — and they'll be hired instead of you.

When working with tasks in your tracker, follow these principles:

- An outside observer should be able to understand what you're doing.
- You should understand what you were doing — even a month or six months later.
- A task must always have an accurate, current status. Don't work on a task marked *Done* — switch it to *In Progress* first.
- Working on tasks that aren't in the tracker is forbidden.
- If a task came from an external source (for example, your boss's tracker), link it in your own system.
- Always save the solution or result inside the task card.
- Give your boss access to your tracker — they should be able to see what you're working on, even on a Sunday night, without needing to ask you.
- Send a short daily update from your tracker:
 - Morning — what you plan to do today.

- Evening — what you accomplished (and what didn't work out).
- If a task is stuck, it's your responsibility to get it moving again.

Each task card must include these fields:

- **Deadline.** If there isn't one, set it yourself — the rule is: the sooner, the better.
- **Estimate.** How long it'll take — e.g., 2 hours or 1 week.
- **Title.** It should clearly show what the task is, even without opening it.
- **Description.** It should be detailed enough that you could hand it off to someone else at any moment without extra explanation.
- **Status.** It should show exactly what's happening right now. If it's on hold, specify what event or action will restart it — and if you can influence that event, do it 😊

If you think all this sounds like outdated corporate nonsense — master at least this level of self-management before moving on to more advanced productivity systems.

Documents

Create files only in the corporate storage — never on your personal drive.

Create a file for any text longer than five lines or anything more than two people will see.

Choose a file name that clearly reflects the document's content.

“File_with_data” doesn't count.

Keep your folders clean — delete duplicates, unnecessary, and empty files regularly.

Before sending a document, check access permissions. The recipient must be able to open and edit it. If the document contains personal data, share access only via email — never “anyone with the link.” 🙅🙅

Always send files in editable formats.

If you send a PDF, also attach the original editable file you worked in.

Use modern file formats only: .docx instead of .doc, .xlsx instead of .xls, and so on.

Calendar

Always add every event to the calendar that you discuss with your boss. If your boss asks you to book a doctor's appointment — you book the appointment and add it to the calendar. If you reserve a restaurant table — same rule applies.

Use clear, specific titles. Don't write "Meeting about..." or "Call on the topic of..." — these filler words make it hard to see what the event is about when viewing it on a phone.

Set exact times. If a shoot is scheduled from 6 to 7 PM CET, create an event titled "Shoot 18:00–19:00 CET." Make sure the event matches your boss's actual time zone.

Avoid back-to-back scheduling. Always leave time for travel (considering traffic) for offline meetings, or a 30-minute break between online ones.

No overlapping events. If you notice time conflicts, suggest how to fix them immediately.

Include location or link. Add the address for offline meetings or the video call link for online ones.

Add backup contact info. In case your phone dies or you're unreachable, include the contact of the organizer or host on the other side, and the phone numbers of participants (especially if there's no clear organizer listed).

If you cancel a meeting, notify all participants and explain why (e.g. "the speaker is sick"). Immediately reschedule if the meeting still matters — otherwise, you'll forget it in five minutes.

Add context in the description. Write a short summary explaining what the meeting is about — so that even a half-distracted participant instantly remembers why they're there.

Invite participants properly. Add them via the Guests feature and make sure they've accepted the invite. If not, follow up to confirm the meeting is still on.

Attach materials. If the external organizer sends files, or if you're prepping your boss, attach those materials. For formal meetings, include an agenda — list key topics and their order.

Offer productivity tools. Suggest connecting an AI transcription tool for calls and a meeting scheduling service (either built-in or integrated). Once approved, set up the integrations and regularly check that these tools are paid for and working properly.

Online Meetings

Follow all the rules from the “Calendar” section.

Make sure your boss has an account on the platform where the meeting will take place. If not — help set it up.

Confirm with your boss whether you should attend the meeting yourself. If you’re attending — turn your camera on. If you feel shy because you “don’t look good,” start looking good and turn it on anyway. If your laptop camera sucks, use your phone camera instead.

Always test your setup by joining the call 5 minutes early.

Check your background. There should be nothing behind you that would look out of place in a real office — paper towel racks, walls your dog has chewed up, bed headboards, or any background that screams *home chaos* instead of a *professional environment*.

Record the meeting (with participants’ consent) and save the recording in the calendar event card.

Send a follow-up to all participants after the meeting — include key takeaways, action items, and next steps.

Follow-Ups

A good follow-up serves three main purposes:

- It helps everyone sync up on the meeting results one more time.
- It helps people remember what was agreed upon — even a month, six months, or a year later.
- It shows your level of professionalism and understanding of proper business communication.

Criteria for a Good Follow-Up:

- Clear to everyone who attended the meeting — even if they read it three days later while hungover.
- Clear to those who didn't attend the meeting but still need to understand what was decided (and who may be in the same hungover state).
- Linked to relevant tasks in the project tracker.
- Includes deadlines and responsible people for each agreed action.
- Written and sent within 30 minutes after the meeting ends.

Security

Use strong passwords. 12345678 is not a strong password.

Share passwords only through secure password managers (e.g., 1Password). Never send login details or passwords in messages, chats, or documents.

Emails

Here are the core principles to follow when organizing and managing email inboxes.

Keep your inbox clean. All emails should be processed and sorted into folders — your Inbox must have zero unread or lingering messages.

Only keep what's truly needed. Save only emails that might be useful within the next six months. Delete everything else immediately.

Have a clear email organization system. Use folders, flags, and labels to categorize and store messages.

Set up automatic filters. Create filters for technical notifications, newsletters, project-related emails, messages with attachments, etc.

Unsubscribe from unnecessary mailing lists immediately.

Delete irrelevant emails right away.

Always keep financial correspondence. Receipts, invoices, and bank statements should never be deleted.

Use auto-replies for common inquiries.

Set up an automatic email signature.

Do monthly maintenance. Once a month, clear out any leftover junk or overlooked emails and create a full backup.

Apply these rules both to your own inbox and your boss's inbox. If you're unsure how to implement a specific rule in a given email service — ask an AI assistant for help.

If you need to clean up an email disaster — say, 5,000 unread messages — first check whether there's an AI tool that can assist you (but make a backup just in case). If there isn't, work through these principles step by

step, updating your boss on what you're doing. If you're unsure about any action — wait for approval before proceeding.



Contacts

When you're asked to find someone's contact information, your goal is to get personal contacts — not just info@... addresses or a company's public phone number.

If you can't use specialized contact search tools (like hunter.io, snov.io, etc.) — or you're hesitant to use leaked databases (your loss, honestly) — here's how to dig up contacts the old-fashioned way.

Find the person's name. If you're asked to find the contact of a company's CEO, start with their name. Use services like Crunchbase to look up the company and its executive director.

Find the legal entity. If you only know the brand name (not the legal company name), go to their website, open any legal document — like a Terms of Service or Privacy Policy — and check the header for the official company name.

Determine the person's location. If it's a company executive, check the company's registered city or headquarters.

Search across all social networks. Focus on their likely platform, not yours. If you're 20 and they're 56 — try Facebook, not TikTok.

Estimate their age if you don't know it. Use logical reasoning. For example, if you're told it's the son of a 50-year-old colleague, he's likely around 20–30.

Read the entire profile carefully. People often leave useful links — for instance, a Taplink page with a direct contact number.

Check username patterns. Once you find a social media profile, note the exact spelling and nickname. Search the same username in Instagram and other platforms — most people reuse handles to make life easier for themselves.

Even inactive accounts matter. Browse them anyway — you might find a clue, like a post saying, “I’ve moved to Viber — here’s my handle.”

Check previous workplaces or projects. Sometimes you’ll find contact details on unrelated sites — e.g., a volunteer page for a charity where they helped “save hamsters from squirrels.”

If they have a public profile, read the bio. It often includes a personal contact link.

If their account looks like a secret agent’s (no info at all), look at photos — if there’s a spouse or partner tagged, check that profile. You’ll usually find far more useful details there.

But honestly — it’s still better to use professional contact search tools. Many offer free access for a limited number of leads and will save you hours of detective work.

Experts

When you're tasked with finding a specialist — e.g., a nanny, makeup artist, part-time developer, etc.

Choose the right platform. Figure out where people usually look for this type of professional. Use GPT or other AI tools to identify the best platforms and services for the specific role.

Evaluate candidates by hard and soft skills. Hard skills are determined by:

- The brief. If you don't clearly understand who's needed, upload the brief to an AI assistant and ask: "What skills would be listed on the resume of someone capable of doing this?" This works especially well for finding part-time developers.
- Ratings.
Always choose candidates with high ratings and plenty of reviews. Read the reviews carefully — especially negative ones — and note how the person responds to criticism.
- Portfolio. Prefer those who've handled similar tasks before.

Soft skills are determined through communication:

- The person should be service-oriented and polite.
- They should speak clear and comfortable required language.
- They should show genuine interest in the task — without being pushy.

Provide several options. Aim to shortlist at least 3–4 candidates who meet the brief so your boss can choose. Include your recommendations on who you think is the best fit and why.

If time is tight and you can't find that many — it's okay to send fewer, if you meet the deadline.

Contractors

The process is similar to finding individual specialists — with a few key differences.

Contractors are usually found through web search, not on freelance or job platforms. Use Google (or other search engines) to identify suitable companies or teams.

Assess hard skills the same way as for specialists — based on their portfolio, case studies, ratings, and relevant experience.

Evaluate soft skills by judging the professionalism and adequacy of the company representative you communicate with.

In short: look broadly, check their work carefully, and pay close attention to how they interact — it often tells you more than their website does.

Waiting

Some tasks can't be completed immediately — for example, when you need to request information from a contractor or post a job listing and wait for responses.

In such cases, it's easy to break the 6th Commandment (“Never wait — act”) and get stuck waiting for others to reply.

Remember this rule. The average turnaround time for these kinds of tasks should not exceed two working days — and sometimes you'll need to deliver results the same day.

As soon as you've done the preparatory work (for instance, posted an ad), check the first responses right away.

If there are no responses or they're irrelevant, don't wait — improve your listing or try other channels for outreach and communication.

Communication

No one cares whether you like talking to people or not. Communication isn't about social comfort — it's about your ability to achieve the desired result through interaction with any person.

You must always:

- Clearly define the goal. Know exactly what result you want. Why are you talking to this person right now? Can the issue be solved without communication?
- Choose the most effective channel. Effective means the one that gets results fastest. Don't book a restaurant via email if you can just call.
- Respect people's time. Skip long intros and personal stories. No one needs to hear how heroically you overcame obstacles to get something done.
- Write and speak correctly. Use proper grammar, avoid incomplete sentences, double-check for typos and mistakes.

General communication rules:

- Never distort clients', partners', or companies' names.
- Never interrupt anyone.
- "Now" means within five minutes. Don't say it and disappear for half an hour.
- Don't use vague phrases like "soon" — always give a clear timeframe.
- Choose the fastest way to get a response. Call if you have a number, message if calls fail, and if a channel doesn't work — find another. "I couldn't reach them" is not an acceptable excuse for an unresolved issue.
- Always confirm phone conversations in writing (via messenger or email).

- If you've sent an email, call to confirm it was received and ask when to expect a reply.
- Consider national context: don't write on a platform if it's uncommon in the recipient's country.
- Be persistent but professional. Don't spam every two minutes asking for an answer — but don't go silent for three days either.

Written communication rules:

- Structure your text. Use paragraphs.
- Check spelling and grammar. Even if you're confident, always proofread.
- Follow the 1:1:1 rule: one sentence — one idea; one paragraph — one thought.
- Maintain atomicity, consistency, and clarity. If these terms are new to you — look them up and learn what they mean.
- Format properly: same font, consistent alignment, no extra spaces or empty lines. Applies to both documents and messages.
- Never send messages word-by-word. Write the full message — then hit "Send."
- If you read a message but can't respond immediately, let the sender know when you'll reply. Reading and disappearing is unacceptable.
- Use complete sentences. Don't write "Alex???" or "???" to remind someone — say: "Alex, kindly remind you about our issue. Waiting from you [precise action from Alex]."

How to argue professionally:

- Prepare first. Don't shout about laws you've never read. Know the facts.
- Gather a full log of the situation. Detail the timeline and pinpoint where the other side went wrong.

- Define your goal. What outcome do you want — refund, compensation, apology, or special terms next time? Make sure your request is realistic under local laws.
- State your escalation plan. Clarify what you'll do if the issue isn't resolved — this usually gets results.
- Escalate reasonably. Don't email the Coca-Cola CEO about a bad can of soda, but also don't spend a month arguing with a call-center agent who can't actually fix the issue.

Team communication rules:

- Post in group chats only if it concerns everyone.
- Don't duplicate actions unnecessarily — no need to message "I created a task in Notion."
- Don't ask for permission to ask questions. Just ask.
- Tag people when you need a quick response — and call if they don't react.

Skills

These are the key skills every great assistant should have. If you're missing any of them — make it your goal to learn and master them within the next month.

- Prompting. You don't just ask an AI a question — you make prompts so precisely that the system gives you a clear, accurate, and high-quality result.
- Multitasking. You don't panic when your task tracker shows 15 active tasks — all due within the next hour.
- English advanced only. You must be able to communicate confidently and professionally in English — both in writing and verbally.

Personal qualities:

- Attention to detail. You notice every little thing, even under tight deadlines and time pressure.
- Accuracy. You instinctively understand why fonts must be consistent and why text should be free of spelling, punctuation, and grammar errors.
- Emotional stability. It's easy to stay calm when things are smooth — but your strength shows in difficult moments. Most of your work as an assistant will happen in those moments.
- Respect for hierarchy. Sometimes there's no time for long explanations. If you need to argue every decision or demand detailed justifications from your manager, this role will be hard for you.

Tools

What you must master at an advanced level.

- Design tools: Figma, Canva, and equivalents.
- Landing page builders: Webflow, or similar.
- Email automation tools: Apollo, or equivalents.
- Calendar management: Google Calendar, Notion Calendar, and similar.
- Online meetings: Google Meet, Zoom, and equivalents.
- Photo editors: Adobe Photoshop or analogues.
- Video editors: iMovie, Movie Maker, or similar.
- Office suite: PowerPoint, Excel, Word.
- Social media: LinkedIn, Instagram, Facebook, TikTok.
- Contact sourcing tools: RocketReach, Hunter.io, and others.

P.S.

This kind of corporate culture isn't for everyone.

If you work as an assistant, you must be highly productive, fearless in the face of complexity, and relentlessly result-driven.

At the beginning, things may feel overwhelming — you'll struggle to keep everything under control and feel like it's all falling apart.

Take it as a challenge. Stay motivated — and you'll get there. Soon, you'll be able to work confidently with any executive, and in a couple of years, you'll see the world from a completely new perspective.

And here are 3 movies every assistant should watch:

🎬 The Devil Wears Prada — on meeting high expectations.

🎬 The Concierge — on finding joy in serving others' needs.

🎬 Triangle of Sadness — on how the VIP service world really works.