

ACHIEVING THE HIGH-LEVEL EXECUTIVE ASSISTANT MINDSET

2023 COURSE GUIDE

**It's all about the executive and assistant partnership –
the foundation upon which your impact is made, and legacy built.**

It has taken me over four decades of experience, countless hours of reading and research on works already developed by active or retired executive assistants, entrepreneurs, and business owners, and my own professional development to stay current on present and future best practices of my profession and small business administration, to assemble this course. This is a compilation of information, advice, and tips from my peers who have graciously shared their experiences in books and articles.

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Tracking my group and individual workshops over the past few years, the participants were at all different levels of knowledge, skills, dedication, engagement, and career moves. Some participants needed support in managing their day, and others were looking to move to a high-level executive assistant and planning to make this role their career.

The executive assistant's role is comprehensive and encompasses all aspects of the business. An executive assistant cannot just handle one aspect of the organization. Being a business support partner does not mean that it is necessary to know everything about everything, but it is important to have reliable resources. You cannot be an executive assistant "until something better comes along". It takes time, loyalty, and trust, to build the partnership.

Building and strengthening the foundation of the executive office is vitally important to the stability of the organization. If the leader can be sure he/she is operating on a solid foundation, they will have the mindset and mental space to do what it takes to grow the organization. This is where we come in. Through our partnership, we are laying this foundation. That's why it is so important to truly want to be in this role. The professional and emotional investment is long-term and extremely rewarding.

The first step to laying the foundation of the partnership is for human resource departments and recruiting agencies to hire the right assistant in order to create the right match with the executive. Many recruiting agencies and human resource departments are not aware of the great impact made by the executive assistant on the executive office.

REMEMBER, the transaction of being interviewed and hired for a position is an exchange of services. They want something from you, and you want something from them. WE choose the terms and values by which we accept a position, and WE choose the terms and values by which we remain in a position.

We can improve/strengthen/update our skills through excellent online tutorials and courses (which I am constantly doing). The purpose of this course is to aspire to professional fulfillment beyond our skill levels, to build our career and our legacy.

I am hoping this course will serve to demonstrate the impact you can have on an organization, let alone the rewarding partnership with your executive. I started in this profession in 1978, and over the past 42+ years I have worked with and learned from wonderful colleagues and executives who have invested the time in me to teach me and listen to me. With the exception of a couple of in between jobs, I have loved every position I have had – and we need those not so good experiences to help us understand and learn and enjoy the good opportunities.

In turn, I wish you, with all my heart, an equally rewarding career in this role. The business world is constantly evolving, and our position, more than most, requires us to be constantly vigilant and be sure that we have what it takes to continue to make a positive impact and make a place for ourselves in the future of our profession.



Professional highlights

I am of Greek descent, born and brought up in Tanzania, East Africa. I have had the great fortune to live in Greece, South Africa, France, Switzerland, United States, Italy, and travel to England, Germany, Serbia, Turkey, and Egypt. Upon completion of my business management studies in Switzerland, I worked on both the European and North American continents in the business and hospitality fields.

In 2002, while continuing as an active executive assistant, I established the UK-accredited *Cross Cultural Cosmos* which provided the wider Balkan region with trainings on international business practices, communication, and behavior. *Cross Cultural Cosmos* co-founded the Building Powerful Influence project, with *euronique+Communications* of Sacramento, CA, to build business communication across borders through global events.

Since 2013, *Cross Cultural Cosmos* evolved to the *Business Realm* which offers my 40+ years of experience and skills in business administration, executive assistant instructor and coach, executive assistant hiring and onboarding facilitator, and administration and operations support to business owners, entrepreneurs, and busy professionals.

I have been extremely fortunate in having chosen a profession which fulfills me intellectually and provides so many opportunities to meet fascinating people and explore and study all sorts of matters which interest me. My studies on business anthropology have given me an insight to human behavior in a business environment which place me in a far better position when working with clients and collaborators.



I. CODE OF ETHICS

1. Before commencement of coaching service, explain and ensure that you understand the nature and potential value of coaching, limits of confidentiality, financial arrangements, terms of the coaching agreement.
2. Before commencement of coaching service, create an agreement regarding the roles, responsibilities, and rights of all parties involved.
3. Maintain the strictest levels of confidentiality and discretion regarding personal data and communication.
4. Be clear on how information will be exchanged among all parties involved in the coaching process.
5. Have a clear understanding with you about the conditions under which information will not be kept confidential (e.g., illegal activity; if required by law, valid court order or subpoena; possible or likely risk of danger to self or to others). In a case where I reasonably believe one of the above circumstances is applicable, I may need to inform the appropriate authorities.
6. Maintain, store, and dispose of any records, including electronic files and communications, created during my professional interactions in a confidential and secure manner that complies with any applicable laws and agreements.
7. Be aware of any indications in a change in the value received from the coaching relationship. If so, make necessary changes or suggest you seek another professional or use a different resource.
8. Respect each other's right to terminate the coaching relationship at any point following a reasonable discussion.
9. Commit to excellence through continued personal, professional, and ethical development
10. Recognize and acknowledge my personal limitations or circumstances that may impair, conflict with, or interfere with my coaching performance. This may include suspending or terminating my coaching relationship.
11. Set clear, appropriate, and culturally sensitive boundaries with all interactions.
12. Maintain fairness and equality in all interactions while respecting local rules and cultural practices.
13. Discrimination on the basis of age, race, gender expression, ethnicity, sexual orientation, religion, national origin, disability, or military status, will not be tolerated from any person involved in the coaching process.
14. Recognize and honor the contributions and intellectual property of others, claiming ownership only my own materials.

II. PURPOSE – OBJECTIVES - OUTCOMES

VISION – PASSION – ACTION

Business triage is a decision-making system that provides a framework for business decision making, outcome goal prioritization, and resource allocation; by categorizing desired outcomes and goals and the processes that support them based on their relative importance to realize agreed-upon measurable goals and outcomes.

VISION: Contribute to a business environment which makes a positive difference to our future.

MISSION: Give back time to business leaders so they can focus on the growth of their company and enjoy their home life while strengthening the economy.

CONTRIBUTION: PROBLEM – SOLUTION - BENEFIT

- Offer constructive steps toward a better understanding on how to bring value to your work, role, and build your legacy.
- Experience in using proven methods to implement your role.

PURPOSE:

To maximize your positive and long-term impact on your organization's executive office, your internal/external relationships, and your legacy.

OBJECTIVES:

- Understand and implement the daily operations of the executive office.
- Build your partnership with your executive.
- Understand, communicate, and implement your organization's vision, mission, and overall direction, internally and externally.
- Maintain awareness of both external and internal opportunities for expansion, customers, markets, new industry developments, and practices/standards.
- Be aware of your employees' morale and their engagement with and commitment to your company's mission and culture.

OUTCOMES & BENEFITS:

1. Improve your executive's working experience by adapting to their business style.
2. Be guided by and align your, your executive's, and the executive office's objectives.
3. Understand the importance of your professional boundaries and ethics; understand the integrity and consequences of your words and actions; importance of trust, loyalty, discretion.
4. Ensure that all officers and managers are conveying your company's philosophy and guidelines to their own teams/front line, so that all employees understand the expectations of your company.
5. Be proficient in the social and professional aspects of protocol and etiquette, while respecting diverse cultural differences.
6. How to manage your board of directors.
7. Manage your role: focus on results, maximize efficiency, navigate ambiguity, focus on critical points, control the flow of information, anticipate the unexpected, build and nurture effective relationships, practice common-sense decision-making, apply strategic skills of good judgment, be precise, perceptive and persuasive in communication and behavior while respecting diverse cultural differences; keep the big picture in place while you work on individual components, learn and use technological advances and system-based thinking
8. Importance of your own professional development to ensure you are future proof.
9. Maintain an objective perspective on your role.

III. AGENDA

INTRODUCTION

Find a place where you belong and contribute to it. Steve Jobs

Course preparation – achieving effective outcomes.

I. HUMAN RESOURCES & ONBOARDING

I want to inspire people. I want someone to look at me and say, “Because of you, I didn’t give up”. Unknown.

- A. Global Skills Matrix
- B. The four phases of employee onboarding

II. THE EXECUTIVE

When you cannot control what’s happening, challenge yourself to control the way you respond to what’s happening. That is where the power is. Unknown.

- A. Past experiences with an executive assistant
- B. What type of leader are you?
- C. The role of the Executive Office

III. THE EXECUTIVE ASSISTANT

If someone offers you an amazing opportunity and you are not sure if you can do it, say YES, then learn how to do it. Richard Branson

If you are not willing to learn, no one can help you. If you are determined to learn, no one can stop you. Zig Ziglar.

- A. About you
- B. Attention management vs. time management
- C. Boundaries & business ethics
- D. Protocol & etiquette
- E. Cross cultural business practices
- F. Dealing with language barriers

IV. THE PARTNERSHIP

If you don’t care about tiny details, you’ll produce bad work because good work is the culmination of hundreds of tiny details. The most successful people sweat the small stuff. Unknown.

- A. Helping your executive build the partnership
- B. Working with different personality types
- C. What if the partnership is not working?

V. EFFECTIVE OFFICE ADMINISTRATION

Out of clutter, find simplicity. From discord, find harmony. In the middle of life, find opportunity. Albert Einstein.

- A. The Influencer: creating an operations network
- B. Executive office administration

VI. THE ORGANIZATION AND INTERNAL/EXTERNAL RELATIONS

Logic will take you from A to B. Imagination will take you everywhere. Albert Einstein.

- A. Internal & external relations
- B. Client relations

VII. COMPANY STRATEGY

Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world. Joel A. Baker

- A. Being a strategic partner and developing your business acumen
- B. How to develop your business acumen
- C. How to demonstrate your business acumen
- D. Strengthening your industry knowledge
- E. Learning to learn

VIII. THE BOARD OF DIRECTORS

You can't go back and change the beginning, but you can start where you are and change the ending. C.S. Lewis

IX. THE FUTURE

Where focus goes, energy flows. Tony Robbins.

Why worry about the future when I could create it? Unknown

- A. The partnership in a virtual, hybrid, remote world
- B. Professional development and fulfillment
- C. Your future work direction

X. ENDING YOUR DAY

There are two days of the year that nothing can be done. Yesterday and tomorrow. Today is the right day to love, believe, do, and live. Dalai Lama.

XI. INDUSTRY RESOURCES

The ultimate ignorance is the rejection of something you know nothing about yet refuse to investigate. Wayne Dyer.

XII. SUSTAINMENT PLAN

As soon as you truly commit to making something happen, the 'how' will reveal itself. Tony Robbins

You will continue to suffer if you have an emotional reaction to everything that is said to you.

True power is sitting back and observing things with logic. True power is restraint.

If words control you that means everyone else can control you.

Breathe and allow things to pass.

Warren Buffet



IV. COURSE PREPARATION

ACHIEVING EFFECTIVE OUTCOMES

GOALS are an observable and measurable end result having one or more objectives to be achieved. Goals are typically broad in scope.

OBJECTIVES are a specific result you are trying to achieve within a time frame and with available resources. They are considered more specific and easier to measure than a goal. Think of them as the steps you will take to achieve the goal.

OUTCOMES are the measurement and evaluation of an activity's results against their intended or projected results. Outcomes are what you hope to achieve when you accomplish the goal.

YOUR STRENGTHS & WEAKNESSES

- Have you shown people the full extent of your strengths?
 - ❖ List all your skills, including your 'super strengths'.
What skills are being underutilized and could help strengthen your role?
 - ❖ Where can your strengths add value?
 - ❖ How proactive are you in your career?
- List all your weaknesses – work with your weaknesses
 - ❖ How are they holding you back?
 - ❖ What can you do to improve in these areas?

MAKE TIME FOR STRATEGY

- Be aware of your environment: stay alert for opportunities.
- Shift your focus: what work is really going to make a difference?
- Make strategic decisions: so that you are not going through the motions without questioning the impact of what you are doing:
 - ❖ How does the business make money? Who are the key players?
 - ❖ What do you know about the business that only you can see?
 - ❖ What opportunities have not yet been explored, and why not?
 - ❖ What organizational goals (or your executive's goals) are you most passionate about? Are you uniquely qualified to move these goals forward? Can you upskill to make it happen?
 - ❖ What business objectives are you passionate about and uniquely qualified to work with? Who is involved in them? Ask for updates so you can feed them back to your executive.

WHAT IS FALLING THROUGH THE CRACKS

- Look towards stressed-out colleagues: where can you pick up the slack.
- Become an expert: is there an area in the business that is lacking experts Can you upskill to fill that gap?
- Be proactive: get it done – do you need to wait for permission?

DELEGATE AND AUTOMATE

- Create slack in your day: so that you have time to work on growth opportunities.
- Say “no” more often: when tasks do not align with your objectives, your executive’s goals, the strategy of the business or your growth.
- Automate: stay knowledgeable about your technological options and learn them if you need them.

YOUR PLAN FOR SUCCESS, AND

Current Status	Desired State	Identified Gap	Gap Due to Knowledge, Skill	Methods Used to Identify Gap	Learning Outcome	Method of Evaluation
What is currently happening?	What should be happening?	Difference between what is and what should be.	Why do you think the current state exists? What is the underlying cause?	What evidence do you have to validate the gap exists?	What do you want to be able to do as a result of participating in this course?	How are you going to measure that change?

.... YOUR PLAN FOR SUCCESS OVER THE NEXT YEAR

Before the end of the course, create an updated version of your original plan for success, **which you will have considered or created at the beginning of the course.**

Your plan for success is a vision of the successful accomplishment of your goals. Why is it important to update this vision? Because you will be a “different” person than when you started the course. You may already have an expanded consciousness or mindset represented by new beliefs, new behaviors, and different emotional responses, so the new Picture of Success could be quite different and informed by your current life and circumstances.

Our follow-ups will cover identifying what you are experiencing, what behaviors you are consistently demonstrating, and what wins or benefits you are enjoying.

Start of course: Your vision of the successful accomplishment of your goals.

End of course: Update your vision of the successful accomplishment of your goals.

- What are you experiencing?
- What behaviors you are consistently demonstrating?
- What wins you are enjoying?

This plan for success then **becomes your vision of outcomes** that will guide and motivate you through the application → integration → embodiment process of your role's transformation.



V. YOUR SUSTAINMENT PLAN

SUSTAINMENT involves continued and consistent action to achieve your desired outcomes. This includes actions to achieve improvement goals, but also outcomes including effective ways to respond when setbacks surface and addressing limiting beliefs or negative attitudes or emotions may show up from time to time, such as self-doubt, resistance, or fear associated with being or operating at a higher level of personal excellence.

For further clarity, ask yourself:

What kinds of challenges are you likely to experience at various times along your path of taking action on the content, skills, and transformation you experienced during the course?

What are typical emotional responses that will result in self-doubt, procrastination, fear of failure, or lack of self-confidence that could cause paralysis moving forward?

What are the ways in which I can provide acknowledgement of progress or celebration of immediate results – this is something I will pursue during the one-month follow-up with you.

Develop your individual sustainment plan to address your own desires and goals to be achieved, capacity of taking action, and readiness for moving forward.

- **Physical** — minimizing self-defeating behaviors, reactions, or outdated habits, and reinforcing new skills and reactions until they become new automatic habits.
- **Mental** — releasing outdated and self-limiting thoughts/beliefs and adopting and integrating new information, insights, perspectives, and beliefs that are more self-supportive and expansive.
- **Emotional** — liberating oneself from negative emotional patterns, reactivity, and unresolved issues, which results in more empowering, self-supportive, and positive emotional responses.

ACHIEVING EFFECTIVE SUSTAINMENT AS A LEARNING OUTCOME:

1. Immediately implement an aspect of the course to continue the momentum built during the program.
2. Engage with one another to keep the community of support and accountability going after completion of the course.

YOUR PLAN FOR SUCCESS OVER NEXT 3-6 MONTHS ... and one year

Before you complete your last day of the course, create an updated version of your original plan for success, **which you will have considered or created at the beginning of the course.**

Your plan for success is a vision of the successful accomplishment of your goals. Why is it important to update this vision? Because you will be a “different” person than when you started the course. You may already have an expanded consciousness or mindset represented by new beliefs, new behaviors, and different emotional responses, so the new Picture of Success could be quite different and informed by your current life and circumstances.

This plan for success is specifically for the **sustainment period of 3 to 6 months**. Our follow-ups will cover identifying what you are experiencing, what behaviors you are consistently demonstrating, and what wins or benefits you are enjoying.

Start of course:	Your vision of the successful accomplishment of your goals.
End of course:	Update your vision of the successful accomplishment of your goals. <ul style="list-style-type: none">▪ What are you experiencing?▪ What behaviors you are consistently demonstrating?▪ What wins you are enjoying?

This plan for success then **becomes your vision of outcomes** that will guide and motivate you through the application → integration → embodiment process of your role’s transformation.

1. KEEP MOVING – START WITH MICRO STEPS

Rather than focusing on how much progress you can create in sustainment, the focus should be on moving. Habits are formed through repetition until they become automatic. It is important to repeat small actions and grow them gradually to create repetition rather than to go for a big movement and, at some point, quit or get tired and stop.

2. PROACTIVE RECOVERY PLAN

One of the biggest factors in short-term and long-term success is having a proactive recovery plan. No one is perfect at keeping their commitments to take action or tracking results on their progress. The only thing we don’t know is WHEN we will get off-track - too often, the normal reaction to getting off track is to blame ourselves for not keeping the commitments, for not being accountable enough, not having enough will power, or feeling a sense of failure that causes discouragement, greater doubt, and even fear of staying with our plan since “it didn’t work.”

In reality, getting off track is perfectly normal and even expected at some point—maybe it is stress or overwhelm, maybe it's the pressure to deliver such good performance that your fear of failure is manifested, or maybe it's simply circumstantial.

The best antidote for anything that could naturally show up is creating your proactive recovery plan. When you do get off track, how will you get back on track as soon as possible with an attitude of neutrality or acceptance about getting off track? In other words, how will you step around self-judgment and just take action to get back on track?

Proactive recovery plans are what professional athletic teams practice and professional music groups rehearse. They do not just practice what goes well, they build their muscle in responding quickly when something goes wrong so that recovery is an automatic behavior, not a paralyzing crisis.

3. PARTICIPANT-TO-PARTICIPANT SUPPORT

Having the support of your peers, exchanging experiences, and sharing tools and skills, is your greatest strength. Executive assistants do not need to know everything, but they do need to have excellent resources. Your fellow executive assistants are your closest partners.

Equally important is that you have the joy and privilege of deeply supporting others and experiencing the fulfillment that comes from witnessing their life-changing growth and how their transformation, in turn, supports their own circles of influence.

4. START A PRIVATE LINKEDIN GROUP

- If you do not already have a LinkedIn page, create one immediately.
- If you have a LinkedIn presence, be active, make connections. There are amazing resources offered by EAs on LinkedIn. These resources will add to your professional development.
- Run accountability teams or accountability buddies that correspond with each other and report back to the group – organized among the group members.
- Post your own training messages including check-ins, new content, application insights, and invitations for participants to post their questions or challenges.
- Encourage participants to post on progress checks, challenges, and questions.
- Open the group to future course participants.

Until you apply your new mindset and behaviors to your real job or life, it can easily remain a skill that stays in the workshop experience.

- Immediately take action steps towards your goals so you do not allow the negative, fearful, and self-doubting thoughts to take over, and are able to focus on taking next step.
- What are the mindset changes that you want to experience during and after the workshop?
- What are the specific concepts and skills that you can easily apply to our situation to get started in creating action for achieving your goals?
- How can you track your progress in using concepts and skills from the workshop in your real life?

How will you apply concepts and skills outside of the training environment in your real workplace or life situation?

- How will you demonstrate your new mindset with new behaviors and habits in your communication, self-care, teamwork, or performance?
- How will you respond to setbacks differently than you did before the training as you experience life's ups and downs?
- How will you support yourself in making changes after you complete your virtual workshop that will help you solidify your transformation?
- What is the benefit that you will receive based on your transformation within three to six months after the course event?
- How will this transformation be of value to your executive and the executive office?
- What kind of challenges are you likely to experience at various times along your path of taking action on the content, skills, and transformation you experienced during the course?
- What are typical emotional responses that will result in self-doubt, procrastination, fear of failure, or lack of self-confidence that could cause paralysis in moving forward?
- What are the ways in which I could provide acknowledgement of progress or celebration of intermediate results? This is something I will pursue during the follow-up with you.
- Review completed action plans that you developed to ensure that your intended actions are micro enough, regular enough, and include proactive recovery plans.
- Review actions taken by you and provide acknowledgement, feedback, or course correction for retuning.
- Provide assessments on your current understanding of the content or skills for effective application, and your awareness about what areas of development you will still need to enhance.
- Set up regular coaching to support you through the different stages of post course transformation, map out your unassisted or minimally assisted next three-to-six-month period of ongoing evolution and transformation.
- Take training sessions, join webinars, on additional topics that support your progress.

ONGOING SUPPORT

ONE-MONTH ONGOING SUPPORT (INCLUDED IN THE COURSE)

- Weekly 30" virtual meetings for one month
- Check depth of integration.
- Review completed action plans that developed to ensure that your intended actions are micro enough, regular enough, and include proactive recovery plans.
- Review actions taken by you and provide acknowledgement, feedback, or retuning.
- Provide assessments of your current understanding of the content or skills for effective application, and your awareness about what areas of development you will still need to enhance.
- Set up regular coaching to support you through different stages of post course transformation, map out your unassisted or minimally assisted next three-six months period of ongoing evolution and transformation.

UPON COMPLETION OF THE ONE-MONTH WEEKLY METINGS, PAID ONGOING COACHING

- Provide fee-based individual or group coaching; deep dive into any aspects listed above which are included in the one-month follow-up plan.



COMMON SENSE IS YOUR SUPERPOWER

It has taken me over four decades, countless hours of reading and research on works already created by active or retired executive assistants, and my own professional development to stay current on present and future best practices of our profession. It is a compilation of advice and guidance stemming from my peers who have graciously shared their experiences in books and articles.

So, I do understand how all this information can be overwhelming.

Think of this course as a how-to guide. Refer to the different sections as you are ready to implement aspects of the course. For a high-level executive assistant all the information will remain valid for a long time yet – it is only the technology and methods of communication which will change as resources evolve to meet our business needs.

To enjoy a rewarding career as a high-level executive assistant, keep up with your professional development, take pleasure in learning, be curious about life and the world around you, enjoy your role; and take pride in the effect and impact you will have on the efficient management of the executive office and strengthening the foundation of your company and your executive office's legacy.

If you would like us to go into further detail on any part of the course, please feel free to contact me, I am happy to discuss it during our sustainment period.

I wish you happiness and professional fulfillment in your executive assistant role.



Annette Pitera

Business Administrative Partner

Executive Assistant Onboarding Facilitator, Trainer, Coach

Business Administration

Copyeditor & Proofreader

office@mybusinessrealm.com

www.mybusinessrealm.com

505-720-2573