YOUR EXECUTIVE ADMINISTRATIVE PARTNER
Introductory Guide
2023

The goal is not to do business with everyone
who needs what you have.
The goal is to do business with those who
beleive what you believe.

Simon Sinek.

Businesses/organizations with which Business Realm prioritizes its collaboration:

- Local business community.
- Start-ups, ensuring their long-term success.
- That are environmentally conscious.
- That provide opportunities for released inmates who are starting a business.
- That advocate for and protect the welfare of the elderly.
- That advocate for and protect the welfare of animals.

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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 in the business and hospitality fields in the capacity of executive assistant.

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.

PROFESSIONAL CERTIFICATIONS

- **International Business, Diplomatic, Hospitality Protocol**
  The European School of Protocol, Brussels, Belgium, 2010
- **Cross Cultural Business Practices**
  Ecuanime **– Innovation, Consulting, Training, Coaching, London, England**, 2007

I. CODE OF ETHICS

1. Before commencement of a Business Realm service, clarify the nature of the project, financial arrangements, terms of agreement.
2. Before commencement of a Business Realm service, an agreement is created 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 for the duration of the service.
5. Have a clear understanding on 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 Business Realm reasonably believes one of the above circumstances is applicable, it may need to inform the appropriate authorities.
6. Maintain, store, and dispose of any records, including electronic files and communications, created during Business Realm's professional interactions in a confidential and secure manner.
7. Be aware of any indications of a change in the value received from Business Realm's service. If needed, make necessary changes, or suggest the client seeks another professional or use a different resource.
8. Respect each other's right to terminate the service at any point following a reasonable verbal and written communication.
9. Commit to excellence through continued personal, professional, and ethical development.
10. Recognize and acknowledge limitations or circumstances that may impair, conflict with, or interfere with Business Realm's performance.
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 based on age, race, gender expression, ethnicity, sexual orientation, religion, national origin, disability, or military status, will not be tolerated from any person working with Business Realm.

II. CODE OF BUSINESS PRACTICES

Competence

Business Realm will not accept any project that it cannot carry out to an acceptable standard:

- The client allows inadequate time or remuneration for the work required to complete the project to an acceptable standard.
- Business Realm has insufficient time available to accommodate the amount of work required.
- Business Realm has inadequate skills or knowledge for the type of work involved.
- Business Realm accepts a project in good faith but subsequently discovers that they cannot complete it to an acceptable standard, they should inform the client as early as possible, and Business Realm should be prepared to negotiate a settlement.

Presentation of work

- Business Realm will present its work in a professional manner consistent either with normal trade practice or with a convention agreed with the client.
- Correspondence, additional text lists of queries, cover sheets, illustration lists, invoices, etc., should be typed, any handwritten notes or corrections should be neat and legible.

Management of electronic files

Original documents may be provided in electronic form.

- Files provided by a client will be virus-checked on receipt. Edited/proofread files should be virus-checked again before being sent on.
- The client's original files should not be overwritten but copied and renamed before editing. A protocol should be agreed upon with the client for the naming of electronic files.
- Any document storage/transfer method should be clearly labelled and dated so that documents are easily identifiable.
- Subject to any data protection obligations in Business Realm's or the client's jurisdiction, it is recommended that copies of completed work sent to the client should be retained in electronic format by Business Realm for at least six months after the completion date of the work.

Original material and records

- It is the responsibility of the client to ensure against loss of original material by keeping copies, etc. Business Realm will take all reasonable precautions to ensure the safe keeping of documents and original material belonging to or held on behalf of clients and, where indicated, should use the method of dispatch suggested by the client.
- Business Realm will keep copies of query lists and important correspondence with third parties, including email and records of phone conversations, for at least six months after completion of the project, and should make these available to the client on request.

Subcontracting

- Business Realm will not subcontract work without the knowledge and consent of the client.
- When subcontracting work, Business Realm will satisfy itself that the subcontractor is competent and reliable.
- Business Realm remains responsible for the terms upon which it agrees with the client and for the quality of work supplied to the client.

Agreement of terms

In its own interest, Business Realm will ensure that the terms by which it accepts a project are clearly defined at the outset, and agreed between the parties, in writing. Any terms and conditions beyond those which ordinarily apply should also be agreed upon at the outset. Any agreement should include:

- The date(s) for delivery of the project, or instalments thereof, to Business Realm.
- The date(s) for delivery of the completed project, or instalments thereof, to the client.
- An estimate of the work required, including due allowance for time spent assimilating the brief, preparing handover notes and correspondence, as agreed.
- The proposed fee for the project, and where possible, an estimate of the total.
- Which expenses (such as postage, paper, copying, travel) are to be borne by the client and, where possible, an estimate of their amount.
- Any special dispatch requirements for material belonging to or held on behalf of the client by Business Realm.
- The payment period from invoice date and any arrangement for payment by instalments.

Project Budget

- Business Realm and the client will ensure that the terms on which they accept a project are clearly defined at the outset, and agreed between the parties, in writing. Any terms and conditions beyond those which ordinarily apply should also be agreed at the outset.
- The client should endeavor to give accurate estimates of the level or type of work and amount of work involved; it is helpful if the client indicates how such estimates are arrived at. Business Realm has the right to receive their fee (or partial fee) in advance, if appropriate, and to have included in the fee an allowance for reasonable time spent on administrative matters, attending meetings, and so on.
- The client should inform Business Realm of any changes to schedules and may negotiate further (in terms of budgets or schedules) the circumstances of the service.
- Business Realm will make every reasonable effort to adhere to the agreed budget and schedule for a project. Whenever circumstances arise that make it fair and reasonable that the agreed terms be renegotiated, Business Realm will inform the client at the earliest opportunity to agree on a strategy for completing and amending the project cost.
- Business Realm will expect to receive payment within a specified time, agreed in advance, from submission of the invoice. The client should be aware that Business Realm has a statutory right to interest and compensation in the event of late payment.

Changes in circumstances

- Business Realm will make every reasonable effort to adhere to the agreed budget and schedule for a project.
- Whenever circumstances arise that make it fair and reasonable that the agreed terms be renegotiated – for example, where the work received is not of the standard, length or complexity envisaged – Business Realm will inform the client at the earliest opportunity to agree on a strategy for completing and amending the project cost.

Indemnity

- It is the responsibility of the client to insure against all loss of or damage to all artwork, photographs, manuscripts, and marked proofs while in transit between client and Business Ream and while in Business Realm's keeping. Where appropriate (for example, in the case of manuscripts and USBs), the client will keep copies for at least six months after completion of the project. It is Business Realm's responsibility to keep copies of electronic files, client queries and correspondence relating to the work, also for at least six months after completion of the project.

Legal issues

- The client bears ultimate responsibility for matters relating to libel, obscenity, blasphemy, incitement to racial hatred, plagiarism and the reproduction of copyright material belonging to third parties.

Loyalty & confidentiality

- Business Realm may be privy to confidential information and have access to sensitive and/or unpublished material, whether contained in a text or in discussions and correspondence. Business Realm will respect these confidences and under no circumstances disclose any such information to a third party without the express authorization of the client. In all dealings with third parties, Business Realm, in fulfilling their editorial obligation, acts as the client's representative.
- Business Realm will respect the confidence of the author and refrain from discussing individual authors by name, except with the client, before publication of the material.
- Business Realm will take all reasonable precautions to ensure the safekeeping and subsequent disposal or return of confidential documents, either on paper or in electronic format, including copies.
- The client should recognize that Business Realm is acting as the client's representative and has the right to expect the client's reasonable support in the event of any dispute. The client should respect the confidence of Business Realm.

Client relationship

- Business Realm will not accept any project it is not able to complete in a professional manner and according to the agreed upon contract.
- If Business Realm accepts a project in good faith but subsequently discovers that it cannot carry it out to an acceptable standard, it will inform the client as early as possible, and Business Realm will be prepared to negotiate a settlement.
- While a project is in progress, Business Realm will keep its client informed of their availability, by email or telephone, giving alternative access numbers where appropriate. Urgent communications should be made by telephone, to avoid the risk that email will remain unanswered, and followed up by email.
- Business Realm will not subcontract work to others without the knowledge and consent of the client. When subcontracting work, Business Realm will ensure the subcontractor is competent and reliable. Business Realm will remain responsible for the terms of agreement with the client and for the quality of work supplied to the client.
- Email and online communication should be copied to the relevant people, where appropriate, and when participating in forums or email discussion groups, members should maintain appropriate standards and abide by the rules of the discussion group.

- Business Realm bears equal responsibility with the client for effective communication and will be proactive in raising matters that require attention with the client.
- Business Realm must have a clear brief for any service undertaken. The brief should set out the tasks to be carried out and the limits of Business Realm's responsibility. While the obligation rests on the client to provide essential information, Business Realm will seek clarification of any points not covered by the brief.
- The client should be prepared to give constructive feedback to Business Ream and to accept that one function of such feedback is to inform both parties about the level of success of the briefing process. As such, feedback is essential in initiating and maintaining a good relationship between client and Business Realm.

BRIEFING AND HANDOVER

Initial contact

- The client should provide an accurate initial description of the project to be placed, followed by a clear and comprehensive summary.
- The summary will be written. Where no written summary is forthcoming, Business Realm will confirm its understanding of the summary in writing. Clients should recognize that Business Realm reserves the right not to accept work.

Nature of the work

- The extent of contact between Business Realm and the client.
- The name of any other individual with whom Business Realm is expected to be in contact (for example, in-house staff at a company), with contact details.

III. CYBER SECURITY BEST PRACTICES

Business Realm insurance coverage includes commercial general liability, professional liability insurance, property coverage, and cyber security breaches.

Business Realm management of electronic files

- Original documents may be provided in electronic form, or via a USB/flash drive and should be clearly labelled and dated so that they are easily identifiable.
- Files provided by a client will be virus-checked by Business Realm upon receipt.
- A protocol will be agreed upon with the client for the naming of electronic files.
- All data is regularly backed up (word processing documents, electronic spreadsheets, databases, financial files, human resources files, and accounts receivable/payable files.)
- Subject to any data protection obligations in Business Realm's or the client's jurisdiction, it is recommended that copies of completed work sent to the client should be retained in electronic format by Business Realm for at least six months after completion of the project.

Cyber Security Protection Small Businesses

- Protect information, computers, and networks from cyber attacks.
- Provide firewall security for your Internet connection.
- Create a mobile device action plan.
- Make backup copies of important business data and information.
- Secure your Wi-Fi networks.
- Employ best practices on payment cards.
- Limit employee access to data and information, limit authority to install software.
- Passwords and authentication.
- Track software solutions.

Data inventory

Protect your virtual assets

- Evaluate and strengthen the passwords identified in the previous step and define who gets access to what.
- If you do not have one yet, get a reputable password manager. This is invaluable in keeping track of all your passwords – and generating secure ones when you open a new account.
- Secure your password resets. Set up customer service pins and do not use real information for security questions. Where possible, enable two-factor authentication.
- Go through all your devices, update the operating systems, and enable encryption and theft protection features. Updating your devices regularly is an essential element of maintaining your digital safety. The majority of technical data breaches do not exploit new vulnerabilities, but developers have already fixed known ones. **To benefit from these fixes, users need to actually install updates and patches.**
- In terms of network security, get a high-quality VPN if you ever use anybody else's or even public Wi-Fi.

Detect threats, invest in digital security solutions

- Most obviously, you need to have antivirus software installed. Given the potential cost of a cyber breach, invest in a paid plan by a reputable, well-established antivirus provider. Make sure to maintain a fixed schedule for installing updates on your antivirus and perform scans regularly.
- When comparing solutions, many vendors offer bundles that are simple to set up, and combine VPNs, encryption solutions, backups, and various kinds of real-time protection. Some services provide all-encompassing digital security solutions that go beyond your system. They combine technical aspects like Wi-Fi protection, VPN, and antivirus with credit monitoring, reputation monitoring, and identity theft insurance.

Set up a response plan for your cybersecurity strategy

- Clearly define a procedure for worst-case scenarios, such as identity theft, a successful phish, or a ransomware attack. Layout all the steps you would have to take in each case – from wiping affected devices to requesting credit freezes.
- Also, keep a list of those who need to be notified if your business is compromised, and who could help you if a breach does happen.

IV. EXPERTISE & EXPERIENCE

- ✓ Strategic administrative partner to executives and business owners.
- ✓ Day-to-day administrative needs, while also contributing to projects that help drive the company's strategic priorities.
- ✓ Manage tasks to minimize the amount of time an executive or business owner spends on them.
- ✓ Look for problems so they can be resolved before they start having an impact.
- ✓ Enable the business to maximize their productivity by simplifying collaboration and connection with one another.
- ✓ Understand the business preferences and priorities of the executive or business owner.
- ✓ Manage inquiries quickly, proactively, and follow through on tasks to successful completion.
- ✓ Maintain relationships with key people to ensure progression in communications and to pursue opportunities for collaboration.
- ✓ Embrace the culture, values, and goals when engaging with internal and external stakeholders.
- ✓ Recognize operational weaknesses and help sharpen processes or develop new ones.
- ✓ Work across roles and teams in a changing environment.
- ✓ Navigate, digest, and make decisions amidst uncertainty.
- ✓ Manage priorities and make trade-offs when needs change.
- ✓ Possess discretion and sensitivity towards confidential information.
- ✓ Ability to display finesse and stability under pressure in both internal and external interactions.

RESULTS OF A 42+ YEAR CAREER IN BUSINESS ADMINISTRATION:

- Stay calm in the face of chaos - use common sense.
- Recognize patterns in the ebb and flow of business operations and employee behavior.
- Analyze a situation from a different point of view.
- Truly prioritize based on constantly evolving urgency and time sensitivity.
- Curiosity broadens the mind.
- Proof of the importance of business relationships.
- Motivated by the impact of my actions.
- Deal with matters only within my control; ruthless about things that don't matter.
- Ego has no place in my role – causes lack of clarity.
- Respect, kindness, discretion, trust, and loyalty are what determines one's reputation.
- Be sensible about learning new skills as needed and not be distracted by constant new digital software promotion.
- Welcome opportunities to change your mindset if they result in positive changes.
- Enjoy your work, contribute to it, make a difference.

Soft Skills/Additional Strengths: battle tested, develop strong rapport with clients/customers, responsively communicate with team members, follow existing guidelines for what works and continually discover better paths, understand your policies and values in order to make educated decisions where no policy exists, provide management with insight into current and future customers' needs and interests, critical thinker (decision-making, problem-solving, planning, organizing, creative thinking), logical and pragmatic, self-reliant/directed, focused, ability to meet objectives in smooth, efficient and timely manner, adapt and assimilate easily in new work cultures, self-awareness of lack of knowledge of particular topics and recognizing the importance of delegating accordingly, requesting assistance/guidance, or learning a new skill.

My WHY – MASTERY

To make a difference, add value, and have an impact
To find a better way to do it
To do things the right way
To challenge the status quo
To create clarity
To simplify

Brain Type - ARCHITECT

Order and balance
High standards
Impact and tangible results
Loyalty & trust
Understand details in a clear, organized way
Seeing and meeting practical needs

Myers Briggs/16 Personalities – ARCHITECT INTJ-A

Introverted – Intuitive – Thinking – Judging - Assertive
Thirst for knowledge, finding a better way, rational, informed, independent, determined, curious, versatile, self-reliant

DOTS Communication Style

Cautious, thoughtful, literal, logical, uncompromising about personal standards, diligent, conscientious, organized, and decisive
Driven by facts, not emotions
Like original ideas and actions, rather than traditional ones.
Ability to direct in a concise manner

V. VISION – MISSION - GOALS

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.

GOALS

BUSINESS ADMINISTRATION:

- Support a business environment which recognizes that it must adjust its mindset to accommodate new trends and generations into its business strategy.
- Create systems to meet current and future administrative and operational needs.
- Build on external and internal opportunities for expansion, clients, markets, new industry developments, and practices/standards, to ensure long-term sustainability and commitment to community.

EXECUTIVE ASSISTANT TRAINING:

- Manage the executive's role.
- Maximize the positive and long-term impact on the organization's executive office.
- Strengthen the executive assistant's professional development to ensure their future role.

VI. WHAT IS AN EXECUTIVE ADMINISTRATIVE PARTNER?

Daily business administration & operations

- Before today, how has this need been filled in your business?
- Are your direct reports/leadership/staff on-site or working remotely?
- What are your business goals & timelines?
- What is the culture/tone that you want to convey?
- Who is your target audience/client?
- What is the history of your business?
- What drives the results of your business?
- What problems are you experiencing now?
- How do you manage your time and focus?
- How is your relationship with your board?

FACTORS TO CONSIDER WHEN WORKING WITH AN INDEPENDENT BUSINESS ADMINISTRATIVE PARTNER

- Brings new ideas to the organization.
- Helps maintain an effective leadership. Builds your influence.
- Is a critical thinker; thinks clearly, rationally, understanding the logical connection between ideas. Provides strategic leverage. Demonstrates business acumen.
- Is part of the leadership team. Takes a seat at the table.
- Is an ally, liaison, and ambassador for your executive team/direct reports, business.
- Embodies the company's culture.
- Discreet, trustworthy, confidant.
- Communicates effectively with others (internally & externally).
- Maintains big picture perspective.

Experience: have they even done this before? Many top executive assistants achieve business ownership because the skills they are offering as a virtual executive assistant are what they used to do in a corporate job – they are experienced and paid well.

Type of service: are you asking for admin assistant-type tasks such as calendar management, or are you asking for executive assistant support?

Deadlines: is the project a rush job or are you providing a realistic deadline? If something needs to be done ASAP, it is within every virtual executive assistant's best interest to charge a little more. After all, they have to find a way to accommodate you among their existing commitments.

Hassle factor: if a virtual executive assistant senses that you are going to be tough to work with or your project requires a lot of extra moving parts, they will charge more per hour. It is the "hassle factor" charge—and it is real.

QUESTIONS TO ASK WHEN CONSIDERING AN INDEPENDENT ADMINISTRATIVE PARTNER

Keep in mind that an independent administrative partner is a subcontractor and business owner, not an employee.

- What are the response time frames when working with an administrative partner? How often can you hear from them? How will you communicate with them across time zones? What hours will they work?
- How will your administrative partner protect your information? How are they capturing and storing your information in case of turnover?
- What happens if your administrative partner is out of the office (on vacation or sick)?
- How does your administrative partner communicate with your team and clients?
- What happens if you need more or fewer hours? What are the commitment and cancellation terms?
- What happens if you experience a bad fit with your administrative partner?
- What technology does your administrative partner support and use internally to manage your work?
- Is the administrative partner set up to operate proactively on your behalf, anticipating your needs, or are they just responding to tasks you send over?
- What services are included or excluded in the commitment?
- What are the payment terms?
- Will you need any in-person support? This is the biggest question you need to ask yourself, as it is an obvious make-or-break requirement.
- What is your preferred communication style. Consider how you like to communicate ***to*** someone and how you prefer to be communicated ***with***.
- How are processes and outcomes managed? An administrative partner is a great solution since they have experiences from other clients or projects that they can implement to get things done quickly and successfully for you.
- How timely are your projects? It is important to evaluate the urgency of your business needs to determine expectations of timeliness.
- How do you feel about sharing? When you hire an independent administrative partner, they are likely to have another client. Often those clients are using them for the same purpose that you are using them. Does it make you uncomfortable having someone who is working with other people in a similar capacity? If the answer is yes, you may prefer to have an administrative partner wholly dedicated to you.

VII. SERVICES

A. **BUSINESS TRIAGE & PLANNING:** facilitating the smooth function of daily operations, multiple department collaboration, internal communication strategies, timelines, follow-up actions, task prioritization, correspondence, calendar, travel, events/functions, meeting logistics, research, implement initiatives, collaborate cross-functionally, office communication, streamlining departmental policies and daily operations.
Board Relations: manage board of directors; onboarding new board members, board engagement.
Business and Hospitality Relations: national and foreign client/guest relations, maintenance of community, national, and international relations and initiatives, company projection to clients, vendors, public, business and hospitality protocol and etiquette, event coordination.
Copyediting/Proofreading: Outgoing written and digital content.
Protocol & Etiquette: power of business etiquette in the 21st century, business visiting protocol, executive communication: official/social, private formal dining/entertaining/table manners, managing meetings, the art of conversation and verbal competence, VIP greeting, meeting, seating, public diplomacy, media relations & protocol, titles, forms of address, gift giving/receiving, cross cultural protocol, communication, awareness, and behavior, the art of public relations, understanding the corporate clientele needs.

B. **EXECUTIVE ASSISTANT TRAINER & RECRUITING FACILITATOR:** interview, onboard, train, and coach new executive assistants and executives to build their partnership.

A. BUSINESS TRIAGE & PLANNING

Executives, entrepreneurs, business owners are so busy moving an initiative forward that they simply forget to take a moment to communicate the goals, responsibilities, and tasks. Remembering that their assistant is an extension of the business is key to the longevity, productivity, and success of the business and the working relationship by making you more accessible and responsive.

The only way to truly multiply each other's efforts is to leverage each of our different skills to ensure that you are working on the highest-value items to move closer to your goals.

Have one channel for communication. Instead of being approached through five different communication channels, there is one designated channel to find and act on the task list. Use that singular channel for tasking and daily communication. This allows both of us to see a project's status and know the owner of each task.

Create an SOS communication channel that initiates an ASAP action. This channel should be utilized solely for urgent needs, not for on-going project work. If we send each other a message through our SOS method, we know it's very important and an immediate response is required.

- **Your "How to deal with me" list:** your preferences, quirks, personality, natural inclinations, information on how you like to handle conflict, and how you like to be communicated with, **t**hings you do/don't like, pet peeves, what fills/drains you energy, what builds/kills my trust, what you love, what things are odd about me, what is often misunderstood about you.
- **Communication:** phone, text, email, EMMRE, DND, quick text reminders - communicate with each other at any time to avoid forgetting tasks and to move forward.
- **Emails:** access to your inbox, respond/stall (go through "sent" to understand your language), categorize, priority projects, priority contacts, upcoming events, folders.
- **Calendar:** DND times of the day, time between meetings, reminders, personal, open time, breakfast meetings, morning coffee meetings, lunch meetings, preferred meal locations; add full content to calendar invite.
- **External meetings:** all meetings set up by me (to avoid hallway promises), I should be part of high priority meetings, take notes, document & track commitments/follow-up actions, anticipate/resolve issues, get to know attendees. Meetings I do not attend will need follow-up between us/ensure follow-through is kept. Preparation for upcoming meetings. Streamline meeting times and locations (including travel/rest time).

- **Internal meetings:** “soften” a meeting invite with additional details to ease any anxiety that might arise from a meeting request from the CEO; meeting may be more productive (or personable) as an offsite lunch or morning coffee meeting. If the meeting is with a direct report, make sure they know what the meeting is about so they can be prepared.
- **Client communication:** run interference, build rapport with VIP clients, and respond on your behalf. This helps your key clients stay more connected to you and gives them another connection point in your organization. This connection point comes in very handy when you are unavailable, and your VIP customer wants to talk directly with someone in your organization. Being recognized as an extension of you, the pressure of these situations can be minimized, freeing up your time and energy.
- **Credit card:** receipts, limit, payment
- **Personal:** dietary restrictions; restaurant preferences, take-out preferences
- **Travel/accommodation** preferences
- **Budget:** travel/accommodation, conference registrations, ….
- **Family**

COMMUNICATION

DAILY BRIEFING:

1. Key actions of previous day
2. Decisions/questions to be addressed
3. Calendar review/personal commitments
4. Critical tasks for today (truly prioritize)
   - Critical questions
   - Critical tasks for you to complete
   - Critical tasks I completed
5. Upcoming items
   - Deadlines
   - Updates
   - To be reviewed
   - Project statuses

END OF DAY SUMMARY

1. Next day calendar review
2. Next day other commitments
3. People’s birthdays, anniversaries
4. Questions that need answers to avoid roadblocks
5. Key tasks by me or moved forward
6. Payments due/receipts

END OF WEEK SUMMARY: 30-40”

1. Recap of previous week
   - Outstanding/pending
   - Staff update
   - Budget
2. Next week
   - Calendar/personal commitments
   - Work/family commitments
   - Upcoming travel
   - Other
   - Payments due
   - Staff issues
   - Board issues
   - Communication with potential client, etc.
   - Business/community-related

MONTHLY MEETING: 40-60”

1. Status of strategy on objectives, goals
2. Flow of previous month
3. Outstanding/pending
4. Next month priorities/deadlines
5. Staff 1-1 & annual reviews
6. Big picture view/direction
7. Budget/accountant/taxes
8. Board matters

ANNUAL MEETING: 60-90”

1. Review of previous year
   - Challenges
   - Status
   - Successes
2. Discussion on upcoming year: strategy, goals, wishes
   - Budget
   - Family commitments
   - Travel/conferences/expos
   - Board of directors

KEY RESPONSIBILITIES

General Business Administration

- Your business cards (vendor)
- Letterhead
- You bio/photo
- Sharing documents
- Company holidays (when business is closed)
- Your IT vendor (to resolve email, virtual meetings, and other issues)
- Frequent/recurring travel; travel preferences (service used, preferred amenities/facilities, hotel/flight reward numbers)
- Subscriptions and memberships: renewal date, log in credentials
- Expense receipts/reports
- External committees; responsibilities; meeting schedule
- Serve as board member of external organizations; responsibilities; meeting schedule
- Holiday card
- Employee handbook and company policies (assist me in understanding the company operation)
- VIP contact list (in order of importance); priority/sensitive business relations

Email Management

- Access to your inbox
- Discussion on priority/pending issues/action items
- Your email filing preference

Calendar Management

- Access to your calendar
- Discussion on upcoming weeks, priority meetings, pending meetings
- Weekly, monthly, annual recurring meetings
- Include private/family and business commitments
- Your scheduling preference; thinking time; catch-up time; personal time

Meetings

- Confirm meetings; location; other participants; internal/external
- Background documents, agenda, bios/photo
- Follow-up on any action items

Internal Relations

- Organization chart; bios/photos
- Your direct leadership/direct reports; meeting schedule; your relationship with them; annual performance reviews
- Employee relations; annual 1:1; annual performance reviews with their managers
- Department heads; bios/photos; annual performance reviews
- Administrative staff
- Staff meetings schedule (in person or virtual)

External Relations

- Existing contacts; birthdays/anniversaries
- New contacts; bio
- Community partnerships/collaborations
- Media mentions of board members, partners, collaborators
- Promotions/achievements/news acknowledged with a note card
- Holiday cards
- Business/industry trends

Board Communication

- Maintaining updated contact information
- Scheduling meetings
  - In-person meeting: onsite staff to manage meeting room preparation and take minutes
  - Virtual meeting: managed by me
- Tracking board member engagement
- Annual board/executive committee slates
- Outgoing/incoming board members
- Onboarding a new board member
- Board committees
- Your annual review by the Board

Copyediting & Proofreading

- Promotional materials
- Press releases
- All other company-related written content

Protocol & Etiquette

- Lunch interviews with prospective employees (their manners and behavior/they will be your company's representative)
- Professionalism vs. familiarity; communication; visitors & VIPs; travel; hospitality (visitors to office); forms of address/greetings/body language; invitations & thank you; note cards
- Dining etiquette: social & professional; residence/restaurant

Cross-Cultural Business Practices

- Working with foreign remote teams, collaborators, clients, partners
- Social and professional cultural awareness
- Your staff needs to represent your organization in a cross-culturally aware manner
- Professionalism vs. familiarity; communication; visitors & VIPs; travel; hospitality (visitors to office); forms of address/greetings/body language; invitations & thank you; note cards
- Dining etiquette: social & professional (manners, seating, eating traditions, …)

B. BUSINESS OPERATIONS

Business operations/financial acumen

The core daily activities to create value and earn profits: doing – making – helping – delivering; the systems that transform inputs into higher value outputs.

Operations management

Coordinating resources, forecasting demand, inventory management, capacity planning, demand management, scheduling resources, systems and layout design, performance management, improvements.

Rhythm of the business

Create baseline - map company purpose, frequency/purpose of meetings, relationships (who is involved), process(es) to achieve goals.

Strategic Initiatives

1. Engage the right stakeholders.
2. Drive awareness of the projects.
   - Relationships; make entire executive team successful; include their priorities.
   - Updates with teams and all staff meetings.
   - Everyone to be clear on status and next steps.

3. Transition of project to the organization.
   - Select someone in the organization to carry forward the initiative as part of their full-time role. The sooner they are identified, the better the chances of continued success.
4. Prioritizing objectives.
5. Making strategic choices/trade-offs/competing; structural and infrastructural.

Communication

1. Drive key communication.
   - Keynotes and presentations.
   - Full awareness of what is happening, needed, and priorities.
2. Be highly collaborative and cross functional.
   - Sit in other department meetings to learn their operations, goals, priorities.
   - Be neutral and objective.
3. Define roles and responsibilities.
   - Avoid overstepping or supplication efforts.
   - What does each person have.
4. How does CEO prefer to work on developing keynotes.

Improvement

- What you can do with what you have.
- What type of resources are available – to deliver specific, future, high-level capabilities and results.
- What to focus on; types of improvement (different risk profiles and skills).
  Recruitment and training.
  Developing improvement culture
  Developing effective systems for change
  Performance management

Deployment

Development:	Comprehensive. Coherent – work with high-level goals. Corresponds with overall strategy. Identify critical issues.
Implementation:	Onto operational reality. Clarity. Communication. Leadership. Project management
Monitoring:	Track ongoing performance; milestones, metrics
Review:	Upon completion of implementation. Evaluating results. Corrections. Strategic flexibility.

C. EXECUTIVE ASSISTANT TRAINING & ONBOARDING

Onboard, train, and coach new executive assistants and executives to build their partnership.

The purpose of the executive assistant's role:

- To cultivate a strong and comprehensive partnership.
- Together with the executive, execute the effective and productive management of the executive's duties.
- Executive's 100%: 20% casts the vision, provides focus, clarity, direction, removes roadblocks; 80% partners with their assistant to accomplish the 20%.
- Executive assistant's 180%: 20% focus on the executive's 20%; 80% ensure the executive's 20% is executed, 80% do their own job.
- Prepare for and invest in the good health and future of your organization.
- Ongoing professional development.

The purpose of the executive office is to:

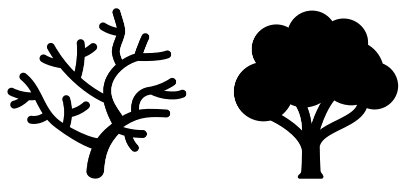
- Create, communicate, and implement your organization's vision, mission, and overall direction.
  - ✓ Corporate Strategy: vision, strategy, resource allocation
  - ✓ Organizational Alignment: talent, culture, organizational design
  - ✓ Team and Processes: teamwork, decision-making, organizational structure
  - ✓ Board Engagement: effectiveness, relationships, capabilities
  - ✓ Personal Working Norms: office, leadership model, perspective

WHAT DOES THIS PARTNERSHIP LOOK LIKE:

PURPOSE OF THE EXECUTIVE OFFICE / BUSINESS OWNER	PURPOSE OF THE EXECUTIVE ADMINISTRATIVE PARTNER
Casts the vison, provides focus, clarity, direction, and removes roadblocks. Create, communicate, and implement your organization's vision, mission, overall direction, and resource allocation.	Offer advice and guidance on prioritizing and managing deadlines.
Personal Working Norms: office, leadership model, perspective	Assess top goals and priorities and create delegation strategy.
Board Engagement: effectiveness, relationships, capabilities	Develop an action plan and delegation strategy to support the executive's vision, needs, goals
Awareness of both external and internal opportunities for expansion, customers, markets, new industry developments, and standards.	Help manage the executive's focus, energy, priorities, and relationships.

Meet regularly with executives of your company to make sure that the decisions your organization needs to make are strategic. **Lead, guide, direct, and evaluate** all other officers, executives, and employees, and ensure they are carrying out the daily operations of your company. **Confirm that all officers and executives are conveying the company's philosophies** and guidelines to their own teams so that all employees understand the expectations of your company.	Provide the executive/business owner with the ability to focus on the internal health of the organization, the organization's reputation, and its relationship with the community. Create a plan for accountability to support leader's goals/priorities to ensure that support time is focused on most impactful tasks; priorities aligned with actions.
Manage and direct actions, tasks, and communications, with emphasis on the executive assistant intercepting distractions and enabling the executive/business owner to maintain focus on strategic leadership, strategy, and communication	To do so successfully, the administrative partner must understand not only the intricate details of the executive's job, but also how he or she thinks and makes decisions. Administrative partners are often trusted with a great deal of confidential business and personal information; discretion and good judgement are essential skills.
Lack of follow-through and accountability by executive's team **Create consistent accountability across the team** and bring good systems to better leverage executive and protect his/her time. **Lack of trust in the team's commitment** to the vision of the organization. **Focus on impactful work**	Create operational infrastructure (email, scheduling, processes/systems). Weekly planning and accountability call for clear and consistent communication with each delegation. Assign tasks to appropriate team members with deadlines. Maintain project deadline and task assignees to hold team accountable for their tasks. Use appropriate software to automate and facilitate communication, collaboration, coordination. Train team to use the software. Break down larger ideas into next best steps. Prepare for related meetings with scheduled brainstorming time blocks (undisturbed, no distractions). Review past/future calendar: compartmentalize which days executive needs to dedicate to each specific activity.

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



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