

WORKING REMOTELY WITH AN EXECUTIVE ASSISTANT/ BUSINESS ADMINISTRATIVE PARTNER

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.

Communication

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 a 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, things 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 executive, 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**

DAILY BRIEFING: 15-20”

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

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 & gifts
- 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 (to help me understand the roles, strengths, weaknesses)
- 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

- Internal and external 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 and 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, ...)

