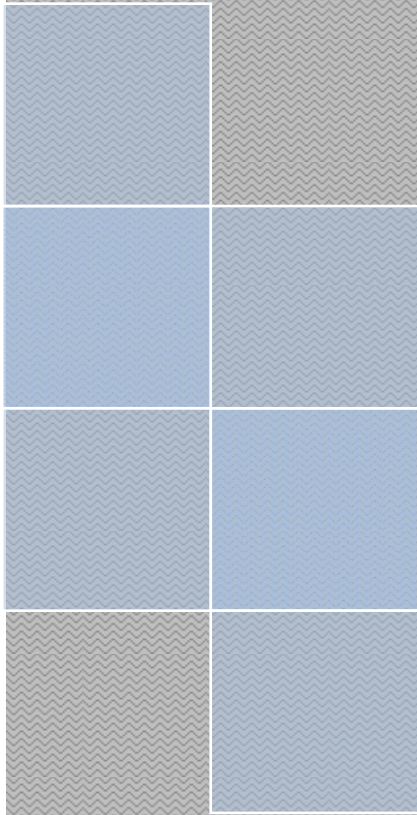




The Effective Executive Assistant

A Guide to Creating Long-Term Career
Success

Discover your potential.





A Message from the Author...

Dear Readers,

I am so happy you decided to purchase this e-book, *The Effective Executive Assistant*. Consider this your first step towards achieving the long-term career success you've been dreaming about.

Let's face it, being an Executive Assistant isn't about money or glamour. It's about providing valuable support to a person and an organization you believe in.

One thing is for sure: being an EA is a unique position and it takes a unique set of skills to achieve long-term success. It isn't easy and it isn't always fun. But, with the right tools, it can be a fulfilling and rewarding experience.

It does take a commitment on your part, though. You must have a drive to succeed. You must *want* to constantly improve your abilities. This position is always changing. New technology and changes in business practices force EAs to remain flexible and level-headed, even in the face of chaos.

So what makes me an expert? Well, I was an Executive Assistant for many years and I was great at my job. I loved it so much, I was inspired to start my website, *The Executive Assistant's Toolbox*, which is where this e-book was originally published. In March of 2008, EA Toolbox merged with OfficeArrow.com and today, I am the Senior Content Manager for OfficeArrow. I still love to write about my experiences as an EA and share what I know with others. I also have a Bachelor's Degree in Business and over 10 years of experience in administration and office support. I've spent many years studying organization and productivity techniques, and I have a deep passion for helping others.

I know that you'll find the information here useful. I've really tried to encompass all aspects of the EA position and provide in-depth exploration of the tools I believe are the most essential for getting the job done effectively and building long-term career success. I encourage you to use this e-book as a guide, not a strict formula. Take this information and make it your own. Decide what you think the most important pieces are and focus on those. The EA position is different within each company; so there isn't a generic step-by-step plan that will lead everyone to the same destination. This e-book will certainly help you along the way, but it's not magic. Success comes from hard work and dedication.

I hope you will continue to visit OfficeArrow.com for information and guidance. Your feedback is always appreciated. You can e-mail me at chrissy@officearrow.com or send me a private message through the OfficeArrow website.

I wish you the best of luck in all your career endeavors. Enjoy the e-book!

Chrissy Scivicque

Table of Contents

Chapter	Page
Part 1: Defining the Effective Executive Assistant	
1.1	Core Competencies 4-9
1.2	Types of Executive Assistants 10-14
1.3	The Career Path of an EEA 15-19
	• Sample Resume 1 17
	• Sample Resume 2 18
Part 2: Exploring the Position	
2.1	Unique Challenges 20-23
2.2	Unique Rewards 24-26
2.3	Dispelling the Myths of Executive Assistants 27-29
Part 3: Creating Success	
3.1	Laying the Foundation 30-37
3.2	Building a Solid Structure 38-46
3.3	Long Term Care and Maintenance 47-49
Part 4: EA Resource Guide	
4.1	Web Resources 50-54
4.2	Consolidated Recommended Reading List 55-56
4.3	Worksheets 57
	• SMART Goal Setting Worksheet 58-59
	• Task Management Worksheet 60
	• How to Map a Project 61

Part 1



Defining the Effective Executive Assistant

“Opportunity is missed by most people because it’s dressed in overalls and looks like work.”

Thomas A. Edison, US inventor
(1847 – 1931)

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

What is an Executive Assistant?

Executive Assistants (EAs) perform, coordinate and oversee office administrative duties while providing an extensive level of support to Executive Managers. They help managers make the best use of their time and are relied on heavily to ensure that work is handled efficiently and without the need for constant or direct supervision.

In supporting these senior level executives, EAs must possess a wide range of skills and extensive knowledge in order to be truly effective.

What defines an *Effective* Executive Assistant?

The Effective Executive Assistant (EEA) builds value for the business by supporting the executive in such a manner that he or she is able to more effectively perform his or her job.

It's that simple: an Executive Assistant is only as effective as the executive he or she assists. (Try saying that three times fast!)

Let's break this down further and look at the precise skills and abilities a successful executive assistant should have.

The Core Competencies

The EEA provides nearly invisible support for the executive, acting with little supervision, anticipating needs while managing the day-to-day workflow and prioritizing various projects. In total, nine core competencies can be clearly defined.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success



The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

1. Adaptability

- Demonstrates flexibility in the face of change
- Projects a positive demeanor regardless of changes in working conditions
- Shows the ability to manage multiple conflicting priorities without loss of composure

2. Organization

- Time Management
 - ✓ Determines the appropriate allocation of time
- Space Management
 - ✓ Effectively manages the workspace (i.e. keeps a clean and organized office, appropriately handles all paperwork, maintains control over the physical environment, etc.)
- Task Management
 - ✓ Balances conflicting priorities in order to manage workflow, ensure the completion of essential projects, and meet critical deadlines

3. Proactive Anticipation of Needs

- Demonstrates the ability to foresee problems and prevent them by taking action
- Utilizes analytical skills and a broad understanding of the business to effectively interpret needs

4. Communication Skills

- Listening skills
 - ✓ Understands that the most important aspect of communication is the act of listening and actively works to improve those skills
- Oral
 - ✓ Speaks with confidence using clear, concise sentences and is easily understood
- Written
 - ✓ Produces well thought-out, professional correspondence free of grammatical and spelling errors

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

- Telephone/E-mail
 - ✓ Uses high quality, professional oral and written skills (as described above) to project a positive image of the business

5. Client Service

- Interacts professionally with clients and associates at all times
- Promptly responds to requests with accuracy and a courteous demeanor

6. Broad Understanding of Business Concepts

- Demonstrates an awareness of fundamental business principles as well as an understanding of the overall industry in which the business operates

7. Team Player

- Works as a competent member of the team, willingly providing back-up support for co-workers when appropriate and actively supporting group goals

8. Computer/Technical Skills

- Displays proficiency using standard office equipment such as a computer, fax, photocopier, scanner, etc.
- Demonstrates advanced proficiency by quickly adapting to new technology and easily acquiring new technical skills

9. Judgment

- Exhibits sound judgment and the ability to make reasonable decisions in the absence of direction
- Swiftly refers problems/issues to the appropriate person(s) when necessary
- Works effectively without constant and direct supervision or guidance

As you can see, it's quite a demanding list of things an EEA should be capable of doing.

Overall, the EEA fulfills these core objectives with accuracy, efficiency and slice of good humor. The role of an EEA is difficult and very intense. A positive attitude goes a long way. Never focus solely on the functions of the job; an Effective Executive Assistant is truly more than the sum of his/her responsibilities.

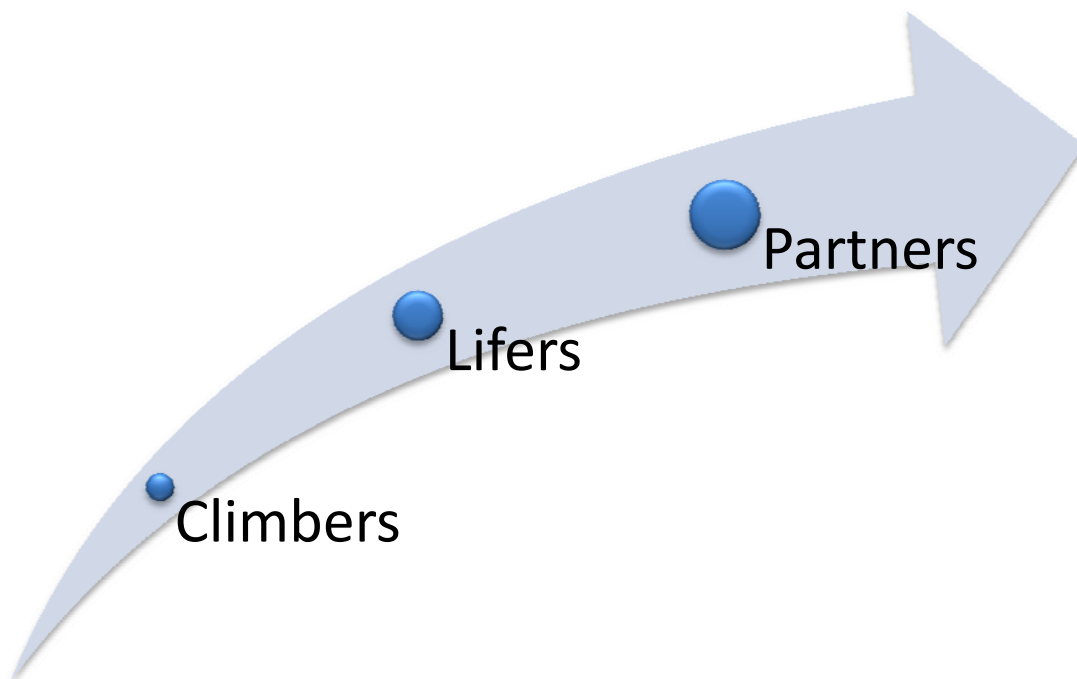
The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Recommended Reading

- [The 7 Habits of Highly Effective People](#) by Stephen R. Covey
- [The 8th Habit](#) by Stephen R. Covey
- [The Success Principles: How to Get from Where You Are to Where You Want to Be](#) by Jack Canfield
- *From OfficeArrow* – [Simply Put: How to be a Good Executive Assistant](#) by Chrissy Scivicque

Types of Executive Assistants

Fundamentally, there are three specific types of EAs. Just as your professional aspirations grow and change, you may also find yourself hovering between these classifications or fluctuating back and forth depending on your state of mind at any given time. Take a moment to evaluate your current position and where you fall on this list. Again, you may not find one that suits you perfectly. However, it's an interesting tool that may help you better understand your professional style and motivation.



The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Climbers

Some Executive Assistants see the position as a “stepping stone”. They take on the role as a means of climbing the corporate ladder and “getting in good” with a top executive. This is a tried and true method of getting your foot in the door. The position is a great way to make a name for yourself and learn the ropes of the business, especially because you’re learning directly from the top leaders of the company.



Style:

Climbers are typically very career driven and enthusiastic individuals. They are outspoken and like to make their voices heard. For Climbers, the position is all about building a reputation and getting noticed. There is little loyalty with regard to the position or the executive for whom they work. Climbers have more devotion to their own goals. They do not typically consider the position a long-term career choice because they assume it will only be a brief first step in the course of their professional growth.

Motivation:

Climbers are motivated by their future career goals. They are often willing to go above-and-beyond the call of duty if they think it will improve their chances of getting promoted. Climbers need to make sure that the executive they work for understands their motivation and isn’t taken by surprise when they express their desire to move up. Some executives will not be interested in bringing on an Assistant, training them, and then losing them to another position, even within the same company. Others will be eager to groom a new company leader. It is important to have expectations for both parties clearly verbalized in the beginning.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Lifers

Some Executive Assistants expect to be EAs until the day they retire. They are not on a particular career path. Being an EA is a reward they feel they have earned; a goal they have achieved. Lifers don't want to change career or company. They are not career-oriented individuals, though they may have been at one time. A Lifer is content with his/her position and feels little desire to grow or seek new opportunity.

Style:

Lifers typically consider the position a long-term career choice. Because they want to remain in their job throughout the foreseeable future, they want to perform satisfactorily. However, they typically do not have a strong drive to exceed expectations, since they are not hoping to be promoted or get noticed. They simply want to know what to expect; Lifers don't usually like surprises. They are good workers but not particularly loyal to the executive for whom they work. They tend to be more loyal to the *job* than the person. If the executive they are assisting leaves the company, a Lifer will likely continue working for their replacement.

Motivation:

Lifers are motivated by stability. While they do not seek to climb the corporate ranks, they like their job and want to remain in it for as long as possible. They are motivated by their desire for consistency.



The Effective Executive Assistant
A Guide to Creating Long-Term Career Success



Partners

Executive Assistants who see their role as a partnership are often in the best position to grow and develop their skills and career. They see the job as a long-term collaboration with the executive they assist. They view their accomplishments as a mutual thing – the success of the executive is a reflection on the EA and vice versa – and thus, there is a true atmosphere of teamwork and solidarity between them.

Style:

Partners typically have a very free flowing communication with the executive they assist. They will often brainstorm and offer opinions when appropriate. Partners have the ability to work on an “even playing field”, meaning that the executive recognizes and appreciates the value of the assistant and truly treats him/her as an equal rather than a subordinate. Together, they strive to support one another and achieve mutual goals. They are typically very loyal to one another – if the executive moves on to a different company, they often bring their “partner” along as well.

Motivation:

Partners are motivated by the job being done. They feel a strong commitment to the goals of the business and the executive they are supporting. Their main desire is to assist in the achievement of those goals by providing outstanding support. They feel rewarded by the success of the business and the executive. Motivation comes from the strong relationship between them, where high levels of appreciation are communicated regularly and typically, the EA’s compensation is a reflection of this.



The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

It's important to remember that any "type" can be an *Effective* Executive Assistant. No type is inherently better than another. They are all appropriate ways of treating the position. However, it's also helpful to be aware that different companies and different people will value each type in different ways.

Consider which kind of EA you are and which one *you would like to be*. You may find it helpful to share your feelings on this topic with the executive you work with so he/she can better understand your professional style and motivations.

For the purposes of this e-book, the focus will remain on Partners. Overall, Partners have a greater opportunity in most work environments. They are typically seeking the most from the EA position as well. It is likely a safe assumption that, if you are reading this e-book, you either already are (or are attempting to become) a Partner.

Recommended Reading

- [Building a Partnership with Your Boss: A Take-Charge Assistant Book](#) by Jerry Wisinski
- [The Valuable Office Professional: For Administrative Assistants, Office Managers, Secretaries, and Other Support Staff](#) by Michelle Burke
- [Managing Up: How to Forge an Effective Relationship With Those Above You](#) by Rosanne Badowski
- *From OfficeArrow* – [Managing Up](#) by Chrissy Scivicque

The Career Path of an EEA

Most Executive Assistants are promoted from the position of Administrative Assistant within the same company. However, due to the eclectic variety of work, many careers can be considered useful experience for the position.

Working as an Administrative Assistant is not only one of the most common ways to start your career as an EA, it's also one of the most effective. As an Administrative Assistant you will gain valuable knowledge that will truly impact your success as an EA.

As an Administrative Assistant, you have the opportunity to:

- Learn the technical skills needed for doing business (i.e. computer and other technology, professional communication, organization, etc.)
- Achieve a basic understanding of general office procedures and operations within the business
- Gain an overall awareness and appreciation of the business environment
- Get to know a variety of people in different departments throughout the company (this will help build your support network for the future)
- Become accustomed to the general flow of work on a daily basis
- Begin to understand the long-term cycles of the business (such as regular seasonal changes in demand)
- Gather a general perspective of the industry as a whole: how it works and where the company fits into it
- Build a reputation as a hard worker, fast learner and dedicated individual

If you have decided *not* to start your EA career as an Administrative Assistant, don't worry. As mentioned previously, many careers can help you develop the skills needed to become a successful EA. The trick is to understand the position well enough to determine how your experience will help support your becoming a successful EA.

Let's look again at an abbreviated version of the nine core competencies of an EEA:

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

- 1. Adaptability**
- 2. Organization**
- 3. Proactive Anticipation of Needs**
- 4. Communication Skills**
- 5. Client Service**
- 6. Broad Understanding of Business Concepts**
- 7. Team Player**
- 8. Computer/Technical Skills**
- 9. Judgment**

Reviewing this list once again, you may begin to notice that these skills are utilized in many jobs, especially those that deal with the public – such as sales or customer service. Below you will find a list of non-administrative jobs that can provide excellent experience to build on for becoming an Executive Assistant:

- Server in a restaurant
- Sales associate in a retail store
- Receptionist
- Teacher or teacher's assistant
- Customer service representative
- Medical or dental assistant
- Salon, spa or fitness associate

It will undoubtedly be more difficult to obtain an EA position without administrative office experience. But it's NOT impossible! You can put your best foot forward by focusing on *how your experience proves you have a clear ability to meet the 9 core competencies* listed above.

To further visualize this idea, let's look at 2 resumes: one from an individual whose office experience shows a progressively increasing level of responsibility; and the other from an individual who has worked in a completely different field but also shows a strong path of career growth.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Jane Doe – Sample Resume 1

Anyone@Anything.com

1234 Anything Dr. Any Town USA 12345

(555) 555-5555

SUMMARY OF QUALIFICATIONS

- Exceptional written and oral communication skills
- Demonstrated ability to develop and maintain excellent long term client relationships
- Ability to interact with a variety of individuals in a courteous, professional manner
- Proven capability to work well under pressure and within tight deadlines
- Proactive leader recognized for team building skills and superior client service
- Extensive experience preparing eloquent and organized marketing materials
- Advanced proficiency in Excel, Word, Power Point, Internet Research

PROFESSIONAL EXPERIENCE

Financial Group, USA

Senior Administrative Assistant, Date – Date

- Responsible for coordination of all client meetings: developed a tracking system to ensure timely and appropriate scheduling, created meeting materials including spreadsheets and executive summaries when needed, ensured successful follow-up on action items resulting from meetings
- Managed daily work flow of partners, appropriately prioritizing tasks and obligations
- Organized and performed office administrative tasks including all client correspondence, marketing, and general client service requests
- Responsible for clerical duties including answering the phone, filing, updating computer database, filling out paperwork, and writing letters

Credit Union, USA

Teller/Customer Service Representative, Date - Date

- Worked directly with clients to process financial transactions including deposits, withdrawals, transfers , loan payments and wire transfers
- Accurately performed tasks to ensure cash drawer balanced at end of day
- Successfully handled customer service inquiries
- Provided superior customer care at all times by effectively managing time and maintaining an organized workspace

Law Office, USA

Receptionist, Date - Date

- Responsible for answering the phone and directing clients to the appropriate team member in a courteous and efficient manner
- Greeted clients in the office in a professional and pleasant way
- Responsible for keeping the general appearance of the office clean and organized
- Occasionally helped file paperwork

EDUCATION

- Associates Degree, Junior College USA
- 1 Year Vocational Training Certification, Private College, USA – Business Technology
- Advanced Proficiency MS Office, Excel, Internet Research

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Sally Smith – Sample Resume 2

123 Any Street
Any Town, USA 12345
Phone: (555) 555-5555
Email: anyone@anything.com

SUMMARY OF QUALIFICATIONS

Highly motivated individual with ten years of experience in the hospitality industry
Especially skilled at building effective, long-term productive working relationships with clients and staff
Superior customer service, organizational and time management skills
Proven ability to maintain composure under stressful and time sensitive conditions

PROFESSIONAL HISTORY

ASSISTANT MANAGER, THE AMERICAN GRILLE (DATE - DATE)

Casual Fine Dining – Corporate franchise, \$3 million annual revenue

- Promoted from Lead Server
- Assisted in recruiting, hiring, training, scheduling and supervising a staff of 30 employees for the restaurant, banquet facilities and catered events
- Maintained a superior level of customer relations at all times and motivated staff to do the same
- Handled various financial and administrative responsibilities including programming POS menu items, table layouts, checking & responding to e-mails, coding and batching invoices, reconciling petty cash receipts, and processing employees' daily cash

SHIFT SUPERVISOR, THE DINER (DATE - DATE)

Casual Dining - Privately owned, \$2 million annual revenue

- Effectively managed time to ensure prompt service and consistently delivered a superior level of customer care
- Executed FOH (Front-of-House) supervisory duties including but not limited to hospitality, marketing, inventory, scheduling, banking, payroll, and budget analyses

LEAD SERVER, THE STEAK HOUSE (DATE – DATE)

Casual Dining - High volume, corporate, \$3.5 million annual revenue

- Responsible for serving approximately 50 diners per shift
- Trained new servers in procedure and etiquette
- Advised patrons on details of a 30 entrée menu

HOSTESS, ITALIAN RESTAURANT AND JAZZ JOINT (DATE – DATE)

Family Dining Jazz Venue - Family owned, \$1 million annual revenue

- Responsible for making reservations, greeting customers, and answering the phones
- Coordinated with supervisors to seat customers promptly and effectively for service
- Demonstrated the highest quality of customer care at all times

EDUCATION AND LICENSES

ABA – Any Town Junior College – Business Administration, Marketing emphasis
Advanced proficiency MS Word, Excel, 10-key, Internet Research
Cash Register, POS, Squirrel, Aloha, Digital Dining, H.S.I., Reserve Interactive, Paychex, ServeSafe License1

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Either candidate could potentially be an excellent choice for the position of EA. As you can see, experience is all about how you frame it. While both candidates have very different backgrounds, their resumes ultimately show that they have similar abilities. Their experience, while different, is highly comparable. They both have computer skills, customer service skills, the ability to multi-task, and many other attributes of a well-qualified EA.

If you are attempting to start a career as an EA without prior office administrative experience, it's important to keep in mind that the process will be much more difficult. You will need to use non-traditional ways of finding a job – mostly because, at first glance, your resume will not display the “expected” background. Though this doesn't mean your background isn't valuable, it *does* mean that your resume will often get overlooked. You will need to try different routes of networking, calling on family members, friends and associates to help support your career change aspirations. Be sure to put yourself “out there” by taking the extra step (don't just fax or email a resume, follow-up with a polite and professional phone call). Lastly, develop a strong cover letter that describes your reasons for the career change and details the skills you possess that show you can meet the 9 core competencies of an EEA. Try to connect each competency to a specific task or action you have performed in past jobs. Should you get the interview, you will definitely want to have such information at the forefront of your mind. Be clear in your intention and remember that you have one great thing going for you: you are unique. You don't blend in. Your resume doesn't look like everyone else's so use that to your advantage.

Recommended Reading

- [Resume Magic: Trade Secrets of a Professional Resume Writer](#) by Susan Britton Whitcomb
- [Cover Letter Magic: Trade Secrets of Professional Resume Writers](#) By Wendy S. Enelow and Louise Kursmark
- [The Pathfinder: How to Choose or Change Your Career for a Lifetime of Satisfaction and Success](#) by Nicholas Lore
- *From OfficeArrow* – [How to Break into a New Career \(with No Experience in the Field\)](#) by Chrissy Scivicque

Part 2



Exploring the Position

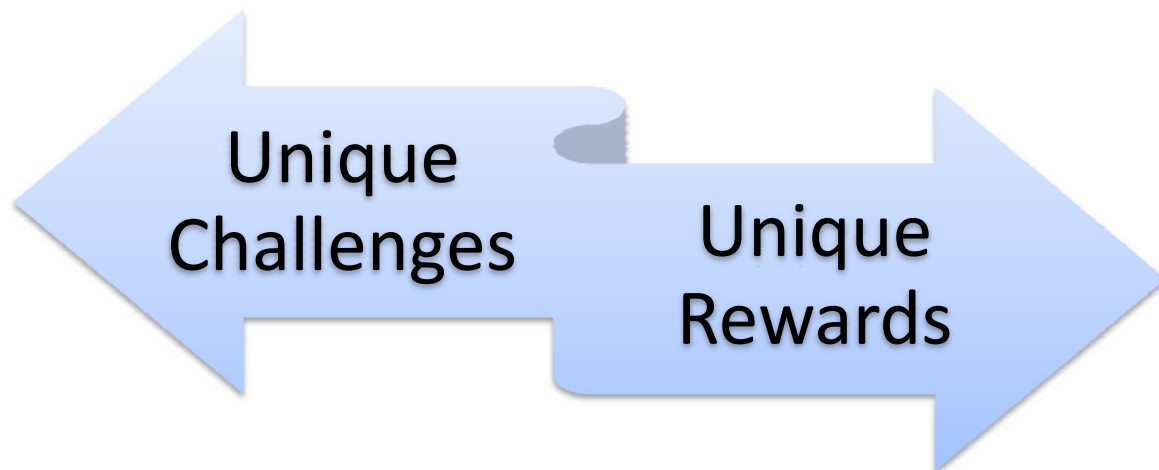
“I find that my greatest pleasure, and so my reward, is in the work that precedes what the world calls success.”

Thomas A. Edison, US inventor
(1847 - 1931)

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

To further explore what it means to be an Effective Executive Assistant, let's consider the distinct things that make the position so incredibly special.

The role of Executive Assistant carries with it a set of unique challenges – difficult and unusual situations that may well be encountered frequently. Recognizing these will help you understand the position more completely. Likewise, it has just as many unique rewards – rare benefits you won't find in many other positions. Understanding these will help you appreciate and take advantage of the exceptional qualities of this job.



Unique Challenges

Direct In-the-Line-of-Fire Contact with “The Boss”

The Executive Assistant will always interact directly with his/her boss- the executive he or she assists. In many other jobs, people see their bosses only rarely. Often times, they can go days or even weeks without really interacting. An EA, on the other hand, will have daily direct contact with him or her. The EA will bask in the glory of the executive’s success and also bear the wrath of frustrations and disappointments. This unique relationship means that, as an EA, you are given an inside view of top-level leadership. While it is undeniably interesting and inspiring, it can also be intimidating and intense. A lot of energy will be directed at you. Executives depend on their assistants to collect information that fires at them from all directions. They expect their assistants to dedicate as much time and energy as they do and they will often be disappointed to find out you have a life outside of work.

Separation from Co-workers

EA’s will inevitably experience a certain amount of distance from their colleagues. As an EA, you are often viewed as a member of the executive team (even though you aren’t). However, because you are privy to information that is not always readily shared with the group, co-workers will have a hard time considering you one of “their own”. Remember that anything you do or say will be considered a reflection of the executive you assist. Therefore, it is imperative that you do not participate in gossip or rumor spreading. Your words will carry a heavier weight than those of others. If you speculate on the possibility of a merger, others will consider it fact since you supposedly have the “inside scoop” (whether or not that is actually true). The natural separation that occurs between an EA and his or her co-workers is simply a reality of the job. It’s not personal, but it is a unique challenge.

Indistinct Authority Levels

As an EA, you must always act on behalf of the executive. Often, you need to communicate decisions for him or her. This can be difficult because you, as the EA, are only the messenger; *you are not the decision maker*. Your authority levels can become blurred because you are the one actively sharing the information with others. You may be tempted to give additional input or make changes that you believe are right, even if they haven’t been explicitly outlined by the executive. Likewise, others may be tempted to come to you with questions or concerns that should really be directed to the executive. It is critical that you remember your place and

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

remind others as well. The boundaries in this type of work are not always clearly defined so it is up to you to keep them distinct.



The “Mind Reader” Expectation

EAs are often held to an impossible standard: the expectation that they will be so “connected”, that they will actually preempt the needs of the executive they assist, effectively acting as a “mind reader”. It is true that EAs often become incredibly capable of predicting the daily flow of work. Due to the intense one-on-one relationship, they are often able to anticipate the moves of the executive they assist. Many EAs suddenly realize (after working with the same executive for a while), that they seem to have a silent communication between them. They are able to read each other’s mannerisms, tones of voice, facial expressions, etc. As a result, the executive may become complacent, thinking that such unspoken communication takes the place of honest verbal expression. He or she will begin viewing the assistant as a mind reader, who needs no direction or coaching. This can be problematic for a variety of reasons, the most obvious being that you are likely *not* a mind reader.

The Role of Intermediary (Acting as an “Alter Ego”)

One of the EA’s most difficult roles is that of *Intermediary*, meaning “one who is in the middle”. As an EA, you are constantly being used as a telephone – taking messages, relaying information, etc. You will be treated as a “gatekeeper”, keeping outsiders from intruding on the executive’s precious time. You may find yourself feeling like a baton being passed back and forth in a race. You may also find yourself thinking, “Why don’t you tell him yourself?”

As an EA, *you* are the one responsible for what information gets to the executive. You are also often in charge of passing the executive’s words on to others. Though it may seem like a simple thing, it is much more efficient for the executive to have you relay information to the necessary parties rather than spend his valuable time on such things. While this isn’t *always* the case, it is a common practice that the EA becomes an “alter ego” for the executive, verbalizing his or her thoughts and instructions to others, even taking his or her place in meetings.

Unique Rewards

Just as there are unique challenges to the position, so are there unique rewards – special perks, benefits and opportunities that are hard to find in any other kind of position. It's important to appreciate these and use them to their fullest advantage.

One-on-one interaction with “The Boss”

You'll notice that this item shows up on both the list of challenges *and* rewards, as it is equally both a blessing and a curse. Such direct interaction allows you to create a strong, long-lasting working relationship with a top leader in your company, which is nothing to take for granted. Great opportunities come with this position: the chance to see how a successful professional thinks, works and communicates; the ability to share ideas and influence decisions; the possibility of experiencing precious inspiration from an accomplished leader. These things would not be possible without the direct interaction that takes place on a daily basis. While it can be a serious challenge, it also represents a wealth of potential rewards.

Opportunity to perform a wide variety of tasks on a daily basis

As an EA, you'll find yourself performing a nearly unlimited variety of tasks. While the typical administrative responsibilities will usually fill your day, you'll also be expected to occasionally cover a wide range of unique and interesting tasks. As “The Executive's Right Hand”, you may find yourself taking notes during client meetings, planning events, preparing materials for presentations and conferences, making travel arrangements and possibly even traveling alongside the executive in order to assist him or her while out of the office. Demonstrate your ability and willingness to do more of these unique tasks and you will likely find yourself doing more of them. If you find yourself bored in this position, do not hesitate to communicate this to your boss. Approach it in a professional way, by expressing your desire to do and learn more. It seems there is always more work to be done – the executive may simply need a reminder that you are capable of taking on more. Don't let yourself sit idle in this position. An Effective EA is always moving. It can be uniquely rewarding to contribute in such a variety of ways.

Ability to create a reputation amongst top executives

Working directly with a top leader in your organization will provide you with the opportunity to meet and get-to-know many other executives. Presenting yourself in a professional manner can help you gain a respected reputation among them, effectively creating a wide group of high-level professional contacts. Remember that every executive you interact with could be your potential future employer. While you may strive to create a strong, long-lasting relationship

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

with the executive for whom you currently work, opportunities abound. Don't limit yourself. Keep your options wide open by creating a reputation for being a hardworking professional.

A valued position as an “honorary” member of the executive team

Providing much needed support to one (or several) of the top executives in your company can put you in a valued and respected position of “leadership”. Though you are distinctly separate from the actual executive team, you do hold a somewhat “honorary” membership because of your constant presence and insider status. It's a nice feeling that can bring a sense of pride and satisfaction. However, it can also be quite deceptive. While others may view you as a member of the executive team, you really aren't. While you are involved in quite a bit of what they do, you certainly will not be privy to *all* the inner workings of the group. Don't allow yourself to get an inflated sense of self-importance. But *do* enjoy a feeling of pride that comes with your involvement. Yours is a position of importance.



Key Concept: Minimize Challenges / Emphasize Rewards

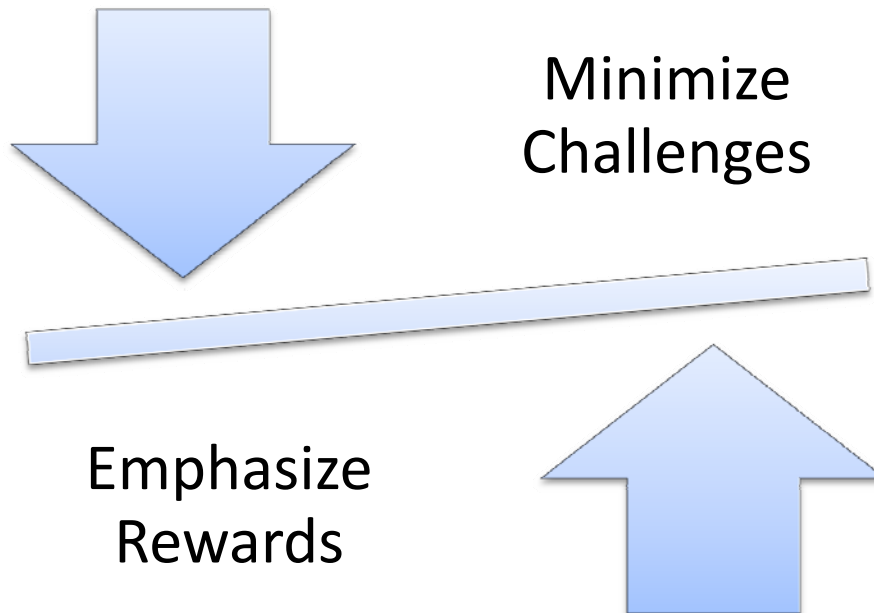
Now that we've reviewed the unique challenges and rewards, it's important to articulate the key fundamental concept of minimizing the "bad" and maximizing the "good".

How to Minimize Challenges

- Understand the challenges and recognize them when you see them
- Proactively work to *decrease* their impact and the frequency with which they occur
- Effectively manage them when they inevitably do occur

How to Emphasize Rewards

- Understand the rewards and appreciate them
- Proactively work to *increase* their impact and the frequency with which they occur
- Effectively manage them to create *leverage*



Dispelling the Myths about Executive Assistants

Myth: “Executive Assistant” is just a fancy name for a Secretary

Reality: While the majority of EA duties are secretarial in nature, an Executive Assistant is so much more. An Effective Executive Assistant truly acts as an alter ego for the executive he or she assists, at times filling in for them at meetings or acting on his or her behalf in the office. Both secretaries and EAs perform basic office functions, but (unlike a secretary) the EEA has the ability to be a business partner – helping to manage the daily flow of tasks and assisting in setting priorities. Many executives rely on their assistants to manage them, ensuring they are on track towards meeting their goals. EAs may also assist in brainstorming and decision making. They truly play an integral role in the success of the executive and the organization of which they are a part. The work of a secretary is typically much more limited and narrow in scope.

Myth: Being an EA means being used and abused (a la “Devil Wears Prada”)

Reality: The relationship between Executive and Assistant is incredibly complicated and unique. In many ways, it is a partnership. While the executive ultimately is “The Boss”, the assistant plays a critical role in his or her success. Most executives recognize this and treat their assistants with the utmost respect.

Typically, the relationship between an assistant and executive includes a very high level of trust. It is essential to the position that the executive be able to confide in the assistant. There is often a very strong sense of loyalty between the two. The goal is to work synergistically, meaning that when one person achieves his goal it helps propel the other towards his and vice versa. Synergy is when the results are greater than the sum of the individual efforts. Together they both go further towards reaching their goals than either would separately. Understanding this critical fact is the essential foundation on which this relationship is built.

The relationship is based on honesty and open communication. Because of this, there are often times that executives and their assistants butt heads. After all, the assistant has a difficult job trying to manage a powerful executive. Most top leaders are incredibly driven and intense (and usually quite vocal in their opinions). Day-to-day things get hectic, stress takes over and tempers flare. Assistants may occasionally take the brunt of this. While an EA should *never* accept abuse, dealing with conflict is a standard part of any job. Effective EAs will know when and how to protect themselves. They will have the ability to communicate effectively even under stressful conditions.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

EAs who find themselves in situations where they feel taken advantage of, unappreciated or disrespected should quickly address the issue. If improvement is not seen quickly, they should consider finding another position. An executive who treats his or her assistant poorly can expect to go through many assistants, which is neither cost effective nor productive. Once an executive finds a good partner, it is in his/her best interest to build a strong relationship based on mutual trust and respect.

Myth: Being an EA is a poorly paid position with little opportunity for growth

Reality: Being an Executive Assistant opens a world of opportunity in any organization. It is a highly visible position in which you have the ability to build a strong reputation. EAs get to know many top executives and build strong working relationships with people throughout the organization for which they work. If an EA chooses to move to another department, he or she typically has a large network to call upon for support.

Working as an Executive Assistant can also be very lucrative. Depending on the company, the location and the experience level of the EA, the pay range could be anywhere from \$30,000 to \$65,000. According to salary.com, the median expected salary for a typical Executive Assistant in the United States is \$44,828. Many EAs also earn bonuses based on performance ranging typically from \$1000 to \$3000 a year. Top-level EAs who have partnered with a successful executive for a long period of time may earn over \$100,000 annually.

Myth: It takes little or no training to be an EA – you just have to be nice and be able to answer the phone.

Reality: As mentioned previously, an EA is not the same as a secretary. While there are quite a few tasks that may appear to be basic, the overall scope of the job is enormous. While a college degree is not always required, it can be an enormous asset for an EA seeking to become an influential and long-term part of the executive's career. Without a degree, an EA can strongly benefit from additional education such as attending junior college courses, obtaining certification in computer technology or business administration from a private vocational school, or simply participating in professional seminars and workshops to expand his or her skills set. The position is one that requires more than a nice personality. It is a job for an analytical thinker – a problem solver.

Once in the role, it may take up to two years for the EA to truly absorb all the intricate details of the position. It is not a role that can be learned overnight. It is very nuanced, meaning the fine points can be subtle and not easily articulated.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Myth: Being an EA is a boring, thankless job.

Reality: The EA position typically offers a wide variety of work and the ability to interact with a lot of people. However, like any job, the experience of being an EA will be different for everyone depending on the personality of the person and his/her specific situation. Some will find it endlessly fascinating and challenging while others will consider it dull and tedious. Some will feel rewarded and appreciated while others will feel used and under-valued. The position is not the same across the board. In every office the experience is different. Research shows that turnover is typically low for the EA profession, presumably because the position is one that is usually worked up to. Since most EAs are promoted internally, they know what to expect when accepting the position.

Recommended Reading

- [Become An Inner Circle Assistant](#) by Joan Burge
- [The New Executive Assistant: Advice for Succeeding in Your Career](#) by Melba J. Duncan
- [Be a Kickass Assistant: How to Get from a Grunt Job to a Great Career](#) by Heather Beckel
- *From OfficeArrow* – [The Relationship Between Executive and Assistant](#) by Chrissy Scivicque

Part 3



Creating Success

“Being busy does not always mean real work. The object of all work is production or accomplishment and to either of these ends there must be forethought, system, planning, intelligence and honest purpose, as well as perspiration.”

Thomas A. Edison, US inventor
(1847 – 1931)

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Success isn't something that simply happens overnight. It's a long process that takes serious effort and organization. Think of success as a house which you are in charge of building. You can approach the project in any way you want but it is *your* responsibility.

Perhaps you are slow to get started and then rushed to get finished. You don't create an overall plan for the structure before you start building and so the process is confusing and messy. It runs over budget, you use every scrap of resources available, and it leaves you exhausted. When you're done, it ends up being a dumpy, poorly made structure that will likely crumble to pieces in the first windstorm.

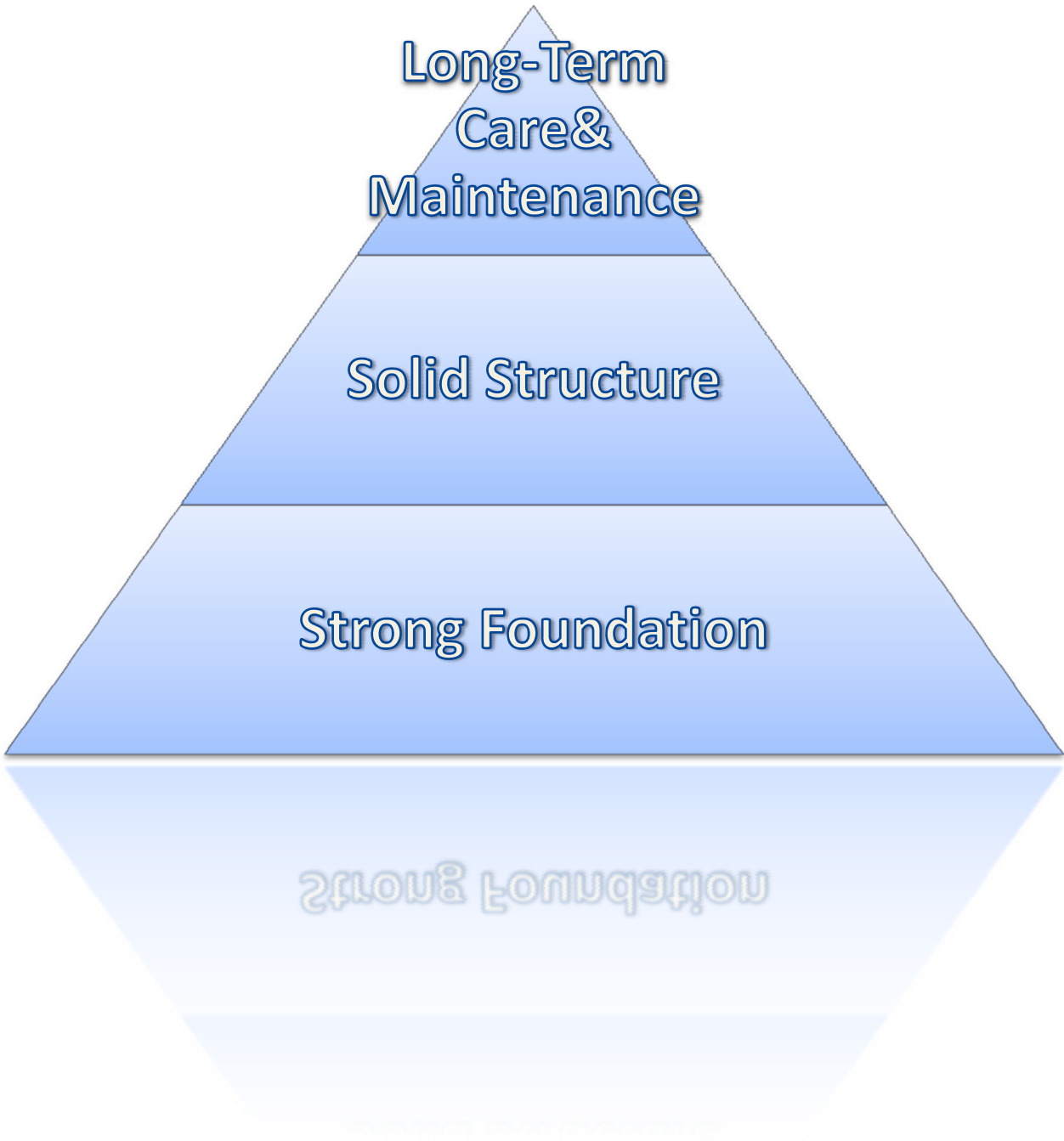
On the other hand, consider what it would be like to be in charge of something as big as building your own home. Perhaps you find it exhilarating and thought provoking. Maybe it inspires and motivates you. The process is organized, fast paced (but not hurried) and in the end, the structure you create is sturdy and beautiful.



Just like a house, success that is built overnight typically will not last. Conversely, success that is built with a clear vision, an organized plan, and a lot of careful attention will be permanent and the process will be enjoyable.

Remember that the creation of your success is a large project of which you alone are in charge. In order to build the vision you have for yourself, you must do the work. Start at the beginning, with the foundation. Then, build a solid structure using an organized plan. And when you've finished your project, don't forget to do the long-term care and maintenance needed to ensure your success is permanent.

Building Career Success



Laying the Foundation

The “foundation” is the basis on which you create your personal vision of success. It’s the bottom layer of you, *the professional*. Building a strong, solid foundation involves working on *yourself* - personal action items that will help support you in *any* professional role.



Visualize your goals

Setting appropriate professional goals is the most fundamental step to creating a strong foundation. You can't create success without knowing what it means to you. Success is a very subjective concept. Goals are more than just ideas of what you'd like to do. They should be comprehensive, clearly defined and measurable. Use the acronym SMART to help you:

S – Specific

What do you want to achieve? How will you achieve it? Why is it important to you? Clearly define the outcome you want.

M – Measurable

Establish concrete criteria for measuring your success. Use actual numbers, target dates, or specific events to indicate when your goal has been achieved.

A – Achievable

Your goals should push you past your comfort point but you should still be able to attain them with effort and commitment.

R – Relevant

Your goals should be important to you and the outcome should impact your life. Likewise, you should have the ability to directly impact them. Don't set goals that aren't significant or that you can't do anything to impact achievement.

T – Timely

Your goals should have a time element established. This will help keep you on track and will prevent you from simply pushing a goal off infinitely into the distant future.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

It's not enough to simply know your goals. You must see them, feel them, and breathe life into them. Once you have created SMART goals, write them down and post them in a visible place where you will see them every day. Constantly visualize what achieving the goals will look like.

Imagine how it will feel. See the attainment of the goals so clearly and vividly that you simply can't help but achieve them. A wonderful exercise is to create a vision board: a large poster on which you can paste pictures or words that illustrate your goals. Posting a vision board by your desk at home is a great way to help keep your goals vivid and in the forefront of your mind on a daily basis.

Consider using the [worksheet](#) provided in the [Resources Section](#) to assist you in setting your SMART goals.

Know your worth

In any job, it's important to have a strong sense of self-worth. Knowing your value helps build confidence and helps you gain respect in the workplace. People who have high self-esteem are typically more capable of setting boundaries and limits because they understand the importance of their work. They know they provide significant value and feel strongly that they deserve fair and adequate treatment and compensation. Because of this, they are often able to negotiate higher salaries.

To establish a strong sense of self-worth, focus on building high levels of confidence and poise. Projecting a cool image is key. Learn to remain calm under pressure and always show strength, even when in doubt. Remember that appearances speak volumes. Present yourself with confidence and you will automatically feel stronger. Remind yourself that you are a valuable asset and any company you work for is lucky to have you.

Always keep learning

Nothing builds your professional desirability more than expanding your skill set. By continuing to grow and learn, you will only improve your career prospects. Keeping your SMART goals in mind, consider what skills would be helpful to you. Review the 9 core competencies and see which you feel are your weakest. Find ways to improve your abilities through learning.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

There are many ways to learn a new skill. Obviously, you can enroll in a class at the local junior college or through a private learning facility. If you don't have the time or financial ability to do this, don't worry. There are plenty of inexpensive ways to learn using self-education tools like books and online technology. Review the [Online Educational Tools](#) found in the [Resources Section](#) and check out some of the suggested reading found throughout this e-book (and [consolidated](#) in the Resources Section).

Feel comfortable with your voice

Get comfortable speaking with professionals and voicing your ideas and opinions. Your thoughts are valuable and you need to be capable of sharing them with people who may be intimidating or difficult to approach.

Practice your conversational skills and learn to speak in public. Do whatever you can to become relaxed and at ease when communicating in a professional environment. Your ability to accurately and eloquently present your thoughts and opinions will significantly impact your career. This will be necessary in every phase of the professional cycle: from the interview to evaluations; from brainstorming sessions to presenting your ideas; from negotiating salary to asking for a promotion. There is nothing that won't benefit from improved communication skills.

If your communication skills could use a little work, consider taking some courses or joining a Toastmasters group in your area. Don't hesitate to practice with your friends and family. If you have an important conversation coming up, don't go into it without a plan. We have all come to believe (from watching too much TV and movies) that great and powerful speeches are given off the top of one's head. This simply isn't true. If you have something important to say, think about it, write it down, practice it. Communication is a natural gift for some but a learned skill for others. Don't take it lightly.

Set comfortable but realistic boundaries

It can be difficult to find the appropriate balance between work and life. Too often, people find that they get sucked into working all hours because they think it's the only way to prove themselves. Don't let your desire to succeed professionally negatively impact your personal life. This can be dangerous for both mental and physical health. Yes, sometimes it will be necessary to make small sacrifices in order to be part of the team or accomplish a special project. Just don't make a habit of it. Decide early on in your career what your priorities are.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Create clear boundaries that are comfortable and realistic (for both you and your employer) from the beginning.

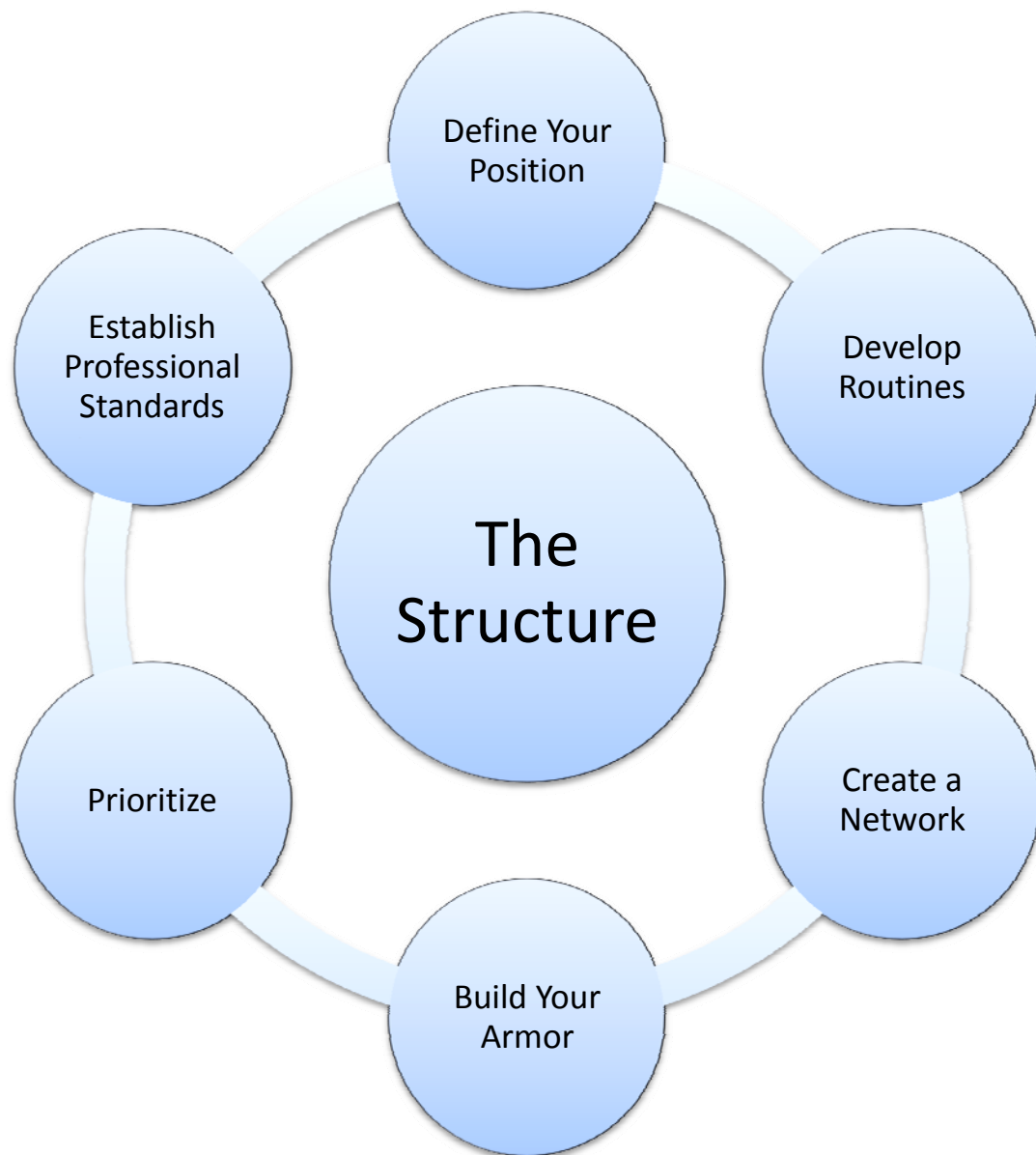
Unfortunately, there is no perfect balance that works for everyone. You must determine what is appropriate for you, your family and your career. By knowing your personal boundaries and setting the limits early on, you can achieve your desired balance.

Recommended Reading

- [Crucial Conversations: Tools for Talking When Stakes are High](#) by Kerry Patterson, Joseph Grenny, Ron McMillan, Al Switzler and Stephen R. Covey
- [Life is Not Work, Work is Not Life: Simple Reminders for Finding Balance in a 24/7 World](#) by Robert K. Johnston
- [How to Say It For Women: Communicating with Confidence and Power Using the Language of Success](#) by Phyllis Mindell
- [The Magic Lamp: Goal Setting for People Who Hate Setting Goals](#) by Keith Ellis
- *From OfficeArrow* – [How to Set Effective Goals](#) by Chrissy Scivicque

Building a Solid Structure

The structure you are building is your own success. In order to do this, you will need an organized plan. Becoming an Effective Executive Assistant is about taking action. There are certain steps you can take in the role that will help you achieve success. Use the concepts listed here as a blueprint for creating your plan but do not limit yourself to these ideas alone. This should be seen as a “jumping off” point.



The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Clearly define your position within the organization

The EA position often becomes an amalgam (a mish-mash) of miscellaneous administrative duties. This can make it difficult to prioritize the various tasks expected of you. It can also make it hard, if not impossible, to maintain an appropriate focus throughout the day.

To avoid confusion, work with your boss and/or HR representative to establish a clear and concise description of your roles and responsibilities. Remove all ambiguity and create distinct, achievable goals to help you track when you are succeeding and when improvement is needed. These should be objective standards that can be easily measured (not *subjective*, meaning based on personal opinions or feelings).

It is easy to get bogged down in tasks that should be handled by other individuals. Without a clear definition of your position, it will undoubtedly happen. Of course, most people want to be viewed as a member of the team. Even though your main responsibility is to the executive you assist, you are still part of the larger organization. It is understandable that EAs often end up taking on various tasks that are not specifically in their job description. You (and your boss) will need to determine your limits in this regard. Being a part of the team does not mean your position should become a “dumping ground” for miscellaneous tasks.

Develop your routines

Organization is a key skill for performing the duties of an Executive Assistant. As you become familiar with your day-to-day activities, you will want to create standard procedures for getting things done. This means developing routines, templates, checklists, and other guides to help keep you on track and prevent you from having to “re-create the wheel” each time a task is to be performed. In any job, you will find that most activities are done with some regularity; however, several weeks or even months may pass between each time a given activity takes place. During that period, it’s easy to forget the steps involved.

Creating standard processes is a way of being *proactive*. It helps prevent future problems that could waste time and cause frustration. After all, you’ve already done the work once; don’t stress yourself out trying to remember what you did and how you did it. Write it down and create useful tools to simplify the process for the future. Create notes for various projects about what worked and what didn’t – even if you believe the project to be a one-time thing. Chances are, something similar will come up in the future and those notes could be an invaluable resource. Or, you may find that a new project could benefit from the tools and processes of a completely unrelated project. Remember to treat everything as a learning experience and don’t expect to be able to remember it all. Make your cheat sheets and study guides so nothing is lost along the way.



Techniques

Generally speaking, a spiral notebook is one of the best tools for tracking the progress of work. Each day, open a new page (in order), write the date on top, and use this page for notes throughout the day. Depending on the amount of work you are doing, it might be a good idea to use a new notebook for each month. Be sure to keep old notebooks for reference!

You may find it useful to create worksheets to track your daily flow of tasks. These can be excellent organizational tools and can also be useful for reference in the future. Once each of the items on the page is marked as “complete”, the sheet should be stored for future reference. Should someone have a question regarding a particular task, it is easy to see the progression of work that took place by looking at the worksheet. Consider using the Task Management worksheet provided in the [Resources Section](#) of this e-book.

Creating a “mind map” is another valuable tool for planning and organizing. A mind map is visual interpretation of a project which allows you to diagram the structure of it. It is a useful way of arranging your thoughts, especially if you are a visual learner. You can use this to track the various parts of a job or assignment while clearly conceptualizing how one piece interacts with another. You will find an example of [How to Map a Project](#) in the [Resources Section](#) of this e-book.

If you’re looking for some high-tech organizational tools, be sure to check out the various options in the [Online Organization](#) section of the [Resource Guide](#) in the back of this e-book.

Create your network

Most likely, the executives you work with are involved in some kind of a structured network of professional associates. There are many different names for this. Some are called “Master Mind Groups” or “Best Practices Groups” or “Alliance Groups”. Whatever name it goes by, the idea is very smart: gather colleagues who all have an interest in improving their work and create a forum to share ideas, brainstorm and learn new techniques. Almost every successful leader you’ll ever meet will be a member of a group like this.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

As an EA, there are only a few existing groups. First, utilize OfficeArrow.com to learn strategies for success and meet other like-minded individuals in similar positions throughout the world. There, you can connect and collaborate with office professionals just like you, ask questions of others and share your professional experiences. OfficeArrow also gives you the ability to create “groups” so consider joining or starting a group for people who work in a similar industry as you. Additionally, you can join or start a group for those who live and work in your area.

Another great way to meet fellow executive assistants is through continuing education. Classes, workshops and seminars are excellent places to meet other professionals in your area who are interested in growing their careers. Check out the [Resources Section](#) for a list of providers.

You can also begin to grow your network by joining professional groups and associations in your area. You can find a list of existing groups and associations in the [Resources Section](#). Unfortunately, many of these groups are not the most sophisticated. However, they occasionally host local meetings and seminars that may help you get to know others in your community. Consider joining a local “Women in Business” group or “Young Business Professionals” group as well. Whatever interests you, there is probably a group that exists. You can find them easily by searching online. Many of these groups also provide educational workshops and seminars. And remember that you can start your own local group by utilizing OfficeArrow.

One of the best ways to create your network is to connect with other executive assistants that you already work with – those who assist the people in your boss’s network. Seek out the assistants of the local professionals your organization interacts with on a regular basis. Most companies have “professional alliances” – people *to* whom they refer business and *from* whom they receive referrals. The executives of your company have already established a relationship with these professionals so connecting with their assistants should be fairly easy, even if you’ve never spoken with them before. Simply introduce yourself and pass along your contact information. Let them know you are interested in creating a network of trusted people that are in a similar position, who can call one another to get advice when they’re stuck, help brainstorm, or simply commiserate when they’re having a rough day. Most people will be thrilled to find a group like this.

Be sure to let your boss know you are interested in reaching out to others in this way. Assure him or her that all conversations will be kept general so as not to be sharing sensitive company information. If the idea is presented properly, he or she should have no problem with it.

The Effective Executive Assistant A Guide to Creating Long-Term Career Success

Remember to organize your contact information in an effective and efficient way. Keep all information in a central location such as MS Outlook or in a rolodex. It's helpful to make notes regarding how you met the person, what you talked about, and any other information that may be useful in future conversations.

Build your armor

The Executive Assistant position can be stressful and intense. Let's face it: most leaders are Type A personalities, meaning they are driven, focused and determined to get the job done. Most Type A people are very high-energy and fast-moving, often working on many projects at once. Assisting an individual like this can be frustrating. You must be capable of managing such behavior and learn to not take it personally when the intensity turns negative (as it inevitably will from time to time).

If your boss is a workaholic, create very clear boundaries to avoid being sucked into an overwhelming schedule alongside him or her. Top executives often lose sight of the precious work-life balance but that doesn't mean you have to. If you've properly laid your foundation, you will have set up appropriate and comfortable boundaries early on.

It is also important to employ stress management techniques to help you create an emotional shield. Working with powerful people can be intimidating. By learning how to manage your own internal stress you will present a strong exterior, which is what the job demands.

Prioritize

Appropriately setting priorities is a difficult but essential task. When facing a stack of thirty tasks, prioritizing is not as easy as asking yourself, "Which task is the most important?" They're *all* important. And typically, they are all urgent to one degree or another. Understanding and clearly recognizing the difference between these two things – importance and urgency – is one of the most helpful tools in prioritizing. Remember that just because something is important, it isn't necessarily urgent...and vice versa. Don't fall into the trap of believing that the two are intrinsically entwined.

The process of setting priorities involves a careful weighing of the time involved to complete the task versus the resulting value of the completed task (the consideration of importance versus urgency). Realistically, you must remember that you simply can't do *everything all the time*. Some things must get delayed or delegated.

Consider the following when establishing priorities:

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Time Considerations

- Approximately how long will each task take to complete?
- What are the variables or unexpected things that may delay each task?
- Which tasks have firm non-negotiable deadlines? What are the consequences of a missed deadline?
- Do any tasks require the assistance of others? What is the availability and efficiency of those people?
- What are the barriers or restraints to accomplishing each task – budget, time, resources?

Value Considerations:

- Which tasks have the most direct impact on the business?
- Are any tasks able to be appropriately delegated to other team members?
- Which tasks have the most negative impact if not completed?
- Which tasks impact the completion of *other* tasks? What is their combined value?
- Who is impacted by this task – indirectly and/or directly?
- What are the consequences if this task does not get done?
- What goal is this task helping achieve? What is the value of that goal?

There are no “hard and fast” rules to setting priorities except that flexibility is essential. Priorities change and shift with time and circumstance. Considering the above items will aid you in the process, but ultimately the decision is yours to make. Use good judgment and don’t be afraid to ask for guidance when needed.

Establish your professional standards

The term “*professional standards*” refers to the quality of your work. In any professional environment, people are often inundated with discussions about efficiency and the ability to multi-task. While these things are undoubtedly important, all too often the topic of quality is ignored. Don’t get so wrapped up in getting things done that you sacrifice quality for efficiency. Set your professional standards consistently high. There is no reason that you can’t be efficient while still producing a high quality of work.

Be cautious of unrealistic expectations such as deadlines that require you to cut corners in order to meet the demand. Confront these types of situations immediately and do not allow yourself to be pushed into this kind of behavior. It will only work for a short period of time. In the long run, work that is done quickly but poorly will not help you (or the business) achieve your established goals.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

“Professional standards” also refers to your everyday behavior or your *“business etiquette”*. Performing your work in a professional manner is a critical part of the EA job. As an EA, you represent the executive you assist. The image you present and the way you interact with people are direct reflections of your boss. In general, it is always safe to err on the side of caution and be overly formal in this position. Don’t run the risk of making a bad impression by looking unprofessional. Remember that you are playing a role – do your best to look and act the part.

For example, it is usually recommended that, when greeting clients (or potential clients) and professional associates in the office, you do not use their first names. Instead, use “Mr.” or “Ms.” This is especially true if you are younger than the person to whom you are speaking. This will give them the opportunity to give you permission to be more familiar and use their first names if they so desire.

Here is another example:

As an EA, you are generally required to be a “gatekeeper”, screening calls to ensure that only the critical ones get through to your boss. Sales calls are usually fairly easy to weed out. However, with clients or business associates, you will sometimes have to do a bit of prodding to find out who is calling and why. Often, the issues that people want to direct to the boss are things that can be more effectively handled by others in the office. Clients mostly just want the assurance of having the head honcho handle their situation. It is critical that these calls are handled with poise and professionalism; otherwise people can end up feeling disrespected and “screened”. If you have been in the position for a while, it’s usually easier to get information from people calling. They will know who you are and they will feel confident that you can handle the situation yourself, direct them to the correct person, or get them through to the boss. You will need to create a professional standard for how you will handle the screening process so that you can get the information you need without offending anyone.

Consider the following phone call:

Client: Hi, can I please speak with Ron Peterson?

EA: Who’s calling please?

Client: Jack Wilson.

EA: He’s not available. I’ll send you to his voicemail.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Is this a professional standard you want to set for yourself? Did the EA above provide good customer service? Did he/she represent a high level of quality? Did he/she project a professional image that their boss would feel is an honest reflection of him or her? You could probably argue that the EA got the job done – he/she was effective in screening the call. And the EA was polite enough. But the client probably felt screened. After all, the EA waited until *after* she knew who was calling to say that the boss was not available. Then, she didn't try to help and didn't even *ask* if the client wanted to leave a voicemail. She simply sent him away.

Now, consider this phone call:

Client: Hi, can I please speak with Ron Peterson?

EA: I'd be happy to check and see if he's available. May I ask whose speaking?

Client: Jack Wilson.

EA: Hi Mr. Wilson. Will Ron know what this is regarding?

Client: Yes, it's about our meeting next week.

EA: Great. I'll see if he's available.

At this point, the EA has enough information to make a decision herself or she has the opportunity to ask the boss if he or she would like to take the call. Let's say the call is not critical.

EA: Mr. Wilson, he's in a meeting at the moment. Is there a message you'd like me to pass on to him regarding your meeting next week? Or maybe someone else in the office can help?

Client: Actually, maybe Michael will have this information. Can you transfer me?

EA: Absolutely.

And it's that simple. The EA has forwarded the call on to someone else who can help, the client doesn't feel screened, and the issue is being resolved.

Generally, you want to know what phone calls your boss is expecting at any given time. You should also know who he wants to be interrupted for and who he would rather not speak to unless it's an absolute emergency (or maybe not even then!). If you don't know these things, you absolutely must have this conversation.

Handling the phones is only one small part of the EA role but it's an excellent way to demonstrate professional standards. You can get the job done in many different ways. But you

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

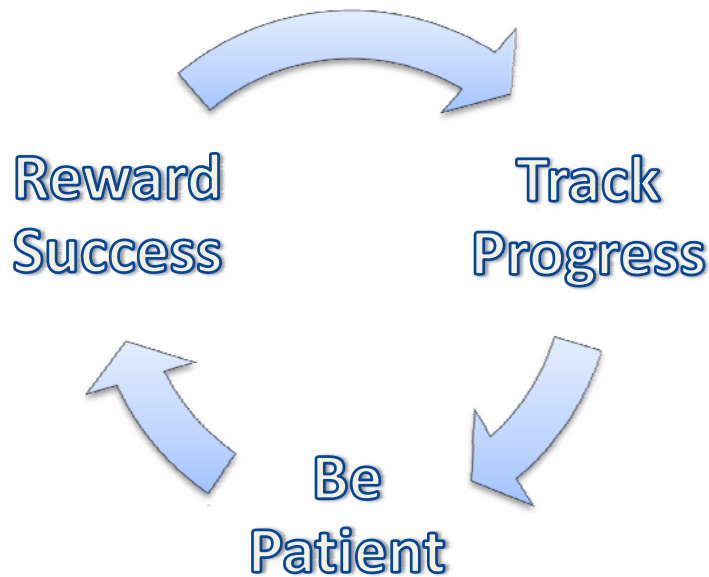
want to be sure that you are choosing standards that are high quality and that reflect well on the executive you assist.

Recommended Reading

- [Getting Things Done: The Art of Stress-Free Productivity](#) by David Allen
- [How to Win Friends and Influence People](#) by Dale Carnegie
- [The Etiquette Advantage in Business: Personal Skills for Professional Success](#) by Emily Post and Peter Post
- [The Organizer: Secrets and Systems of the World's Top Executive Assistants](#) by Anna-Carin Jean
- *From OfficeArrow:* [How to Map a Project](#) by Chrissy Scivicque
- *From OfficeArrow:* [Overcoming Intimidation](#) by Chrissy Scivicque

Long Term Care and Maintenance

Once you've created a sturdy foundation and built a solid structure for your success, you must show it continuous care and attention. A house that is well built but not cared for will eventually have problems. The roof will leak, the foundation will crack. Even the most solid structure cannot sustain itself without regular maintenance.



Track your progress

An important part of achieving success is the evaluation process. As you pursue your goals, take time to regularly review your progress and your level of personal and professional satisfaction.

- Are you making consistent strides towards achieving your goals?
- Are you following a time frame that will lead you to a timely result?
- Are you still feeling confident that this is the direction you want to be heading?

Pull out the written SMART goals you created for yourself and consider where you are in the process of achieving them. Do you need to reformulate some of them? Are there some that are no longer appropriate? Don't be afraid to re-work your goals. Life circumstances change.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Your goals can and should adapt. However, don't make excuses for why you haven't kept up with them. Be honest with yourself. The goals you set will not achieve themselves.

Set a weekly appointment with yourself to physically sit down in private and look at your goals. This should not be a scary event. Use it as a way of re-focusing your energy. It's easy to get sidetracked by the day-to-day activities of life and forget about the overall destination. Take time to close your eyes and see what you want. Refine your plans for how you will get there and concentrate your energy on the execution of those plans.



Technique

Hold regular "State of the Union" meetings

The term "State of the Union" is being used to describe the concept of a two-way discussion regarding the overall condition of the partnership between you, the assistant and your boss, the executive. It is a forum for both parties to communicate their feelings – what is working and what isn't; how things can or should be improved. This is not a "gripe" session. Rather, it is a time to evaluate what is happening and make sure that a satisfactory level of mutual benefit is being achieved. It is also a time to review the mutual goals and your progress in achieving them.

It is recommended that "State of the Union" meetings take place at least once a month. It is possible to hold them more frequently, especially if the relationship is somewhat rocky or if there is a substantial amount of change happening within the business. The meetings should be scheduled as recurring appointments and every effort should be made to avoid rescheduling.

This should be seen as a priority and the appointment as a firm commitment to the ongoing improvement of the relationship.

Be patient

Don't get in a hurry to make things happen. Success is a long road. There will be set-backs and unexpected detours. It's important that you remain patient and focused. Don't look for quick fixes; they are surely schemes that will only waste your time in the end. Remain steady and strong and eventually, you will create your success. It won't always be exactly what you expect, but you will get there.

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Reward Success

Remember that success takes hard work, so make time to reward yourself. Don't depend on others to tell you when you've done a good job because it won't always happen. If you're lucky, you'll work for an organization that praises you and gives generous rewards for your hard work. But that's not always a reality. Even great companies and great people will overlook your work at times. That's the nature of business. Hard work is *expected*. Just remember that you are working to achieve goals for *yourself*, and no one else.

Give yourself a pat on the back once in a while. Acknowledge all you have done. Don't let lack of recognition make you lose confidence in yourself. Success is *earned*. Take yourself out to a nice lunch, get a massage, or buy a new outfit. Do something that says, "I worked hard. I deserve it!"

Of course, there's nothing wrong with occasionally "tooting your own horn". If you find that you are consistently going over-and-beyond yet never getting recognition for it, speak up! *YOU* should always be your biggest fan. Cheer yourself on and share your enthusiasm. You are *totally* worth it.

Recommended Reading

- [Unstoppable: 45 Powerful Stories of Perseverance and Triumph from People Just Like You](#) by Cynthia Kersey
- [The Magic Lamp: Goal Setting for People Who Hate Setting Goals](#) by Keith Ellis
- [Do It! Let's Get Off Our Butts – A Guide to Living Your Dreams](#) by John-Roger and McWilliams
- *From OfficeArrow* – [The Success Formula: Make the Commitment](#) by Chrissy Scivicque

Part 4



Resources

“We don’t know a millionth of one percent of anything.”

Thomas A. Edison, US inventor
(1847 – 1931)

Web Resources

Connect, Collaborate, Ask Questions, Get Answers

OfficeArrow

www.officearrow.com

Online Educational Tools

Massive Free Education List

www.jimmyr.com/free_education.php

TED – Ideas Worth Spreading

www.ted.com

I-Village

www.ilearn.ivillage.com

Helpful Video

www.helpfulvideo.com

Expert Village

www.expertvillage.com

Vidipedia.org

www.vidipedia.org

Berkeley Webcasts

www.webcast.berkeley.edu/courses.php

MIT Web courses

<http://ocw.mit.edu/OcwWeb/web/courses/courses/index.htm>

Carnegie Mellon’s Open Learning Initiative

www.cmu.edu/oli

John Hopkins Open Courseware

<http://ocw.jhsph.edu/topics.cfm>

Notre Dame Open Courseware

http://ocw.nd.edu/eduCommons/Courses_listing

UCLA Podcasts

www.bruincast.ucla.edu

Stanford on I-tunes

<http://itunes.stanford.edu>

Wikiversity

<http://en.wikiversity.org/wiki/Wikiversity:Browse>

Flashcards

www.flashcardexchange.com

The Teaching Company

<http://www.teach12.com/teach12.asp>

E-Books and Audio

Free E-Books

www.free-ebooks.net

Audio Books

www.podiobooks.com

Free Audio Books

<http://librivox.org>

Free Academic Textbooks

www.textbookrevolution.org

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Writing Tools

Free Dictionary	www.thefreedictionary.com
Free Translation	www.translation2.paralink.com
Free Thesaurus	www.thesaurus.reference.com
Free Encyclopedia	www.reference.com
Guide to Grammar and Style	www.andromeda.rutgers.edu/~jlynch/Writing
Verb Conjugation	www.scientificpsychic.com/verbs1.html
APA Citation Style Help	www.owl.english.purdue.edu/owl/resource/560/01
MLA Citation Style Help	www.owl.english.purdue.edu/owl/resource/557/01
Acronym Finder	www.acronymfinder.com

Office Tools

World Clock	www.timeanddate.com/worldclock
Calculator	www.math.com/students/calculators/source/basic.htm
Unit Convertor	www.digitaldutch.com/unitconverter
Currency Converter	http://www.xe.com/ucc
Zip Code Lookup	www.zip4.usps.com/zip4/welcome.jsp
Do Not Call Registry	www.donotcall.gov/default.aspx
Telephone Directory	www.infospace.com
Yellow Pages	www.yellow.com
Weather	www.weather.com
UPS	www.ups.com
USPS	www.usps.com
Federal Express	www.fedex.com
DHL	www.dhl.com/splash.html
Docu-sign	www.docusign.com

Travel

Airports	www.smilinjack.com/airports.htm
Embassies	www.embassyworld.com
Airline/Hotel/Rental Car	www.kayak.com www.orbitz.com www.travelocity.com www.expedia.com

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Route Planner www.cheaptickets.com
www.mapquest.com
www.maps.google.com

Online Organization – Task, time and project management

Backpack www.backpackit.com
Stikkit www.stikkit.com
Webnote www.aypwip.org/webnote
The Online CEO www.theonlineceo.com
Ta-Da List www.tadalist.com
Remember the Milk www.rememberthemilk.com
Todoist www.todoist.com
Vood2Do www.voo2do.com
Toodledo www.toodledo.com
Orchestrate HQ www.orchestratehq.com
Jott www.jott.com
Sandy the Assistant www.iwantsandy.com
Highrise www.highrisehq.com
Basecamp www.basecamphq.com
iOrganize www.brunoblondeau.com/iorganize
Bubbl.us www.bubbl.us
Lazybase www.lazybase.com
Quickbase www.quickbase.com
iOutliner www.ioutliner.com
Harvest www.getharvest.com

Meetings and Collaboration

Campfire www.campfirenow.com
Go To Meeting www1.gotomeeting.com
Demofuse www.demofuse.com
DimDim www.dimdim.com
Prezentit www.prezentit.com
Slideburner www.slideburner.com

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

Spresent	www.spresent.com/v2
Thumbstacks	www.thumbstacks.com
Viewbook	www.viewbook.com
Wrike	www.wrike.com

Documents and Templates

OfficeArrow Templates	www.officearrow.com/forums/templates-documents
Microsoft Office	www.office.microsoft.com/en-us/templates
DIY Planner	www.diyplanner.com
Template Central	www.templatecentral.com
DocStoc	www.docstoc.com
Gazhoo	www.gazhoo.com
Scribd	www.scribd.com

Classes, Workshops, Seminars, and Conferences

Fred Pryor Seminars	www.careertrack.com/index_body.asp
Franklin Covey	www.franklincovey.com/fc/training_and_consulting
Toastmasters International	www.toastmasters.org
Performance Institute	www.performanceweb.org

Professional Groups and Associations

International Association of Administrative Professionals	www.iaap-hq.org
The Association of Executive and Administrative Professionals	www.theaeap.com
American Business Women's Association	www.abwahq.org
Women's Business Mastermind Group	www.womensbusinessmastermind.com

Consolidated Recommended Reading List

Part 1: Defining the Effective Executive Assistant

[The 7 Habits of Highly Effective People](#) by Stephen R. Covey

[The 8th Habit](#) by Stephen R. Covey

[The Success Principles: How to Get from Where You Are to Where You Want to Be](#) by Jack Canfield

[Simply Put: How to be a Good Executive Assistant](#) by Chrissy Scivicque

[Building a Partnership with Your Boss: A Take-Charge Assistant Book](#) by Jerry Wisinski

[The Valuable Office Professional: For Administrative Assistants, Office Managers, Secretaries, and Other Support Staff](#) by Michelle Burke

[Managing Up: How to Forge an Effective Relationship With Those Above You](#) by Rosanne Badowski

[Managing Up](#) by Chrissy Scivicque

[Resume Magic: Trade Secrets of a Professional Resume Writer](#) by Susan Britton Whitcomb

[Cover Letter Magic: Trade Secrets of Professional Resume Writers](#) By Wendy S. Enelow and Louise Kursmark

[The Pathfinder: How to Choose or Change Your Career for a Lifetime of Satisfaction and Success](#) by Nicholas Lore

[How to Break into a New Career \(with No Experience in the Field\)](#) by Chrissy Scivicque

Part 2: Exploring the Position

[Become An Inner Circle Assistant](#) by Joan Burge

[The New Executive Assistant: Advice for Succeeding in Your Career](#) by Melba J. Duncan

[Be a Kickass Assistant: How to Get from a Grunt Job to a Great Career](#) by Heather Beckel

[The Relationship Between Executive and Assistant](#) by Chrissy Scivicque

Part 3: Creating Success

[Crucial Conversations: Tools for Talking When Stakes are High](#) by Kerry Patterson, Joseph Grenny, Ron McMillan, Al Switzler and Stephen R. Covey

[Life is Not Work, Work is Not Life: Simple Reminders for Finding Balance in a 24/7 World](#) by Robert K. Johnston

[How to Say It For Women: Communicating with Confidence and Power Using the Language of Success](#) by Phyllis Mindell

The Effective Executive Assistant
A Guide to Creating Long-Term Career Success

[The Magic Lamp: Goal Setting for People Who Hate Setting Goals](#) by Keith Ellis

[How to Set Effective Goals](#) by Chrissy Scivicque

[Getting Things Done: The Art of Stress-Free Productivity](#) by David Allen

[How to Win Friends and Influence People](#) by Dale Carnegie

[The Etiquette Advantage in Business: Personal Skills for Professional Success](#) by Emily Post and Peter Post

[The Organizer: Secrets and Systems of the World's Top Executive Assistants](#) by Anna-Carin Jean

[How to Map a Project](#) by Chrissy Scivicque

[Overcoming Intimidation](#) by Chrissy Scivicque

[Unstoppable: 45 Powerful Stories of Perseverance and Triumph from People Just Like You](#) by Cynthia Kersey

[The Magic Lamp: Goal Setting for People Who Hate Setting Goals](#) by Keith Ellis

[Do It! Let's Get Off Our Butts – A Guide to Living Your Dreams](#) by John-Roger and McWilliams

Worksheets



SMART Goal Worksheet

Today's Date: _____ Target Date: _____ Start Date: _____

Date Achieved: _____

Goal: _____

Verify that your goal is SMART

Specific: *What exactly will you accomplish?*

Measurable: *How will you know when you have reached this goal?*

Achievable: *Is achieving this goal realistic with effort and commitment? Have you the resources to achieve this goal? If not, how will you get them?*

Relevant: *Why is this goal significant to your life?*

Timely: *When will this goal be achieved?*

SMART Goal Worksheet

This goal is important because:

The benefits of achieving this goal will be:

Take Action!

Potential Obstacles

Potential Solutions

Who are the people you will ask to help you?

Specific Action Steps: *What steps need to be taken to get you to your goal?*

What?

Expected Completion Date

Completed

<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Task Management Worksheet

Date	Task	Results Expected	Assigned By	Date Due	Comments/Follow-up	

How to Map a Project

