Executive Assistants: Best Practices Checklist

Tips for building a strong partnership with your Executive Assistant

One of the greatest productivity drivers is a strong partnership between a professional and their assistant. Best practice is achieved when you work seamlessly as a team, with common goals and without hierarchy. The following checklist will provide you and your assistant with options to support your partnership.

Deadline Management

- ❑ Establish and maintain a central Master Plan (to do list) that tracks all of your commitments. Update this list as necessary, ensuring it is always current.
- ❑ Ensure all tasks are associated with deadlines.
- ❑ Highlight items that have been on the list for too long. Move the task along by identifying the next step, blocking time to work on it, booking a meeting or committing to a deadline.
- ❑ Incorporate your business plan into your Master Plan. Schedule regular business plan reviews (e.g., monthly or quarterly) to stay focused on your long-term goals.

> A Master Plan is a critical productivity tool for any busy professional. It prioritizes your work and tracks all commitments. It also serves as a critical communication tool between you and your assistant.

Planning and Communication

- ❑ Book a brief, regular daily meeting to go over your daily plan, upcoming deadlines, meeting preparation, schedule management, etc.
- ❑ Protect time in your calendar to focus on specific tasks.
- ❑ Share additional efficiency suggestions.
- ❑ Prepare draft communications and files.
- ❑ Prepare precedents, checklists and process summaries.

> Planning and being proactive go hand in hand. Involve your assistant in your planning process so he/she can support your goals and better anticipate your needs.

Client On-boarding

- ❑ Establish a client contact list with pictures, full names, titles and role on the file (including all relevant participants, internal and external). When not readily available, obtain information through LinkedIn or other online sources.
- ❑ Add anyone included in email chains to your contact database.
- ❑ Add matter shortcuts to email folders so you can quickly access documents.
- ❑ Add docket shortcuts to the online docket system.
- ❑ Create hard-copy file structure including folders for correspondence, drafts, closing agenda, accounts and any other key documents that warrant their own folder.

Information Management

- ❑ Help to organize your office. Keep your desktop clear. Establish a “staging area” for other work to be completed that day. Establish a simple filing system with homes for everything. Keep key reference materials close at hand. Sort through piles. Purge or archive inactive information. Organize shelves and desk drawers. Eliminate physical clutter.
- ❑ Ensure that your staging area remains current and in alignment with your daily plan.
- ❑ Establish systems to manage your precedents and other files.
- ❑ Set up files as new projects and prospects arise.
- ❑ Ensure access to a supply of office tools (working pens, paper, files, etc.). If you are on the road frequently, establish a travelling kit and update it regularly.
- ❑ Update your contact records as necessary. Track key notes (e.g., where you met; their assistant’s name; spouse’s name; etc.). Set up groups where appropriate (e.g., Holiday Cards; Client Event; etc.).
- ❑ Establish a simple system to collect and process expenses on a regular basis.
- ❑ Establish and maintain templates that can be leveraged for related tasks (e.g., client proposals).
- ❑ Purge excess paper and clear clutter.
- ❑ Digitize information.

Schedule Management

- ❑ Review your ideal allocation of time. Establish a routine focused on your client work, business development goals and other responsibilities. Protect time for communications (email and informal calls/discussions) and rejuvenation activities (breaks, exercise, lunch, etc.).
- ❑ Establish scheduling protocols. *E.g., No more than two presentations per month; a maximum of four hours of meetings per day.*
- ❑ Book meetings and manage schedule based on a pre-defined routine and schedule guidelines.
- ❑ Prepare materials for meetings.
- ❑ Process files after a meeting: *Is follow-up required? Should the file be put in the staging area or file drawer? Should tasks be added to your Master Plan?*
- ❑ Monitor calls and email during your focused work times.
- ❑ Confirm directions and parking options. Block travel time.
- ❑ Prepare travel kits complete with itineraries, directions, checklists, etc.

Docketing

- ❑ Establish a real-time docketing system/routine.
- ❑ Track *all* of your time, including client work, other initiatives and personal time.
- ❑ Monitor your docketed time on a daily basis and discuss gaps or unallocated time.
- ❑ Streamline your online time tracking system by establishing/adding docket shortcuts.