



INNOVEST SME

Accelerating Small Business

A photograph of two women in professional business attire. The woman on the left has long brown hair, wears glasses, and a grey blazer over a light blue shirt. The woman on the right has dark hair pulled back, wears a light blue blazer over a white shirt, and is smiling broadly. They are both looking towards the right of the frame. The background is a soft, out-of-focus office environment.

Hero behind the scenes:
Executive *and*
Personal Assistans

Rick Chisholm and Tala Chisholm

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PREFACE

Executive and personal assistants have always played an important role in business. Their roles and responsibilities have evolved, but assistants are still vital to the profitability of any organization. Training to become an effective assistant will make you a valued employee who assists management on the road to success.

*An employee's motivation
is a direct result of
the sum of interactions
with his or her manager.*

BOB NELSON



WORKING WITH YOUR MANAGER

All assistants work to make life easier for their employers. This requires assistants to be adaptable. While you should never work in an unsafe environment, it is imperative that you adapt your communication and work style to the style, needs, and responsibilities of your boss. This will help ensure that you have a productive and amiable work relationship.

ADAPTING TO THEIR STYLE

You do not always get to choose your manager. While there is every possibility that you will find your manager's style amiable, you must prepare yourself for a manager who presents more of a challenge. You will have to work with people you find difficult. However, you may be able to turn a negative into a positive if you take the time to understand your manager. This understanding will allow you to adjust your responses appropriately.

COMMON DIFFICULT MANAGEMENT STYLES:

- **Authoritative Commander:** This management style does not respond well to criticism and expects things done a certain way. Additionally, outcomes matter more than the task itself.

- ▶ **Approach:** Phrase concerns as questions; do not say no directly. Do not volunteer information about projects unless asked.
- **Pessimistic:** This type of manager can never see the bright side of life. Time is wasted second-guessing, and it is easy to become a free counselor.
 - ▶ **Approach:** Actively listen to determine if the negativity is justified. Offer suitable solutions, but remain professional. Provide positive updates whenever possible.
- **Control Freak:** Also known as the micro-manager, this type of person has trust issues. Every action you make is questioned and double-checked.
 - ▶ **Approach:** The best way to gain trust is to deliver projects that are complete and on time. Additionally, you should provide updates on work without being asked.

ANTICIPATE THEIR NEEDS

Your job is to reduce the number of distractions or minor tasks that your manager has to handle. You should not expect every need to be clearly outlined for you. For example, your employer should not have to explain that they should not be interrupted during a meeting with the CEO. You should anticipate this need. Anticipating managerial needs is an essential skill that every assistant should learn. Anticipating needs requires using common sense with each task. For example, if you schedule a flight and book a hotel, the need for printed boarding passes and a map with

directions should be anticipated. By paying attention to the demands placed on your manager and anticipating needs before they arise, you will make yourself an invaluable employee and respected assistant.

GETTING YOUR RESPONSIBILITIES DEFINED

While your job description will provide most of your job responsibilities, it is necessary to clarify certain aspects of your job with your employer. Much of this is based on their personal preferences. You should initiate a discussion to clarify information if your manager does not. Your responsibilities will change with each manager, so you should have a conversation whenever you work for a new manager.

Responsibilities to define:

- Is phone, email, or face-to-face communication preferable?
- Do you have a reminder system?
- Do you schedule meetings with or without consulting your employer?
- Is any training necessary?

Once you have your responsibilities outlined, you need to write them down. This will ensure that you do not forget anything.

WHEN TO TAKE THE INITIATIVE

Managers expect assistants to take initiative. However, it is important that you do not overstep your bounds. The key is deciding when it is appropriate to take the initiative. The answer will be different in every situation. Understanding when to take initiative requires you to know your employer's needs and expectations. Some managers are more comfortable with employees taking initiative than others, so you should act slowly.

Regardless of who your manager is, you need to begin with smaller tasks until you earn a sufficient level of trust. For example, you could conduct research for a project your manager needs to complete. Later, you could create a powerpoint presentation or volunteer to draft correspondence and weed out emails. Remember only to take initiative when it is appropriate and based on your manager's wants or needs. It will be easier to discern when it is appropriate to take initiative the longer that you and your manager work together. However, if you believe your manager would be uncomfortable with you taking on a project, you should discuss it before taking action.

PRACTICAL ILLUSTRATION

This is Karen's second position as a personal assistant. She is sure that her new manager will be pleased with her and does not feel that she needs to discuss her responsibilities with him. Karen chooses to communicate with her boss using email, which her last employer preferred. She also takes over scheduling meetings because it had always been her role. Her

manager soon called her into a meeting and expressed unhappiness with her performance. He only checked email at the end of the day, and he considered several scheduled appointments to be a waste of time. Karen took this opportunity to clarify her manager's expectations.

*Appreciate everything
your associates do
for the business.*

SAMUEL WALTON



ADMINISTRATIVE SOFT SKILLS

An assistant also functions as an administrator. Your job requires you to work with different people, and administrative soft skills are essential for success. Developing social intelligence, business acumen, office management skills, and active listening will improve your working relationship with those around you and make your life much easier.

SOCIAL INTELLIGENCE

Social intelligence is the empathy, understanding, and cognition that is necessary to be effective in social settings. It allows us to identify and interpret social cues and react appropriately. Empathy is the ability to understand or share feelings. Some people are naturally more empathetic than others. However, it takes more than empathy to have effective social intelligence. You run the risk of creating animosity if you react inappropriately in social situations. This requires understanding of social norms and cultural customs. Remember that different cultures have different social cues, so you should take some time to research cultural customs when working internationally.

Ways to Improve Social Intelligence:

- **Pay attention to others:** It is easy to become caught up in our own lives. Paying attention to others, particularly you manager, will improve your social intelligence.
- **Practice cues:** Practice interpreting social cues that you see in others. Learn to interpret facial expressions, and become culturally aware of those around you.
- **Self-monitor:** Before you blurt out a response in a social situation, think about its appropriateness. This will improve your social intelligence.

BASIC BUSINESS ACUMEN

Business acumen is the ability to look at the big picture and make the necessary decisions for the good of the organization. While many executives practice business acumen, assistants must also develop business acumen to be effective. Developing business acumen requires you to stay informed about the different aspects of the business and industry and educate yourself on the financial equations and their meanings. This will allow you to see the impact your role has on the organization.

Ways to Improve Business Acumen

- Research using the Internet, books, and journals.
- Network within the organization.

- Take classes when necessary.
- Practice interpreting financial reports.
- Pay attention to how your role affects other departments.

OFFICE MANAGEMENT

An assistant must also operate as an office manager. This requires you to take on specific roles that are necessary in order for the department to move forward. Poor management skills will impede productivity for everyone.

Skills:

- **Plan:** Plans are essential for success, but the assistant must drive the plan forward by making sure the steps are executed.
- **Schedule:** The schedule and its details are typically the domain of the assistant. For example, you would make a list of people to attend a meeting, contact them, and book the location of the meeting.
- **Organize:** The assistant must keep everything filed, organized, and accessible. This includes paperwork, schedules, travel, financial papers, etc.
- **Order:** You will be responsible for ordering supplies. This requires you to keep a careful inventory and order at the correct time.

ACTIVE LISTENING

Listening skills are essential for the assistant. Listening and understanding everything that is said may be difficult in a fast paced environment. This is where active listening will help. Active listening allows you to connect with and understand the speaker. Additionally, it is a skill that may be honed.

Improve Active Listening:

- **Pay attention:** Face the speaker and make eye contact. Let the speaker know that you are listening. Turn off distractions and focus on what is said.
- **Respond:** Do not listen in silence. Respond when it is appropriate so that the speaker knows you are listening. Body language will speak for you, so be aware of how you present yourself.
- **Remain open-minded:** Avoid preconceived ideas when speaking with someone.
- **Allow the speaker to finish:** Do not interrupt, even if you have something to say.
- **Paraphrase:** Restate what speaker says to make sure that you understand.
- **Answer:** Be respectful when you answer the speaker.

PRACTICAL ILLUSTRATION

Ron was in charge of the details for a company conference. He had to talk to a lot of people when making the plan. The keynote speaker gave him an agenda, but he was trying to multitask while he took down the information. Somehow, he managed to write down the wrong arrival time, and no one was there to pick her up. Both his manager and the speaker were unhappy, and Ron had the problem of fixing the issue at the last minute.

*Time is what
we want most,
but what we
use worst.*

WILLIAM PENN



EFFECTIVE TIME MANAGEMENT

Time management is extremely complicated for assistants. Not only do you have to manage your own time but also the time of your manager and those around you. It is easy to be blindsided by life and lose control of your schedule. By taking the time to implement a few time management techniques, you can maintain control of your time and increase your productivity.

CALENDAR MANAGEMENT

Calendar management is essential to your time management. It is important that you keep both a personal and professional calendar, and sync them, in order to prevent overlap and confusion. Fortunately, there are countless applications that allow you to easily manage your calendar at home and at work. Outlook is popular and provides a color-coded system and pop-ups that help you keep track of your schedule. If you are in charge of your manager's calendar, be sure of what you are allowed to schedule.

Steps to Management:

- Schedule recurring meetings and tasks for each month.
- Include time to travel and follow up for each activity.
- Include personal and vacation time early or you never will.
- At the end of the day, review tomorrow's schedule.
- Schedule daily tasks.
- Schedule single meetings or tasks.
- Schedule time to reply to emails and return calls.

PREPARE FOR CHANGES AND SURPRISES

No matter how carefully you plan, there will be surprises and changes that disrupt your schedule. While some surprises and changes are emergencies, most are interruptions that eat up your time. In the case of an emergency, you will have to change the schedule. Most of the time, however, you can take control of the situation if you plan ahead. You need to schedule time to handle surprises in your day and take a few steps to limit the interruptions in your workday.

Steps:

- **Analyze the surprise:** Determine if you need to address the interruption immediately or if it can wait.
- **Say No:** Obviously, you have to use this one carefully. However, it is appropriate if an employee who wants help with a minor project

if you are in the middle of a major project with an upcoming deadline.

- **Schedule:** Plan time when you will not be available to handle surprises and times that you will.
- **Limit time:** If someone does surprise you, limit the amount of time that you spend with the person. Get straight to business, and do not chat.

KEEPING OTHERS ON TRACK

As an assistant, it is your job to help keep other people on track, particularly your manager. As the person in charge of scheduling, you are responsible for making sure that your manager arrives at meetings on time. You need to remind your manager about meetings and help keep them on schedule. Reminders can be set through email, given in person, or over the phone. You may also need to extend the reminders to other people attending the meeting.

Project updates will probably be sent to you as well. You should establish timelines for updates, and check in with employees when if the updates do not show up on time. It is not your job to hover over other employees, but staying aware of updates on the timeline will help you keep other employees on track to complete their projects on time.

URGENT / IMPORTANT MATRIX

Being able to differentiate the urgent from the important is essential for time management. The urgent / important matrix is a useful tool that will help you identify which tasks need to be addressed first. Urgent tasks, such as picking up dry cleaning or fixing the printer, often take up too much of our time. Urgent tasks do not help you meet your goals and can become distractions. Important tasks help you meet your goals and the activities that reach the goals. For the best productivity and time management, give priority to the important tasks. However, you have to identify the important tasks first.

MATRIX



PRACTICAL ILLUSTRATION

Jane scheduled her calendar every day, but she was never able to stick with it. She felt like she spent her time putting out fires, but today was going to be different. Jane planned on checking email and voice messages in the first 15 minutes of her day. One of the employees caught her on the way in and he was in a panic. He told her that he lost the itinerary for the meeting the next day and did not know what to do with his calendar. She retrieved one for him, and he spent the next 20 minutes asking her questions about the meeting. As she was checking messages, someone ran in and told her that the printer was low on toner and she needed to change it. By the time that was done, she needed to remind her manager about a meeting. He left her with a project to research while he was gone. She would need to work through lunch to complete it along with her regular tasks. Once again, her schedule seemed to be a waste of time.

*Before anything else,
preparation is the
key to success.*

ALEXANDER GRAHAM BELL



MEETING MANAGEMENT

Meetings are crucial to the success of your business. As an assistant, you will be in charge of managing meetings. To provide an effective meeting it is a matter of planning, organization, and timing. Fortunately, experience will make meetings easier to manage. Additionally, you can improve meetings by following a few basic tips.

CREATING AN AGENDA

The key to a successful meeting is an effective agenda. You must be familiar with agendas and how to create them. There are different computer programs available that you can use to create and keep track of meeting agendas. Before you create an agenda, you need to define its purpose. You should ask your manager and the speakers for feedback. Consider the meeting's objectives, and write them down to guide you in creating the agenda.

Steps to the Agenda:

- **List topics:** The topics that will be introduced are based on the objectives you discover.

- **Assign times:** Delegate a time for each topic. Without a time limit, the meeting will run long.
- **Determine presenters:** Find out who will present each topic, and list speakers on the agenda.
- **Provide the agenda:** Send the agenda to everyone who will be involved in the meeting. You should also include additional instructions, such as any materials that the attendees will need to bring with them.

KEEPING MINUTES

Keeping minutes provides a legal and historic record of the meeting. Taking minutes is a very important job and should not be taken lightly. Keeping minutes begins before the meeting. If taking minutes is new to you, it is a good idea to check in with the chairperson to determine exactly what is required of you at the meeting. The requirements for the minutes will depend on the type of meeting. Fortunately, there are different programs and templates to help guide you.

Once the meeting is set, make note of who will and will not be attending. Some meetings require a quorum to vote, and no voting may be done if the necessary quorum will not be present. You must take attendance at the meeting. People who give advanced notice that they will not be at a meeting are listed under "Apologies," and people who do not are listed under "Absent." What you record will depend on the circumstances, but there are some basic guidelines.

Typically Record:

- The date and time of the meeting as well as the location
- Chairperson
- Purpose of meeting
- Call to order
- Amendments or approval of the past minutes
- Motions, proposals, etc.
- Minute keeper's name
- When people exit early
- Voting results
- Adjournment

KEEPING THE MEETING ON TIME

While an agenda is supposed to keep meetings under control, attendees do not always follow them. Rants and off-topic tangents can cause meetings to run long and eat up everyone's valuable time. You have to balance keeping the meeting on track without alienating the attendees. Fortunately, there are a few ways to keep meetings on time.

- **Assign a parker and timekeeper:** Ask someone to volunteer as a timekeeper. The timekeeper points out when the time for each topic is up. The parker keeps a list of topics that should be

discussed later. The topics are parked and not discussed during the meeting.

- **Make the agenda visible:** Do not assume people will bring their agendas. Post the agenda for all to see, or hand out copies at the beginning.
- **Remind participants about the purpose:** You should remind participants of the purpose of the meeting before it starts and during the meeting if necessary.
- **Signal the chairperson:** The chairperson is ultimately responsible for seeing that the meeting runs well. You could work out a signal system ahead of time to point out distractions.

VARIATIONS FOR LARGE AND SMALL MEETINGS

The size of a meeting will greatly affect the proceedings. Smaller meetings may be more informal, while larger meetings require greater organization. You need to be familiar with the differences between the two so you can adequately prepare. Any meeting with more than 50 attendees is considered a large meeting.

Small Meetings:

- There is a chance that everyone will participate.
- Procedures do not have to be explained unless they are formal.
- Personal opinions are more likely to be expressed.
- Agenda may be treated as more fluid.

- Attendees are more likely to be interested in the topic.
- 100% consensus is typically needed.

Smaller meetings are more intimate. The smaller venue encourages everyone to become involved, but people are more likely to go off topic.

LARGE MEETINGS:

It is unlikely that everyone will be given an opportunity to speak.

80% to 90% is needed for a consensus.

Voting and procedures likely need to be explained.

Agenda needs to be strictly followed.

Attendees are less likely to be invested in the topic.

Personal opinions are less likely to be expressed.

Large meetings require a great deal of space, and they do not encourage teamwork or intimacy. Employees are more likely to lose interest during large, formal meetings. However, large meetings typically have fewer interruptions and stay on schedule.

PRACTICAL ILLUSTRATION

Harvey sent out the agendas for his first meeting. He was prepared to take the minutes, and felt confident that the meeting would end punctually. The meeting began promptly at 8:00 AM. At first, everyone seemed to follow the agenda. However, Mr. Smith went off topic when he was presenting

the ROI for the new training program. He gave personal anecdotes and made a few jokes about how pointless meetings are. As a result, he put the entire meeting 15 minutes behind. He then took up valuable time asking questions that did not related to the subject of the meeting. The meeting ended at 10:00 AM when it should have ended at 9:30 AM.

*Give us the tools, and we
will finish the job.*

WINSTON CHURCHILL



TOOLS OF THE TRADE (I)

It is impossible to be an effective assistant if you do not use the tools of the trade. The tools of the trade for an assistant go beyond simply printing, filing, and taking messages. You need to become familiar with machines, computer programs, and etiquette to become a successful assistant. If you are unsure about any job-related tools, you should take the time to educate yourself.

EMAIL PROTOCOL

Today, email is a necessary form of communication. Emails allow people to respond when convenient, and it is easy to save emails to servers and prevent the loss of valuable information. Understanding basic email protocol is essential, considering that it is a main method of communication in the business world. An email is similar to a business letter, but it does not require a heading with a date and address. When sending or replying to emails, there are a few basic guidelines to follow.

- **Double-check the address:** Make sure that the wrong address was not accidentally used. Not double-checking could cause problems.

- **CC carefully:** Do not carbon copy your entire address book. Only copy people on emails when the issue concerns them. You may also blind carbon copy to protect the privacy of your recipients.
- **Subject:** Choose a subject heading that is professional and pertains to the topic.
- **Salutation:** Use standard greetings, like a letter. Introduce yourself if you have not met the individual.
- **Body:** Maintain a professional tone, and proofread for mistakes. Do not use all caps because that is considered yelling.
- **Formatting:** Do not over think formatting. It is a message, not a webpage, and a basic paragraph format is typically all that is required. Additionally, you should avoid distracting fonts and emoticons.
- **Sign off:** Sign off like you would a business letter.

OFFICE MACHINERY

Being an assistant requires a basic understanding of office machinery. The company that you work for determines the machinery that you will use. Each organization has different needs and purchases equipment accordingly. However, some devices are more common than others. Common office machinery includes faxes, scanners, copiers, printers, postage machines, shredders, and telephones. It is not enough to simply know how to use a piece of equipment; you should familiarize yourself

with ways to troubleshoot problems. If you do not have the manuals for a faulty machine, you can always look up the item online.

COMPUTER AND SOFTWARE SKILLS

Every assistant needs to have basic computer and software skills. Do not expect anyone in your organization to teach you how to use a computer. The computer and software that you use will depend on the organization. You should be familiar with basic computer skills such as keyboard and mouse use, external devices, and retrieving files. Most companies require an understanding of Microsoft Office, which includes Word for documents, Excel for spreadsheets, and PowerPoint for presentations. You should be familiar with databases and the Internet. You may need to use financial software such as Quicken. Some positions also require a basic knowledge of graphic design. Online training, books, and classes are available in computer and software skills.

COMMUNICATION SKILLS

The ability to communicate is necessary for a successful career. You need to brush up on both your verbal and written communication skills if you want to make a good impression.

While it is true that writing is not the main aspect of your job, you will have writing tasks. Remember that people will judge your abilities based on your writing style. Emails, reports, memos, and proofreading may fall under the assistant's domain.

Improve Writing:

- **Spell check:** Run a spelling and grammar check on everything that you write.
- **Proofread:** Typos occur after a spell check. Proofread for grammar and spelling.
- **Be professional:** Use a professional tone in your writing. Avoid slang and informal terms.
- **Use mistakes:** Do not become offended if someone points out a mistake in your writing. Learn from the mistake and do not repeat it.

Writing is a skill that you can easily improve. Take a class from time to time to hone your writing and improve your communication technique.

Assistants also need excellent verbal skills. You will need to demonstrate proper phone etiquette, plan events, and inform your manager about important topics. You may also have opportunities for public speaking.

Improve Verbal Communication:

- **Think:** Consider everything you say. Do not simply respond.
- **Speak clearly:** Annunciate and speak slowly to be understood. Do not rattle off as fast as you type.
- **Be confident:** Make eye contact and monitor your body language.
- **Get to the point:** Do not ramble; speak concisely.

- **Be sociable:** Remain professional while making others feel at ease.
- **Share the conversation:** Dominating the conversation will make people feel uncomfortable.
- **Listen:** Practice active listening skills.

We are not always aware of how we communicate verbally. You can ask friends and family for feedback and model your verbal communication on others.

PRACTICAL ILLUSTRATION

Renee had more emails to write and reply to than normal, and she was in a hurry. She sent out an email with employee reviews for the department attached to the head of HR, and she CC'd the managers involved. A few minutes later, an employee called and asked to talk about his review. Confused by his request, she checked the email and realized that she accidentally sent the email to her entire contact list rather than a single group. She sent another email asking everyone to disregard the previous communication, but the damage was already done.

*We shape our tools
and our tools shape us.*

MARSHALL MCLUHAN



TOOLS OF THE TRADE (II)

Ever changing technology is shaping the job of the assistant. You must pay attention to the tools of the trade and adapt as social convention and technology changes. Keeping up with the tools of the trade will allow you to become an invaluable assistant.

PHONE AND VOICEMAIL ETIQUETTE

You are the voice of the company when you answer the phone and make calls. It is necessary to follow basic phone etiquette so that you represent yourself, your, manager, and your company well.

- Identify yourself when someone calls.
- Ask before placing someone on hold.
- Answer the phone within three rings.
- Be friendly
- Do not eat or chew gum on the phone.
- Know what you are going to say before you call someone.
- Limit personal calls.

- Do not call people before or after business hours unless prior permission is given.

Voicemail is a useful tool. However, in a fast-paced work environment, many people do not check their voicemail as often as their email. You need to decide when a voicemail is necessary. If you have a great deal of information to impart, voicemail may not be the best option. When you do use a voicemail, follow the basic etiquette.

- **Prepare:** Know what you are going to say ahead of time. Do not ramble, or the listener might not finish listening to your message.
- **Be concise:** Leave a brief message with your name, number, and the purpose of the call.
- **Speak clearly:** Speak into the phone, turn off background noise, and announce.

When setting up your own voicemail, avoid cute or silly outgoing messages. Be professional, and keep your outgoing messages up-to-date.

WORD PROCESSING

Word processing is an essential part of any business position. The word processor has replaced the typewriter for creating documents. Common business documents include reports, memos, letters, and legal documents. While most companies use Microsoft Word as the main word processing program, other options are available. For example, AbiWord is an open source application, and Google Docs is web-based.

The word processor that you use will depend on your organization. Do not panic if you find yourself working with an unfamiliar word processor. They all have similar operations, and most offer tutorials. Word processors are more than glorified typewriters. They provide a number of tools including: spell check, grammar check, Thesaurus, Dictionary, editing, word counts, formatting, and alignment to make creating documents easier. Taking advantage of the tools available will improve your documents, making them more professional.

BUSINESS WRITING

Business writing includes emails, memos, reports, and business letters. Each one has its own formatting, but there are a few basic guidelines you can follow with all of your business writing to ensure that the message is clear and effective.

- Identify your goal: Determine if you need to inform, persuade, etc.
- Understand your audience: Create your message around the expectations and interest of your readers. Your audience will determine the tone that you use.
- Stay concise: Use short, simple sentences so that you do not lose interest. You should also condense information to keep the message shorter.
- Structure: Make sure that your topics transition easily. Use space to emphasize breaks for different topics.

- Grammar and spelling: Check your grammar and spelling with the word processor and by proofreading.
- Internet Research
- As an assistant, you will have to do a great deal of research. The Internet makes this task faster and easier. All research, however, is not created equal. Basic search engine results are based on clicks and keywords, and they will not always provide the detailed information you need. You should familiarize yourself with specialized search engines such as www.firstgov.gov. A number of databases, such as ABI/Information Research, also allow you to access information. When you find information, always determine if you have a legitimate source. A blog based on opinion with little research cited, for example, would be suspect.

PRACTICAL ILLUSTRATION

Ken was running errands for the first part of the day, so he kept his phone close to him. He received a call while he was driving, so he let the phone go to voicemail. He arrived at his destination and listened to the voicemail. It was a caterer calling back with a quote for the next large meeting. There was so much background noise that Ken could barely hear the message. Additionally, it took forever for the caterer to get to the point. Ken was so annoyed that he erased the message and decided against using the caterer.

*Dealing with people is
probably the biggest
problem you face,
especially in business.*

DALE CARNEGIE



BEING AN EFFECTIVE GATEKEEPER

Assistants are gatekeepers. It is your job to save your manager the time and hassle of distractions. These may be preventing sales calls or weeding unnecessary information. Being a gatekeeper requires you to be savvy and develop the ability to see through tricks.

FILTERING DATA AND INFORMATION

Filtering data and information is part of your job. You need to determine what your manager needs to see and know and what is unimportant. For example, you do not need to pass along a sales catalogue. In order to know what information is important, you need to understand your manager's interests, goals, who are essential to projects, and the names of family members. When determining whether or not to pass along information, you need to ask a few qualifying questions. The exact qualifying questions you ask will depend on your company and your manager, but you can begin with some general questions.

Examples:

- Is this important?
- Is the manager the only one to handle this?

- Is it relevant to goals?
- Can I address this myself?
- Is the source reliable?

After you determine what needs to be seen and what does not, your manager will not have to wade through useless information or distracting requests.

LEARN TO SAY NO

Part of your job as gatekeeper is to say "no." Your manager's time is valuable, and many people will try to make appointments when none are available. They will call to distract your manager throughout the day. Sales associates are trained to get past gatekeepers, but you cannot allow them access. No matter how hard people try, you need to say "no." You do not need to be rude; you can offer to take a message if someone is insistent. Sales associates will occasionally attempt to sell to the assistant directly and befriend them. If this occurs, you need to explain that you do not make such decisions and explain that you will take a message.

DEALING WITH DIFFICULT PEOPLE

Every assistant has to deal with difficult people. Conflict is sometimes unavoidable, but it is sure to appear when you practice saying "no" and preventing people from reaching their objectives. When difficult people

present themselves, you need to repress your fight or flight response and engage in conversation.

Handling difficult people:

- **Speak assertively:** A passive tone indicates that you are uncertain. Be assertive but respectful.
- **Address the request:** Make it clear that you are rejecting the request but not the individual.
- **Avoid sarcasm:** Do not use sarcasm, and address it when it is used against you.
- **Restate:** Restate the problem in a different way for another point of view.
- **Compromise:** You need to be willing to compromise in certain cases.

Occasionally, difficult people may become dangerous. If you feel threatened, do not hesitate to call security.

RECOGNIZE THE TRICKS

People train and write articles about tricks they used to get past gatekeepers. Sales calls and other interruptions will not always be obvious; people will try to trick you. You must familiarize yourself with common tricks so that you can recognize them.

Tricks:

- They will use the manager's first name and give the impression that they are friends.
- They will not volunteer information about why they call, hoping you will let them through.
- They will be assumptive and not ask to be transferred to the manager.
- They will say that they have important news that affects the manager.
- They will use your first name and try to befriend you with multiple phone calls.

There are many more tricks besides the ones listed. Research additional tricks and share stories with other assistants.

PRACTICAL ILLUSTRATION

Sherri was comfortable fielding sales calls. She caught tricks every day, saving her manager the hassle of high-pressured cold calls. One day, Tom called and asked to speak to Jim. Jim was her manager and Tom was his brother. Sherri had never spoken to Tom before, but he was on a list of approved names that Jim gave her, so she transferred the call. After a few minutes, Jim called her and told her to be more careful screening his calls. The Tom on this call was not his brother but a sales representative. It was the first time that anyone managed to get past Sherri.

*Success is steady progress
towards one's goals.*

JIM ROHN



ORGANIZATIONAL SKILLS

With the busy schedule that assistants have to keep, organizational skills are essential to success. You must learn how to prioritize, plan, and work towards your goals. Organization is a skill that you can always work to improve. However, by implementing the following techniques, you will improve your efficiency as an assistant.

PRIORITIZING YOUR WORKLOAD

You will work more efficiently if you learn how to prioritize your workload into four tiers. Use the urgent important matrix to help you identify your tasks. The tasks will be given priorities based how urgent and important they are.

- **Top priority** should be given to tasks that are both urgent and important. These need to be done immediately.
- **The second priority** should be given to tasks that are important but not as urgent. If you spend enough time on tasks in the second tier, you will reduce the number of urgent tasks. Plan to do these tasks the same day.

- **The third tier** includes urgent but unimportant tasks that should be done today. If you ignore tasks in this tier, they may become both urgent and important.
- **The bottom tier** includes tasks that are not urgent or important. Label them as tasks that cannot be forgotten. These tasks may carry over to the next day.

GOAL SETTING

You need to establish goals to prioritize and organize your work related tasks. You should establish long-term and short-term goals for your personal and professional life. It is important to align your short-term work goals with your manager's. It is also important that you create **SMART** goals.

Goals cannot be achieved if they are impossible. **SMART** goals make it easier to achieve success because you know that success is within your reach.

SMART Goals:

- **Specific:** Goals must be specific. An example of a specific goal is, reply to all emails.
- **Measurable:** Measurable goals allow you to realize when they are attained. For example, research for one hour each day.

- **Attainable:** All goals, particularly short-term goals, need to be attainable. For example, completing a project a week early is probably not attainable.
- **Relevant:** Goals must be relevant to your situation. A goal to learn a new language is probably not relevant to a financial project.
- **Timely:** Goals require specific deadlines. For example, complete the project by 5:00 pm on Friday.

PLAN FOR TOMORROW, TODAY

You should schedule the next day when the current day ends. Planning each day in the week is not feasible because your tasks and priorities will change. You need to wait until the end of the workday to plan for tomorrow. List all of the meetings, appointments, and relevant events in your plan. Note unfinished tasks for today to combine with new ones for tomorrow. Make a list of all tasks for the next day and prioritize them. Add the tasks from the list to your plan, according to their priorities. If you take the time to plan at the end of the day, you will be able to save time the next morning and stay focused on your plan.

STAYING ON TRACK

Keeping your organizational skills on track is easier said than done. Your life may be organized on paper, but it is easy to become overwhelmed when the problems and distractions come. However, staying on track will make your life easier and increase your productivity.

Tips to Stay on Track:

- **De-clutter:** Keep your workspace clean and free of clutter. Put away files and papers once you are finished with them and at the end of each day.
- **Use technology:** Software and apps are available to keep you on schedule.
- **Two minute rule:** If a task takes less than two minutes, such as filing a paper you are done using, perform it. This will prevent tiny tasks from piling up.
- **Balance:** Schedule your personal life's needs such as exercise and hobbies.
- **Be flexible:** Your schedule is not set in stone. Be ready to adjust it if necessary.

PRACTICAL ILLUSTRATION

Allen decided that he was going to become organized. He created SMART goals, prioritized his activities, and established his schedule. His plan began to fall apart by the second day. Allen's manager gave him an emergency project to finish. His down time was gone, and there was no way that he would be able to keep up with the schedule he created. Allen decided to stop trying to keep himself organized and focused on handling the emergency his boss gave him.

*Keep the problems of clients
and prospects confidential.
Divulge information only
with their consent.*

ARTHUR C. NIELSEN



CONFIDENTIALITY GUIDELINES

As an assistant, you will be privy to confidential information. It is imperative that you learn how to handle this information and keep privileged information from leaking to the public. Following confidentiality guidelines will make you a better assistant and improve the level of trust that your employer has in you.

YOUR CONFIDENTIALITY DUTY

Confidentiality is one of your basic duties as an assistant. You will have access to company secrets, employee records, and financial information. Failure to keep information confidential will damage your reputation and the reputation of your organization. In certain circumstances, lack of confidentiality breaks the law. HR will have information on this topic. You need to treat all information that you come across at work as a confidential. Do not share information with friends, coworkers, clients, etc.; unless you are specifically told that it is part of the public domain.

Most breaches in confidentiality are not malicious. While it is true that some people are motivated by greed or revenge, a breach of confidentiality may be caused by attempts to impress rivals or clients. Extenuating circumstances may also cause breaches, meaning that accidental slips

happen. You need to be careful handling confidential information. Never repeat anything that is related to your job, even when people tell you that they are cleared to know.

BE DIPLOMATIC AND DISCREET

As an assistant, you are expected to be diplomatic and discreet in the workplace and when socializing. You are in a unique position because of all the information that you handle. You need to be careful about what you say, who you say it to, and where you say it. Do not join in employee gossip, and never discuss sensitive information in a public setting. Be diplomatic about refusing to join the gossip. Reject the action but not the people.

As you separate important information from the unimportant, you will stumble across intriguing correspondence that you do not fully understand. You must resist the urge to investigate the information or jump to conclusions. Simply pass along information without asking hypothetical questions. Employers expect this level of discretion from a personal assistant.

KEEPING DATA SECURE

Due to the sensitive nature of the information that you handle, you need to take steps to make sure that you keep the data secure. The company should have security to protect physical copies of information, and you may have to lock your files. The data on your computer, however, needs

additional security. Take a few simple steps to make sure that your information is safe.

Steps:

- Check with IT to make sure that the security and software on your computer is up-to-date.
- Do not open emails if you do not know the sender.
- Create a strong password with numbers and symbols, and do not save it to your computer.
- Enable password protection.
- Lock your computer.
- Encrypt files that are sensitive.

WHAT TO DO IN STICKY SITUATIONS

You will find yourself in sticky situations when you work as an assistant. You need to handle them carefully. The situations will vary. No matter the situation, you will need to implement problem solving to handle it:

Possible situations:

- An employee gossips and drains productivity.
- Your manager friends you on Facebook.
- An employee shares too much information.
- You believe someone is stealing from the company.

Problem solving follows a basic pattern:

- Identify the problem.
- Look at the problem objectively.
- Brainstorm ideas.
- Identify risks and benefits of each solution.
- Make a decision.

PRACTICAL ILLUSTRATION

An employee is brought in to help launch a new product. She is in charge of monitoring focus groups and reporting the feedback. The product is not complete and is still a secret. Everyone has been warned not to discuss the project. One day the employee is seen discussing the changes in design with some coworkers during lunch. The coworkers are not part of the project. When reprimanded, the employee explained that her friends wouldn't betray the company. It was safe to talk to them, and she did not provide detailed information.

*Do not pray for tasks
equal to your powers.
Pray for power equal to
your tasks.*

PHILIP BROOKS



SPECIAL TASKS

As a valued assistant, you should be prepared to take on special roles and tasks. You will find yourself interacting with clients and managing social media. You may be managing projects and hosting trade shows. With a little practice and research, you will be ready for any situation.

PROJECT MANAGEMENT

Many assistants also play the role of project managers for their employers. You need to understand the basics of project management to be successful. The five steps of project management are: start, plan, execute, manage, and end. The start does not include you because it involves choosing a project and project manager.

- **Plan:** At this phase, you determine that steps that are necessary for the project. This includes a risk analysis, estimate of resources, Work Breakdown Structure, activity sequence, schedule, budget, risk analysis, and communication systems. Much of this will be decided for you.
- **Execute:** At this phase, you are responsible for making sure that the tasks for the project are completed on time.
- **Manage:** You manage a project by creating status reports on the progress. The status reports are sent to the manager.

- **End:** Complete the project by writing a summary of the project that includes its scope, changes, lessons learned, impact, and successes.

TRADE SHOWS

A trade show is a chance for a company to display the product or service the organization provides. Trade shows are the perfect venue for finding new customers and generating interest in the product. Your role in trade shows may vary. You will probably have to schedule and coordinate the trade show, but there is a chance that you will have to attend. If you do attend, prepare the following tasks:

- Assist with booth set up.
- Develop and/or present demonstrations.
- Interact with potential clients.

Trade show demonstrations are advertising opportunities. You need to tailor the presentation for your audience. For example, you should play up money saving opportunities for CEOs and innovation for IT buyers.

INTERACTING WITH CLIENTS

Assistants have to interact with clients in person, on the phone, and through email. It is important to be friendly and professional in your communications. Build rapport with clients by remembering their names, interests, and needs. Keep a reference list to help you. You are already

familiar with email and phone etiquette. Now, your personal interactions need to be honed so that you can become that face of the company.

Face to face interactions:

- **Grooming:** Be well groomed and dress professionally.
- **Body language:** Do not fidget, and pay attention to your, stance, and facial expressions.
- **Right side:** Influence people by staying on their right sides.
- **Hand gestures:** Use open but limited hand gestures to appear trustworthy.
- **Posture:** Lean forward with an open posture to indicate interest.

SOCIAL MEDIA MANAGEMENT

Social media is an important tool on a personal and professional level. You may be responsible for managing the company's social media, but you will definitely have to manage your own. No matter the platforms you use, you must be careful to present a professional persona. Once you join a platform, choose the necessary security, and follow pages and people that interest you. Now you are ready to develop relationships.

How to develop professional relationships:

- Post links about your job
- Create compelling status updates
- Link company blogs

- Link pictures and videos
- Praise others
- Celebrate all success

Use social media carefully. People have lost their jobs because of questionable postings. If you wonder whether or not something is appropriate, err on the side of caution.

PRACTICAL ILLUSTRATION

Jenna was nervous about meeting new clients at a trade show. She was fidgeting and biting her nails before the show began. She memorized the demonstrations and was ready to answer any questions. When the show began, Jenna had trouble concentrating. She stuttered and shifted her weight while talking. She did not make any sales. After the show, her manager told her that she needed training to deal with the public before he would bring her to another trade show.

*Every day is a journey,
and the journey
itself is home.*

MATSUO BASHO

CLOSING THOUGHTS

- **Peter Drucker:** Efficiency is doing things right; effectiveness is doing the right things.
- **Kara Udell:** I look for energy, charisma -- I look for people who obviously have a level of business savvy and acumen, because this is a show where it's about business.
- **Steve Jobs:** Be a yardstick of quality. Some people aren't used to an environment where excellence is expected.
- **Henry Ford:** Coming together is a beginning; keeping together is progress; working together is success.
- **Thomas J. Watson:** A manager is an assistant to his men.



Rick Chisholm made history when he single-handedly changed the professional Audio Visual industry by breaking all the rules and capitalised over 50% market share in Australia with very little capital, no partners, mergers or lenders and set up the first franchise operation of its kind in the world in the late 1990's and early 2000's.

As a 7x founder of companies and 30x businesses such as Innovest, AI Machine, Lightsounds, LSW, Light Emotion with revenue in excess of \$300 million and having employed more than 1,000 staff over the last 35 years. Rick is known as the Start-Up and SME Guru and is Author of a number of books including Business Success for Life. Unlike many mentors, he actually walks the talk and has a number of businesses under management in such areas as Automation, Events management, Importing, Distribution, Retailing and E-commerce.

His BIG passion is Business Education empowering Businesses Owners through knowledge and skills. Whilst Rick has experienced great success, he has also endured many failures. Rick has faced and overcome the exact same challenges you are facing now.



Tala Chisholm is an SME specialist who has owned and managed several small to medium sized businesses in the last 20 years, several of which were eventually sold. She has extensive experience in the fields of retail, franchising, licensing, dealerships, education, importing, distribution and consulting.

Her expertise lies in building and implementing customised cross-platform database and software solutions for businesses, automation, IT, web marketing, advertising, graphic design, business administration, process refinement and implementation. Her business experience ranges from bricks-and-mortar Giftware retailing to highly technical fields such as Security, CCTV, Entertainment Lighting and Audio sales, hire and installations as well as e-commerce.

Throughout her career she also trained and mentored Franchise business owners as well as internal division managers. Some areas of training included retail operations, management practices, business strategy, accounting, cash-flow, marketing, customer service and IT. She has also headed up the drafting of Operating Compliance Manuals for Franchise operations and implementation of all the elements involved.



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