



THE

29-HOUR

WORK DAY

**A HIGH PERFORMER'S GUIDE
TO LEVERAGING YOUR EA**

ETHAN BULL AND STEPHANIE BULL



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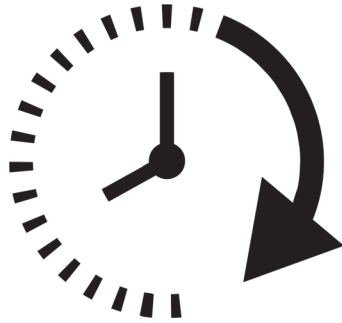
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ISBN 978-1-5445-3029-1 *Hardcover*

978-1-5445-3030-7 *Paperback*

978-1-5445-3031-4 *Ebook*



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*We dedicate this book to our two sons, Wyatt and Henry.
May you work hard, be kind, chase your dreams,
and always have as much fun as possible.*



FOREWORD

When Ethan Bull and Stephanie Bull asked me to write the foreword for their book, I was more than eager to dive into the much-needed conversation about how executive assistants can be leveraged by super busy executives like you.

Why is it needed? In the fourteen countries where I train executive assistants, three of the most common frustrations are:

- My executive does not know what to do with me.
- The leaders in our company, including HR, do not understand what assistants really do.
- I am thinking about quitting because I can do so much more and feel bored.

If you are reading this book, then you are looking for answers about how to work with an EA. I am happy to cut to the chase and

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report that you have found exactly the right resource, written by two industry experts who have walked the walk for years.

The title of the book is the heart of the matter. It's about time. Saving *your* time, that is. It does not matter who we are, where we live, or how much money we have. We all only get twenty-four precious hours each day. The question becomes, what do we do with them?

You probably don't have enough hours in your day and important things are falling through the cracks. Executive assistants can be the answer to most, and possibly all, of these issues. After all, if you don't have any assistant, you are one. While it might seem faster to book your own flights, Ethan and Stephanie make a rock-solid case for how executives no longer need to do everything themselves. What a welcome relief.

As the former twenty-five-year assistant to Oscar winner Olympia Dukakis and author of *Be the Ultimate Assistant*, I train executive assistants who will eventually be supporting leaders like you.

The great news is that this book clearly and accurately outlines the steps you need to take to find, onboard, train, retain, and best of all, experience the full superpowers of a well-chosen executive assistant.

What will not be a surprise is that, while an EA's work can sometimes seem like magic, the process to get to that place is neither mysterious nor magical. To employ an EA who anticipates your

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needs and functions as an invaluable business partner takes time, hard work, and a commitment to the partnership, as is true of all important human-to-human relationships. This is especially true in our volatile workplace, made even more complex because of its remote and virtual environments in varied time zones.

Ethan and Stephanie address all of these unprecedented demands with vivid and relatable examples, and they do it with heart and empathetic understanding.

One of the most valuable gems in the book is about empathy and shining a light on EAs who completely understand how tough it is to be a leader. Top EAs respect their leaders and do everything they can to free them of unnecessary work. In kind, the smartest leaders know to leverage the unique subject matter expertise of their EAs and to mutually respect their talent and skills. If there is any magical performance multiplication to be experienced, it is what happens when a leader and an EA are truly in sync. And that is all right in Chapter 1.

Like Ethan and Stephanie, I learned the nuances about the partnership between leaders and assistants from experience. We know that these relationships are not one-size-fits-all and every executive/EA partnership is specific to them. This is why it takes intentional effort to find “the one.”

This book proves that the time you take to focus on what you really need in an EA and then empowering that person to help you achieve your loftiest goals, will reap fruit beyond words. You will

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gain precious time back in your day, peace of mind that your priorities are being handled, and the freedom to do whatever it is that feeds your soul.

Now that's magic.

Bonnie Low-Kramen
Author, TEDx speaker



INTRODUCTION

It's four-thirty in the morning. Outside, on a street in Manhattan, a Hollywood star is ushered into a waiting limo. There's a box in her hand: her pre-ordered breakfast, provided fresh by her luxury hotel. Inside the car, she sits with her assistant, ready to go over the day's needs and wants. The limo pulls into the street, the actress opens the box, and...

There's no raspberry jam.

"Where's the raspberry jam?" she asks her assistant. "All I wanted for breakfast was toast with raspberry jam! Where's. My. Jam?"

Her assistant, knowing the raspberry jam had been ordered, insists the limo driver pull over. Without waiting for the vehicle to come to a complete stop, the assistant jumps out of the car and runs inside the hotel. There is no time spare—the actress *must* be in hair and makeup within ten minutes to stay on schedule.

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Unfortunately, there's no raspberry jam anywhere in the hotel. Back outside, the assistant assures the driver he'll return in an instant, then dashes off in the opposite direction the car had been headed. Three blocks later, he finds an open bodega where he buys an entire jar of raspberry jam. Huffing and puffing, he sprints back to the limo and hands the jam over with a flourish.

Not only did the actress get to eat her favorite breakfast, but they still managed to make it to hair and makeup on time.

In other words, the assistant's superpowers saved the day...even though it required running a 4.9-second forty-yard dash.

Raspberry jam isn't frequently (ever?) a necessity for most busy executives, but that kind of service from an assistant? That commitment to making sure your wants and needs are met? That kind of innovative thinking and inspired action? That willingness to go above and beyond the call of duty? Who wouldn't want all of that?

Whether you are the CEO of a large corporation, a former executive now doing consulting and philanthropic work while sitting on several boards, an entrepreneur at the helm of a busy startup, or you have taken over the family business and grown it beyond your ability to manage everything yourself, *you* can use that kind of dedication. Imagine how productive, efficient, and effective you would be if you could leverage the commitment of somebody like *that* assistant to support you.

HELP WANTED

Executives often find themselves in a tough position. Gone are the days when a secretary diligently answered every call that came in for you, took dictation while you spoke your way through your communications, and managed your calendar with discretion, determining which appointments should be penciled in and which should be set in stone.

Instead, frequently you answer most of your calls on your cell, organize your calendar yourself, and write emails, text messages, and occasionally a printed letter. You are being pulled in numerous directions—leading teams, overseeing projects, and trying to keep up with various fundraisers and networking.

Meanwhile, your calendar is overbooked, and there are literally thousands of emails in your inbox. You have no gatekeeper and, consequently, too many people are coming to you for answers—rather than the direct reports who should be handling them—because they have easy access to you. You know you're spending too much time online researching things like travel options, on hold waiting to get through to airlines and hotels, and on the hunt looking for thank-you gifts for clients.

Likewise, all those PowerPoints you have created, although well-designed and perfectly worded, monopolized an excessive number of hours and amount of energy. You wish you had a clone so you could attend all the community functions you're invited to

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and do more networking—or at least network efficiently. Right now, there are just too many channels to keep track of.

You are good at what you do, but you could be much better if you were not inundated and overwhelmed by the abundance of administrative work required to support your efforts. You need to find an assistant—but not just any assistant. You need to find someone to do more than keep up with you. You need someone who, like Pepper in *Ironman*, can almost read your mind and stay one step ahead of you so *you* can be a superhero in both your business and personal life.

If any of this rings true for you, maybe it's time to put an ad on Indeed to find an executive assistant (EA). Before you do that, though, read on. You do not want to find just any assistant. You want to find someone you can partner with and who you can enable to leverage *their* superpowers so *you* can be an executive who accomplishes great things and achieves maximum impact in minimal time. We call such EA skills *Performance Multipliers*.

PERFORMANCE MULTIPLIERS

The truth is, no high-performing executive works in a vacuum. Having a good team under them is crucial for their success, and their EA is often one of the most vital members of that team. At a minimum, by taking on the traditional office-support responsibilities of handling phone calls, scheduling meetings, and organizing travel arrangements, EAs put more room on an executive's plate.

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That time and mental space can then be focused on other aspects of the business.

Expanding beyond that traditional role, though, is where a top-level EA's support truly becomes a performance multiplier for you, the principal or executive. That expansion includes applying exceptional organizational skills and a precise eye for detail to projects and initiatives that you want managed in alignment with your vision. Because they know you and your goals so well, they are in a prime position to help maintain boundaries around your priorities by controlling access to you and maintaining your calendar (which is more than just scheduling meetings). They are also key in helping you establish relationships both internally with staff members and employees, and externally with clients, vendors, service providers, and people from your community.

Although having such a person on your staff may sound too good to be true, we assure you it is not. However, there is a caveat. You need to know how to partner with such a person and learn to enable them to become a performance multiplier. This book will guide you through how to do just that.

A FRAMEWORK FOR PARTNERSHIP

The first part of this book discusses why and how the right assistant can help any executive live their best life and be as successful

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as possible. We open with a discussion that compares the difference between partnering with an EA versus hiring someone you can give only limited responsibilities and whom you must micro-manage. Once you see how partnering can benefit you, you will be eager to find an EA for you and your company, so we will go into what is involved in recruiting the perfect person for the position. We'll review what to look for in candidates, where to find them, and then provide strategies for making the decision and offering that perfect candidate a job.

When you get the right EA on board, it's time to enable them to use their superpowers for the benefit of you and your company. We will explore what those powers are and show how they are manifested in everyday business life. We also talk about why it's so important that an EA is a "hospitalian," to borrow a term from restaurateur Bobby Stuckey, meaning someone who goes beyond merely providing a service, to someone who provides a high-touch hospitality service. Such a concept may seem odd for a discussion about EAs, but we promise you it is *the* primary mindset for EAs to have when working with successful executives (as well as Hollywood stars).

With a fuller understanding of what your EA can do for you, you will be ready to train and partner with them. So we will round out the first part of the book by providing strategies and techniques to make that happen as smoothly and efficiently as possible.

In the second half of the book, we'll take a deep dive into the five performance multipliers and discuss what you can do to be sure

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your EA is empowered to execute each one. Those performance multipliers include:

- Business partner
- Chief of staff
- Project manager
- Assistant/scheduler
- Personal assistant

Yes, it seems like we are promising a golden ticket to high productivity, exceptional time management, and even greater success for you. And perhaps we are—but that’s because we know the true power of EAs. That is what *our* business is all about.

WHO ARE WE?

We are Ethan and Stephanie Bull, founders of ProAssisting, a remote executive assistant service company that provides a full spectrum of support to consultants, entrepreneurs, C-suite executives, startup and former CEOs, and board of director members. Combined, we have more than thirty years of experience meeting the high expectations of demanding, discerning, and uber-successful principals.

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Ethan was the personal assistant sprinting down the Manhattan street on the hunt for raspberry jam. Prior to forming ProAssisting with Stephanie, he built a resume working on Hollywood films before moving on to serve some very elite entertainment agents at The William Morris Agency. Later, he worked with marketing executives, including Marc Schiller, CEO of ElectricArtists; Sharon Napier, CEO of Partners + Napier; and a series of C-suite members and partners at marketing giant Deutsch NY. In the world of healthcare, he served as the director of administrative services and senior executive assistant to the CEO of Rochester Regional Health, a massive network of hospitals, elderly care facilities, out-patient laboratories, rehabilitation programs, surgical centers, and independent and assisted-living centers. In his role as director of administrative services, he led a team of eighty assistants who supported over 250 healthcare professionals through the network.

Throughout his career, Ethan excelled at being the right hand of his principal: managing schedules, email, and travel; supervising projects; and coordinating community events. Additionally, Ethan directly managed senior executive assistants supporting executive leadership teams, and he recruited, trained, and supervised assistant support staff members of entire organizations.

Stephanie, Ethan's wife and business partner, brings her own impressive background to ProAssisting and to this book. She developed an eye for detail and process-development skills while serving as project manager and editorial assistant for a World Bank consulting firm. Later, she expanded in her role as an executive

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assistant in the world of finance as well as chief of staff/executive assistant to the CEO at J. Crew.

Stephanie excelled in positions that blurred the lines between personal and corporate service when she took on the title and responsibilities of director of operations and executive assistant for large hedge fund CEOs. There, she developed expertise in managing business and personal properties (including the associated staff), transportation management, and construction oversight. An exceptional researcher, she planned and coordinated domestic and international travel, and created and maintained inventories of precious metals, art, jewelry, and antiques. In short, Stephanie cultivated invaluable skills that make her a unique asset to powerful, meticulous, intelligent, and extraordinarily busy people.

We pooled our knowledge, skills, and talents together to create ProAssisting. Before pairing an EA with a principal, we make sure the EA's skills are up to our expectations. However, sometimes an EA's skills remain untapped by their principal. That was something we frequently observed throughout our tenure: while numerous principals, executives, and business owners did quite well, several could have done phenomenally well if they knew how to work better with their EAs.

So here we are with this book. However, please keep in mind that, although we wrote this for the busy executive or principal, we would like to encourage you to share it with your EA. By doing so, you may find it easier to explain the kind of relationship you would

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love to have with them, and they will have a reference for how they can expand in their position and provide a fuller service to you.

BUT WAIT! WHO ATE THE JAM?

The actress Ethan worked for is Nastassja Kinski. He was with her when she was on location in New York City and played the love interest of Warren Beatty's character in the movie *Town and Country*. Ethan was fresh out of college at the time but had no qualms about providing the high-touch hospitality effort necessary to get the raspberry jam. Both of us grew up in families engaged in the hospitality industry, so perhaps going the extra mile (or, rather, three blocks) did not seem all that extraordinary to him at the time.

That hospitality mindset, the willingness to be a hospitarian, is what we believe separates an average EA from an exceptional one.¹ As you'll soon discover, 51 percent of a good EA's job is concerned with soft skills—communication, service, emotional intelligence, and trust. The other 49 percent are hard skills, which include technology, calendar and data management, and organization.² By performing as a hospitarian for the total 100 percent, EAs are able to do their job with such finesse and aptitude that you—the

1 The "hospitarian" concept is borrowed from Bobby Stuckey, "Be a Hospitarian," TEDxX Talk, November 5, 2014. https://www.youtube.com/watch?v=TH2L_uNkt-Y

2 The 49:51 ratio comes from Danny Meyer, *Setting the Table: The Transforming Power of Hospitality in Business* (Ecco, 2008).

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principal—can achieve exponentially more than you ever thought possible. So, let's start with why that is—why and how can the right assistant make an executive look superhuman?

PART 1

PARTNERING WITH YOUR EXECUTIVE ASSISTANT



1



EXECUTIVE ASSISTANT SUPERPOWERS

Few are the executives with very little on their plate. Most— actually, *all*—whom we have worked with not only had overflowing plates but several such plates on the table, not to mention a platter or two. One of Steph’s clients could easily be described that way. His business is one that ebbs and flows seasonally, with summers being the slowest period with the fewest number of projects going on. However, that principal took on a new kind of project over the summer, which kept everyone in hyper-mode.

Knowing he was adding more to everyone’s responsibilities during a time when they usually had less, he tried to compensate by being more hands-on. However, what he considered “hands-on” was what his staff considered “micromanaging.” Not only was he involved with every aspect of the project, but his attempts to be useful and supportive were actually disruptive. He’d jump into the middle of a process or communications thread thinking he was

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clarifying or adding in necessary information, only to create more work for the others and confusion all around.

As everyone's stress level increased due to his interference, a parallel uptick in mistakes became evident. Not realizing the true cause of the stress and errors, he doubled down on his efforts to "help." Soon, that included reading all communication to and from his company regarding the project. Yes, this added hours to his days at the office and amped up his own levels of frustration while decreasing his (and everyone else's) effectiveness.

His micromanaging reached a peak one day when he called Steph to admonish her for being "too polite" to a representative of a company they were partnering with to complete part of the project. He let her know that, in his experience, people who are polite the way she was are often interpreted as passive-aggressive or sarcastic.

Steph was taken aback. She explained to her principal that she'd built a relationship with that particular rep and that they had a very friendly and polite rapport. She tried to assure him the rep did not interpret her through such a negative lens. He refused to let it go, so Steph apologized and let him know she'd be more careful in the future and try to refrain from being "too polite."

Never had Steph thought it was possible to be too polite, and frankly, she wasn't sure how *not* to be polite. It went against her nature to be anything *but* polite. And the result of her executive's request wound up causing Steph to be less productive. Emails that

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would typically take her a minute and a half to write now took over five. Phone calls she'd never hesitate to make or answer gave her pause while she reflected on how to get into the mindset of being anything other than too polite. Worse, the whole experience eroded her self-confidence. A person's optimal communication style is subjective; micromanaging such things makes everyone wonder what else is being observed and criticized.

In the end, the company completed the project. They did a satisfactory job, but the executive was not thrilled with the outcome. Everyone on the staff was exhausted, burned out, and morale tanked to an all-time low—just in time for fall, their busy season.

It did not have to end that way. The executive could have kicked off the project by letting everyone know he was there if he was needed and that he trusted the team to get the job done. Even better, if he had been able to let himself partner with Steph instead of micromanaging everything she did, he may have seen much better results from the project overall because she was a key player in it.

WHEN YOU CAN TRUST

Communication is key for establishing a high level of trust between principals and their EAs. Principals must make the time for casual conversations that will allow their EAs to get to know them. They must inform their EAs of their opinions, expectations, and business wants and goals. Then they must test the trust waters and let their EAs prove their capabilities.

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Establishing a level of trust will enable your EA to unleash what we call their EA superpowers. At that point, you will notice a shift in what they do for you—a shift for the better—and a shift in your relationship. You will have more confidence in each other because when you trust your EA, your EA will trust you to have their back, which is what they need to really go the extra mile for you. The benefits from such a relationship are plentiful! Executives will be more effective, efficient, and organized.

It sounds so perfect, executives may just want to jump in and trust 100 percent from the start. However, full trust means:

- You hand over your credit card information so your EA can make purchases and travel arrangements and pay bills.
- You will provide your EA with your social security number so they can complete forms.
- They may have access to your most important financial information.
- You will need to be comfortable letting them handle those times when business life and personal life bleed into each other—like when someone must communicate, nicely, with an ex-spouse to coordinate schedules around children.

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- You will need to be comfortable with them communicating with your most important business relationships.

That kind of trust is intense. It's like jumping off a cliff: there is no way to guarantee that nothing bad will ever happen to you or the information you shared with your EA. However, if you don't take that risk, your performance, results, and ultimately, your income will be hampered. We have found that it's not as optimal to force your assistant to gain your trust over a period of time versus jumping off the cliff and trusting them right away. By giving in to trusting them right away, you can let their actions dictate if that trust should ever be pulled back or adjusted.

Meanwhile, trust is what will enable your EA to use their superpowers, which is how they can become a performance multiplier for you.

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What Steph's executive didn't realize was that by micromanaging her, he was inhibiting her ability to use her EA superpowers to their fullest extent, which meant she was not able to serve him to her highest ability. It's an irony we have witnessed several times in our personal experiences, as well as in situations involving others: principals hire EAs to make them more productive, yet

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they micromanage them so neither are as productive or efficient as they can be. In order to stop micromanaging, executives must be willing to loosen up the reins a bit and put trust in their EAs to do their jobs.

Trusting those in support positions can be difficult. But we believe a key to opening the lockbox housing trust is in gaining a full understanding of what an EA's superpowers are and realizing how effective they can be when enabled. If your EA is to be fully empowered to fulfill the performance multipliers to the point where you can and do get twenty-nine hours of work completed in one twenty-four hour day, then you must let them unfurl each of the superpowers to the fullest extent.

Those superpowers are ESP, Synchronization, Omniscience, and Translation. Let's take a look at them now.

ESP

When we talk about how a good EA has ESP, we are not suggesting they read a tarot deck to foresee the outcome of your every decision. Instead, we are referring to how your EA will *appear* as if they can see into the future to figure out what you will need, then present it to you before you even know you need it. They are able to do that because they know your business as well as you do. They know how it functions, who the key players are, what your objectives are, *and*, perhaps most important, what is looming ahead on the calendar.

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When your EA gets to know you and your organization very well, a rhythm sets in, a backbeat of habitual behaviors. They will have a running to-do list for the day, which includes looking ahead to see where you will be, with whom, and why. Armed with that information, they can collect the knowledge and materials you'll need and prepare it for you so you will be ready to handle whatever is coming your way.

Examples of EA ESP are rampant in movies. In the *Devil Wears Prada*, Andy Sachs is the assistant to the very high-profile Miranda Priestly. Because Miranda cannot possibly remember everything about everyone she meets, Andy memorizes the biographies of all the important people expected to attend a major event so that she can whisper relevant tidbits into Miranda's ear, if needed, as guests approach her. And in *Ironman*, Pepper Potts's ESP repeatedly saves the day when she shows up with just the right file or information that Tony Stark needs before he asks for it.

Off the movie screen, principals are the beneficiary of these superpowers on a daily basis. If a principal is going to be speaking on a panel at a conference, the EA will research the backgrounds of the other panelists as well as the moderator, condense the information to bulleted lists, and have it at the ready the minute the executive asks for it (and if the executive doesn't ask for it, the EA will hand it over, knowing they will need it). It happens in a boardroom when notes, briefs, and other information that executives did not ask for is inconspicuously placed in front of them. It happens when they take unexpected calls from heads of other companies with whom they want to do deals, and their EA slips them a dossier with the

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top three bullet points they think would be of interest to the other exec—bullet points your EA noted from previous conversations about similar projects.

Ethan recently had the opportunity to stretch his ESP superpower muscles when a principal sent an email about an upcoming trip. It read:

As soon as you can, please get back to me on the flight information today. I need to know when the charter takes off. What's the tail number? The FBO address? And the menu—what's on it? Is it set? What about the car service? We need to have a call ASAP to discuss.

Actually, they didn't need to have a call. Ethan had already collected the information and replied with it instantly. His principal wrote back, thanking him for being two steps ahead of her.

Sometimes ESP works in surprising ways for executives. For example, it is not unusual for an executive to catch themselves silently appreciating their EAs when they are out to dinner with a client and discover that particular restaurant caters to the client's very specific dietary needs. Why are they there? Because the EA called the client's assistant and got the scoop on food allergies and preferences before choosing the restaurant and making the reservations. In other words, the EA took the time and necessary steps to anticipate what would make for a successful meal, then took on the challenge of finding the restaurant that could provide it, and *voilà!* The client feels valued, and the deal is solidified.

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The benefits of an EA's ESP are enormous—if the principal can let themselves trust their EAs enough to use them. Steph's executive could have focused on other aspects of his business, had he trusted her ESP. She knew his thoughts about the project, what he needed to get it done, and what he believed was required to achieve the results he wanted. She also knew what the next steps were for everyone on the project, so she could have stayed ahead of his needs if she were not so busy triple-checking whether she was being too polite to her various contacts.

Synchronization

The Synchronization superpower is closely related to ESP because it relies on a schedule and the calendar. A good assistant knows their principal's productivity cycles. They know the circadian rhythms of their executives, when they are most alert during the day, and when heavy lunches hit. They also know which days of the week are better for travel, phone calls, and in-person meetings, and they know how outside influences like children's school schedules and other personal issues impact the calendar. When they take all that knowledge and use it to manage their executive's schedule, they are applying their Synchronization superpowers.

Sometimes EAs know their executives' rhythms better than the execs themselves do. Ethan once had a principal who held his most productive meetings in the mornings. However, he was resistant to Ethan scheduling meetings in the morning and instead wanted them in the afternoon. Ethan reminded the principal that he

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tended to have an afternoon slump, but the man insisted—subsequently frequently complaining that the meetings were a waste of his time.

We've noticed that the more successful principals are the ones who honor their time and energy levels—and insist their EAs do, too. The less successful ones are easily pulled in a multitude of different directions, including ones that are counter to their personal rhythms and preferences. That then creates an unstable environment for their EAs to work off of when managing their schedules.

To optimize your EA's Synchronization superpowers, take the time for a self-inventory to determine what times of the day are better for focus than others. In addition to that, what do they need to make room for in their schedule to be at their best—twenty minutes for a workout during lunch every day? A mid-morning quiet time for meditation? What about blocking time each day or a few days a week to work on particular goals? For example, Steph has a client who is writing a book. That principal blocks out time on her calendar to focus on only that, and Steph works around it. In fact, that principal knows herself so well that she's discussed with Steph at length about how to best maximize her writing productivity with her calendar. That led to the agreement that Steph will not schedule several sales calls on a day that her principal will be writing since it's too difficult for her brain to switch to the different functions and still produce good writing.

Principals should check in with their EAs, too, to see if they have noticed better alertness at particular times of day. Or are there

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days of the week when they regularly run late because traffic patterns change? Is there anything else that should be taken into consideration based on its impact on the schedule? Sometimes, executives schedule sales calls back to back, and then they do not have time for the necessary follow-up that is best to happen right away versus at the end of the day, after several similar calls (or the next day, which could potentially be worse because of memory lag).

The Synchronization superpower is not one an executive's EA will be able to step into and perform right away. This one will take some time and will require both of you to do an honest assessment of what you need to do and when you do that best. However, we feel it's worth the effort to define and enact as best you can. Principals and their EAs will all discover they can easily get more done in less time and often do it better when those circadian rhythms and supplementary needs are honored on the calendar.

Omniscience

An excellent example of an EA using the Omniscience superpower comes from one of Steph's clients. That client is in sales and has a particular step-by-step process that must happen each time a client signs a contract with them. Once Steph realized it was the same process each time, she quit waiting for her principal to tell her what to do and used the contract signing as a trigger to start the process, which meant scheduling a kick-off call with the client. In turn, that call, once completed, kicked off

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an internal team meeting, then a project schedule, then an email campaign, etc. Those are all task-based items that she can easily click off, but a few of the others require more in-depth work, like checking in with other teams for availability and input before communicating back to the client. The thing is, her principal used to do most of those steps, but once Steph understood the process, she took ownership of it. Everything gets done and the principal is alerted after each stage of completion so they stay abreast of the progress.

By allowing the Omniscience superpower to be expressed, the principal has no need to micromanage. They can trust the EA is competent, and they can be confident all of the details are covered. That means they can then focus on bringing in the next client, or on some other facet of their business that can impact their bottom line better than micromanaging their staff will.

Translation

It is not unusual for EAs to develop good relationships with all their executive's direct reports, but they must always keep in mind that their first line of allegiance is to the principal. Executives can encourage that allegiance through clear communication and expectations that emphasize who can be clued in on which topics. Such discourse helps build Translation superpowers that enable EAs to speak to people according to who they are in their principal's world and express what their executive is saying in ways that are appropriate for each one.

Executive Assistant Superpowers

If an executive is going to confide in their EA that they're thinking about doing a partnership with another company—a partnership that will set the VP of engineering's nose out of joint—the executive needs to know the EA will keep the idea confidential. That means the EA must feel comfortable saying things like, “I'm not at liberty to say” should the VP of engineering ask, and it means that the EA will manage to maintain a relationship with the VP that is courteous and respectful. The Translation superpower can soften rejection, ensure speculation is targeted in the appropriate direction, and put context around decisions with nonconfidential information that will smooth concerns or alleviate potential fears.

As Translators, EAs can help keep teams aligned and focused where they need to and not get distracted by misinterpretations (or correct ones that need to stay under wraps). People who are direct reports to executives are always trying to read the principal's mind, and often do so through a lens of insecurity: *will I get fired for this?* So, at times when busy principals are in crisis mode and must cancel meetings at the last minute or end calls abruptly without giving any real explanation, those direct reports often speculate in the wrong direction. They feel insecure, angry, and may be prone to fuel gossip, which encourages low morale throughout the whole company. But when an EA can follow up on those meetings and calls with a quick email or message about how something blew up in a different department, then those people will take the incident less personally and be more likely to forget about it.

Similarly, a great EA has the “velvet no” perfected—that ability to refuse to accommodate a request on a principal's time or

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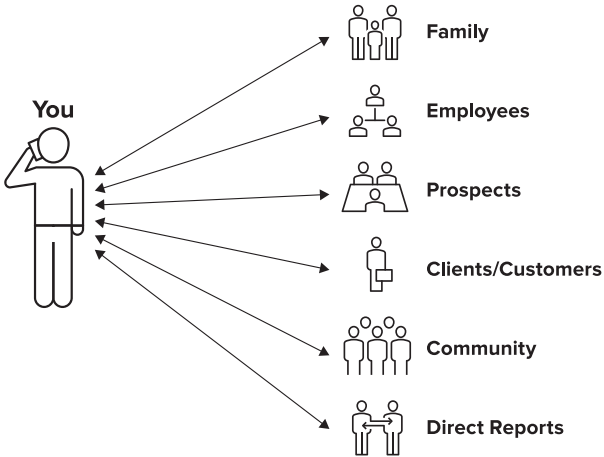
attention in such a way that the person asking for it feels honored. Perhaps no one can do it as well as Hillary Clinton's aide, Huma Abedin, when she was lauded for it in the press. The way *Forbes Magazine* described her, she "calmly manages time demands on her candidate with apologetic grace."³ The velvet no is every EA's secret weapon to ensure all are happy with the executive—even when the executive says "no" (or, "NO!"). When a principal is shouting that he will never do business with "that freaking idiot!" the EA will deliver a velvet no that assures the recipient still feels respected but is just not the right fit at this time. In the end, this preserves relationships and, in some cases, could even avert a potential public relations nightmare.

Whether they are speaking with the dispatch person at a car service company, the representative of a hotel or airline company, the maître d' at a restaurant, or the executive assistant of a client, the most successful EAs can work, interact, and express themselves with a full understanding of the pecking order. If they need to get a little sharp and verbally throw a couple of elbows with an airline representative because they're receiving the runaround, they can do that. On the other hand, if they are speaking with the EA of a challenging client, they know how to be diplomatic and handle the situation with grace—the hallmark of a true translator!

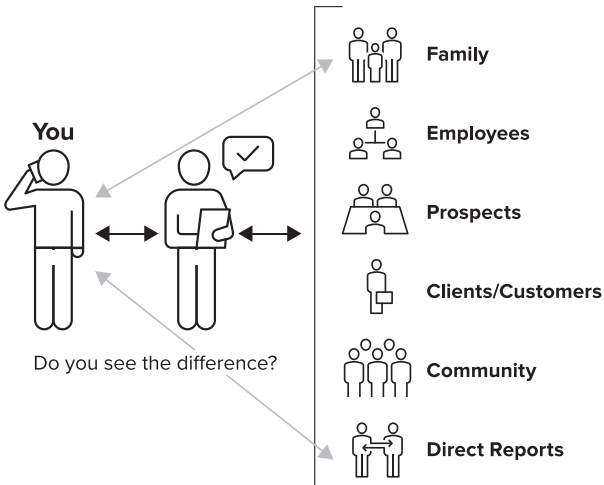
3 Nina Easton, "How Huma Abedin Became Hillary Clinton's Confidante and 'Translator,'" *Fortune*, 9 July 2015, <https://fortune.com/2015/06/10/huma-abedin-hillary-clinton-aide/>.

Executive Assistant Superpowers

Before You Get an Assistant



You with an Assistant



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Clearly, a good EA has some impressive superpowers. However, your EA can only help you as much as you let them. Again, you have to be willing to trust them and let go of some of your control for their superpowers to do their magic, and for your EAs to be the performance multipliers they can be. If an executive cannot trust the EA to use their superpowers for the good of the company *and* the executive, the executive will wind up micromanaging, which is a huge waste of their time and energy, and get only minimum benefit and performance.

Of course, hiring the right person will mitigate the risk of an EA abusing your trust. Once hired, you will need to ensure your EA knows right out of the gate how important your confidential and private information is to you and that you will both need to trust each other. Let them know they cannot gossip around the water cooler about anything that has to do with you or any business that comes across their desk. If you cannot get an agreement to that trust, then that is one of the signs that person is not the right EA for you.

There will be plenty of signs to let you know who might be the right one, though, so let's now look at how to find a great EA for you.

2



FINDING “THE ONE”

In the early 2000s, Ethan worked for one of the largest, most high-profile advertising agencies in the United States. Their offices were located in Manhattan and were run by a celebrity in the field. He had a brash personality—a “true New Yorker”—was opinionated and not afraid to yell. Consequently, at that time, many on his leadership team ruled their departments in a similar style.

Ethan entered the company as the assistant to the man leading the digital and direct/print production portion of the agency. He was a man who yelled—a lot! To say he was demanding would be an understatement. Should anyone complain, he let them know where exactly they could go. So perhaps it’s no surprise that, prior to Ethan’s arrival, he had gone through thirteen assistants in the previous twelve months.

That last line is *not* a series of typos—the man literally had thirteen assistants in twelve months. Yes, you could say he was a bit of a tyrant. Ethan was hired simply because he was a male, had experience in the entertainment industry, and had worked for some fairly

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demanding personalities. On Ethan's first day, he found a blow-up doll sitting in his seat, covered with Post-it Note messages. It was basically a "welcome aboard" gift from his coworkers wishing him luck via euphemisms his new principal favored. It was their light-hearted attempt to let Ethan know, right away, that this was not a company that held hands, that everyone was an adult hired to do a job, and nothing else really mattered. However, in the end, Ethan got the last laugh; he stayed with the company longer than his principal did.

You could also say that if Ethan's principal had been a little pickier and taken the time to find the right EA for him from the beginning, he would not have spent so much time looking for others—time he could have spent on activities that would positively impact the company's bottom line.

Though, sometimes it can seem as if you need to find someone right away, as was the case with Ethan's principal, it's often better to take your time when hiring an EA. A sense of urgency may cause you to discount any potential negatives in a candidate that could wind up causing you to let them go in just a couple of months and start the hunt anew. As Dr. Stephen Covey says, "What is important is seldom urgent, and what is urgent is seldom important." It is more important you find the right person than it is that you find the first one to fill a vacancy.

Granted, it can be difficult to find the right EA. Everyone looks almost too perfect on their resume. So here are what we consider

Finding “The One”

the key attributes to keep top of mind when recruiting an EA, how to make the offer, and how to recognize when it is time to let someone go.

KNOW YOUR NEEDS

Before initiating the recruiting efforts, it’s imperative that a principal takes the time to figure out what, exactly, they need or want in an assistant. Recently, the CEO and co-founder of a company reached out to us. They were going to use an executive search firm to find him an executive assistant, but they thought perhaps they’d need someone else to support the entire executive team as well. On a Zoom call with the executive team, we discovered the CEO wasn’t on board with two newly hired positions, so they wanted to find one person to support the CEO, the COO, and the VP of business development, and then eventually work for the rest of the team once they were brought up to speed on how the operation worked. Instead of going with the headhunting firm, they decided to see what we could come up with in terms of providing a remote executive assistant.

They sent the job description—it was a beefy role, with lots of responsibilities. Yet, we found the perfect EA for them. They interviewed her and brought her on board. We checked in with her a week later and discovered the CEO was really monopolizing more than one-third of her resources, which was the limit they had all agreed he’d ask of her. Soon after, the company confirmed he wanted her as his own EA, and the team would need to find someone else.

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Of course, we were happy to find that “someone else” for that additional position. However, it would have been more expedient for them to have us find both positions *after* they thoroughly thought through what each member of the leadership team needed. After cataloging those responsibilities, they would then know what to look for in a new EA.

Another way of recognizing what you need in an EA is to see where you are the bottleneck causing delays and confusion. If someone needs to send an executive three emails over the course of a week to get them to sign a document in order to move a project forward, that is probably a sign the executive has too much to do. As is when they are perpetually a week and a half (or more) behind. When they ask their teams why something has not been completed only to find out it’s because they, the principal, had not followed through on a minor task. And, when they are chronically late to meetings, forget about meetings and calls, or say “yes” to too many things so that their schedule ends up being double- or triple-booked. With each one, the principal should look at what they are doing poorly or procrastinating on and assign those duties to their EA. Whether that means letting the EA monitor their emails, take over the project management of an endeavor, or be the point of contact for their scheduling, all will remove the bottleneck the executive caused and smooth out operations.

We recently signed on a new client who told us she just had too much to do. None of it was necessarily hard to do, but she just didn’t want to do a good portion of it because she had more

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interesting or important tasks to check off. That’s a common plight: the next fire drill that comes along is always more interesting than knocking out the boring stuff on your to-do list. So things like completing an insurance claim form will perpetually land on the bottom of the pile on her desk. Meanwhile, that pile continued to grow—until she signed with us and we found an EA to eliminate it.

That principal’s pile actually brings us to a very important point: sometimes it is not a matter of what you *need* your EA to do for you, but rather what do you *want* them to do. Or, what is it that *you* do not *want* to do? Do you spend more time making travel arrangements, sending thank-you notes, researching service providers, filing, itemizing expenses, trying to end unwanted calls, or dealing with other tasks that don’t directly contribute to the bottom line than you do on those things that will? Those unwanted or time-consuming tasks can become the job responsibilities of the EA.

Once you know what responsibilities you want to assign to your EA, the next question is what hard or technical skills will be needed to fulfill those responsibilities? Additionally, what specific soft skills? As we will discuss in the next chapter, always remember that soft skills are more important than the technical ones. For now, the important thing is that you have cataloged the responsibilities you want your EA to have and the requisite skills for those responsibilities. With that, you can create a job description. And that means you are ready to recruit.

RECRUITING

We understand recruiting can be daunting. And we have discovered that executives who have never had an assistant are often the most reluctant to bother trying to find one. However, after working with an assistant for just a short period of time, they change their tune and cannot imagine ever working solo again. The reason for their initial reluctance usually comes down to money. Sure, there is a huge threshold to cross when it comes to trust and privacy, and most successful people are cognizant of how much money they are spending. Whether they're worth hundreds of millions of dollars, hundreds of thousands, or hundreds of hundreds, we have noticed a phenomenon that is so prevalent among them, we believe it's a genetic tendency. That is: successful principals are very cost-minded. So they think, *I can do all of these things myself, so why should I have to pay someone to do it?* What they forget about is that "these things" that always end up at the bottom of the pile could add up to cost quite a bit of money—lost contracts; poor relations with people you did not respond to; even those insurance claims, if not completed within a time frame, will become un-reimbursable.

If cost is a serious consideration, principals need to remember technology has enabled new options. For less than a full-time employee working in your office, companies like ProAssisting can partner with you to provide a committed assistant who will be able to provide the full service of an in-house person at a third of the cost. Or, if you truly believe you need someone to live in your office, local colleges will be happy for your company to provide

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intern opportunities. Virtual assistants are another option, and you can get creative and pay the receptionist a little more to take on some administrative responsibilities. Of course, you can always hire a full-time EA, pay them what they are worth (which in large metropolitan areas means a six-figure salary), and enable them to be a Mini-me.

To help figure out what you really need, we put together a presentation, the *State of the Assistant in a Remote World*, that is a helpful overview of virtual assistant, remote executive assistant, administrative assistant and executive assistant roles, and that includes details about what differentiates them and the expected pay rate. You can download that guide here: <https://info.proassisting.com/download-state-of-the-assistant>.

Once you realize you need someone to help, and you know exactly what you want that person to do, it is time to put out an ad (or have your HR department do it) and begin the recruiting process. Now that you have the job description for your EA (because you know their needs), the next step is to start the hunt. The ideal method to recruit the perfect EA is to send an email to your HR department and let them handle the recruiting. However, if you have neither an HR department nor a recruiter in your contacts, you will need to do a little work for yourself. Also, depending on what kind of position you are filling—i.e., a virtual assistant, remote executive assistant, in-house, etc.—you will have various options to review.

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There is always the traditional route of contracting with an outside recruiter. They will take the legwork out of finding and screening applicants. They will also take a fee equivalent to 20 percent of the annual salary of anyone you hire through them. Opposite that route is a free option on LinkedIn. That platform has an “Open to Work” status that allows people searching for potential candidates to find them easily.

In between those extremes are online job listings like Indeed.com, which does have a free option, but charges a fee for a better service. Similarly, there is remotework.com, which is a site focused on just remote workers. Facebook also has a jobs page that is free to use, but if you want to cast your net into a targeted pool of candidates, you will need to pay a fee to boost the job as an ad.

If you are looking for a virtual assistant, a Google search will provide a list of companies that specialize in connecting you with people of varying skill levels. If you are comfortable hiring an intern, local colleges have career placement centers that help their students and graduates find jobs. And, of course, for a true top-level EA, there are companies like ProAssisting that specialize in providing remote superpower assistance to busy executives.

BEFORE YOU MEET: FIRST IMPRESSIONS COUNT

Most likely, a candidate’s resume will have been proofread multiple times, as will their cover letter. So, obviously, any mistakes

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you find on it are red flags that perhaps their skills are not where you need them to be; obviously their sense of accuracy or attention to detail are a little off (or, worse for your purposes, they *did not* do the proofreading they should have). When we are searching for a top-level EA at ProAssisting, we start off by looking not only at a candidate’s resume, but their LinkedIn profile as well. If they cannot present their information in a professional way that makes sense in both places, it’s another red flag. While reviewing that material, we look at their experience and take note of whether they have been a chief of staff, project manager, or administrative assistant at any time in their career because the hard skills that come with those positions are invaluable for an EA.

We look at their career progression—did they constantly move up in titles? Are there any backslides that they do not seem to have moved forward from? What level was the person they assisted in their previous position and how big was that company? If the titles of the people with whom they have worked progressively went up or they reached the C-suites, that tells us the person worked at a large company (usually employing more than fifty people), which in turn means they have probably experienced a much broader scope of responsibilities than someone at a small family company with a handful of employees.

Notice we have not mentioned anything about checking to see if the person has experience in the specific industry or type of business at hand? That’s because, while it could be of benefit to have someone steeped in the general nature of what your company

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does, it is not really necessary. A good EA is a chameleon who can use their foundational skills and knowledge to blend into any environment.

In terms of tenure, we prefer to see people remain in their jobs for more than a year. However, if there is a blip of less than a year in between two long-term positions, we will not hold that against them. No one is a good fit for every company, and we understand that. If the other positions are high level, we will still want to talk to the person and take the opportunity to hear how they explain the blip.

Stephanie is a prime example of why it is a good idea to hear candidates out. She worked for a hedge fund manager for seven years where she grew her skills tremendously. Her principal trusted her completely and handed over the project management for organizing company retreats and overseeing the construction, build-out, and decorating of a \$55-million estate, among other projects. However, Steph loves fashion, and when a high-level position opened up in the fashion industry, she took the opportunity. Unfortunately, within a year she realized she loved fashion much more than working in the fashion industry, so she left. After she decompressed, she worked for another hedge fund manager for two and a half years before leaving when we made a long-distance move. We started our business at that point. If we hadn't, she would have felt comfortable interviewing for another job elsewhere because her story is cohesive, it makes sense, and she's not the only one to have such experiences.

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Steph’s story is a prime example of why we feel it is important for people to be given a chance to explain short-term positions. However, if a person cannot explain a gap in their employment, or they tell a convoluted tale about short-term employment, then we see that as a red flag and do not move them on to the next round.

We also give people a chance to explain their job titles. We realize you cannot always trust a title listed on a resume. In some companies, people with the title “executive assistant” really only do the work of an administrative assistant; in others, an administrative assistant is really doing executive assistant–level functions. So we do not just read a job title and skip over the description. If a person has applied for a position, we will look past the titles to check out their responsibilities.

When we are reading through a candidate’s LinkedIn profile, we pay attention to whether they have taken the time to put up a background photo. If they have, it shows they’ve put thought into how they’re presenting themselves to the world. If they haven’t, we move on because that is a differentiating factor in terms of someone who truly understands the role of an EA. We also look at their profile picture. We are not concerned with how attractive a candidate is, but if the image shows them slurping Jell-O shots on a beach instead of a professional headshot, we will take a pass because that tells us they need to up their game as far as professionalism goes.

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When it comes to education, we do not always believe a bachelor's degree is necessary. A candidate can have a skill set built up from previous positions and even a natural affinity for the position. Also, when the candidate's resume displays a perpetual expansion and progression of responsibilities, that is evidence of them being able to quickly adapt and succeed in new positions. So, often we will put as much weight onto their career history as their education. However, we do like to see that the candidate took extra courses or certifications—whether that is in Photoshop or event management, it doesn't really matter. The additional education tells us that the person is willing to learn and improve upon whatever skills they have.

We have frequently met and prefer candidates who are career EAs. One of the ways that is made evident on a resume or in a LinkedIn profile is through not only a continuation of ways they have tried to better their skills and improve their performance, but that they belong to communities of assistants—groups like the American Society of Administrative Professionals, the Administrative Assistant Office Professional Network, or one of the LinkedIn communities for assistants. Those groups help their members stay at the leading edge of assistant work, which means they can bring innovative skills to support you and your team. If we see an applicant with a continuous career path, who is also a member of those types of groups, we know that person is a strong candidate. They really want to be in a position for the long haul, they enjoy the work they do, and they have a servant's heart.

WHEN YOU MEET: SECOND (THIRD AND FOURTH) IMPRESSIONS COUNT

As with a resume, that first handshake and the first conversation you have may not give you an accurate portrayal of your candidate. Their speaking voice and the way they make eye contact and hold their posture during the initial interview will be done with utmost care to present to you the person you want to hire—not necessarily the person they really are.

Gruff people can pull off polished and charming for an interview. So, go beyond that first impression and ask questions aimed toward revealing what may be behind the veneer.

1. How did they manage their previous principal’s time?
Can they give an example of when it was more tricky than usual?
2. What about an example from when they had to play the role of gatekeeper? How did they deal with the senior leadership team wanting to see the executive without an appointment or checking with them first?
3. How did they handle a crisis or problematic situation?

Listen to the answers and look for clues that tell you whether this person used EA superpowers to achieve the best results for

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everyone. And, if not, were the results they achieved accomplished with panache and confidence? Or with abrasive assertiveness? Based on their answers, you should ultimately ask yourself: *is this the kind of person I want representing me and my company?*

Something to keep in mind as you are interviewing is that a pause before answering is *not* a negative. EAs often perform so many functions and have been through so many different scenarios that they may need to stop and think about specific examples to pull from a vast array of experiences. So, instead of asking them, “What did you do at Company X?” instead ask, “Tell me what your responsibilities were when you first started.” Then, when they have answered that, ask them what their responsibilities were when they left (or are currently fulfilling). Compare and contrast the two, and you will be able to fill in the blanks for a full scope of their capabilities.

Additionally, pay attention to the way a candidate answers your questions. If you have to continue to pull a thread to get them to tell you their story in a succinct way, realize that is probably how they will interact with your clients and staff members. Such a communication style makes it difficult to create personal connections and partner with others.

Even though the EA will work directly for the principal, often it is a good idea to have all of the executive’s direct reports and any other significant people interview the candidates as well. They can help choose a person who will fit as a member of their team, and they will also have other perspectives that can help inform

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the decision. At a company where Steph worked, the receptionist was always included in the hiring process. She was often the first person the candidate met in the company, hence the ultimate litmus test of the candidate’s character. If that person was rude to her, or wasn’t gracious when she offered to take their coat, that was a sure sign the person was not a good choice for the company.

BE CASUAL

We always suggest that principals try to have at least one interview that is more casual than an in-office meet-and-greet. Meeting over breakfast or lunch can be ideal because it will give the principal a better idea of what the person is really like. Your office, with a desk between you, will set up a psychological barrier that may prevent the candidate from giving you a full picture of who they are and what kind of character they possess. Whereas breakfast or lunch meetings tend to remove that barrier so you get a fuller, more real picture of them on which to base your hiring decisions.

At these meetings, consider their tone of voice—are they at ease having a general conversation? Do they easily make eye contact? How do they treat the staff at the restaurant? Are they pleasant to them? Does it seem as if this person will be congenial to work with? Being able to communicate clearly and effectively, to carry on a free-flowing conversation that doesn’t feel forced or stilted is so very important—especially in today’s world where so much interaction is done via phone or video conference.

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In such a casual situation, you can also see how open someone is to criticism. A technique we use to check on that is to challenge people about how their resumes differ from their LinkedIn profile. Watching how they react to such a question in a relaxed atmosphere will reveal just how they will handle mistakes or corrections. This is also a great time to get stories that check all the boxes of the performance multipliers (as we will discuss in the second part). Those stories will be about how they gave their principals input on marketing campaigns, about their project management work, about how they interacted with all the direct reports and other staff, how they juggled scheduling, and how they managed tasks that would fall under the rubric of a personal assistant. As they talk about those situations over lunch or in another casual environment, you will get a better feel for their willingness to do those tasks that may be deemed “meaningless” because they are not specific job-description functions. Of course, the danger in such meetings is that the person may feel too comfortable and overshare personal information. That is yet another red flag. If they do not have the discretion to maintain a sense of privacy and confidentiality with their personal business, then you know they will not have it to maintain yours.

YOUR GUT WILL KNOW

Often, you’ll know you have found the right EA because you will feel it in your gut. There have been times when we have found assistants that seemed perfect on paper—they had the skills, they had the experience, but our gut told us something was off. Maybe

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they seemed a little too rough around the edges, or they treated the receptionist rudely, or something just didn’t feel right when they spoke about their tech-savviness. Whatever it was, our instincts cautioned us to wait and do a little more research.

Every time we ignored our gut because a candidate’s on-paper information was just so very good, we regretted it. So listen to your gut. If your first instinct is to say “yes,” then it is probably right. Likewise, listen if your gut tells you “no.” In the long run, you will save time and aggravation if you have the wherewithal to sit and touch base with your instincts—and follow through on what they say. However, even if all signs point to go, you still need to do your due diligence before making the offer.

BEFORE MAKING AN OFFER

Congratulations—you have found “the one”! Or, you think you have, anyway. Before you make an offer, there are a few things to consider. If you have the luxury of an HR department, there will be little for you to do other than say, “This is the person for me.” HR will handle the rest. If you don’t have that luxury, there are a few more hoops we suggest you jump through before onboarding someone.

Those hoops will be similar to the ones you had your other direct reports jump through. If you ran background checks on them, do the same for the potential EA. If it is important that the people who work close to you sign an NDA, then have this person do so,

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too. The same goes for a conflict of interest. Even if you do not typically run background checks or insist on NDAs, you may want to for your EA as it will help you establish that sacred level of trust we spoke about earlier.

We typically do not follow up on references beyond confirming dates of employment and title. That may sound counterintuitive, but you seldom get any kind of information that makes the process worth it. If the candidate's full resume is on LinkedIn, there is nothing those references can tell you that will be new.

Now, if after your due diligence you still want to make the offer, have a discussion with the candidate to ensure you are both on the same page. If you are looking for a career EA, and this person is looking for a place to work for a year or two, you may want to take a pass. Similarly, if you want to find someone who is willing to grow inside the organization or industry—and possibly to grow so much that they are promoted into a different role—make sure your candidate is aware of that and willing to expand in that direction. Taking the time for clarity at the pre-offer stage can save you the time, expense, and aggravation of needing to find another person long before you want to.

And finally, before making the offer, be sure you are paying this person what they are worth. At the time of this writing, a top-level EA can make a six-figure salary in large metropolitan areas—and they are worth every penny of it. Bring them in at a competitive rate, and keep them at a competitive rate. If the company has a tough year and no one gets a raise or bonus, then find another incentive

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for your EA—bump up their title, increase their paid time off, or find something else that is meaningful to them. Otherwise, that perfect EA will take all their superpowers and become a performance magnifier for another principal at a different company.

WHEN YOU HAVE “THE ONE”

So, the offer is made and accepted. The perfect candidate is now performing as the perfect EA for you. Everything is great! But then...time and time again, we have witnessed executives shoot themselves in the foot *after* hiring the ideal candidate.

How do they do that? Despite being excited about discovering someone who can be their right hand, someone who will anticipate their needs, think three steps ahead of them, and cut off problems before they can manifest, someone who can run your business life so your personal one is even more fulfilling, they do not let their EAs use their superpowers.

Why do principals do that? Well, perhaps it’s true that old habits die hard. And habits created out of a strong drive to control are the hardest. For some executives, trusting others to handle things they used to manage is next to impossible. They might want everything a great EA can do, but soon after hiring the ideal candidate, they revert back to their old habits. Often without even realizing it, they withhold important information, they do not bring their EAs into conversations when decisions are being made, or they do not introduce them to anyone as a point of contact.

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Not every principal who has difficulty trusting their EA has control issues. Many times their own psychological programming interferes. Perhaps they had a father who was an executive and now they treat their EA the way their father treated theirs. Or, perhaps they are a very private person who comes from a family that never talked about money. So why would they ever think to include their assistant in their personal life? Numerous personality quirks can interfere with a principal's ability to release control to their EA. By looking at themselves in the mirror and asking some hard questions, a principal can potentially recognize what may hold them back, then they can reframe what the relationship with an assistant is, what it can look like, and what behaviors or attitudes that entails. Then, when you find the right person and properly vet them, you can work together to overcome your reticence to let your EA use their superpowers to support you.

Actually, before *any* principal takes the time to go on the hunt for an EA, they should seriously ask themselves if they are sure they want someone with all those superpowers. Are you willing to let that person take ownership of projects and calendars? Are you willing to let an EA speak for you? If the honest answer is no, consider thinking about what it would take to build that level of trust in an assistant in the future.

Understand that for an EA to do their best work, you will be required to let them know what you are particular about, what you may have a tendency to micromanage, and what you are willing to let the EA run while you orchestrate at a high level. When that is

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clear in both your mind and the EA’s, then it is a matter of hitting singles and doubles, to use a baseball analogy, over and over again until you let the assistant hit a triple or possibly a home run. At that point, you may feel comfortable letting the EA be the manager of the club.

Of course, if you can trust your EA right away, that means you also get the benefits right away. Time is money, after all. And we believe if you do your due diligence, your EA will prove you can trust them almost immediately. Your job is to allow them to unleash their superpowers in the way they communicate, use their technical skills, and treat others.

WHEN IT IS *NOT* “THE ONE”

Now you have hired someone, they have gone through the onboarding, some initial training has happened to get them up to speed with the company, and... something’s not clicking. It’s not clicking to such a degree that you are beginning to doubt you have the right person, after all. What do you do? It could be another long process to find someone—is it worth firing the EA you already have? Maybe.

To answer that question, the first thing you will want to do is check in with yourself first. Have you done what you needed to for this person to provide optimum service for you? Do they need more training in a specific area? Is the problem one of hard skills, and

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perhaps an online course would provide the tutoring they need to improve? Did you bring them in during a maelstrom of unprecedented chaos where few people performed at their optimum level?

If you are certain it's not the circumstances at fault, but that you have the wrong person, whether it is a personality mismatch or a consistent level of mistakes that suggest this person's skills are not quite what you need, being honest is the best practice to handle the situation. Long explanations are not necessary. A simple, "Look, we're just not the right fit," will do. But it is kinder if you can explain why so the person doesn't end up in a similar situation again. Optimally, if you sense this person would fit somewhere else in the company, you may try to transfer them there, or you might offer to connect them to a different company. Taking that human-centric approach lets the EA know you really do care about them and you realize losing the job is an upset in their lives.

If you have to let someone go, do not do so out of left field. Nothing is worse than being surprised by an HR director knocking on your office door or being invited to the conference room by your principal, only to find out you are being let go—especially if there has not been any acknowledgment that you're not meeting expectations up to that point. Being honest about an employee's performance gives them the opportunity to improve if need be before you have to terminate their performance. As we will discuss in Chapters 3 and 4, spending time honestly communicating exactly *how* your EA is not performing up to expectations is what will help them figure out what they need to do to change their performance.

Finding “The One”

Then, if they cannot improve enough, let them go in a manner that gives them feedback so they can improve in the future.

Good leaders know they will never bat a thousand when it comes to hiring people. Some hires just won't work out, but that is no reason to be aggressive or mean to them. Top leaders have conversations to try to take something that may not be perfect and make it better. If it's fine, make it good. If it's good, make it great. That includes the way they treat people at all times—even when letting them go.

Up next is a more detailed discussion on what that proof looks like so you can easily recognize that the one you hired is truly “the one.”

3



WHEN YOU HAVE “THE ONE”

Restaurateur Bobby Stuckey has a popular TED Talk in which he explains the difference between service and hospitality.⁴ According to him, “service” is all about what you do to someone, and hospitality is all about how you make them feel.

While Stuckey may have been discussing customer service in a restaurant setting, the distinction can easily be applied to executive assistants. A diligent, detail-oriented, task-focused EA provides a service. Whereas, if you take those same attributes and tack on situational awareness and compassion, then that EA is leaning into hospitality. Those EAs do not limit their thinking to just themselves, but take a broader perspective. They value every person they come into contact with and make everyone feel heard. The difference between providing a service and providing high-touch hospitality is more in the intangibles rather than technical abilities—and EAs who are imbued with those intangibles are

⁴ Stuckey, “Be a Hospitlian.”

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ones Stuckey would call *hospitalians*. While they bear some resemblance to their corporate ancestors, the CEO secretaries of the 1950s, their attitudes could not be more different.

Old-school secretaries were not of the warm-and-fuzzy ilk. Extremely protective of their principal's time, they were feared by everyone inside and outside the company. They had no qualms about being argumentative, and they demanded the world adhere to their very structured ways and to fit where they slotted them in their organized domain. They were gruff and short if they felt the need, and unapologetic if and when they were wrong.

Granted, not every secretary ruled with such an iron fist, but there were enough who did that it was considered more of a norm than an extreme. Their principals tolerated this behavior because it was effective: CEOs were able to get their work done and not have to deal with any of the riff-raff. In that sense, the word secretary is a rather appropriate title. It comes from the Latin word *secernere*, which means to distinguish or set apart. That definition is an adequate description of what secretaries were originally meant to do: keep their principals "set apart" from the rest of the world by managing their calendars, screening their calls and visitors, and ensuring they had whatever they needed to do their jobs.

In today's corporate world, the term "secretary" is seldom used. As the word transitioned out of use, the perspective of who that person sitting outside the CEO's office is and what their responsibilities are has transitioned, too. In that evolution, CEOs discovered that

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EAs who were less territorial and adversarial and more respectful and friendly actually made their lives and businesses run better.

This is not to say a good EA doesn’t need the right hard skills. They do. They must be efficient, and they cannot let things fall through the cracks. They need to be organized, tech-savvy, and able to speak and write clearly. But their soft skills, their hospitality mindset skills are just as important—actually, they are slightly *more* important. In fact, we take a lead from restaurateur Danny Meyer who encourages hiring according to the 51 percent rule—we believe a good EA has a 51:49 ratio of soft skills to hard skills.⁵

In our view, an EA who is a hospitalian and is also very good at all of the hands-on, practical, and day-to-day responsibilities of their job is one you know you can trust. You can jump off the cliff knowing they will have the communication skills, the hard skills, and the hospitality mindset to provide a safe landing for you.

COMMUNICATION

Communication is probably the most obvious sign of a great EA. By communication, we mean across all forms of discourse and dialogue: verbally, in written form, and even body language.

When communicating with you, their principal, a great EA will first think through what you’re asking before replying to you. That

⁵ Meyer, *Setting the Table*.

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means when they do reply, they have options and solutions, not just questions for clarity—though they should be sure they are clear on your expectations—before they hit the *reply* button on an email. For example, if a principal asks their EA to put together a trip, the EA should compile as much information as possible before responding, and the response should be clear with questions and information in numbered or bullet form. This kind of thought-through communication respects everyone’s time and limits the potential for confusion.

When it comes to questions, a great EA does not ask questions about things they should already know. That is, a principal should not have to tell their EA more than once that they don’t want to sit next to a particular person at dinner or that they don’t want a window seat when flying. Of course, in the beginning, they will need to tell their EA everything, but not more than once or twice. Then, when the assistant does have questions to ask, they do so without going down rabbit holes or getting involved in elements that are not in their job description.

Communication ESP is evident when your EA goes the extra mile to prepare you for meetings and calls. When they schedule Zoom calls, they will reference the subject of the call as well as include the full name of everyone involved (e.g., Andrew Kumar and Kelly McInliss: follow-up from proposal sent 8/12). Additionally, in the calendar listing for the call, the EA will include notes from emails or any other content that the executive might find helpful during the meeting. When scheduling meetings with someone the principal does not know well, the EA will review the LinkedIn profile

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of the person or visit their website to gather relevant information, then present it in bulleted form in the calendar listing or by email.

An excellent EA does not save their good communication skills for just their principal, though. They are gracious and polite to everyone—whether it is a VIP client being ushered into the office or the janitor they pass in the hall. They recognize they represent their company and their executive everywhere they go and maintain a high level of respect for everyone with whom they interact at all times.

A final note on communication, which may only be tangentially related to the topic, is the way a good EA holds themselves accountable and is genuinely remorseful when they make a mistake. Naturally, you do not want someone who makes many mistakes, but “to err is human,” as Alexander Pope once said. Mistakes will happen. How your EA handles them is what matters. You want someone who will care about your business as much as you do, and one of the ways they will express that is in the way they handle mistakes—being mortified, remorseful, and fixing them as soon as possible is the right way.

Interestingly, a great EA will often cover for the mistakes their principals make. They’ll fall on the sword for you and tell a client they made a scheduling error to deflect negative attention on their principal. That way the person on the other end is upset with the assistant, not with the principal. Being upset with a principal could break a deal, but the same cannot be said about being upset with the principal’s EA. Such a relationship can lead to an executive

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feeling comfortable asking for something that may fall outside the bounds of the EA's traditional responsibilities and be a task of a more personal nature. We, at ProAssisting, regularly handle such personal tasks and have noticed that they help engender us to our principals and build tighter bonds between us. In fact, many high-level EAs will easily see some personal tasks as under their purview. They actually enjoy following through on them knowing they are being valuable in that capacity and saving their principals time. Whether it's running an errand to pick up the dry cleaning, helping you plan your child's birthday party, or something else of that nature, ask your EA if they feel comfortable handling the job and trust they will feel empowered enough to be honest with their reply.

The last two notes about mistakes are really side notes for principals. First, something we have repeatedly witnessed is that when an EA makes an honest mistake, many principals use it as an excuse to micromanage, which is almost never the right way to handle the situation. In the grand scheme of things, most mistakes can be fixed with a simple adjustment. It is better to let the mistake be part of the growth process so the EA can learn from it and become better at their job, than to micromanage it, which will inhibit growth and improvement.

The second and last notes are that not all mistakes are actually mistakes. Some principals perceive any deviation from perfection as a mistake, which is true only if something goes wrong. And other principals assume there is only one way to do something and doing it any other way is a mistake, which, again, is *not*

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a mistake—unless something goes wrong. When an EA takes a different approach to manage a situation or uses a different phrase in communication than you would, that does not mean the EA blundered. It means they are a different person than you. Spending time to explain how you would handle it or having a discussion about the difference between the two styles is counterproductive and, worse, could undermine your EA’s self-confidence going forward. The same could be said regarding demanding perfection with every action. Your concerns should be: Did the job get done? Is everyone satisfied? If the answer is “yes” to both, no mistakes happened.

HARD SKILLS

When the word “secretary” was used, the primary technology supporting the EA ancestor were the telephone, a typewriter, pencil and steno pad, and a calendar pad. When the Rolodex came out as a method to organize contacts through alphabetized, hand-written cards in 1956, it was considered revolutionary (until the office copy machine popped up a few years later).

Sometimes we look back in awe at what those secretaries were able to accomplish with so few tools, which limited their ability to develop hard skills. Now, such rudimentary tools have been replaced with an ever-expanding array of computer apps. Does a great EA need to know how every one of them works in order for you to hire them? No. They need to know how to do a mail merge, maintain calendars, send emails, write a document in a

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word-processing program, and understand the basics of how to manipulate a spreadsheet. Anything above and beyond that can be easily learned via online tools or a class, and a great EA will be willing to learn.

A good EA should be a quick study when it comes to learning new systems and have already developed a kind of ambidexterity so that regardless of what email platform, calendar system, or word processing software the principal wants to use, the EA will have the foundational knowledge that underlies most common tech.

What is more important than specific technical know-how is the way an EA uses it—their hard skills. They must be consistent about how they send out every single one of their calendar invitations—always in the same format. The way they manage digital files should be efficient and easy to navigate—having 900 folders for a thousand different files is neither effective nor efficient. How do they keep track of tasks and priorities? We are big proponents of using the inbox as a to-do list for what is on deck, what needs to be followed up on, what needs reminders, and so on. Also, EAs should put their principal's contact info in their VIP lists on their phones and computers so that when a text, call, or email comes in, they can leverage the notification to respond right away.

Having strong hard skills means your EA is always at the ready to handle whatever curveball comes across their plate. If they know where everything is and how it all works, when that curveball comes, it will be responded to right away. It won't land on a to-do list where it festers as the EA tries to figure out how to handle it.

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Sometimes that means an EA uses a “low-tech” tool like a spiral-bound notebook on their desk to scribble notes on; sometimes it means they are using cutting-edge new software. The specific tech utilized is not nearly as important as getting the job done.

Hard skills include being able to organize and manage their physical space, as well as records and documents on a computer. It means having systems set up so nothing is forgotten or lost—the proverbial cracks must remain sealed so nothing slips through. Being neurotic about details and concerned with timing are also included in the hard skills department. Knowing what time your principal’s plane is expected to land, being aware of how long it usually takes to meet a car in the pick-up lane versus renting one, checking Google Maps to determine typical traffic patterns for that city at that hour, and *then* making dinner reservations in accordance with all of that information is the kind of time-awareness we’re talking about here. These hard skills get the actual work done, and they support both the communication skills and the hospitality mindset of a great EA.

HOSPITALITY MINDSET

We started this chapter discussing Bobby Stuckey’s ideas about hospitality and hospitalians because we think *the* key, essential ingredient for a great EA is what we call “high-touch hospitality skills.” If an executive is to achieve their highest functionality and optimum business results, settling for anything less just will not do.

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That service mindset is what will inspire your EA to use their superpowers and do things like refuse to schedule a budget meeting in the afternoon after you have a luncheon scheduled at an Italian restaurant because they know pasta makes you sleepy. Being a hospitalian means they will know not only when to distract and divert people who are potential time-wasters, but how to do it with panache and ease so they do not mind. Equally, they'll know when it is beneficial to grant access to you. That mindset will help them build healthy, respectful relationships with every member of your organization and anyone who enters your office. In other words, a hospitalian has situational awareness and takes action on it.

That awareness extends to you, too. They will know that they shouldn't pounce on you the second you enter your workspace with a laundry list of questions and expectations when you are late because of a traffic jam—or worse, immediately usher in a demanding, yet well-paying, client. They will give you the space you need to decompress while ensuring the waiting client is comfortable and feels important and valued.

Providing such high-touch hospitality means your EA is proactive. Often when speaking about being reactive versus proactive, people are talking about problem-solving either after the problem has hit (reactive) or finding solutions for potential problems before they arise (proactive). However, when it comes to hospitality, your EA is proactive not just in the sense of protecting you from problems but in the sense of having everyone's best interests in mind. Should an appointment get canceled, leaving you with an unexpected opening in your schedule, they will reach out to

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someone who has been struggling to find a time that works to see you. They’ll wish everyone a happy birthday on the day of their birthday, not just on Happy Birthday Tuesday, or whenever else it is you celebrate special days in your company. They will know to call ahead to restaurants to be sure they have vegan options if that is important to you (or your clients). They’ll anticipate your needs the way a good waiter will. When a good waiter looks over the reservation list for the evening and sees a particular customer is coming in with his wife—a customer who *always* orders the bone-in filet—that waiter will let the kitchen know to put one on hold two hours before the customer arrives to be sure they do not run out.

That’s the kind of service your hospitalian EA can provide for you.

When the hospitality mindset is perfected, a kind of corporate magic happens. No one can quite put their finger on why, but everyone’s game is elevated. There is a flow from assistant to executive, assistant to direct reports, to clients, to prospects, vendors, and everyone else. Good EAs know that, which is why they treat the mailroom people with as much respect and value as they do the number one client of the company. In return, everyone is willing to work with them, to accommodate *them*. You will get better results from your EA, and the company will get better performance out of everyone.

And let’s not forget the invaluable velvet no that we spoke about in Chapter 1. Assistants have to say no all the time. The most common scenario is when someone from outside the company wants to

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schedule time with the CEO, usually to do something like sell a very expensive product or service. The salesperson knows that a big sale will not happen unless the CEO signs off on it, so they try to work backward and begin with the CEO rather than someone at a lower level. A good EA will ask the salesperson questions that will ultimately save everyone time *and* make the salesperson feel respected. They'll say something like: "Tell me a little more about this. What are you trying to do? What's your objective, because the more you tell me, the better I can help you navigate the system here."

Then, armed with that information, the EA will connect the salesperson with the right in-house team member who might have a problem the product or service could solve. They may even go one step further and invite the salesperson to let the point person know that the EA referred them. The EA can even offer to act as a liaison and follow up if the point person does not respond in a timely manner.

This kind of behavior is the opposite of what used to happen back in the day when secretaries were also the executive's guard dogs; people feared them. Secretaries were not afraid to be argumentative. They were very structured with what fell under their purview and pretty much ruled who went in and out of their principal's door with an iron fist. A sharp "No!" was perfectly acceptable then, but times have changed.

Interestingly, Ethan experienced that change when working for the executive at the advertising agency we spoke about in the last chapter. During his tenure with that company, the CEO decided

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women are smarter than men and that they worked harder, so he replaced several male key executives with females when he, himself, decided to step back. Ethan’s principal was passed over for a higher position. After the new executives were in place and Ethan had his first review with his new female principal, he was told “You know, you’re not suffering fools lightly.” She admitted she did not either, and then explained why they both needed to.

The conversation took place in the late 2000s, when the corporate world was experiencing a shift in culture as millennials were filling more positions. The younger professionals coming in were not trained, nor were they willing, to “throw elbows” at each other to get things done—the way things were often handled back in the day.

That review began an internal dialogue for Ethan that ultimately encouraged him to go back to his roots, to when he worked in his father’s restaurant beginning around the age of nine. At that point, he consciously decided to change his demeanor and has since seen the bountiful results top-level executives get when they have an assistant who provides high-touch hospitality.

Having such an approach clearly makes a difference. Just look at the businesses that value hospitality, and you can see how they truly are separate from the rest of the crowd. Consider Nordstrom or Wegmans—they are consistently rated among the top in their industry for customer service. That comes down to the things they do for their customers and the many ways in which they go above and beyond to ensure everyone feels valued.

THE 51:49 RATIO

By now you may agree with us that hiring for a 51:49 ratio of soft to hard skills is imperative. If you still need a little more convincing, though, think about what is involved in training both soft and hard skills. Hard skills can be taught much easier than soft skills can. You can have someone sit with a coworker to learn how to manage a calendar. You can have them watch a YouTube video to learn how to make a PowerPoint presentation. But how do you train someone to go out of their way to learn a potential client's dietary restrictions before they make dinner reservations for the two of you? How do you teach someone to treat the janitor with as much respect as they treat your spouse? Those service-minded, hospitality skills are less tangible, hence harder to teach. Not impossible, but definitely harder.

To a certain extent, soft skills can be faked. But remember, people can “hear” when someone is rolling their eyes on the other end of a phone. If your EA can make everyone who meets them feel important, if they can negotiate a compromise where both sides come out thinking they are the winner, when they can settle a frazzled client enough that you easily close the deal, then they have the real skills. No one can fake that. Meanwhile, everyone will remember what it is like to be in the presence of your EA, how they represent you. As Maya Angelou once said, “I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

4



TRAINING AND PARTNERING WITH YOUR EXECUTIVE ASSISTANT

Ethan had a very interesting experience when he worked for a CEO of a billion-dollar company. His principal wielded power in a rather odd way: he liked to keep his direct reports and everyone else working with him “guessing.” That means, he kept them on their toes, perpetually worrying whether they would be the next one handed a pink slip and told to pack their stuff. Frequently, without any warning, people would be fired.

One day, after supporting that CEO for two years, Ethan was on the receiving end of the pink slip. It came completely out of the blue. Never, in the two years of working with the man did Ethan receive an indication that his support was insufficient. In fact, Ethan had heard from other executives in the company that he was doing exceptionally well.

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It's not fair to put anyone in Ethan's position. It's also not fair to yourself or your company to allow someone to continue working for you without knowing whether they are meeting your expectations—it is equally unfair to neglect to give them a chance to do so through training or instruction.

That kind of relationship with your assistant—or any direct report—is doomed to fail from the start. In addition to providing feedback and reviews, you must put in the time and energy required to set your EA up to succeed, especially if they are to be enabled to use their superpowers and become a performance multiplier for you. That means you must supply them with every bit of knowledge you can, detail your expectations, and learn to partner with them.

INVENTORY OF KNOWLEDGE

If you currently have an EA on staff to train the new one coming in, you may have very little to do with the training. Unless, of course, you want massive changes from the way your outgoing EA handled things. Otherwise, to assist the incoming EA to transition into their role as smoothly as possible, you will need to do a self-inventory on a number of fronts to compile an assortment of information for your new-hire.

That information includes elements from your personal life. You will want to provide the contact information for your primary home and any secondary ones you may have. Also include the

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contact info of those close to you: spouse, parents, children, and perhaps even siblings if you're close to them. Ensure the new EA knows the birthdays of everyone important to you. Provide the information for your dentist, optometrist, general practitioner, accountant, attorney, and other important business associations.

Think about what you will expect your EA to do and arm them with the kind of knowledge that will be helpful. For example, do you prefer flight arrangements to be made around your children's school schedule so you can be there at drop-off or pick-up? Do you have food allergies or preferences? Give them a data dump of all your loyalty reward program numbers and information, and logins for frequently visited websites. Next, share all of your business contacts and explain who they are. Do you sit on any boards? Include those contacts as well. Also, provide an organizational chart for your company, including the responsibilities noteworthy colleagues handle.

Provide this information on day one. Depending on how large your circle of influence is, your EA may not be able to digest it all in one day. However, the quicker they get that information, the quicker they will be able to get up to speed with everything you do.

If all of this seems a bit daunting, we do have an onboarding questionnaire on our website that can help you with this process. You can find it here: info.proassisting.com/client-onboarding-questionnaire.

In addition to contacts and personal preferences, review your calendar. Detail for your EA how frequently you meet with your

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board of directors or other regular meetings. How does your year work overall—is it broken into quarters? Does your fiscal calendar follow the regular calendar?

Once those basics are established, share with your new assistant any white papers related to your work, marketing materials for your company, and industry information sites and resources. Are there any blogs you follow or favorite articles you think are compelling and informative? Provide everything you can for your EA to steep themselves in what is important to you and your company. All of that information will be stored in their memory and will serve to inform their approach to their work for you and your company.

The question may arise, though, about what to do if you do not already have that information compiled in easy-to-find references? What if you have no standard operating procedures, no calendar preset? We suggest you work together with your EA to create them, at least to get the basics filled in, and then make it part of your EA's responsibilities to continuously update checklists, contact lists, and ways to catalog pertinent information to create efficiencies and put structure around the chaos.

INVENTORY EXPECTATIONS

An inventory of your expectations is imperative for a number of reasons. Of course, expectations related to goals and performance should be clarified so that both the principal and the EA are working

toward the right targets. But, also, inventorying and discussing your expectations with your EA will help ensure you are being realistic.

Many times, adversarial relationships between principals and their EAs arise because an assistant is forced to deliver bad news that something is unavailable or not possible, thus disappointing an executive with unrealistic expectations. Sometimes executives think their EA's superpowers mean they can wave a magic wand and make anything happen.

While EAs often can do what appears to be magic, sometimes restrictions are placed on all of us that no amount of magic will undo. If a principal has preconceived notions that their EA will always come through on unrealistic demands, they will be frequently disappointed by an EA who is constantly delivering news they don't want to hear. Frequent disappointment can lead to a negative attitude and adversarial behavior. Ask yourself some hard questions about what you can realistically expect from your EA. Then, ask yourself if you have done everything you can to set up your EA to succeed. A principal cannot expect ESP or any other superpowers to be of optimum use unless the proper amount of time is given to the assistant for *continuous* onboarding, as well as for letting your assistant into your thought processes and priorities.

WAYS TO PARTNER

There are a multitude of strategies you can take to partner with your EA. The following are some we have found to be the most

productive and that lead to the highest level of efficiency and performance.

Make Introductions

One of the first things to do, right off the bat, is to copy your new assistant on every single email (within reason, of course; highly personal or confidential correspondence that does not relate to the company does not need to be shared). By doing that, they will get some context, as well as a feel for your rhythm and the people you're emailing most.

In addition to that, send out an introductory email to everyone in your company and your VIPs outside it that welcomes, in an enthusiastic and heartfelt way, your new EA into the fold. It does not have to be very formal, unless you want it to be. A quick note like the following will do:

Hey, everyone! You know how slammed I am and that I really want to make everyone happy and not be a bottleneck. Well, here's the person who will help me do that. Meet Jennifer. She's a rock star. It took us a while to find her, and she's exactly what we were looking for. She should be included in everything that is nonconfidential that you send to me. And please note, if she's telling you something, know that she is representing me, my office, and our company. All of our help getting her onboard is greatly appreciated.

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Along with sending the email, encourage all of your direct reports to take fifteen or twenty minutes to meet with your new EA. Encourage them to confide in her what they hate about working with you (seriously), and what your office could do that would make their life easier. Yes, this is a bit self-deprecating, but it will go a long way toward encouraging camaraderie and great working relationships between your direct reports and your EA, as well as between your direct reports and you.

One of our newest clients, former CEO of Elie Tahari and current board member Rory Tarhai, expressed the reasoning behind this tactic of introductions beautifully. She said, “I used to tell new direct reports and my new assistants that if you want to be successful, then you have to understand, you don’t work for me. I work for you. You need to be MY boss. You are in charge of making sure I am on top of everything. And if I’m not, then you need to let me know.” She understood that whatever the executive does impacts how everyone else performs.

To help spread awareness of the new EA to people outside the office, some principals include their assistant’s name and contact information in the signature line of their emails. Not only does that immediately show your EA and everyone you know that you have a high level of respect for them, but it helps train people that there is a system. Before they go to you for every question, they can check in with your EA.

Training

When it comes to training your EA, again, an outgoing one is ideal to train the incoming one. If you do not have one, then it's up to you to train the new EA. You should have a few guideposts to get you started, one of which is that inventory of things you don't want to do—the reason you hired that person to begin with.

Start with that list. Show your new EA what needs to be done and how you have done it to date. The person you hired should have some experience under their belt from other companies and will be able to pick up on your needs quickly.

Setting up their email account in a way that gives them access to your contacts and calendar will help them tremendously. That way, they can proactively get you up to speed with whom you are meeting with (if necessary), what they do, and why you are meeting with them. If you're comfortable giving your EA access to your email, that's even better because then they can read through your sent notes to see how you reply to people—how long it generally takes you, who you ignore or take a while to respond to, and who you quickly respond to. (Note: if you are going to allow your EA into your emails, it will be a wise move to have them sign an NDA and understand you have a confidentiality policy).

If you have a file system in place already, review it with your new EA. If there is not one in place, suggest your EA use her inbox as a task list. If they keep their pending items or if they are working on something and waiting on information to come in about it, their

inbox is a safe spot to store the emails related to it. Most email clients have a search feature that allows for easy retrieval when necessary. Then, when the project is done, or whatever the emails are concerned with is complete, they can file the emails in designated subject folders. Of course, this means they have to stay on top of their emails and not let their inbox get cluttered up with junk or useless information.

Immediately establish feedback meetings, where you can check in to see what your EA is working on and what you need done that day. Then, ask if they understand how to do what needs to be done. Show them if necessary. Keying them into your thought process to show them why you do what you do might be helpful. A client of ours actually created video vignettes to do just that. For one video, he filmed himself booking a flight. In it, he explained that he didn't like to fly any earlier than ten o'clock in the morning because he needed to get his kids on the school bus. When he found return flights, one landed at eight o'clock in the evening, the other at eleven-thirty at night. Although the later flight was a hundred dollars cheaper, it was worth that much for him to arrive earlier in the evening.

His process leads right into the idea that sometimes executives think it's quicker to do something by themselves than explain it to someone else, particularly someone new in their job. Sure, that may be true on the first go-around, but in the long run, if your EA can take that task off your plate, your time-savings will pay off in dividends. Isn't that one of the reasons you hired an EA to begin with?

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So we encourage you, whatever you are doing now that your EA can handle, video yourself, take screenshots of your steps, have a Zoom call while sharing your screen or have them sit next to you and take notes about how and why you are doing what you are doing. What thought processes are you working through as you do it? What has worked well in the past, and what did not? Was the budget similar? Were there other restraints then, or are there restraints now that did not exist then? You can do this for tasks like booking flight travel, creating a sales presentation, or booking a company retreat.

Perhaps you are thinking about a board meeting that is coming up and you need to put a presentation together for it. Discuss it with your EA. For example, “I’ve got to have a prep meeting with my direct reports to get all their KPI data before this date—I always get the KPI data a week and a half before the board meeting.” The more you can talk through what’s going on in your head during your EA’s first month of working with you, the faster they will be able to get one step ahead of you to help you.

This concept includes letting your EA know who can and cannot interrupt you in the office or when you are on calls and other visitor management strategies. Train them to say they are not at liberty to tell people where you are—unless they *are* at liberty to do so. How strong of a gatekeeper do they need to be? What are your thought processes behind that decision so they can apply it when necessary? Is it okay for them to provide your cell number to certain people? If so, who are those people? What makes them special enough for that number?

Laying those ground rules when you train your EA will make it that much easier for them to step in, amp up the superpowers, and be the performance multiplier you hired them to be.

No Micromanaging!

We are astounded every time an executive tells us, “Oh, I know I’m a micromanager. I’m working on it.” In this instance, “working on it” is not good enough. If you have the self-awareness to know you are micromanaging, then stop doing it. As the principal, you will naturally share as much as possible with your assistant because that person is there to help you. The more information they have, the better equipped they will be to use their superpowers to magnify your performance.

Micromanaging does the opposite of its intended effect. It inhibits superpowers and prevents your EA from mining their previous experience for innovative ideas that could be of benefit for you. For example, they may notice that you send the same email out several times a month as a sales follow-up, and it doesn’t get that high of a response. It is possible that your EA has experience with better-written copy and can rephrase your message in such a way that they improve the response rate. You have no idea what your EA may have learned in the past, what they’ve had to research, or what kind of projects they’ve been part of. And that means you have no true idea of what they can bring to your table.

Allowing your EA to do things differently than you is often something a principal has trouble allowing. You must remember that as long as they are just as effective as you (or more so), then they should be able to do it their way. They are juggling different balls than you are, so it is very possible that *not* doing it their way causes more work for them than it would for you.

Accountability Versus Criticism

We do not need to go too far into how to handle mistakes here, since we covered it back in Chapter 3. The key point to remember is everyone makes mistakes. The ideal way of handling them is to ensure something was learned so the mistake doesn't happen again. We've witnessed executives harshly reprimanding their EAs, and even bullying them, and can honestly attest that such tactics are not sustainable for a long-term relationship. There should be no keeping score, no *gotcha!* attempts to find an EA doing things wrong, no testing them to prove something, no adversarial approaches to enforce behavior. That is not what partnership is about. Partnership is about collaboration, not confrontation.

The idea that you can belittle or berate your assistant à la the movie *Swimming with the Sharks* is being thrown by the wayside due to a couple of factors.⁶ First, the #MeToo movement empowered women, who make up 98 percent of assistants, to stand up

6 Anthony Breznican, "Scott Rudin Scandal: 'Swimming with Sharks' Tried to Warn US," *Vanity Fair*, 22 Apr. 2021, <https://www.vanityfair.com/hollywood/2021/04/scott-rudin-swimming-with-sharks>.

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to management and not take abuse. Second, the combination of assistant plus technology plus emotional intelligence/art of hospitality expands the meaning of *executive assistant* to encompass business partner, chief of staff, project manager, assistant/scheduler, and personal assistant (the performance multipliers) *if* the principal is open to treating their assistant as such.

And when you do hold an EA accountable, be sure you're right—remember your EA is great at documenting! Once, Ethan had a client who needed to go to Washington, DC. Previously, he had always booked her to fly into the Ronald Reagan Washington National Airport because that airport is right in the city, whereas Dulles International, the other airport in the area, is about forty-five to sixty minutes outside the metropolitan area. However, to get her in on a direct flight that landed when she needed to, he had to book her into Dulles for this one particular trip. He ran it by her first, and she agreed it was the best way.

About three months later, while stuck in traffic in the car on her way into the city from Dulles, Ethan's principal called him and, well, was rather terse with her admonishment for booking her through *that* airport. He was a bit flustered by the call and could not remember why he had done so, so he listened and apologized, then they hung up.

The incident happened at the beginning of their working relationship, so Ethan was more than mortified thinking he'd made a mistake. He felt he had proved to her he wasn't trustworthy. So he logged into his email and found the one he'd sent that documented

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their decision to use Dulles. He forwarded it to her with a note letting her know the reasoning behind the travel itinerary. She replied quickly with an apology and wished him a good weekend.

However, if Ethan had messed up and just forgot to book her for Reagan, his principal would be justified in being angry. And Ethan would need to create a system or a tool to ensure he never made that mistake again. The executive can encourage that by asking, when things are calmer, how they can prevent the mistake from happening again. Perhaps they could create a table that listed frequent travel destinations and her preferences for each one that he could check prior to finalizing any reservations.

Feedback and Reviews

Related to holding your EA accountable is the concept of providing constructive feedback. It is so valuable for your EA, they will be eager to hear it. Feedback can begin almost immediately upon hiring. Begin with daily meetings to go over what they did and how it went. Once you realize you have little to talk about, you can move those check-ins to weekly meetings, then monthly, then quarterly.

Those meetings give your EA an opportunity to see how you do things and what your processes are. They can also open a dialogue for your EA to provide feedback on how to improve things. Because your EA is coming in with fresh eyes, they may notice things that you gloss over. So, as we mentioned in the section on

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micromanaging, these meetings can give your EA the opportunity to show you there is potential for improvement by trying a new way. As the leader, you may have to encourage this line of communication. Ask them how they have handled similar situations in the past or if they have any kind of insight into how things could be improved moving forward.

You can even take this concept one step further and empower your EA to find ways to make things better. Tell them, “If you see me thinking about a decision and you may have some insight, please let me know if we are by ourselves and not in a group setting.” When they hear something or come across a communication that triggers an idea or resembles something they have had success with in the past, encourage your EA to provide you with that information when they can do so with confidentiality. In this way, you can encourage innovative thinking in the way that your EA supports you.

Your feedback for one another should always be given in total honesty and with a heartfelt personal touch, as we spoke about in Chapter 3. Being candid is always the best approach with feedback, as well as with reviews. However, even knowing that radical candor is the best approach does not always make it any easier to start the conversation. When executives have difficulty starting a feedback-based conversation, we suggest they try a process developed by Steve King, as presented in his book *Brag, Worry, Wonder, Bet: A Manager’s Guide to Giving Feedback*.⁷ He suggests

⁷ Steve King, *Brag, Worry, Wonder, Bet: A Manager’s Guide to Giving Feedback* (iUniverse, 2013).

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four dialogue starters that can be used as stand-alone statements or in combination. They are:

- When I brag about you, I brag about...
- When I worry about you, I worry about...
- When I wonder about you, I wonder about...
- If I were going to bet on you, I'd bet on...

These openings provide a framework to build the discussion on a topic for feedback. For example:

- “When I brag about you, I brag about the way you’re able to create clear messages in your emails” can open a discussion about communication in general.
- “When I worry about you, I worry that sometimes your intuition leads you astray” can lead into a discussion about someone’s tendency to waste time going down rabbit holes.
- “When I wonder about you, I wonder if you may not make these kinds of mistakes if you slowed down a little bit” can progress to a dialogue about better time management.

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- “If I were to bet on you, I’d bet that you’re going to continually get better” can be a beautiful way to introduce a concept like believing that an EA needs more training.

One thing that is imperative to remember when providing feedback is that, in addition to being honest, you must explain *why* an issue is an issue, why it matters that it is done correctly. That is one of the ways you can bring a heartfelt, personal touch to the conversation. Knowing what that reason is can soften the review process and make it about the company, and not so personal. That, in turn, might make the review process go a little easier.

Despite your EA loving to get feedback, most likely they will dread the review process. Everyone hates the review process—both the reviewers and the reviewees, which is why we stress that they should be held in less formal settings than an office. Reviews should be a time to kick back and have a couple of laughs about the year—however, they should also conquer the serious turf of *where improvements need to happen* as well as *areas of strength*.

The last thing a review should be is a surprise for the reviewee. Stephanie had a principal who gave two reviews a year. With each one, the principal opened with, “If anything comes as a surprise to you, then I’m not doing a good job.” But he was great at his job, and consequently those reviews never held any surprises. When he wanted to see improvement, he was straightforward about it, explaining what he wanted to see and why. Stephanie always

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knew where she stood with the man and where she stood with the company. Having that kind of open relationship led to an optimal working environment, in part because expectations were clear and understood.

PART 2

PERFORMANCE MULTIPLIERS



5



PERFORMANCE MULTIPLIER #1: BUSINESS PARTNER

A COO of a facilities management company was ready to sign a contract for Jack’s organization to provide all the cleaning solutions and paper products for their janitorial service teams.⁸ It was a huge contract for Jack. That facilities management company serviced more than one hundred office complexes in the northeast. Jack had been wooing them for months and was eager to get that signature on the dotted line.

But there was a hitch: the COO was flying out that evening, heading to Asia to source equipment. Jack knew how easy it would be to source cleaning solutions and paper products while there, too. He had to meet with the COO before the flight took off and get that contract signed!

⁸ In this and the following stories, Jack and Jill will alternate as principals. They are a conglomerate of past professionals that we have worked with.

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The hitch: unfortunately, Jack had a board meeting that night for a philanthropic nonprofit in his community. They were discussing the year-end gala fundraiser and Jack was to lead the presentation and strategic plan. Additionally, throughout the meeting he was sure there would be plenty of discussion he'd need to follow up on during the next meeting, not to mention action items assigned to him.

If only Jack could split himself in two. If only he had a trusted business partner who could faithfully represent him at the board meeting. That would be ideal. Who could do that, though? The board had nothing to do with his company (directly, at least). So asking one of his direct reports to attend on his behalf was out of the question; it would be completely outside of their job description.

However, there was Steph, his EA. She understood why this particular nonprofit was close to his heart. She'd been cc'ed on all of the emails Jack had sent to the committee expressing his concerns. She'd even completed some research for him regarding expenditures for one of their other fundraisers, as well as helping him create the PowerPoint presentation about the gala. She was the perfect person to sit in on the meeting.

Jack sent a note to the board chair letting her know his dilemma. He asked if he could send his assistant to do his presentation, take notes, and collect action items for him. The board chair agreed. In the end, Jack not only won the contract, but Steph's presentation was met with no objections. The gala went off without a hitch.

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Taking on this kind of stand-in role is just one way EAs can serve as a busy executive's business partner. There are a multitude of other ways, too, as long as the principal is open to the concept. But first, perhaps, we should set some parameters around the term "business partner."

YOUR EA AS BUSINESS PARTNER

Rest assured, we're not suggesting you should sell half your company and divvy up the profits with your executive assistant. Instead, we are suggesting you look at your executive assistant as someone who shares your concerns about your company, who knows how you think, and is loyal to representing your vision. If you can perceive your assistant through that lens, you'll discover a variety of ways you can team with your EA and have them take on some of the responsibilities a business partner would handle.

One way you can empower your executive assistant to be your business partner is to equip them with the background and information necessary so they can sit in for you at board meetings, fundraising functions, and even the occasional team meeting. Of course, they will not make decisions for you, but they can be your eyes, ears, and sometimes your mouth so that you can make the decisions when you are able.

Another way an EA can serve as a business partner is that they are often the perfect person to bounce ideas off of. Not only do they understand what needs to happen to meet your objectives,

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but they also have their own perspective. Remember that mine of information they brought to your company from their previous employers? Also, they are likely more “in the trenches” with your team than you and can see how things will impact the company and your direct reports in ways that you, perhaps, cannot. So when it comes to things like making decisions about options for a new logo or wording on a mission statement, get their honest opinion—as you would your business partner’s.

The fact that your EA may be closer to your team than you allows them to be that business partner who runs interference for you, too. No matter how well you run your organization, sometimes stuff happens. CEOs will commit to something internally, like an employee event. The head of HR is excited about it and gets the entire team energized to put on the event. But then, at the last minute, the CEO has to cancel because of some other more pressing issue. Sure, the HR director understands why the event has to be canceled, but he is still crushed. He’s spent three months working around the schedule for this event only to have it ripped out from under him. His whole team is upset and other employees are noticing. The CEO’s EA will feel that attitudinal temperature and is in a position to go to the CEO with not only the situation at hand, but also potential solutions to alleviate it. Again, as a business partner would do, the EA can come to the CEO with answers instead of more questions or problems.

And finally, as a business partner, your EA can populate your LinkedIn page or company Facebook page with information for

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you. You may want to pre-approve the posts for a while to be sure they are saying exactly what you want to say or are sharing articles you want shared. Similarly, they can monitor your online reviews and, should any negative ones come in, they can bring them to your attention and offer a solution.

BENEFITS

One of the reasons why EAs can easily step in as a business partner is because they have a front row seat to how you run your business. So, they can, in effect, be your “mini-me,” to a certain extent. Their ESP superpower gives them an advantage when it comes to helping you make decisions. In addition to knowing where you stand and how you think, their opinion is colored from a different lens—one that you will not have access to: being a fly on the wall to witness everything going on behind the scenes in your company.

Your EA will know the true temperature of how the staff is feeling about a project or how the employee morale is overall. They are at the water cooler and in the breakroom with your team members on a regular basis. They see all, they hear all. They are seen by team members as “one of us,” so they will be privy to issues that you may never be exposed to.

Being in such a catbird seat, they can keep you clued in about what is going on behind the scenes. How do your employees *really* feel

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about the new benefits package? Do you want to find out during the exit interviews in a mass exodus? Or do you want your EA to feel you value their opinion enough that they can alert you to the grumbling in the company before it's too late?

Their Translation superpower allows them to run interference or soften your approach, when need be, as Steph experienced first-hand. She has a principal who has weekly calls with everyone on her small team. During those calls, she tends to rapid-fire delegate tasks to the various team members who will often have a couple dozen tasks assigned to them by the time they hang up.

One of the team members is very intimidated by the executive and will agree to manage all of the assigned tasks, but then after the call, when Steph follows up with him, she frequently finds he's almost on a window ledge from the stress. He can't possibly do everything he said he would. So, knowing what her principal is most interested in and wants done, she'll triage his task list to ensure he accomplishes the most important tasks. Then, she'll go back to her principal and, after ensuring she understood the priorities correctly, will explain the team is at capacity and that they may need to contract out some of the work or re-prioritize when things need to get done. In other words, she acts as a business partner, mediating between the other partner and the team.

As a business partner, your EA can also serve as an invaluable course corrector. With their ESP superpower, they always have their eyes on what's coming next, what is around the bend, and what is down the road. Because of that, when they realize you've

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been sidetracked by an unexpected curveball in a project and subsequently have not made as much progress on another project's goals, they can nudge you to course correct.

Finally, for smaller businesses in particular, your EA can step into your role and keep the train running should you need to step away due to a health or family emergency. Of course, in larger businesses, a COO or a VP will most likely fill your shoes while you are away. However, your EA will be the person your temporary replacement leans on to find files, to explain the significance of particular people they'll have meetings with, or to let them know what stage various projects are at. Like a business partner, your EA will have that information at the ready and be able to advise how *you* would prefer actions be taken.

EMPOWERING YOUR EA BUSINESS PARTNER

There are a couple of different approaches you can take when it comes to empowering your EA to work like a business partner, but underlying both of them is the need for clear communication. They can feel confident taking a literal seat at the table in meetings and other functions only if you clearly detail how you want to be represented and set boundaries around what they can and cannot do. For example, Jack's assistant gave a specific presentation, took notes, and built out a task list for him. If he knew there were certain types of tasks he wanted no part of—for example, being on the auditing committee—he would make that clear to

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her. Likewise, if there are particular people he would prefer not to collaborate with one-on-one in a task, then she should know that as well so as not to volunteer him for those.

When not taking your place but more simply answering questions or running interference the way a business partner would, a different level of communication is required. That level is an unspoken one, where you show others the nature of your EA's position. To do that, bring your EA into meetings with your direct reports and other contacts. Make sure they see the two of you are almost joined at the hip so they feel comfortable approaching your EA with a question or concern, knowing it will either be relayed to you or they may already have the answer from you.

Similarly, bringing your EAs to help you "work the room" at events is almost the equivalent of being in two places at once. People at those events will recognize that your EA is significant enough in the company that they can speak to them about subjects that may or may not be of interest to you, without wasting your time.

Again, having your EA speak for you is only effective if they have a complete understanding of what your goals are, what kind of projects you want to be involved in, and any other preferences you have. That's why we suggest including your EA in your goal setting for the company. What are you shooting for over the next six months? What are your expectations of particular teams? Is your company distracted from its North Star? If so, how far off are you and what do you need to do to get back on track?

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Make your EA part of your annual meetings when you set up the goals for the next four quarters. Keeping them abreast of all the company's endeavors will provide them with invaluable insight for if and when it becomes time to course correct. If you don't have the bandwidth to focus on each and every project, but your EA knows what is supposed to happen and when, it's very possible they can lighten your load and take ownership of that project. Similarly, for those emergency situations when you may need to be absent from the office for an extended period of time, your EA can only help the COO or VP who substitutes for you if they know how you are running the show, who your key players are, how it's going so far, and what your expectations are.

We recognize it can be hard for principals to lean in to thinking about their EAs as business partners. It all goes back to trusting that your EA will follow through and take their responsibilities to heart. Yes, all sorts of negative consequences can occur if your trust is not deserving: they can steal your information, they can spend on your credit card, etc. However, if you have done your due diligence in the hiring phase, the odds of that happening are slim. And if you take the time to make your EA prove to you they deserve that trust, you are only losing time you could be benefiting from their service as a business partner.

Meanwhile, a top-level EA will only step into that role knowing your trust in them is already in place. And they will do whatever they can to encourage their principal to feel confident they will represent them at the highest level possible in all interactions. We suggest you trust first, right out of the gate, and then pull back if

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necessary, as opposed to spending time building trust. If you do need to pull back, have a conversation about why that happened and make a change if need be.

When you put your trust in your EA, the rest of your world will see that and put their trust in them, too. They will be viewed as someone who is extremely valued by you and will be treated accordingly.

6



PERFORMANCE MULTIPLIER #2: CHIEF OF STAFF

Jill led an enormous healthcare company. Accountable for several hospitals, out-patient clinics, and urgent-care facilities, she had a massive number of people working under her, and she had an equally large number of contacts outside the company. She also had a big heart and truly cared about the well-being of all her patients and their families.

As is the case with many CEOs, when customers would get angry or upset because their problems were not being handled by the department they were working with, Jill would receive calls about it. Every day, there were numerous calls from patients or their family members. For a long time, she tried to speak with each one. Because of that, people knew they could always call Jill if they weren't getting satisfaction elsewhere in the network.

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Unfortunately, Jill was nothing more than an ear for these people. HIPAA laws prevented her from discussing cases involving the friends or family members of the callers. And, as for the patients themselves, often Jill would wind up transferring them to the appropriate department.

She didn't want to upset people any more than they already were—after all, if they were calling the CEO of a healthcare company, they must have some pretty emotionally charged problems. But the calls just took up too much of her time. She had to put a stop to the interruptions and leaned on her EA, Ethan, to do that.

Ethan created a system for dealing with the calls. He first communicated with the various departments within the organization asking them what kind of disgruntled patient problems they could handle. He then mapped out a response plan so that when Jill's office received a call about a patient, he could lend them an ear, then connect them with the correct person to help the patient.

He handled those calls well. Jill was impressed with the compassion he gave patients and their loved ones and his efficient method of finding solutions. She was equally pleased with the hours she got back in her day simply by not taking those calls, which inspired her to trust Ethan with more of her communications. Soon, very few calls came directly to Jill. Instead, Ethan became the point of contact for everyone. He answered questions, filtered incoming information, and he redirected as appropriate. If he didn't have the answers to questions immediately, he'd check in with Jill at a time

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that was convenient for her, ask her the questions that needed answering, and return the call or email.

Jill grew ever more productive, saved hours out of each day, and experienced far less aggravation once she allowed her EA to serve as her chief of staff and act as her point of contact.

YOUR EA AS CHIEF OF STAFF

Traditionally, a chief of staff is someone who is hired at the direct report level to sit on strategy and C-suite meetings. They are expected to track progress and push toward quarterly and yearly goals. They know what KPIs to measure performance, who controls what, and what levers to push or pull to ensure expectations are being met.

That is not the kind of chief of staff we are talking about here, though—however, your EA will share the same type of knowledgebase a traditional chief of staff would have.

When we talk about relying on your EA as a chief of staff, we mean making them a singular point of contact for you. In that sense, they know who is responsible for doing what and what you expect out of them. But they are not responsible for tracking, guiding, or ensuring progress is made. They have more of a logistical and immediate role than strategic.

From both within your organization and from without, you have an enormous audience of people who will *want* your attention at

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different times but may not exactly *need* it. Perhaps it's your landscaper who calls to make an appointment to winterize your home irrigation system. Or maybe you are a chair of a board of directors, and the board members call you frequently to confirm the date and time of meetings. Or it could be any number of other examples—the point is, your EA can handle most of them.

Instead of providing your contact information to everyone, give your EA's; let them be the gatekeeper and determine who can actually reach you. That will cut out many hours of your week—or day, even—spent on calls that are unnecessary for you to handle personally.

As chief of staff, your EA represents you and is the receiver of the information that comes at you from all directions—including people from the mailroom, to the chairman of the board, to the people outside of the office who interact with you in any way. Your EA receives the information, filters it, distills it down into digestible and applicable pieces, organizes it, prioritizes it, and then involves you only if need be.

You can also be proactive about this by looking over your to-do list and transferring anything to your EA's plate that does not require your personal attention, such as reaching out to check in on people, following up, or providing quick answers.

This doesn't mean you have to alienate yourself from everybody. You can strategically target who and even what subjects you want your EA to handle as chief of staff.

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For example, when Steph worked at a fashion house, her principal liked to have Steph serve as the person to collect feedback, input, and other information from the various head designers and chief creative officer. She'd coalesce and organize material, coordinating the various pieces to provide to her principal in a way that would be easy for him to then incorporate into a presentation.

Similarly, Ethan has a client he works with now who holds a key issue meeting once a month. Prior to the meeting, Ethan connects with all of the direct reports and department heads to ensure they supply the necessary information to the individuals who attend that meeting a few days in advance. In that way, Ethan is the "heavy," putting the pressure on individuals to provide the information when it is due. Ethan also knows which ones tend to wait until the last minute (or even send it in late), so he is able to be proactive and send them a note a few days before when the others are nudged.

In both situations, Steph and Ethan are the points of contact for particular meetings, which saves their principals both the time and aggravation required to pull together the information necessary ahead of time. You can also isolate particular groups for your EA to handle, which is what Ethan did for a principal who led about sixty executives supported by a team of twelve assistants. His principal didn't want to have to deal with the assistants since her hands were full enough with the executives, so she handed the reins over to Ethan. He was the one who partnered with HR to speak, confidentially, about who was good at their job, who needed

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some work, new-hire compensation and training, any interpersonal issues that needed to be addressed, and so on. His principal never had to deal with anything that had to do with these dozen assistants, which allowed her more mental and temporal space for her other responsibilities.

Another way your EA can be your chief of staff is to have them facilitate any debriefing sessions following an event or meeting. This sort of discourse can be managed as a formalized debriefing meeting, or it can be handled in a very informal way. Ethan handled the debriefing of senior leader meetings by sitting outside the room where they were taking place. When the meetings ended, the direct reports would stop by his desk as they filed out and let them know what they were expected to do or if they needed a private meeting with the principal. Ethan would take notes and send a recap email to everyone summarizing the meeting in general and reiterating everyone's next steps. He'd also ask if his email was accurate and complete, which gave people an opportunity to fill in any blanks. With this process, the principal didn't have to follow up with each direct report to ensure they knew what was expected of them, and the email's contents could be used as part of the agenda for the next meeting.

BENEFITS

It's pretty clear that the primary benefit of allowing your EA to be your chief of staff is time saved! The broader the range of people or circumstances you hand over to them under this designation,

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the more time you will get to add back into your day. That range can even include your child's nanny, your landscaper, or other non-work-related people.

It can be hard, at first, to empower your EA to speak to your nanny for you or to provide them with your dry cleaner's information. You may be concerned about "bothering" your EA with something "trivial." Rest assured your EA has your back. If you have a top-level assistant, they should be looking at their role as encompassing anything and everything they can to save you time. They see giving their principal some time back into their day as a win for the principal, for them, and for the company.

Of course, there are those executives who, again, must wrestle with this notion of trust. Still others may be reluctant to pass the communication baton over because they really do not want to let go of the reins and cede that kind of control over to anyone.

If you are struggling with a feeling of lack of control, look at it in terms of saving money and time. Do you know how much your time is worth? If you're a business owner, you may never consider your income from an hourly wage perspective, but try this exercise to get close. Take your annual net profit and divide it by 2,080 (forty hours a week multiplied by fifty-two weeks comes out to 2,080 hours). That resulting number is how much your hourly time is worth. For example:

$$\text{Net profit } \$350,000 \div 2,080 = \$168.00 \text{ per hour.}$$

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If you spend just one hour per week talking to people your EA could talk to—and let's face it, you probably spend at least one hour per *day* talking to people your EA could handle—that means, over the course of one year, you will spend the equivalent of \$8,736 on your own wasted time ($\$168 \times 52 = \$8,736$).

Aside from the time wasted, think back to the reason why you brought on an EA to begin with. Were you a bottleneck to progress because you were juggling too many balls to be able to respond to proposals, provide your approval, or otherwise follow up on what you needed to follow up on? Handing the chief-of-staff ball off to your EA will open up a little more breathing room—use that room to give yourself the time to focus on more important work.

Once your EA steps into that role of performance multiplier, all of their superpowers will be set free. They'll be able to monitor your communications and notice that you have not had a chance to reply to an email even though you have the answer, and they can (with your permission) reply for you. If you don't have the answer, they can use their ESP: research the subject to provide you what you need so you can answer it with the right information. Synchronization will be frequently used for this position, too, in that they will know when to confer with you about topics they cannot handle on their own.

EMPOWERING YOUR EA CHIEF OF STAFF

If you think it is worth empowering your EA to be your chief of staff, it's a simple process. Figure out who *must* go through that person before they get to you.

Performance Multiplier #2: Chief of Staff

Of course, everyone who must go to the EA first needs to be aware of the process. Likewise, your EA needs to know they can no longer answer the phone, find out who is calling, and immediately pass the call through to you. Now, they will need to find out who is calling, ask how they can help the caller, and determine next steps from there based on the system the two of you establish.

Earlier, we mentioned including your EA's contact info in your email signature line. We are reiterating that here because it's such a great, simple way to reinforce and streamline your desired chain of command. Letting your EA make calls on your behalf and send emails or other correspondence will help build momentum in that direction too.

Also know that using your EA as chief of staff will backfire if they have no idea how to step into your shoes and act as your voice. You cannot leverage this performance multiplier without enabling the position through clear communication. If you're going to let your EA interact with your landscaper, for example, they need to know you want your property maintained on Friday because you are holding a large party on Saturday.

If you are using your EA as the chief of staff for an event or meeting, then you'll need to be clear about what you expect your EA to do with the information they gather, from whom they need to gather that information, and the timelines involved. To make things easier on everybody, you can send an email to alert all parties that your EA will be your liaison for the event or meeting and include their email address, Slack handle, phone number, and other contact data.

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There is some cross-over between the EA as business partner and the EA as chief of staff. There are times when a principal may consider setting a goal or proceeding in a particular direction, but before they do, they want to know how the idea will be received by the employees. At those times, the principal can ask the EA to check the temperature of the company and see how employees are feeling about the matter at hand. Would they prefer the company picnic to be held in the fall? Did they hate the sweat-shirt and swag holiday gifts last year? Your EA can collect intel and report back to you with suggestions in accordance with the employee sentiment.

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PERFORMANCE MULTIPLIER #3: PROJECT MANAGER

Like many executives, Jack had a full plate running his company. That plate was overflowing with an assortment of work-related tasks to various boards he was on, as well as some family obligations. On top of all that, he wanted to build a new home—a new estate, really, on the New England coast. Speaking with the architect and contractors, Jack discovered the build-out would take about two years and that the team would like to meet with him once a week throughout that period. Would he mind popping up from New York City that frequently to discuss progress and decisions?

Of course, he wouldn't mind. But it was an impossible ask. Neither he nor his wife could spend a day up in New England every week. There had to be some sort of work-around.

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So, he turned to his EA, Steph. Well aware of her ESP superpowers, he tapped into those abilities and made her the project manager for the build-out of the estate. He arranged for an introductory meeting, which assured that key contacts knew to go to Steph for answers. At first, Steph started out as something akin to a messenger—armed with her ESP superpower, she would check in with the architect and contractors to relay messages and set and monitor deadlines.

When the occasional mishap happened, Steph tapped into her Translating skills; she was there to advocate for Jack to ensure the work was done to his specifications. When one of the subcontractors had an issue with a designer, Steph stepped in, finessed the relationship, and redirected everyone back to the main points and the task at hand.

Once the estate was built, Steph met with the general manager on a weekly basis to go over the punch list that ran a full fifty pages(!). Each week, she'd ensure each task was assigned to the proper group and provide an update to Jack.

Clearly, Jack was able to be present and function optimally within his business, thanks in large part to Steph taking on the role of project manager. Knowing both Jack and what his expectations were for the project well, she was able to see it through to completion while he was able to focus on his job and, perhaps even more importantly, enjoy the building of such a rare estate because Steph took the brunt of the daily challenges.

Performance Multiplier #3: Project Manager

That's what it's like to enable your EA as a project manager: leaving the managing and organizing of your projects to someone else frees your time and energy and allows you to fully experience those projects as a spectator.

YOUR EA AS PROJECT MANAGER

Traditionally, the title of project manager is reserved for people who are responsible for taking a viable product and moving it through production, following particular steps. Those individuals often have a degree in project management and are familiar with Sigma Six or Lean manufacturing process tools. That's not quite what we mean by the term.

When we speak of your EA being a performance multiplier as a project manager, what we are talking about is giving your EA ownership of a project or an event. Let's say you want to have a board retreat. As project manager, your EA looks at the timeline available to pull the event off and then follows through on taking care of everything. They manage the attendees' flights, arrange car service from airport to hotel, and reserve all the lodging. They make sure the meals fit any specific dietary needs. They collect items for and fill the swag bags, coordinate the entertainment, and create agendas and board books. If there is a theme for the event, they ensure the decorations are in alignment with it. In short, they will manage every facet of the retreat and make sure it's a success. Meanwhile, you get to enjoy the retreat with your board. You'll

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be able to think a little more clearly during any meetings because there will be no interruptions from hotel staff with last-minute questions or concerns because your EA will be the contact person throughout.

As project manager, your EA can take on annual events, like the board retreat or setting up for a vendor show, and handle the one-offs. Ethan once organized the physical relocation of a small marketing company in New York City. The company moved three floors down in a large skyscraper. He was the point person who coordinated with the building's facilities management to clear out the new space. He then worked on the build-out with the architects to figure out the floor plan: Where should the outlets for the internet go? How about the copier? The equipment closet? He also worked with the interior designer to pick out the color scheme and furniture. Additionally, he was the contact person for the certificate of occupancy and got all of the permits signed off so the company could make the move. Next, he coordinated the movers, which included working with all of the staff to ensure that everyone's personal materials wound up at the correct desk in the new office. Finally, he subcontracted with a professional IT relocation group to handle moving the computer infrastructure.

Stephanie, meanwhile, had a principal with a large art collection and served as the project manager for the build-out and updating of a database of artwork. She uploaded all the documents necessary to have the pieces appraised for insurance coverage. That required collecting data on where it was bought, documenting what kind of materials were used to create it, recording whether

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it was signed and dated, and specifying where the piece of art was physically located. While that was a one-time project for her, she does periodically need to update the database when her principal moves pieces to different residences or purchases more.

Many jobs can fall under the rubric of project management: family vacations, preparing for large presentations, holding fundraisers, and coordinating corporate or team events. We would like to encourage executives to think broadly about what their EA can do for them; they might surprise themselves with new ideas. For example, we had a client who asked us to help her get a BMX riding course created in her backyard. Of course, we could! (That was a fun project to manage.) Executives are going a million miles a minute, cramming as much as they can in their days, which means there must be something they can hand off to the person running alongside them. Empower your EA as a performance multiplier for you by making them a project manager for something.

BENEFITS

Once again, the biggest benefits of thinking of your EA as a project manager is the time they will save you. From the point of doing a needs assessment prior to starting a project to the actual completion, your EA can be the one with an Excel spreadsheet, listing the tasks, tracking assignments, and monitoring the timeline. They can coordinate with each of the actors for each of the tasks, follow up with them (numerous times if need be), and be certain that the project goes off without a hitch.

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The ESP superpower that helps your EAs stay two steps ahead of the process, combined with Synchronization in ways that will wow everyone else involved, makes you look like the amazing executive pulling all the strings. Their Translating skills, including the velvet no, will enable them to be persistent with people to maintain the timeline and keep the ball rolling without angering anyone along the way. Meanwhile, you can focus on your part of the puzzle, knowing your EA has the rest of it under control.

Depending on the project, your EA can also lighten your decision-making load. What to serve for the main course at an awards banquet? Should you use navy blue or light blue for the slide background? They can collect bids from various car service providers, entertainers, and so on, and make recommendations from there. All of those decisions can add to the pile of much larger decisions you need to make to run your business. Though some seem relatively minor in the grand scheme of things, they still take mental energy that you may want to reserve for larger concepts. Take that energy back by delegating the decisions that don't require your personal attention. We know that many business leaders have a hard time letting go of the small details—probably one of the reasons you're as successful as you are—however, once a level of trust and finish-each-other's-sentences partnership is built between you and your EA, letting go of those decisions is freeing.

You do not have to walk through the minutiae of each step of each project; all that's required from you is a couple of hours spread over the planning months spent on check-ins to be sure you are on target and for you to approve bigger decisions when necessary

Performance Multiplier #3: Project Manager

(the more decisions you hand over to your EA, the less time you'll need for these items, too). Of course that means you *must* be willing to hand over the reins. Yet again, you truly have to trust your EA to empower them in the role of project manager.

EMPOWERING YOUR EA PROJECT MANAGER

To empower your EA to take ownership of projects, one of the first things you can do is hold a kickoff meeting for the project. Your EA will need to be at that meeting, as well as any other key players that the project impacts or effects in some way. Outline the overall scope and goals of the project, then list the milestones. What important tasks need to be done, and by what dates?

If you have any ideas or concerns about the tasks, you can make them known at this time. If you do not have any specifics to share or discuss, but you don't want to give your EA carte blanche, you can establish that you will need to see options before any decisions are made. After that meeting, you can schedule regular check-in meetings to be sure you stay up to date and in the loop.

Eventually, after your EA has handled a couple of large projects, you will feel confident in letting them handle all of the decisions. Then your kickoff meetings will be about the scope and breadth of the project and any touch points for specific wants or needs. Ideally, you'll reach a point where a kickoff meeting is not even necessary, when you can just tell your EA "I need to have X done by Y date."

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They can then use their superpowers to make it happen and just check in with you right before they hit a point of no return—for example, a deposit is being placed on a hotel room, that there are just twenty-four hours remaining to confirm a flight, or a cancellation deadline is imminent.

You can always set parameters for decisions beforehand, as well. For example, you can set parameters around the amount spent on swag bag gifts, the hours of the day you prefer to travel, or are open to specific genres of music for entertainment booking.

Aside from empowering your EA by trusting in them, you need to think about whom your EA will need to communicate with to complete the project. Those people then need to be alerted that your EA speaks for you, that they are an agent-in-charge, and, as such, should be treated with respect and cooperation. And then set the expectation that those people should speak with your EA about the project, not you, the principal.

A top-level EA in the performance multiplier role of project manager can coordinate all facets of your events, special one-time projects, ongoing tasks, and so much more. Your EA is smart and will represent you at the highest level. They understand your wants and needs, as well as your expectations. As such, they can put some space around you by being your eyes and ears on a project so you are not inundated with calls, questions, and emails from a multitude of people who need to be answered. By introducing the EA from the get-go to all those key players and empowering them with trust, they can complete the project in such a way that

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what *you* need to do for it fits into your schedule throughout the whole process—which brings us to the next performance multiplier: assistant/scheduler.

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PERFORMANCE MULTIPLIER #4: ASSISTANT/ SCHEDULER

Jill often jokes about her tendency to double book events and meetings on her calendar. Truth be told, though, she often triple and even quadruple books them. It's not that she's care-less; it's that her priorities often have to shift at the last minute in order to meet client or prospect deadlines. Additionally, she has a tendency to make some appointments in person, while speaking directly with a client, and doesn't always remember to enter them into her phone later. Then there were all the other meetings she'd be invited to via an email link and yet others she makes while speaking on her cell, usually in the car en route to an appointment.

At the end of the day, when she tries to reconcile the various events, she often discovers she double-booked herself by accident or that,

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unless she could gain access to George Jetson's flying car, there simply wasn't enough time to get from one meeting to another. Because it would be so late in the evening, she would usually set a few reminders for the next day to follow up and rearrange whatever she could.

Unfortunately for Jill, frequently the next day was filled. She seldom has enough time to answer all the emails in her inbox, let alone connect with everyone she needs to in order to coordinate her calendar. Sometimes it takes a few days of playing phone tag with someone to change a lunch meeting; in the interim, the date it was changed to was already taken by someone else, and Jill would need to reroute once again.

Meanwhile, those emails continue to pile up in her inbox. One morning, she used the search feature to find a specific one only to discover that she'd received subsequent emails from that same person. She could sense their frustration because she hadn't answered their questions. However, she didn't have the answer yet...Or did she?

She used the search feature again to find the email she'd sent to a supplier to get the answer and realized she never inquired in the first place. She now tries, and the email immediately bounces back—that supplier is no longer in business. She'd have to find another one and get back to her client ASAP. But soon a calendar alarm goes off on her cell: it's time to leave if she's to make it to an appointment on time.

Performance Multiplier #4: Assistant/ Scheduler

Clearly Jill needs help. And the most helpful person she can think of is her assistant, Ethan. To date, she'd seen him as someone who typed up the latest proposals, sorted the mail, and completed other minor tasks. But he had a track record of managing more.

As she's in the car, heading to the meeting, Jill calls Ethan. She explains her dilemma with the supplier and asks if Ethan thinks he can help. He asks for access to Jill's email. At first, she hesitates—her email is loaded with confidential information on clients! But he's there to work for her; of course he wants her to succeed. She can trust him.

Jill quickly sends IT a note to provide Ethan access to her email. A couple of hours later, she returns to the office to discover that not only has Ethan found a new supplier, but he's already responded to the client and the client is ready to sign the deal. Additionally, he explains that he's sent Jill an email that includes, in a logical format, all of the necessary information she needs to reply to several other emails. He then discusses Jill's calendar, as many messages are related to scheduling events, and explains what he can do to clear up all the cross-communication and ensure she always arrives on time, where she needs to be—without worrying about wasting time on research or gathering intel because he can take care of that. In the role of assistant/scheduler, Ethan lowers Jill's stress level and improves her performance with clients by being a gatekeeper who protects her time and attention while also facilitating all of her meetings and interactions.

YOUR EA AS ASSISTANT/SCHEDULER

As executives become more successful, they can—really they *should*—become more dictatorial about how they spend their days as more and more people clamor for their time and attention. Yes, you may want to be all and do all for as many people as you can, but unless you empower your EA's assistant/scheduler performance multiplier, you risk coming up short for everybody and every project. Even for yourself.

In the area of assistant/scheduler, your EA takes on the traditional role of assistant, with the added bonus of being a master at playing calendar Tetris—managing time slots on a calendar filled with shifting priorities and projects, doing whatever is necessary to line things up just so.

Such time engineering requires detailed, precision scheduling. That includes more than just entering the time and date of an event in your calendar. Using their ESP skills, your EA can log pertinent information on your calendar invites or in an email to you with a link to the calendar invitation.

If the event is a call with a client, a bulleted list within the calendar invitation between you and the client can serve as an agenda and include the key points for discussion. If the meeting is for a consultation or sales call, your EA can send you the link to the calendar invitation in an email, as well as providing background information or a dossier on the potential new client, any relevant details about the nature of their business or competitors, and so

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on. They can also use a routing aid like Google Maps to check the average commute times to various destinations at the time of day you may be driving and incorporate that into the appointment so it does not come as a surprise that what seems like it should be a smooth twenty-minute drive is really a forty-five-minute stop-and-go session.

Because your EA knows your priorities and goals as well as your overall day-to-day routine, they can pencil in times to hold slots for potential events, then rearrange those in accordance with your priorities. Their mastery of the velvet no will enable them to make the necessary calls or emails, with grace, to get everyone involved in sync with your scheduling needs.

An EA's email is a primary tool as an assistant/scheduler. Part of their Tetris-like skills for lining everything up is played out in their inbox. Great EAs use their email inbox as a to-do list, snoozing mail that needs follow-up or is waiting for additional information so that nothing falls through the cracks. They can do the same for your inbox, too, if you allow them access to your email.

BENEFITS

Top-level EAs use their Synchronization superpower the most when it comes to being an assistant/scheduler. Knowing your habits and routines, they will schedule around them to ensure you are at your best everywhere you go. Additionally, that Synchronization can extend to helping you serve yourself better. For

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example, Ethan noticed one of his principals was often aggravated when looking at his schedule. The two discussed this, and Ethan realized the formatting was the issue. So he developed a personalized system for his principal.

The system includes Ethan sending the principal an email at the end of each day. Inside that email is a table that includes everything scheduled for the following day and anything related to those events. For example, if the executive has a phone call, the number will be included; a Zoom meeting will have the link embedded in the table. If there are notes or background information that may come in handy (such as a LinkedIn profile or client website), they will be included, as well. All of this information is an exact replication of everything already included in Ethan's principal's calendar, but in one easy-to-access, streamlined place. The principal loves the system; having everything compiled in one place saves time and eliminates aggravation.

The daily system worked out so well that they began similar ones covering longer time spans. Ethan sends a note on Fridays listing all of the upcoming events for the following week. And, on the last day of each month, he sends one out for the following month. A side benefit of these weekly and monthly lists is that Ethan can look over them and include potential prep work his principal (or Ethan) may want to do prior to the day before the call. For example, if the principal will be on a call with someone they have not spoken to for six months, Ethan can remind the principal of that and what that person may be expecting from them.

Performance Multiplier #4: Assistant/ Scheduler

Part of being an assistant/scheduler performance multiplier requires EAs to use their ESP superpower and help their executive develop that ability as well. An example is when Stephanie had a client who needed to create a massive presentation in March. She entered the information on the specific date in her principal's calendar. She then entered a meeting between her principal and herself the second week of October before that presentation to discuss the plan for March and the timeline of the project. Knowing the plan, Steph was able to collect the information her principal would need for ensuing milestone check-ins and provided that information prior to each check-in.

Steph helped another client with a similar scheduling strategy. That principal greatly enjoys remembering the birthdays of his leadership team members and likes to offer them a special gift—but he often forgot until the last minute. Steph went into his calendar and entered not only the team-member's birthday, but also a reminder with a notification alarm attached to a message reminding her principal to think about what to get for a present for that specific person—along with noting what they were given the previous year—the week before.

When EAs have access to their principal's email, it always makes everyone's life run a little more smoothly. They can eliminate the junk that isn't filtered and even weed out emails that might be better off going to someone else in the company (e.g., the email from a salesperson wanting to discuss the facilities maintenance supplies can be forwarded to the operations VP). They can coalesce

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emails that belong together but may not be in one thread, do research to provide answers for when you do respond to inquiries, and so much more that will save time and energy—as well as alleviate some stress!

One additional benefit of your EA serving as an assistant/scheduler is that they can help maintain good relationships or even improve them. If they see an email hasn't been answered because you are waiting for the information, they can reach out and let that person know they have not been forgotten and explain the delay. In other words, they can be a buffer, someone to ensure all parties are heard and valued while waiting to hear back from the principal.

EMPOWERING YOUR EA ASSISTANT/SCHEDULER

To empower your EA to be your Master Scheduler, assess your rhythms and habits and think about how you can enable your EA's superpower of Synchronization. If you know you tend to have low energy after lunch, then that is not the time for high-level thinking. Similarly, if you have a regular appointment with a trainer, after which you are somewhat “jacked” up with adrenaline, then that's not a good time for things like analyzing P&L statements or reviewing financial forecasts. Also consider whether you like time between calls or meetings to clear your head or if you prefer to have them back-to-back within a certain time frame each week to get them done and over with. Or, when you're working on a special project, would it be conducive for you to have regularly scheduled

Performance Multiplier #4: Assistant/ Scheduler

blocks of time to focus on it? Possibly, you could use “catch up” time scheduled in each week to do, well, just that: get caught up and close any loose ends.

Any insight into your personal life that you can give your assistant will also be of great benefit. Are you fine with having calls at seven o’clock in the morning, before you arrive at the office? Or do you not feel ready to take any calls until after you have been through your emails each morning? If you have personal events scheduled during the week—say a dinner with old friends in town where you know the wine will be flowing and will go until late at night—let your EA know that you may be late the following day. Even better, your EA may use their ESP superpower and realize you have the dinner planned and will double check with you about whether you want to schedule anything the following morning.

Related to that, any time you can explain the reasoning behind why one meeting or event is more important than another, that will be of great help, too. Your EA will remember that information and proactively try to set up your calendar to revolve around that rational the next time a potential conflict comes up.

Steph had a client who excelled at empowering his EA to be an assistant/scheduler. That client knew himself well and was protective of his time. Once he had his ground rules set, he trusted Steph to abide by them, which she did, as did all of his direct reports. Those ground rules included how he wanted his appointments set up in the calendar invitation. He didn’t like “John/Alex call 3:00” because that left too much room for confusion. So he set specifics

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for how calls should be set up: “John to call Alex at 3:00 regarding _____,” along with the phone number and any relevant information. He also requested that Steph include any email chains related to the call and coalesce any information that could be of help during the meeting.

Setting up parameters for calendar invites should also include closing parameters—how much information is too much? This tactic is particularly useful when a principal relies on their phone for their information and there is not enough room for reading everything or long external links.

Other ground rules can include asking your EA to set people up for success before they get in front of you. That means, if someone schedules an appointment with you, let your EA discuss with them what they want to talk about. Armed with that information, and knowing what you will want to know, your EA can then potentially steer the person to the CFO to gather necessary data, let them know they should include a PowerPoint (or vice versa), or do whatever else they will need to so that they are fully prepared for your meeting.

Yes, as an assistant/scheduler, your EA can manage your calendar like a pro Tetris player lines up blocks. But, to really ensure your time and attention is optimally managed, it helps if your EA is privy to parts of your life outside of work, which leads us to the next performance multiplier: your EA as personal assistant.

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PERFORMANCE MULTIPLIER #5: PERSONAL ASSISTANT

Not only was Jack the CEO of a successful consulting agency, but he also sat on two local boards, had three busy children, and he and his wife found themselves taking on more and more responsibilities for his mother. Thankfully, he had a great EA, Steph, whose superpowers covered the full gamut, so things continued to run smoothly on the work front—for a while, anyway.

Jack's wife was an accountant, and when tax season hit, she worked eighteen-hour days, six days a week. She was, understandably, less available at home during that time. Usually Jack had no trouble keeping up on the homefront during tax season, but things were different this year due to his mother's declining health. Jack had difficulty keeping up with it all, and the stressors outside work began taking their toll.

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He frequently arrived at the office exhausted on Monday mornings, which is never a good way to begin a week! His personal trainer was turning into a distant memory because he just didn't have the time. And more than once he took the wrong kid to the wrong soccer practice. So when his home's foyer began to show signs of water damage, suggesting there was a leak somewhere, he hit the proverbial wall. On top of everything else, now he needed to find a contractor, arrange for repairs, and...would they need a mold test?

The office was almost a refuge for him by that point. Noticing a change in his demeanor, Steph asked how she could help. Jack had no idea and gave her a litany of everything that was on his plate outside of work. Steph listened, then said the magic words: "No problem! I can help you!"

After quick introductions to the house cleaner, soccer coaches, his mom's home-health aid, and a few more key players in Jack's life, Steph went to work coordinating with the housekeeper the arrangements to get quotes from three different general contractors and for conducting mail-order air-quality testing for mold. She added all of the kids' school and extracurricular activities schedules to Jack's work calendar, with notes about location, supplies, and other details. She set up a system for Jack's mom's home-health aid to text status changes to Jack when necessary. And, toward the end of tax season, she made reservations at Jack's favorite restaurant so that he could have some downtime alone with his wife.

Jack then began trusting Steph with more projects, like picking up dry cleaning and ordering thank-you flowers to send to

Performance Multiplier #5: Personal Assistant

well-wishing friends. Having that extra assistance lightened the at-home load so much that Jack was back to his old self at work, and even resumed training with his personal trainer. Of course, he over-indulged on that delicious meal with his wife, too.

The good news is an executive does not have to wait until there is a pressing need, as in Jack's case, to ask their EA if they would take on what would traditionally be the tasks of a personal assistant. They can do it at any time. It's simply a matter of empowering their EA to take on the role. Remember, the overarching goal of a top-level EA is to give their principal back time. So, when a principal separates their world in two (business and personal) and does not allow their EA into their personal world, they can accidentally create an obstacle to that time-saving objective.

DEFINITION OF A PERSONAL ASSISTANT

It is relatively difficult to define what a personal assistant is as the job varies according to the expectations and needs of the principal. In general, a personal assistant is someone who helps a principal manage their life outside of work. They could be closely tied to the household and oversee the grocery shopping, schedule appointments, pick up dry cleaning, and run other errands, ensure any household staff members are performing their job duties, sort/answer mail, respond to emails and phone calls, and an assortment of duties required for vehicle or property management.

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We have fulfilled personal assistant duties as EAs on a multitude of fronts. We've helped an executive's horse trainer figure out how to extend his visa to stay in this country. We found and purchased numerous pairs of bamboo underwear for a client's father. A desperate principal once needed an immediate appointment with Apple's Genius Bar, and, eleven phone calls later, we found one. We've bought teacher gifts and arranged for furniture delivery. We have researched miscellaneous charges on credit card statements and read through (every single word of) the terms and conditions on loyalty rewards programs to finagle a way to use them on specific dates. And Steph was once sent to the Diamond District in New York City with a million-dollar budget to purchase a diamond ring.

One client had a ski home in another state. He also had four children. Whenever they were heading up for a weekend, we'd make arrangements so that their refrigerator and pantry were stocked with the specific food and beverages they liked. Another client wanted to know when a private fireworks show was going to happen at a property in the town where she has a vacation home. It took about forty-five minutes on the phone and lots of googling for us to find the answer. And we've scheduled a private jet for a fun weekend away that included securing the charter, coordinating catering for the flight, and arranging a driver to pick up and deliver the passengers on the tarmac.

Does any of this have anything to do with a principal's success at work? Absolutely! When life outside of work is running smoothly and efficiently, it helps the workday run equally well.

BENEFITS

It is not unusual for a successful executive not to give any thought to hiring a personal assistant or having their EA take on that role. Often, they are used to doing things for themselves, so asking for assistance is not always a knee-jerk response. But when things pile up on the home front, they can and do interfere on the business side. And when those things are projects or exercises that your EA would do if they were labeled “business,” they can still easily do them if they are labeled “personal.”

Those “things” include researching how many airline points an executive needs to fly their father from Toronto to Cabo, first class, and then transfer the points into their father’s account. That twenty-minute exercise just gave you twenty minutes to talk to a client. If you need new tires on your classic car, you could spend the time researching who can get that specific brand in stock, when, and then schedule a day and time around your workday to have them installed. Or you could provide the make, model, and year to your EA and let them handle it, knowing they will respect your calendar—or coordinate with your spouse to take the car in when it is convenient for them. Speaking of spouses or partners, we once had a client who liked to give his wife very rare, vintage Birkin bags by Hermes for gifts on special occasions. Tracking these bags down took days, sometimes even weeks to find. In these and so many other ways, your EA as personal assistant can save you plenty of time and potentially prevent you from dealing with aggravation.

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You can ask your EA to serve as a personal assistant to handle one-off projects, as well as regularly scheduled ones. Steph, for example, had a principal who liked to invest in precious metals as a hedge against the market. She tracked down the gold, silver, and platinum and created a chart to track its value. As far as regularly-scheduled projects go, another client has Steph schedule the dog walker and interact with the vet because their dog has a chronic condition that needs monitoring.

The list of what your EA can do for you as a personal assistant is endless, but the benefits are often the same as they are in the more strictly professional realm: your assistant can save you time, energy, and aggravation. In essence, this role helps you live your best life! However, you do need to trust your EA quite a bit to empower them to take this role on. Likewise, your EA must be on board with doing the personal work. Buy-in is necessary on both ends of the relationship, with clear appreciation from the principal for the EA's willingness to take the reins and be that go-to person.

EMPOWERING YOUR EA PERSONAL ASSISTANT

Something tactical to think about when empowering your EA is how you can make their jobs easier. For example, the principal that had Steph look for rare Birkin bags knew she had built a relationship with a key person at Hermes and would often tell Steph to

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thank the man with a \$500 gift card. That appreciation only made the Hermes contact even more eager to help Steph with the next request.

Additionally, your EA will probably be so good at their job that the other executives in your company may start asking for similar service. Most likely your EA will say yes in response to the occasional ask to walk a VP's dog because a meeting runs late. However, it is in your best interest to discourage such requests. If it takes the assistant away from making travel arrangements, there is no guarantee that the flights won't book up while they were walking Fifi around the block.

Also, you have to be realistic about what you expect your EA to be able to do. Yes, sometimes what they do really seems like magic. But, if you want front-row tickets to your favorite rock band and you do not have any connections, your EA may be limited in their resources. They will do their best, but there's no guarantee they will be able to get them without paying an enormous price on StubHub.

Outside of the tactical ways to empower your EA as a personal assistant, your best tool will be excellent, respectful communication. It is a matter of creating a rapport with your EA and making sure they feel appreciated for taking on what you're asking them to do.

And there are limits as to what you can ask your EA to do as a personal assistant. Some of those limits might come from your

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work environment—large, public companies tend to frown on this, seeing it as stepping beyond the bounds of propriety. However, when running your own company or working with an organization like ProAssisting, that barrier between business and personal can be set after a little brainstorming between principal and EA. It is never a good idea to ask your EA to do something of a personal nature without first discussing what they would and would not feel comfortable doing.

Setting the parameters can happen as early as the interview process. It is always best to be completely transparent when discussing how you think your assistant can be of best service, but it doesn't have to be a formal treatise with a bulleted list of expectations. You might simply say, "There may be days when I'm going to ask you to get coffee for me because I'm going to be slammed," or "I will expect you to make travel arrangements for my family members or to do other things for them."

Good assistants will always come into the job expecting that at least 20 percent of their time will be spent on menial activities and will look at your request from a big-picture perspective. They know that by making your life easier outside of work, it makes you more productive at work, and they will not mind picking up the dry cleaning or calling Fido's walker with a last-minute request. So approach them about this from the get-go in an interview by asking, "Do you understand that in this role, along with being the gatekeeper to the CEO's office of a thousand-person company, you'll also need to go running to get coffee on occasion or take lunch orders when meetings run long?"

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As you build a level of trust with your EA over time, you will always be able to ask for more and have faith they'll be able to accomplish more complicated tasks like that private charter trip.

Perhaps you have noticed as you read through this book how frequently we've expressed the need to trust your EA and employ excellent communication skills. These are the cornerstones for empowering each of the performance multipliers as well as for enabling your EAs superpowers. That might sound easy, but we know it can be among the toughest things you do as an executive—though we promise the payoff will be commensurate. Allowing your EA's superpowers to go to work through the five performance multipliers will enable you to succeed at higher and higher levels, and yes, work a twenty-nine-hour workday between nine and five.



CONCLUSION

We hope this book will help you redefine the role of an executive assistant.

However, it is not unusual for an executive to compartmentalize roles and shrink their EA's significance. More than once, we have been told something like: "My administrative assistant does my scheduling. My COO is my business partner who runs interference with my employees. I have project managers who keep tabs on everything and basically keep the trains running on time." Although, yes, we agree you may need a full staff, we also believe that if you can find a rock star EA, one with super-powers at the ready to help, all those roles can be rolled (no pun intended) into one.

Hopefully this book inspired you to look at your EA as that rock star and to think about how you can empower them to be the performance multipliers they can be. That empowerment comes on the heels of you learning to trust them and their capabilities and on you taking the lead to develop a clear communication

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channel with them. An easy way to open that channel is to hand them this book and ask them to read it. Afterward, the two of you can discuss how to implement any changes into your current work patterns.

You must also be open-minded enough to do a little self-examination. Great leaders are humble and self-deprecating, and they use that to their advantage to make people below them feel comfortable expressing their ideas, thoughts, and opinions. If you can do that with your EA in a proper way, you will enable them to set their superpowers free. You'll create a safe space between the two of you to encourage them to be your performance multipliers.

And that's when the magic happens!

We see it all the time with our business, ProAssisting. We walk the talk we put forth in this book using our superpowers to multiply the performance of a number of principals. By matching our principals with EAs we have prescreened and deemed qualified based on the categories in this book, we provide our clients a very economical, efficient way to succeed beyond what they thought capable of before coming to us for help. By leveraging technology and the ever-growing acceptance of remote work, we are taking the shackles off geography when it comes to the search for the perfect assistant. We are reimagining the executive assistant support role as being geographically agnostic, yet time-zone committed, as we provide our principals with the ability to get twenty-nine hours of work done in the scope of one twenty-four-hour day.

Conclusion

To learn more about what ProAssisting can do, or to check out our blog for helpful tips about partnering with your current EA, visit us at www.proassisting.com.



ACKNOWLEDGMENTS

We want to start by thanking all six of our parents. They have provided unwavering support through all stages of each of our lives and have served as models of hard work, kindness, love, hospitality, joy, and success to each of us in their own ways.

We also want to thank all of our past principals for allowing us to grow each and every step of the way as we provided support for you. Without your trust, guidance, candor, and driving work ethic, we would not have grown into the support professionals we are today.

Thank you to all of the other assistants we have worked with throughout our careers. The best among you have shown us what truly great assistant support encompasses and driven us to improve our own support service and hospitality.

Lisa Shiroff, this book would not have been possible without your guidance, support, humor, and persistence as you lead us through this process. Thank you.

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Thank you to the clients of ProAssisting who understand the value of true support as they grow their businesses and appreciate the benefits of partnering with a service like ProAssisting.

Lastly, we want to thank all of our ProAssisting partner remote executive assistants who embody the performance multipliers detailed in this book and provide superb support for our clients.



ABOUT THE AUTHORS

Ethan and Stephanie Bull are founders of ProAssisting, a remote executive assistant service company that provides a full spectrum of support to consultants, entrepreneurs, C-suite executives, startup and seasoned CEOs, and non-executive board directors to Fortune 1000 companies. Combined, they have more than thirty years of experience meeting the high expectations of demanding, discerning, and uber-successful principals.

Ethan served with Hollywood celebrities, elite entertainment agents at The William Morris Agency, the Chairman of USA Films, and a series of C-suite members and partners at marketing giant Deutsch NY. He also worked in the world of healthcare where he served as the director of administrative services and senior executive assistant to the CEO of Rochester Regional Health, supporting the CEO while overseeing a team of eighty assistants who supported over 250 healthcare professionals throughout the network.

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Stephanie's impressive background began by serving as project manager and editorial assistant for a World Bank consulting firm. Later, she expanded in her role as an executive assistant to multi-billion-dollar hedge fund CEOs and to chief of staff/executive assistant to the CEO at J. Crew. In these roles, she supported these principals in all aspects of their lives and thus making them as efficient as possible.

As technology allowed for remote work in recent years and as remote work has become fully accepted as part of the working mix, Ethan and Stephanie saw a gap between virtual assistants and a full-time assistant support professional. With their experience, they developed the ProAssisting Remote Executive Assistant business model. Derived from their decades of in-office experience, this model serves clients who want top-level support but do not have the need for an in-office or full-time executive assistant. You can learn more about ProAssisting at their website: www.proassisting.com.