

## Executive Onboarding Overview

When onboarding new execs, I ask the following questions:

- Have you taken a personality profiles (MBTI, DISC, Team Chemistry, etc.)
- Weaknesses? Strengths?
- What should our Goals/Concerns be for the first 90 and 120 days?
- Who was the best EA you've been supported by and can I contact them, or what made the relationship great?
- Preferred frequency for us to connect (daily, weekly, etc.)?
- What templates or forms are they used to using for travel, meetings, briefings, etc.?
- When is your peak productivity time (morning, afternoon, evening) and how do you like to use that time (for meetings, for thinking/planning, for ideating)?
- If I send you something for your review, do you need a reminder text or ping and how quickly can I expect you to turn it around?
- Do you prefer to create a draft and then have me refine (presentations, comms, etc.) or would you prefer I draft it and then you can refine/edit?
- When are you available?
- What motivates you?
- What consumes most of your time?
- What days/when do you take off? (When is your usual vacation time?)
- Have you been able to take off when you need to for you and your family?
- What do you need more of/less of?
- If your team could do 1 thing for you in the next 6 months, what would it be?
- If you could solve one thing for your team in the next 6 months, what would you like to solve for them?
- How do you best process information (visual or auditory)
- What are your hot buttons and your boundary buttons?
- What are you most concerned about this year?
- If you could improve one thing here at \_\_\_\_\_ what would it be?

For the details (i.e., what belongs in the vault): Credit card information, home address(es), state where born, mother and father names (and addresses if applicable), personal credit card and banking information, personal preferences when recognizing family, friend, and employee life events such as birthdays, anniversaries, deaths, etc.

### Questions about the admin:

- What do you feel I need to be successful in this role?
- What is important for me to know coming into this particular position?
- What concerns might you have in working with a new assistant?
- If I could solve 3 things for you in the next 6 months, what would they be?
- What are my primary responsibilities (as exec understands them)

If there is something EAs crave more than feedback, I don't know what it is. My experience with exec teams is that they give you a massively blank stare when you ask them what you could do better or where you can improve (that could be good or bad and is a topic for another day). Here are some approaches that have worked for me in the past:

1. Ask them for 15 minutes to discuss their most significant day to day challenges then either follow up or ask to be able to follow up with an idea or two around how you can modify what you have been doing to help them solve a gap.
2. Ask them to identify (based on their experience with others and you) what the core competencies or skills for someone in your role would be. Then engage your HR team (or whoever administers 360 reviews) to build a brief 360 around those to measure how you are stacking up.
3. Do a three-part analysis around: What I Was Hired To Do (Job Description), What I have Been Doing, and What I Could/Should Be Doing (based on your observations/interests) and review with your CEO and/or their leadership team. From there, you should have a better idea around what to "Start/Stop/Continue".

#### **MY OKR: Bring Efficiency to the Office of CEO**

Understanding the current climate of events, knowing priorities and my role in executing them.

#### **2 Approach styles which can be combined:**

- Fluid calendar checks as needed during the day as things change or important reminders
- Exec to share Focus/Goals for the week to clarify priorities (usually at weekly 1:1)

#### **Additional Solutions:**

- Numbering priorities from 1-5 (5 being most important) to help order task list
- Having a shared "to do" list—one place we can both go to see list or edit
- Notify me when booking an appointment (i.e. dental) so other scheduled items can be handled/managed or let me book your dental or other appts.
- Meeting monthly or quarterly to have an offsite (start/stop/continue) meeting to decide what is working or what updates need to be made based on company's needs

#### **Working Hand-in-Hand/We're Not so different:**

- Care about people/passionate about helping others
- Take it seriously when things haven't gone as planned

**What I want:**

Constructive Feedback

Post-ops on what could be done better/differently

Continued communication: (i.e. responding to my texts)

Working together in lock step so I know when to be proactive vs. wait for directives

Knowing how you want things is key for me to understanding and planning

**What I have Been Doing (examples)**

- Calendar management/special meetings (board, employee lunches)
- Coordination of candidates with HR
- Travel booking for:
- Expense reports for:
- Interacting with

**What I Could/Should Be Doing (based on your observations/interests)****What I Was Hired To Do (Job Description example)**

- Provide complex, diverse, and confidential administrative duties for the CEO
- Use strong business judgment and communication skills to make administrative decisions, handle correspondence, schedule calendar appointments
- Handle business, company, and personnel details of a highly confidential and sensitive nature, and engage with high-level contacts inside and outside the company
- Collect and prepare information for use in executive-level meetings and discussions
- Arrange department and group meetings ensuring all necessary information is available for discussion; help track department-level projects, activities, and results
- Coordinate domestic and international travel arrangements
- Exercise discretion and judgment regarding highly confidential internal and external communications and within generally defined practices and policies
- Manage office operations and procedures, including correspondence, and design and/or manage filing systems

### **What I have Been Doing (examples)**

- Calendar management/special meetings (board, employee lunches)
- Coordination of candidates with HR
- Travel booking for sales and marketing and random other travelers
- Expense reports
- Interacting with Brand/PR team on weekly calls
- Uploading contracts into Salesforce/organizing filing system
- Assisting with various requests from CFO
- Managing/mentoring Office Manager with office tasks, assisting with larger projects
- Updating Gmail contacts
- Updating exec level contact into Salesforce

### **Documentation:**

#### Paper:

- What gets filed and/or saved?
- Where, how and when do you want it filed?

#### Electronic:

- What gets saved?
- Where do you want it saved?

#### File Organization:

- Are you comfortable with the way your filing system is set up?
- Do you need any new systems implemented/organized?
- Where do you keep your most sensitive documents and are they in a locked cabinet?

### **Reminders:**

- Do you want me to give you 5 – 10 minute warnings before your next call or meeting?
- What kind of reminder system do you use? I can explain systems I have used and you can decide what works

### **Interruptions:**

- When is it unacceptable to interrupt you during a call or meeting?
- What people/companies do you consider urgent/ most important?

**Executive Questionnaire: Food for thought/discussion**

**Personal Preferences:**

Family:

- Names of family members and relationships where I might have interaction
- When is it acceptable to interrupt you if someone in particular calls?

Food:

- What are your food & beverage preferences?
- Do you want me to grab lunch for you when you are tied up in back to back meetings?

Health:

- Any food allergies?
- Any medical issues that I need to be aware of?

Other:

- \_\_\_\_\_ ?
- \_\_\_\_\_ ?
- \_\_\_\_\_ ?

**Meeting Preferences:**

Lunch/Dinner meetings:

- Do you have a preference as to where you entertain? For lunch/dinner?

Meetings:

- When food is involved, do you have a general preference for food choices?

Performance Meetings:

- How often do you perform reviews for staff?
- When is the next schedule review period?
- What team members do you perform reviews for?
- What is needed in order to perform the necessary reviews?

**Travel Preferences:**

Airline:

- What is your preferred airline(s)? Do you have a rewards program with them? If not, should I enroll you?
- What are your seating preferences? (aisle/window) for long vs. short flights?

Hotel:

- What is your preferred Hotel? Do you have a rewards program with them? If not/ should I enroll you?
- What is your preferred room type? (any special requests, i.e. Q/K/D, away from elevators)
- Any Extras? (i.e. foam vs. feather pillows)

Rental Car:

- What is your preferred car company?
- What is your preferred type of car? (Class or Size)

Pricing Limitations: (I can always ask Amy about this too)

- What is your/company policy on Air Travel? (Coach, Business or First)

**Communication Preferences:**

I like to have an escalation system in place:

Realtime questions (text)

To-do item that must be completed or explained (email)

Complex situation where email isn't enough or conversation is becoming difficult (call)

This is just a smattering of things to think about, and I am sure there are others we need to add going forward to discuss.

Please let me know anything else you can think of that will help me to support you going forward—I am always open to feedback and getting things done the way that works for you! 😊