

**EXERCISE 2**

## Determining Effectiveness Of Current Tasks

Every day there are numerous tasks and projects to be handled in an office environment. The cycle of work ebbs and flows with the pace of our world, economic conditions, and industry trends. Some administrative professionals move at a slower pace; some faster. An administrative professional can be supporting one senior executive and two directors, yet each person they support can have different perspectives of that administrative partner’s effectiveness. This can range from the thoroughness of the task being performed, to the speed, efficiency, and clarity used to complete it.

Leaders and their administrative partner should not wait for annual reviews to ensure the leader’s expectations are being met. Often, leaders see their administrators differently than the administrator sees within his or her own self.

**Objectives:**

1. For you (the leader) to clarify your administrative partner’s performance from your side of the desk and then to compare that with your administrative partner’s perception. This is not intended as a salary increase tool, but rather to ensure the assigned tasks are being acted on effectively.
2. Open the lines of communication between an administrative professional and leader so that they are “on the same page.”
3. To bring clarity to daily work life within the office by utilizing an open communication tool effectively.

**Directions:**

1. Review each item on the grid and circle the appropriate % number in terms of effectiveness or N/A if not applicable. **A duplicate grid can be accessed via [OfficeDynamics.com/Partnership](http://OfficeDynamics.com/Partnership).**
2. Schedule a time to meet with your administrative partner to review your ratings and discuss any discrepancies. Use the Enhancement Agreement on page 30 to guide you.

Task / Responsibility	N/A	20%	40%	60%	80%	100%
Promotes a balanced life for leader.	N/A	20%	40%	60%	80%	100%
Recommends improved systems and procedures.	N/A	20%	40%	60%	80%	100%
Demonstrates the capacity to provide comprehensive professional and personal support to leader.	N/A	20%	40%	60%	80%	100%
Outstanding liaison with external contacts and business colleagues.	N/A	20%	40%	60%	80%	100%
Streamlines office procedures and processes.	N/A	20%	40%	60%	80%	100%
Active problem-solver.	N/A	20%	40%	60%	80%	100%
Exhibits leadership qualities.	N/A	20%	40%	60%	80%	100%
Demonstrates mindfulness and being “present.”	N/A	20%	40%	60%	80%	100%

## CHAPTER 2

Task / Responsibility	N/A	20%	40%	60%	80%	100%
Consistently accessible when/if working remotely, hybrid schedule, or WFH.	N/A	20%	40%	60%	80%	100%
Courteous and respectful to all.	N/A	20%	40%	60%	80%	100%
Not overwhelmed by or addicted to technology.	N/A	20%	40%	60%	80%	100%
Keeps confidential information confidential.	N/A	20%	40%	60%	80%	100%
Trustworthy.	N/A	20%	40%	60%	80%	100%
Demonstrates an interest in ongoing learning and development.	N/A	20%	40%	60%	80%	100%
Attention to details.	N/A	20%	40%	60%	80%	100%
Organizes work area.	N/A	20%	40%	60%	80%	100%
Protects the integrity and confidentiality of leader's position.	N/A	20%	40%	60%	80%	100%
Gathers background information and materials for meetings; appropriately preps leader.	N/A	20%	40%	60%	80%	100%
Promotes positive image of the office.	N/A	20%	40%	60%	80%	100%
Acts as a liaison for leader or key people.	N/A	20%	40%	60%	80%	100%
Produces accurate and thorough work.	N/A	20%	40%	60%	80%	100%
Coordinates leader's on-site meetings.	N/A	20%	40%	60%	80%	100%
Effectively manages leader's travel schedule.	N/A	20%	40%	60%	80%	100%
Handles telephone calls on behalf of leader.	N/A	20%	40%	60%	80%	100%
Collaborates with leader's staff and other colleagues.	N/A	20%	40%	60%	80%	100%
Displays a strong level of professionalism even in the most tricky situations.	N/A	20%	40%	60%	80%	100%
Proactive approach to matters of importance.	N/A	20%	40%	60%	80%	100%
Manages all aspects of a task/project from start to finish.	N/A	20%	40%	60%	80%	100%
Elevated level of responsibility and accountability.	N/A	20%	40%	60%	80%	100%
Keen sense of what is urgent and what can wait.	N/A	20%	40%	60%	80%	100%
Displays proficiency in skills (in planning meetings, maintaining action logs, maintaining leader's schedule, coordinating executive reports, and more).	N/A	20%	40%	60%	80%	100%
Able to articulate what she/he needs to be successful in the administrative role.	N/A	20%	40%	60%	80%	100%
Ensures that leader is organized, on-time, and well prepared for whatever lies ahead.	N/A	20%	40%	60%	80%	100%

Task / Responsibility	N/A	20%	40%	60%	80%	100%
High level of responsibility displayed through daily task lists and reminders.	N/A	20%	40%	60%	80%	100%
Builds relationships with peers throughout the company.	N/A	20%	40%	60%	80%	100%
.....						
<b>The below spaces are provided for your own job-specific responsibilities.</b>						
	N/A	20%	40%	60%	80%	100%
	N/A	20%	40%	60%	80%	100%
	N/A	20%	40%	60%	80%	100%
	N/A	20%	40%	60%	80%	100%
	N/A	20%	40%	60%	80%	100%
	N/A	20%	40%	60%	80%	100%
	N/A	20%	40%	60%	80%	100%
	N/A	20%	40%	60%	80%	100%



**Joan's Star Burst:** Workshop exclusively for leaders and executives: *How to Maximize Your Assistant's Time and Talents* by Joan Burge. [OfficeDynamics.com/executives-only](http://OfficeDynamics.com/executives-only)



## Enhancement Agreement

The following areas were identified as 60% or less:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

My leader's pick: The top three areas I should focus on building:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

My plans for improvement are as follows:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Tools and resources that would help achieve growth in these areas:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

\_\_\_\_\_  
Progress Check Date