

# Leaders and Assistants: Importance of Daily Huddles

By *Joan Burge, founder & CEO, Office Dynamics International*

Because of the multiple daily activities in the office, it is important for the leader/AP partnership to establish scheduled time to meet without interruption or at least by conversing on the telephone. The best time to do this is in morning. If you wait until the end of the day, it may never happen as things tend to build as the day progresses.

Another benefit of having a daily huddle in the morning is that your leader can share what happened the night before after you left work. Most leaders still “work” after 5:00 p.m. and often into the late night. With the use of technology and the ability to work offsite independently, there are numerous things that take place long after the administrative partner has left the office. And, many of these leaders are starting their work day very early, well before arriving at the office. If the leader/AP partnership meets in the morning or at minimum converses on the telephone, they will work in tandem, ensuring the day’s top five priorities are agreed upon, be proactive on any new issues that might have arisen, and much more.

While some leaders prefer to wait until the end of the day, it is easy for that time to be pushed aside because of other priorities. If this is the only time of day that works best for your primary leader, then schedule that on the calendar.

If you support multiple leaders, the daily huddle is with your primary leader. It would be almost impossible to meet with every person you support. You may want to have weekly or monthly one-on-one time with some of the key leaders you support.

When you meet in person in your leader’s office, make it known to others in the department or immediate area that, barring emergencies, this is uninterruptible time.

## **What would we talk about?**

If you’re wondering what to discuss, here are a few ideas:

### **Daily Calendars**

Technology is not perfect and neither are humans. It is easy to place a wrong time or wrong date on a calendar. Or because so many leaders are independent, they place events on their own calendars and forget to inform their administrative partner.

Accuracy in scheduling is extremely important. Leaders are TOO BUSY to have hiccups in their schedules. Plus it is embarrassing to the leader or the administrative person who set the schedule.

It’s always best to review the day’s events together. Many administrators are now handling their leader’s pre-read meeting materials by printing, reviewing and flagging them as appropriate. Many administrative professionals are doing research, preparing outgoing pre-reads and filtering e-mail note strings for their leader in preparation for a meeting. (Gone are the days when administrators simply reserved a conference room and readied it for the meeting!)

This is also the time to discuss any meetings or travel that was scheduled since yesterday.

### **Voicemails/IMs**

Discuss requests that need immediate attention or response. You can return many calls if you have the appropriate responses or required information from your leader.

### **Discuss E-mail Communications**

When it comes to e-mail management, there are various approaches. Some leaders want their administrative partner to read all their e-mails and take action on those e-mails. Another approach is the leader who wants to manage all his or her own e-mails and forward specific e-mail to their administrative partner as appropriate.

Your daily huddles are the time for leaders and the administrative partner to update each other on e-mail communications, whether it is a status update or clarifying new actions to be taken.

### **Review Hard Copy Mail**

Hard copy mail still exists, even if it just internal reports. Your leader may want to respond verbally to correspondence or tell you how to respond. Discuss meeting notices, invitations, or community activities that you may have to coordinate or respond to on behalf of your leader.

### **Visitors**

Discuss any events that external visitors will attend and anticipate actions to be taken before and during their visit. Does your leader have insight they need to share with you? Get the detailed information you need to help you prepare for such events.

### **Department Issues**

This is a good time to discuss any departmental problems that need your leader's attention. Administrative professionals are often privy to information within the department or are aware of potential personnel issues. These should be brought to the attention of their leader before a situation escalates.

### **Status Updates**

Provide your leader with updates on projects, meetings, items you are working on, and any other pertinent information. Leaders do not like to have to ask the status of projects and tasks. (Nor do they have the time.) A Star-achieving assistant initiates status updates.

### **Upcoming Travel**

Find out about upcoming trips so you can anticipate schedules and prepare necessary travel materials. At least bi-weekly, you and your leader should review the calendar for upcoming events as far as three months out.

### **Follow-up Items**

Bring to your leader's attention information requested from staff that you have not yet received. You can also let your leader know whose work you have received.

### **Training & Development**

Development happens when we take conscious action to improve. It is not a "check the box" aspect of your career. You must be intentional about it. Discuss your training and development requirements with your leader. Tell your leader about upcoming seminars and workshops you would like to attend and why. Be prepared to show your leader the information about the workshop, the objectives of the program, how the topics tie in with your job responsibilities, and the benefits of attending.

If you recently attended a seminar or training session, share the ideas you learned with your leader. Explain how you intend to incorporate the ideas you learned and if and how your leader can participate in the change. Demonstrate that this has added value to you and your leader. A hand-written thank you note for your leader's support would be a nice touch, too.

### **Special Projects**

Find out what special projects your leader is working on or has coming up in the next few weeks. Ask if there are any portions of the project you can work on. Is there any research that needs to be done? Will information necessary for the project be coming from others inside or outside the company? If so, can you start assembling that information? Are presentations, graphs or charts required? If so, how many?

### **Time: Investment or Expense?**

It might initially appear as though these meetings might involve a tremendous amount of time, but they don't when you meet on a regular basis because things don't have a chance to build up. In fact, it keeps everything flowing smoothly, reduces chances of missed details or tasks falling through the cracks, eliminates chaos and reduces last-minute crunches. Whether you view time spent as an investment or an expense can often be based on the filter with which you view time in general.

### **Benefits of one-on-one meetings**

- Reduces stress
- Diminishes last-minute chaos
- Opens lines of communication
- Decreases paperwork buildup
- Clarifies expectations for both parties

- Both parties understand the day's priorities
- Flags issues or situations that might arise
- Makes working together more enjoyable
- Provides the leader with status updates
- Helps the leader get organized for the day
- Right hand knows what the left hand is doing
- Assistant will more effectively complete work assignments

## Getting Started

Changing behaviors and habits that have been with us for a long time is never easy. You may notice that after you have tried to have daily huddles for a few days that you or your leader stop. The reason this usually occurs is because it is uncomfortable. Your leader may feel like it takes too much time or interrupts her eagerness to get started on her workday as soon as she arrives at the office.

I want to encourage you to stay with the process. Eventually, you and your leader will see the tremendous benefits of these meetings and will make them a part of your work routine. I have actually heard leaders say they miss these daily huddles with their administrative partner once they engage in the process and miss a day or few days. They realize these communication opportunities are critical.

Discuss this process and its benefits with your leader.

1. Teach your leader how to prepare for their meeting with you. Keep in mind that if you have a telephone huddle while they drive into the office or on their way to the airport, it is a bit different. You won't be passing hard copy information to each other.
2. Start with meeting one morning a week. You might start with Monday or Friday to discuss the upcoming week.

3. Gradually increase meetings to two days and then three days, and so on. Your goal is to have a daily huddle with each other whether in person or on the telephone. Of course, sometimes this is just not possible if your executive is in a location with a different time zone, especially going into an early meeting or conference. Then defer to the Star Essentials tip below. (I am certain you will text back and forth or leave voice mails for each other.)

4. Location for meeting: most often the administrative partner goes into the leader's office for the meeting. There are times when the leader may just stand at the administrative partner's desk for five minutes while they confer together. Where is never as important as that you do meet.

5. When you hold these meetings on a regular basis, they will not consume a great deal of time because you keep the communication about things/information moving between you. Meetings will take more time when you or your leader has been out of the office for several days.

(Caution: There are some instances where a leader will just not want to make this change.)

*NOTE: This information is from Joan Burge's flagship training program for administrative professionals and executive assistant, the Star Achievement Series®.*

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About the Author

Joan Burge is known as the red-lipstick-wearing "Rock Star" of administrative and executive assistant training and a successful entrepreneur who created a unique niche in 1990 by founding a training company that would uniquely provide sophisticated, robust educational programs and information to administrative professionals. Joan is an accomplished author (8 books), professional speaker, consultant and corporate trainer.

She is the creator of: Annual Conference for Administrative Excellence™; World Class Assistant™ Certification course; Star Achievement Series® Certification and Designation course; 30+ customized workshops, 200+ educational videos, 150+ articles and nearly 1,000 blog posts for executive and administrative assistants.

Her company, Office Dynamics International, is a global industry leader which offers a broad range of solutions and provides high-performance, sophisticated executive and administrative assistant training and coaching.