

Exercise 1: Clarifying Expectations Of Tasks

While you may think your administrative partner clearly knows what tasks you expect performed by him or her, don't assume this to be true. An excellent, experienced administrative professional usually does know what the role requires. Yet, every leader seems to have particular needs and different values.

When you clearly communicate these expectations, your work partner can at least try to meet those expectations. If your administrative partner should fall short, it may be due to lack of training in that particular area.

Exercise Objectives:

1. Open the lines of communication between the leader and administrative partner.
2. Communicate to the leader the tasks that the administrative professional performs. The leader may not have thought of asking the assistant to take on these tasks.
3. Bridge any differences between the work the leader expects to be performed and what the administrative professional does or is willing to perform.
4. Discuss any discrepancies, and prepare an action plan.

Directions:

1. The leader reviews each responsibility on the list, and under the Leader column, checks each one that he or she believes the administrative professional should complete.
2. The administrative professional reviews each task/responsibility and, under the Administrative Professional column, checks the one he or she thinks should be performed by the administrative professional.
3. The leader and administrative professional schedule a time to meet and review each line item.
4. Complete the "Team Agreement" on page 31.

Task / Responsibility	Leader	Administrative Professional
Organize and coordinate multiple projects.	<input type="radio"/>	<input type="radio"/>
Coordinate accomplishment of leader's priority tasks.	<input type="radio"/>	<input type="radio"/>
Recommend improved systems and procedures for daily operations.	<input type="radio"/>	<input type="radio"/>
Represent leader in business meetings.	<input type="radio"/>	<input type="radio"/>
Delegate and explain tasks to other support staff.	<input type="radio"/>	<input type="radio"/>
Manage leader's calendar.	<input type="radio"/>	<input type="radio"/>
Coordinate on-site meetings.	<input type="radio"/>	<input type="radio"/>
Coordinate off-site meetings.	<input type="radio"/>	<input type="radio"/>
Streamline office procedures.	<input type="radio"/>	<input type="radio"/>

Task / Responsibility	Leader	Administrative Professional
Monitor and manage leader's e-mails.	<input type="radio"/>	<input type="radio"/>
Draft and edit correspondence on leader's behalf.	<input type="radio"/>	<input type="radio"/>
Gather background information and materials for leader's meetings.	<input type="radio"/>	<input type="radio"/>
Act as a liaison for leaders or key people.	<input type="radio"/>	<input type="radio"/>
Resolve conflicts in the office.	<input type="radio"/>	<input type="radio"/>
Create presentations.	<input type="radio"/>	<input type="radio"/>
Advise leader concerning ethical factors.	<input type="radio"/>	<input type="radio"/>
Counsel administrative staff about performance.	<input type="radio"/>	<input type="radio"/>
Write courtesy notes and cards on behalf of leader.	<input type="radio"/>	<input type="radio"/>
Make calls on behalf of leader.	<input type="radio"/>	<input type="radio"/>
Prepare travel itineraries, travel contact list, travel meeting materials, process visa applications and arrange travel immunization appointment.	<input type="radio"/>	<input type="radio"/>
Communicate as necessary with leader's spouse, providing softcopy of travel itinerary, etc.	<input type="radio"/>	<input type="radio"/>
Help visitors with travel and on-site arrangements for their visit.	<input type="radio"/>	<input type="radio"/>
Help ensure that executive is compliant for required training for business conduct, safe driver training, data privacy and anti-harassment, etc.	<input type="radio"/>	<input type="radio"/>
Process travel and/or expense reports.	<input type="radio"/>	<input type="radio"/>
Track and process periodical and subscription renewals, association and membership renewals.	<input type="radio"/>	<input type="radio"/>
Find training opportunities that fit executive's schedule for maintaining professional license requirements.	<input type="radio"/>	<input type="radio"/>
Obtain backups of executive's tech, such as chargers, cords and peripheral accessories.	<input type="radio"/>	<input type="radio"/>
Operate and troubleshoot office equipment.	<input type="radio"/>	<input type="radio"/>
Manage social networking for the leader, organization or company.	<input type="radio"/>	<input type="radio"/>
Track completion of follow-up tasks.	<input type="radio"/>	<input type="radio"/>
Manage budget, bills and invoices.	<input type="radio"/>	<input type="radio"/>
Discuss problems and solutions with leader.	<input type="radio"/>	<input type="radio"/>
Analyze trends in office technology.	<input type="radio"/>	<input type="radio"/>
Assist with organizational outsourcing.	<input type="radio"/>	<input type="radio"/>
Compile and distribution of reports.	<input type="radio"/>	<input type="radio"/>
Develop spreadsheets.	<input type="radio"/>	<input type="radio"/>
Preview, select and contract offsite venues for meetings.	<input type="radio"/>	<input type="radio"/>