

Webinar: October 8, 2015
Managing Your Executive's Day
Joan Burge's Talking Points (unedited)

BOSS'S DAY is October 16: What better gift to give your boss than that managing their day! While I am sure many of you are doing a good job, I know there are some tips I am going to share with you that will take you to the next level.

Managing your executive's day can be difficult. Do you find yourself running in circles around an executive who thinks outside the box? Or flies by the seat of her pants? It's difficult to get work done while figuring out leaders. What are the best practices that executives want and need done?

SURVEY RESULTS: 700 respondents

Question asked: What is your biggest struggle in partnering with your executive?

#1 struggle: Under Communication—all aspects ranging from

- Lack of communication due to execs busy schedule
- Talking about calendar and upcoming meetings
- Getting information far enough out
- No daily huddles
- Executive doesn't share information
- Executive manages own email so assistant is out of the loop

#2 struggle: Not getting time with executive to discuss things

#3 Their Calendar:

- Executive runs from meeting to meeting
- Doesn't let "me" control his/her calendar

First of all, there is a bigger problem – bottom line is:

1. Your executives don't see you as their partner --- or they would make time for you.
2. Your executives aren't seeing you as the answer to increasing their productivity by 20% or more.
3. Your executives don't realize that by NOT making time for you and letting you be the funnel through which everything flows....they are hurting THEMSELVES and YOUR ABILITY to be the best assistant possible.

Center of Influence (Visual from *Executives and Assistants Working in Partnership: The Definitive Guide* by Joan Burge with Chrissy Scivicque.

- The stream of information that your executive is exposed to should flow to you and then you MANAGE it—delegate it, take action on it, place it in follow up, make a phone call.

1st: 6 Overall strategies for managing your executive's day:

1. Be a cognitive being. Engage all your senses as you go through your day.
2. Use a holistic approach. Not only with a specific task like "appointment scheduling," but have a big picture view of everything. You need to step above all that you see and know and make connections.
3. Be flexible and adaptable.
4. Stop running in circles. When you feel like you have spent more of your day running in circles or putting out fires (which inevitable happens), stop. Catch your breath. Re-assess you priorities and tasks for the rest of the day. Then move forward.
5. Don't be wishy-washy. A good executive depends on their assistant to "manage" their day. That is what they want their assistant to do. The executive has enough on their mind and they don't need to be bothered with the nitty gritty.
6. Remain calm to help ensure your executive's day runs smoothly. Jasmine possesses this great trait!

Now, let's drill down to specifics. The best practices I'm sharing with you are from a new operating manual for executives and assistants –new release..... ***Executives and Assistants Working in Partnership: The Definitive Guide*** by Joan Burge with Chrissy Scivicque (at OfficeDynamics.com)

#1: COMMUNICATE, COMMUNICATE, and COMMUNICATE

In order to "manage" your executive's day, you need to be up to date on priorities, projects, events, -- basically everything that is happening in your executive's world. Many of our survey respondents said they aren't sure of their execs priorities or projects on the horizon.

This is where it starts. This requires daily conversations with your executive, either on the phone or in person.

Daily Huddles

We all love technology, but what about Human Moments? How can these opportunities build rapport, relationships and the people side of success? It's important to know how and why we should create a window of communication with your leader. What time schedule does your leader work on and how does that affect your tomorrow?

#2: PRIORITIZE

Every day, focus on the top 3 – 5 priorities. But you have to understand what those are and that takes having conversations with your executive—whether on the phone or person. If you are going to manage their day, you have to know what is inside their head.

#3: MASTERING YOUR EXECUTIVE'S CALENDAR—THE HOLISTIC APPROACH

We recommend that the Assistant approach Calendar Management with a holistic perspective. This means she understands the big picture regarding priorities. She isn't simply looking at today; she is always thinking two steps ahead and understands how each piece of the puzzle impacts the others.

Of course, an assistants needs input from her executive!!! You've got to initiate those conversations. And also look 3 – 6 months out.

#4: PROTECT YOUR EXECUTIVE'S TIME; BE A GREAT GATEKEEPER

An essential part of the Assistant's role is to protect the Executive's time, minimizing distractions and unnecessary interruptions. Of course, there are *necessary* interruptions and spur-of-the moment meetings that must also be effectively handled and accommodated.

Many executives have open-door policies but when is it too much to where the executive does not get their work done or have time to prepare for an important meeting.

It is up to you to elicit information from a visitor or caller.....

A good rule of thumb is to maintain a position of information gatherer rather than information divulger.

#5: SAVE YOUR EXECUTIVE FROM HERSELF

Many times, executives are their own worst enemy. They tell you not to add anything to their calendar, and then they fill up their calendar with spur-of-the-moment meetings.

- Your executive tells you to make sure he ends his meeting on time because he has to be somewhere after and then he ignores your signals that it's time to end his meeting.
- You executives tells you don't book any travel the last 2 weeks of October and then she agrees to speak at a big event the last week of October.

What is an assistant to do? After all, you have been told by your executive “manage” my life. Then when you try to keep all nice and organized, they mess it all up!

What is the solution?

First of all, accept that will probably not change *completely* but it certainly can get better. In many cases, the executive is willing to change or try new things—especially the process part. And yet there are some concessions the assistant has to make.

Some solutions are:

1. Make sure you leave some wiggle room on their calendar for last-minute appointments or for your executive to work on a project, emails or phone calls.
2. When you are in your Daily Huddles, remind your executive that they told you they don't want to travel during “X” time (and keep reminding them).
3. Throughout the week, get clarification on your executive's expectations.
4. Maybe you need to have a heart-to-heart conversation with your executive as to your desire to manage their day and you need their cooperation.
5. Know when to flex to your executive's preferences and when to stick to your guns.

JASMINE IS VERY GOOD AT REMINDING ME WHAT I SAID.

#6: WOW YOUR EXECUTIVE

An executive wants to be informed! They don't like surprises in terms of not knowing “so and so” was showing up for a meeting; or they didn't get sufficient background information on a new client they are meeting;

- Think 4 - 5 steps ahead.
- Be over-the-edge organized in every way. (You manage your executive's day when you are organized.)
- Monitor projects from beginning to end.
- Keep accurate records and files so you can quickly access information your executive needs.
- Utilize the electronic reminders on your smartphone, online calendars, etc.
- Know what kind of information is important to your executive in various situations.
- Go the extra mile to provide new or important information:
 - Google New
 - Google Alerts
 - Google Clients (look for changes such as downsizing, mergers, or acquisitions as those can affect your company's business)
- Send links to articles that may be of interest to your executive.

#7: MEETINGS, MEETINGS AND MORE MEETINGS...

1. Keeping your executive on track and on time
2. Ensure they have everything they need for their meeting
3. Can you reduce the number of meetings they attend ---- giving them space on their calendar?
4. Determine a clear "wrap up" signal for meetings that are in process. Executives, acknowledge the signal, even if you can't immediately act on it. Assistants understand that it's not always possible or beneficial to cut a meeting off at the exact "right" point for the schedule. Get instruction regarding your next steps when this is the case.

#8: JUGGLING TASKS Do you believe multi-tasking makes you more efficient? Our brains cannot process two things at once using two sections of our brain. However, we can juggle many items concurrently. We have immediate focus and peripheral vision. Juggle tasks through diversity of tasks. Top priority is to maintain your focus.

#9: INVOLVE YOUR EXECUTIVE

For you to better manage their day, your executive has to participate in the partnership!!! Your executive needs to keep you informed on everything from what's on the horizon to the change that is taking place in one hour.

Problem is executives think you **are mind readers**; executives are independent and tech savvy; they don't understand your role;

- "Teach" your executive how to utilize you and your talents. Be patient as this will take time.
- Let them know that you can handle a particular project, task or report for them if they will just show you how to do it. What is the long-term time savings to the executive? What else can he or she spend their time on that is more important to the company mission?

SUPER SECRET: INSERT YOURSELF INTO THE PROCESS—Be assertive.