

WEBINAR

Building A Star Partnership

with

Joan Burge

Founder and CEO, Office Dynamics International





In just a little more than two decades, Joan Burge built her company from a little desk in her living room to an international brand. Based on 20 years of experience as an administrative professional and more than 26 years as a trainer, author and coach to executive assistants and their executives, Joan is sharing with you her wisdom and principles. We hope you enjoy this webinar!

6 Ways to Get the Most from Office Dynamics Webinars

1

Print this handout prior to the webinar start time and keep it in front of you throughout your webinar. Filling it out will help you stay focused and engaged.

2

During the session, write any additional questions you may have that are not covered in the webinar. There will be a Q&A session at the end of the webinar.

3

At the end of the session, highlight the top 3 – 5 learning points that you want to focus on right away.

4

Watch the replay of this webinar for reinforcement. There may have been ideas mentioned that you didn't hear due to work disruptions or watching the chat.

5

If appropriate, discuss ideas with your manager.

6

Keep this handout nearby so you can refer to it often. In fact, you might want to create a binder with webinar notes or handouts as a reference book.

Survey Results:

1,474 completed the survey

How many managers do you support?

1: 21%

2: 23%

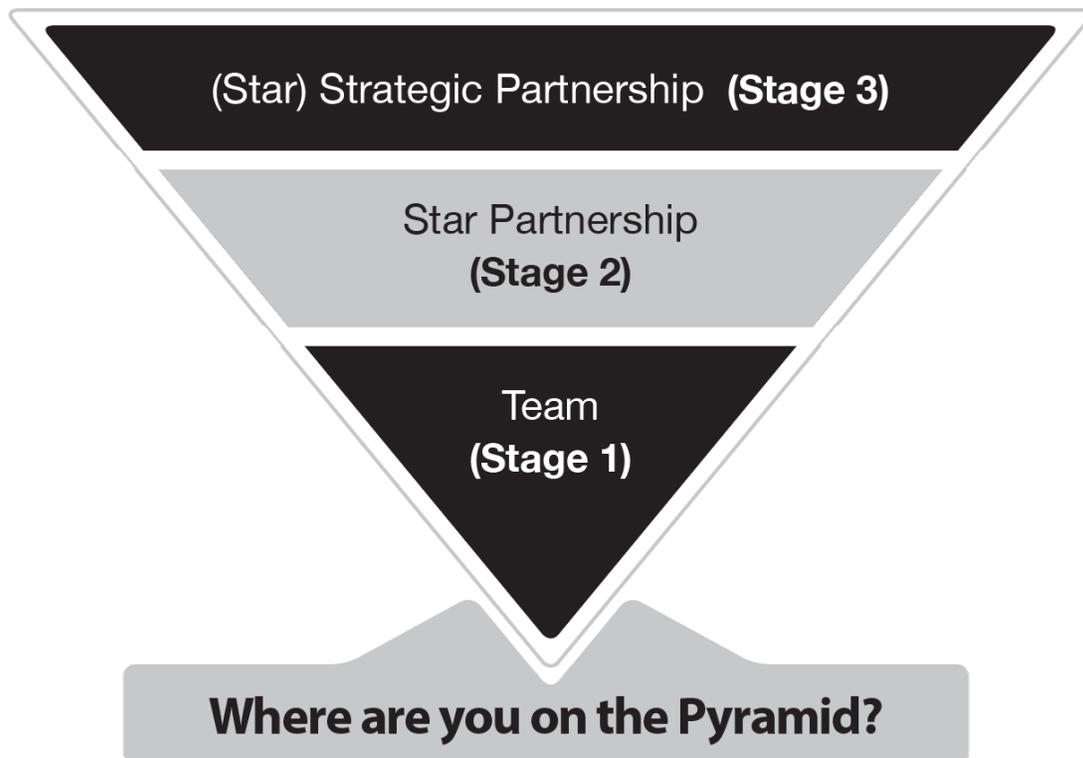
3-5: 41%

5-10: 12%

More than 10: 4%

How would you describe your primary partnership?

- We need a lot of help becoming a team. (9%)
- We have an okay relationship but we have a lot of work to do. (60%)
- We have an awesome strategic partnership in place. (32%)



The Foundation For A Successful Partnership

Perceptions have to do with roles, team relationships and the quality of work performed.

Expectations are tied to tasks. What tasks do you believe you should perform? What tasks does your leader believe you should perform? When expectations are not clearly stated or understood by work partners, job frustration, anger and resentment, and lack of motivation will result.

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 principal support can have differing 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.

Star-achieving administrative professionals and their leaders 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 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 tasks to be done are being done.
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.
2. Schedule a time to meet with your administrative partner to review your ratings and discuss any discrepancies. Use the Improvement Agreement on page 19 to guide you through the process.

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%

Task / Responsibility	N/A	20%	40%	60%	80%	100%
Demonstrates mindfulness and being “present”.	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 difficult 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%
High 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 mastery of 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%
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%

Task / Responsibility	N/A	20%	40%	60%	80%	100%
Takes a strategic approach to own personal development.	N/A	20%	40%	60%	80%	100%
Acts in a highly professional manner.	N/A	20%	40%	60%	80%	100%
Discusses priorities and problems with leader.	N/A	20%	40%	60%	80%	100%

The below spaces are provided for your own job-specific responsibilities.

	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%

Executive Speak

- Use straight forward communication. (Don't beat around the bush.)
- Be precise and concise. Busy executives do not have much available time.
- Communicate big picture, abstract ideas.
- Mirror words and phrases they use, such as:
 - √ Analyzed
 - √ Flawless execution
 - √ Strategic...
 - √ Holistic
 - √ Alignment
 - √ "Get in the game"
 - √ engaged in the business
 - √ Synthesis
 - √ getting into abstracts
 - √ Forecasting
 - √ Near-zero tolerance
 - √ Trite ideas
- Speak with intelligence, thought and clarity.
- Use a confident tone.
- Be prepared (organize and prepare what you are going to say).

Steps to Providing Upward Feedback

1. Be calm and d_____.
2. Schedule an a_____ time to meet with your leader.
3. Be c_____: prepare your notes before walking into the meeting.
4. State the d_____ effect.
5. Develop solutions or r_____.
6. Remain c_____.
7. Watch your body language and f_____ expression.
8. Listen to your leader's v_____.
9. Focus on the i_____.
10. Be c_____.
11. A_____ the outcome.
12. T_____ your leader for taking time to meet with you.

Strategies to Supporting Multiple Managers

1. Encourage managers to use uniform procedures. It really helps keep things simpler when everyone uses similar procedures.
2. Limit personal tasks for managers. Lean to say “no.”
3. Treat each manager fairly and with respect, despite your personal preference. You may not like everyone you support, but you do need to treat each person equally.
4. Understand each leader’s unique work style. While you may encourage uniform procedures, do pay attention to the work style that best suits each manager.
5. Establish a priority list for all your principal supports to see; update it frequently. Either post this in a common area or distribute it weekly. This allows all the leaders you support to be aware of what and how many project you are involved in, and it helps them understand why their work isn’t turned around in one day.
6. Communicate regularly with all your managers. Be sure to inform them of any delays.
7. Except for time-critical projects, do the senior manager’s work first.
8. If your managers are on the same level, complete the task with the earliest due date first.
9. Find out what projects are coming your way so you can plan accordingly.
10. Ask your managers to give you project materials as sections are ready. This will help avoid any last-minute rush.

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Monday Motivators™

This weekly e-note offers practical ways to create a new mindset, change behaviors, develop positive relationships and thrive in the workplace with energy, effectiveness and excellence. [OfficeDynamics.com/monday-motivators/](https://officedynamics.com/monday-motivators/)

Blog

More than 1,000 blogs covering 30 categories will guide you through your administrative career. [OfficeDynamics.com/blog/](https://officedynamics.com/blog/)

Articles

Learn everything from becoming a strategic partner with management to managing your career, powering up your attitude, dealing with office dragons and much more.

- Office Dynamics web site [OfficeDynamics.com/articles/](https://officedynamics.com/articles/)
- LinkedIn (Linkedin.com/in/JoanBurge)
- *Turbocharge Your Career* [OfficeDynamics.com/assistants/](https://officedynamics.com/assistants/)

Educational Videos

- Office Dynamics web site: Access more than 60 free educational videos for administrative professionals. [OfficeDynamics.com/educational-videos/](https://officedynamics.com/educational-videos/)
- You Tube Channel: Watch more than 150 educational videos by Joan Burge. YouTube.com/OfficeDynamicsIntl
- 4 Free Conference On Demand Videos. [OfficeDynamicsConference.com/free-conference-on-demand-videos/](https://officedynamicsconference.com/free-conference-on-demand-videos/)

Monthly Webinars

Office Dynamics webinars provide convenient, cost-effective professional development for the modern administrative professional. Relax in the comfort of your home or office while learning directly from Joan Burge, founder and CEO of Office Dynamics. Our webinars address the most pressing issues facing administrative assistants and their executives, resulting in enhanced workplace performance and true administrative excellence." [OfficeDynamics.com/webinars/](https://officedynamics.com/webinars/)

Facebook Live

This is a great place to learn. You can catch Joan Burge live and dialogue with her on the spot or watch the replay. Jasmine Freeman regularly appears with Joan to provide her perspective.

Also check out Office Dynamics books, online learning, *e-guides*, *Annual Conference for Administrative Excellence*, conference on demand, and *World Class Assistant Certification/Designation* course. [OfficeDynamics.com](https://officedynamics.com)