

# Own Your Admin's Success and Realize the Rewards



Behind every successful executive is an organizational genius—a great admin assistant. If admins are positioned to win, you and your business will be positioned to win.

A great admin can help build better systems, improve staff retention, and much more. They can also help leaders build bandwidth and stay focused on what truly matters.

Because admins are the heart and soul of any well-functioning organization, these are relationships worth investing in.

First, find the right talent. Next, put the conditions in place for this talent to excel. Any time, energy, and attention invested will yield phenomenal returns.

## What Admins Need to Be Successful Over Time



**Build Trust:** Done right, a strong, trusting collaboration with your admin can transform how you experience work and potentially life. It is an investment you won't regret..



**Share Your Logic:** Let your admin in on how you are thinking about key decisions. They can help filter access and make sure you hear from the right stakeholders at the right time.



**Mutual Respect:** Admins can make or break your business. When executives understand, nurture, and develop these relationships, there is a ripple effect. How you treat your admin, sets the standards for how others will treat your admin. Both leaders and the organization as a whole, including clients, stand to gain when mutual respect is a foundation.



**Training Opportunities:** Admins are often the first people in an organization to witness breakdowns in systems (i.e., what is no longer working or no longer working efficiently). As a result, they can play a vital role in identifying training opportunities. Listen to their advice. But don't stop there. Also, ask them where they see opportunities to streamline their work (and your work) by adopting new technologies, platforms, and systems.



**Decision-making Opportunities:** Give your admin the autonomy needed to make decisions. If your admin is free to make smaller decisions, you'll have more bandwidth to make big decisions. For example, if they know what you enjoy eating most for lunch, let them take care of your ordering and skip the time and lines to focus on what matters.



**Development Opportunities:** Admins need to have opportunities to grow on the job over time and may crave opportunities to expand the scope of their role/contribution to the organization; check in with them regularly to find out what they need to thrive.

# Ensure Your Admin Is Set Up for Success

Once you've set your admin up for success and set a tone of respect across the organization, start to drill down on the day-to-day details.

## COMMUNICATION

### 1 Clarify and prioritize alignment

- Check in to ensure understanding
- Track successes to streamline future collaborations
- Remember that alignment is ongoing—align on a regular basis

### 2 Decision making

- Specify what decisions can be made by the admin alone and when decisions should be calibrated
- Assess your level of comfort with autonomy

### 3 Decide how to communicate

- Indicate if you prefer emails, calls, texts, or prefer different modes of communication depending on the context
- Indicate your preferred mode of communication with your admin, employees, clients etc.?
- Specify how often you prefer to communicate with your admin (e.g., do you prefer to receive messages as they arrive or in bundles just a few times each day?)
- Use Captured to help facilitate communications
- Ask your admin to let you know when a specific task has been completed so you can cross it off your own list
- Default to overcommunicating with new admins (as you get to know each other, you'll likely need to communicate much less—the best admins can intuit what you need and when)

## FOUNDATIONS

### 1 Clear expectations:

- Always be clear about what by when
- Clearly state criteria for success
- Focus on outcomes
- Be available for questions (especially early on) to increase understanding and foster alignment
- More is less, as it reduces disconnect and confusion

### 2 Schedule preferences

- Indicate when you can handle calls (e.g., not before 9 or after 4)
- Be clear about scheduling and leave gaps between calls (i.e., 25 (30) mins or 50 (60) min)
- Indicate whether you'll call or client will call you
- If you prefer to use conference number, make this clear to your admin

### 3 Computer information sharing

- Determine what level of computer access is needed;
- Set clear expectations for engagement;
- Ensure your admin has all vital login information for your computer and specific programs.

## ACCESS TO INFORMATION (WORK)

### 1 Bank account info

- Needed for reconciling invoicing, handling returns, managing payments etc.

### 2 Shared folder system

- Google Drive
- Dropbox
- Slack and other work platforms etc.

### 3 Online Accounts

- Access to organization website, social media accounts (e.g., Twitter, Facebook etc.) and external publishing platforms (e.g., Forbes etc.)
- Access to email accounts, calendar etc.

### 4 Calendaring systems

- Determine how will you calendar meetings and events
- Be clear about what scheduling decisions your admin is free to make on their own without your input

## ACCESS TO INFORMATION (LIFE)

*\*This is optional (not every admin will also be supporting you and your family on a personal level) but if they are, here are a few things to which they should have access.*

### 1 Information sharing

- All personal info (birthdays, personal and family members' SSNs, trusted traveler numbers, emergency numbers, addresses, etc)
- Credit card numbers
- Passwords to all accounts (e.g., shopping and email accounts etc.)
  - *LastPass allows you to share your logins*

### 2 Travel preferences and FF info

- Seat preferences (e.g., aisle and seat)
- Flight time preferences
- Hotel chain preference and membership numbers

### 3 Preferences in general

- Admin should know what foods, colors, places, and restaurants you love (remember this can also help them more easily set up meetings etc.)

### 4 Names and numbers

- Doctors, dentists, physical therapists, pharmacy etc.
- Hair stylists, nail salon, massage therapist etc.