

3rd edition

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THE DEFINITIVE PERSONAL ASSISTANT & SECRETARIAL HANDBOOK

A best practice guide for all
secretaries, PAs, office managers
and executive assistants

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assistant and secretarial trainer*



A chapter to share with your boss

This chapter is designed to help bosses and assistants have the most rewarding, satisfying and successful relationships possible.

Very few bosses receive insightful coaching or training specifically on how to work with their assistant and I am frequently asked for advice such as:

- I wonder if you could let me know what makes a good assistant.
- I believe my expectations of my assistant are too low and wonder if you have any hints. Perhaps I am not managing him/her effectively.
- I have not had an assistant before and am not sure how to use one.
Can you give me some advice, please?

As a leader and a boss you have a responsibility to understand and be aware of how the brain works – as leadership is about understanding people and how best to manage them. Therefore, you may want to read the rest of this book and not just this chapter. Then you will be able to lead with your brain ‘switched on’ to neuroscience wisdom and not only with your assistant but with all colleagues.

The most useful advice to bosses and assistants is to communicate constantly with each other so that they understand what each expects of the other and understand each other’s boundaries and rules. Communication, understanding, respect for each other, trust and empathy are the only way to build a mutually beneficial and successful boss–assistant relationship.

However, many bosses and assistants find it difficult to get the communication started, especially if there is an issue to be cleared up. This chapter

can be used as a tool to open up communications between you and to point you in the right direction to make an effective working relationship.

Communication



If you don't know the rules you won't succeed. The rules come from both the boss and their assistant.

The following are top tips given by bosses to help make the relationship work, taken from their own experience:

- To make the relationship work, the manager needs to be open with the assistant. It cannot work if the boss has secret appointments, secret projects and so on. The assistant also needs to know where the boss is at all times, to know whom he or she is dealing with and what his or her relationship is with them so that, for example, the assistant can make an informed decision as to whether or not to get the boss out of a meeting for a telephone call that the caller says is extremely important.
- Bosses should view it as a partnership working together – a ‘business couple’ that involves respect and understanding each other as well as having one voice in the company.
- The boss–assistant relationship should be like a good marriage. There should be mutual respect, trust and understanding, a sense of loyalty and a good sense of humour.
- Communicate – tell the assistant what you are doing, where you are going, which are the key clients or projects at the moment and so on.
- Tell the assistant your preferred writing style, whether you prefer to receive minutes verbatim or simple action points, or something in between. Tell them if you prefer to receive reports as a one-page summary with bullet points and a pie chart or a four-page wordy document, etc.
- Understand the assistant's preferred work pattern and use that to your advantage, for example whether their most productive times of working are in the morning or the afternoon, making sure that work is received in enough time to finish on time.

- Spend time getting to know and understand your assistant as a person and be aware of their non-work commitments so that you can give flexibility when required, which will be rewarded in the long term.
- Let your assistant know about your home diary so that your personal appointments can be factored into your work diary, thus allowing you to leave on time.
- Remember that your assistant will have to have worked with you for a long time to get a deep understanding of your priorities and pressures – so be prepared to really explain your motives, pressures and concerns so that he or she can help you to get the best solutions.
- Let your assistant decide how best to do the things that he or she is skilled at – use your judgement as to how much instruction your assistant needs. Too little could end up as a time-wasting exercise when they don't produce what you want in the way you want it. Also, if you over-instruct, you could kill your assistant's initiative and never get to see his or her potential.
- When trying to get out of tricky situations with clients, never lay the blame on assistants for something you know they did not do, as you will lose their respect, which could cause an effective working relationship to fail.
- Solicit and be open to constructive feedback from assistants on how they think the relationship is working and if there is anything they can suggest to help make the relationship even better.
- Continually and regularly communicate, whether formally, informally, daily, twice daily, weekly, by phone, meetings, by text or Skype – keep in touch with each other with the plethora of different media and stay updated with everything that is happening.
- It may take a lot of courage on the assistant's part to approach the boss and say what he or she thinks or feels, so the least the boss can do is to encourage the assistant to communicate.
- The boss should actively listen, empathize and give serious consideration to what is being said – it's about respecting each other.
- Set aside half an hour each week to sit down and explain not just what you are doing the following week, but also what you are aiming to achieve and why.

- Remember that assistants are not paid nearly as much as their boss, so be appreciative of how hard they work and be reasonable with your demands.
- Encourage self-development and training needs, support and encourage requests for continuous development in both financial and time terms – it pays off in the end.
- Praise as often as you like – this will trigger the reward response of the brain as well as several other areas, and dopamine will be released making them feel good and appreciated. Dopamine is heavily involved in reinforcing behaviours as it helps them to remember how good they felt and it also has positive effects on the prefrontal cortex, helping them to think clearer, more creatively and increase their problem-solving and memory capabilities.
- Similarly, if an assistant has consistently been working overtime to reach a specific deadline then offer them some time off in lieu. This is another form of appreciation and it will release oxytocin, which counteracts stress and creates trust, generosity and empathy. This motivates us to act in other people's interests, which is of course the crux of the job of an assistant. Oxytocin is also known as the 'bonding' hormone.
- You should consider your assistant as an important part of your team and value their opinion as much as you do other members of your team, if not more so.
- Explain the vision and mission of the organization so that your assistant can see how their role feeds into that overall vision.

What bosses should know to work effectively with their assistants

Empowerment

'Never be limited by your job description. On many occasions throughout my career I have been fortunate to work on some extremely satisfying and interesting projects simply because I initiated an action when I saw a need, had the skill or accepted responsibility for something. As a result I have travelled, met some wonderful people, been responsible for some really interesting projects and have certainly

not been limited to the traditional concept of an assistant. This has also resulted in several promotions and been very rewarding financially.'

Liz O'Farrell

Empower your assistant by delegating project work that can relieve your schedule to do other things.

Remember, empowering someone is about the three Ps:

- *Permission* to do the work, although the request can come from a proactive assistant.
- *Power* to make decisions (so you need to 'let go' to an extent).
- *Protecting* them if things go wrong or they need your support, as the overall accountability still lies with the boss.

If ongoing communication and updates do not happen or permission, power or protection is missing, empowerment cannot occur.

Empowerment allows learning and development; it makes the job more interesting, satisfying and motivating as well as raising self-esteem and morale, and therefore fostering a happier relationship and excellent work output.

Bosses should think about what would help to relieve them of pressure and at the same time broaden the experience and skill set of the assistant. Fortunately, most bosses want to give their assistants power, authority, decision-making capabilities and control over areas of their jobs but are not always confident that their assistant wants this and may not ask. Therefore, assistants need to articulate what they want, ask for it, demand it and grow with it!

If you have the attitude that you are willing to accept empowerment then you will be given it. This will encourage you not only to continually develop by doing new and different tasks, but also to be given the permission to formulate your own ideas and follow them through.

A useful project that an assistant might be empowered to do is developing a workshop and teaching new managers how they should interact with their assistants, explaining what is expected of them and what they should expect of their assistants. This would enable you to influence managers who have never had an assistant before on the best way to develop an efficient and effective working relationship, thereby also helping your fellow assistants.

So all bosses and assistants should think about what projects the assistants could be empowered to do – they may be work related, charity related or business development-type work such as looking after the alumni of the organization.

When taking on a project you should:

- Follow through to a project's end, demonstrating tenacity and persistence in completing the project.
- Give attention to detail. Detail is hugely important, especially if you are organizing an event of any kind.
- Take responsibility for the quality of the finished product.

The law of expectations: communicate your expectations clearly

As the boss, it is important to communicate your expectations to your assistant clearly. When communicating expectations, you should be as specific as possible since ambiguity may cause misunderstanding, mistakes and failure.

Your expectations of people and their expectations of themselves are the key factors in how well people perform at work:

- Bosses have expectations of the assistants who work for them and communicate these expectations consciously and subconsciously.
- Assistants consciously and subconsciously pick up on their bosses' expectations.
- Assistants perform in ways that are consistent with the expectations of the boss. When the boss has high expectations it helps individuals to improve their self-confidence and therefore their self-esteem: people believe that they can succeed and their performance rises to the level of their own and their boss's expectations.
- 'Self-fulfilling prophecy' means that an individual's opinions about their ability and their own expectations about their performance largely determine their performance. People who think they can do something well will probably succeed if they have faith in themselves and are willing to work hard for it. Consequently, any actions the boss can take that increase the employee's feelings of positive self-worth will improve the employee's performance.

How to motivate your assistant

To understand how to motivate you need to understand how the mind works optimally.

Human beings are first and foremost social beings. We need to connect and speak to others, share knowledge and get to know people and network. If your assistant is away from their desk in short bursts realize that they are getting their social boost or 'brain break' (see Chapter 6). As long as you have articulated clearly your expectations, they will know exactly when they need to be sat at their desk and when they can stretch their legs. Remember they are your eyes and ears, so 'walking the floor' could be useful to you too. Especially when you request in the next 15 minutes a meeting room, with refreshments, audiovisual equipment, flip charts and stationery as you have important clients on the way into the office – if your assistant has efficiently networked and built relationships with the people in facilities, catering and IT then your request will be done with a smile, no problems and in time.

The brain needs to have five minute breaks every so often, as the pre-frontal cortex will get exhausted after a short time due to it needing 20 per cent of the body's glucose – when that runs out the brain becomes exhausted but can revive very quickly. Your assistant will work in bursts of maximum 25 minutes at a time with full focus on something that needs their full attention and should not be disturbed during this time if possible. They require clear expectations from you and also variety of work, especially if some of the work is challenging.

Remember that the best person to lessen the burden of your load is your assistant. In not communicating, you make your assistant feel disrespected, forgotten, and out of the total picture. Help them to help you. Tell them what you need and want:

- When a boss ignores, blames or accuses an assistant they will immediately have an amygdala hijack, meaning that their threat response will come into play and they will either want to run and hide, stand there and say and do nothing, argue back or go and find someone to talk to about it. This threat response produces cortisol and adrenaline, both of which can be harmful in continued doses. They have a direct effect on efficiency, productivity and memory that will in turn affect your productivity.
- Show that you value your assistant by actively listening and asking appropriate questions. If you feel that your assistant is indispensable, make it known. Learn each other's strengths and weaknesses. Figure out how each other 'ticks'. Pay attention to each other's style of thinking, learning and communicating.

- Have daily (or whatever works for you both) communication meetings, even if it is only for 15 minutes, so that you both can catch up with each other's activities. Confide in your assistant about things you are working on and let them know what your objectives are – it makes them feel involved and part of a true partnership.

Treat these meetings as you would a client meeting – stick to the time and date, make sure the door is shut so that no one pops in to see you in the middle of your communication meeting, and put the telephone through to someone else to take calls. This shows that you take the meetings seriously and you will be able to get through the tasks much more quickly. Besides, it is demotivating to be in your boss's office to have a catch-up meeting if the phone rings and you have to sit waiting for the call to finish, and thus feel that your precious time is being wasted.

- Don't lay blame where it does not belong unless you have permission. (One assistant observes that: 'In the past I have allowed my boss(es) to use me as a scapegoat when they had forgotten to do something, send something, phone someone; that's okay if I know about it and agree it – in fact in some cases it was my idea.') If you have made a mistake then accept responsibility, own up to it and apologize.
- Take five minutes in the morning to ask how your assistant is doing/feeling – and be genuinely interested. That will mean you will get to know them better and be able to understand if they are not on top form that day for whatever reason, or indeed are 'hyper' because of something exciting in their home life. It's about building relationships, getting to know each other, building trust and communicating.
- Encourage your assistant to join a network of like-minded colleagues and offer to pay the subscription and allow them to leave on time for their networking meetings. It is good for you and the organization for your assistant to network with counterparts from other companies, which could possibly develop business for you. These meetings are also a cost-effective way of providing training and self-development. Assistants will have the opportunity to practise, in a safe environment, skills that they may bring into the office once learnt, such as chairing meetings, giving presentations or managing events.

- Ask your assistant out to lunch sometimes for a ‘catch-up thank you’ lunch – away from the office environment. Talk about things that are not office-based in order to get to know one another – it works wonders for building your relationship and evoking a feeling in them of wanting to do all they can for you.
- Conduct appraisals every six months but give regular feedback in between time for the completion of projects, and talk about your goals and objectives so that your assistant can align his or her goals with you and the organization. Work on, and agree, some of your assistant’s goals together. If your assistant has organized an event really well, say so and congratulate him or her. Similarly, if something has not gone quite to plan, help people to learn from the mistake.
- Ask what motivates them, what career objectives they might have and what they are aiming to achieve.

You will be aware of how important it is in a relationship to show appreciation for the work carried out. This appreciation could be shown by a simple ‘thank you’ at the end of each day, taking the assistant to lunch or for a coffee and catch-up, and even nominating the assistant for an award, such as Assistant of the Year. When you feel appreciated it motivates you to work even harder and ‘go the extra mile’.

Assistants should exceed the expectations of their boss and customers/clients by being proactive, taking on projects, continually learning and developing. The very fact that an assistant is reading this book shows self-worth and willingness to improve to become a respected and esteemed assistant.

I asked Julie Daniels, a former regular judge for the *Times* PA of the Year competition: ‘What it is that the judges look for to decide who has a chance of winning a prestigious assistant award?’ She replied as follows:

Candidates entering the Assistant of the Year award should always make sure that they supply the right information. If a resume is requested, then it’s important that one is sent in. If a 500-word submission is asked for, then it’s a little frustrating to receive one of 1,000 words. These are the first indicators of whether the entrant has read the instructions properly and wants to get the application right; it’s also a sign of how that person will behave in a work situation.

The next thing I look for is the quality of the submission. Has the entrant written an interesting description of the job and given compelling reasons why he or she should win the award? How much value has the entrant given to his

or her organization? Candidates who have been involved in projects such as building websites, marketing campaigns, company charity functions or organizing events will attract the attention of the judges more than someone who describes the more mundane aspects of an assistant's role, such as keeping a diary or taking minutes at meetings. At the final stage of the competition, the judges will speak to the shortlisted candidates to find out how well they conduct themselves at interview, and see who has the extra spark that sets them apart from the rest.

The Assistant of the Year award is always a difficult call. There are many outstanding applications, so it is hard to single out one particular candidate over another. At the interview, the candidate's personality comes through and so adds the final ingredient to the mix.

The above quote is an insight into how to enter competitions and gain recognition for a job well done; make sure you build excellent working relationships and exceed the expectations of your colleagues, your customers and even your own expectations!

Focus on the development of your assistant

Encourage your assistant to continually self-develop and learn new and challenging skills. Perhaps they could add even more value to the project work you have empowered them with. A training budget should be set aside, with a yearly allowance to pay for attendance at conferences and exhibitions, in-house training, external training, one-to-one coaching. Maybe e-learning is already set up or could be set up, and if so, time for studying in work time should be allowed. I have created a 'Personal strengths assessment form' (Appendix 2, see the Introduction for download details). Encourage your assistant to complete this as well as Appendix 3, 'Personal development plan' (also downloadable), which includes a 'Strengths, Weaknesses, Opportunities and Threat' analysis that they can conduct on themselves.

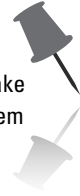
Let your assistant know where your weaknesses lie so they can make that their strength to complement you.

Read the tips below, which have come from assistants around the world when asked: 'What would you do differently or change if you were the boss for the day?' The following are answers for bosses to think about. Alternatively, they could be ideas that assistants could take to their bosses to help them understand what the assistants want and need in order to improve relationships, their careers and work ethics:

- 'Remember to greet your assistant on arrival in the office. Take a minute or two to ask how their evening or weekend went.'

Neuroscience tip

Even if it is not your 'style' to say hello or have a quick social chat, it can make such a huge difference to how you make a colleague feel. You can make them feel either like a valued member of the team or someone who is not worthy even to say hello to. Neuroscientist Matthew Lieberman states that our brains react to *social* pain and pleasure in the same way as they do to physical pain and pleasure. Ignoring your assistant could raise stress hormones and prevent the 'thinking' rational, problem-solving part of the brain from working, which in turn means you are not as well supported as you could be! You can read more on this topic in Chapter 2.



- 'If I was the boss for the day I would forbid myself to use the e-mail to communicate but pick up the phone and speak to people.'
- 'I would not give false deadlines as these often end up being the biggest time-wasters.'
- 'Bossses should praise the work that is done well and mention exactly what it was that impressed them.'
- 'Saying please now and again also helps – just being polite and having old-fashioned good manners with each other are appreciated by everyone.'
- 'I would change my diary and keep some "planning time" free to really see what is urgent and what is not, and work accordingly to move key things forward. I would also take appointments out of my diary that really don't add any value (time-wasters).'
- 'I would involve my assistant in planning the day (first, I would plan the day), and keep him/her informed about the cases we are working on.'
- 'I would have e-mail downtime – I would ensure that everyone turns off their e-mail for one hour in the morning and one in the afternoon.'
- 'The first thing I would do as boss for the day is initiate excellence programmes to ensure all employees are maximizing their potential and contribution (this might include job rotation, for example). The second thing would be performance measures for everyone, with a direct influence on their income.'
- 'Make the very most of my assistant at all times.'
- 'Ensure staff morale is kept at maximum by rewarding with either a good word/e-mail or a lunch out.'

- ‘Ask the staff what their workload is like before insisting they do more work. Explain things in plain English, and confirm that the person understands what the requirements are.’
- ‘Make appointments to speak to colleagues, rather than just have an open office door. Otherwise, when you are in the office people are constantly wanting to speak to you, and you are being distracted from work.’
- ‘I would give my assistant access to my e-mails and encourage them to read my “sent” e-mails to ensure transparency.’
- ‘I would give feedback on a regular basis and not just at six-monthly appraisal time. Both to give praise with a job well done and also to inform what could be done differently to make it even better next time. I would also ask for feedback from my assistant on how well he/she thinks we are working together and is there anything I could do to help them. This would help create a solid trusting relationship.’
- ‘I would swap roles for half a day to increase understanding and empathy.’
- ‘I would encourage my staff to take their full annual leave allowance each year and advise that they should not feel guilty about it, given that we work for a company that promotes flexible working practices and a good work–life balance.’
- ‘Communicate openly. Inform employees of both successes and failures. Clearly state targets/budgets and provide facts and figures, so the employees know if they and their department are on the right track.’
- ‘Provide enough staff so that excessive workloads and stress do not make employees ill.’
- ‘Encourage and provide opportunities for your assistant to grow in their role. For example, invite them to participate in some of your meetings whether internal or external – possibly to take minutes, or perhaps to get their contribution. If your assistant attends management meetings with you and gets to understand the business better, how it is run and why, he or she will be able to be more proactive and will become an even more valuable asset for you.’
- ‘I would eliminate any “them and us” practices that may exist, in ways ranging from ensuring that the admin team are suitably incentivized (pay/bonus) to ensuring there is adequate funding for training and development at all levels.’

- ‘I would support my assistant with subscriptions for industry magazines and membership/event fees for assistant networking organizations, and would recognize how powerful these networking organizations are. I would also make sure that they could leave on time (so long as I was forewarned) to attend networking events. After all, this could benefit the boss and the organization when you consider that the assistants are seen as the “gatekeepers” to the CEOs and directors.’

The key to a successful working relationship is *communication*, empathy, *communication*, empowerment, *communication*, motivation etc, and of course, *communication*! Set ‘SMARTER’ goals (see Appendix 5) and remember to review them continually. Keep your boss and/or organization informed of your activities even if you are organizing and paying for this yourself; this will enable them to understand your situation, particularly if you possibly need to finish on time regularly or work on projects within your organization for your qualification. Remember to make them Specific/ Stretched, Measurable, Agreed/Aligned with your boss if appropriate, Realistic and achievable, and Time-bound, because without dates set it will not happen. Remember to Evaluate regularly because things change, and Revise if appropriate – and remember to reward yourself.

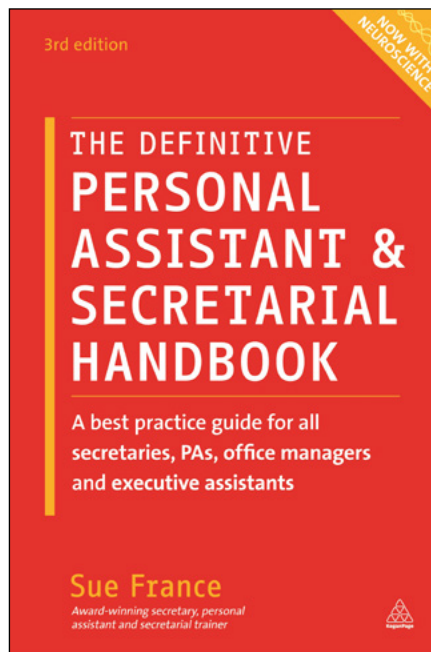
Your relationship should be a ‘partnership’ that is powerful and beneficial to you both, exceeding all expectations. Your assistant can be your coach, your sounding board, your ear to the ground, your timekeeper, your confidante and your friend. Once you trust and respect each other, your assistant will be loyal, hard-working and motivated. You will both enjoy going to work more, have more fun, and feel more exhilarated and satisfied that your efficient and effective working relationship will help you to deliver your objectives and so help you exceed your clients’ expectations, which in the end improves the bottom line.

On that note – a note to the boss: thank you for reading this chapter, whether it is on your own or together with your assistant. Please take action today and I wish you both a successful and mutually beneficial career.

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Sue France is an international, motivational and inspirational speaker for PA/EA/ secretarial conferences and workshops. Sue is available for one to one coaching, speaking at conferences, seminars, facilitating workshops and bespoke training as well as chairing conferences.

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