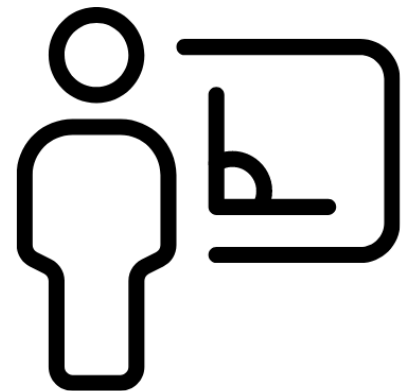


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



An employee's motivation is a direct result of the sum of interactions with his or her manager.

Bob Nelson

Module Two: Working with Your Manager



All assistants work to make life easier for their employers. This requires assistants to be adaptable. While you should never work in an unsafe environment, it is imperative that you adapt your communication and work style to the style, needs, and responsibilities of your boss. This will help ensure that you have a productive and amiable work relationship.

Adapting to Their Style



You do not always get to choose your manager. While there is every possibility that you will find your manager's style amiable, you must prepare yourself for a manager who presents more of a challenge. You will have to work with people you find difficult. However, you may be able to turn a negative into a positive if you take the time to understand your manager. This understanding will allow you to adjust your responses appropriately.

Common Difficult Management Styles:

- **Authoritative Commander:** This management style does not respond well to criticism and expects things done a certain way. Additionally, outcomes matter more than the task itself.
 - **Approach:** Phrase concerns as questions; do not say no directly. Do not volunteer information about projects unless asked.
- **Pessimistic:** This type of manager can never see the bright side of life. Time is wasted second-guessing, and it is easy to become a free counselor.

- **Approach:** Actively listen to determine if the negativity is justified. Offer suitable solutions, but remain professional. Provide positive updates whenever possible.
- **Control Freak:** Also known as the micro-manager; this type of person has trust issues. Every action you make is questioned and double-checked.
 - **Approach:** The best way to gain trust is to deliver projects that are complete and on time. Additionally, you should provide updates on work without being asked.

Estimated Time	10 minutes
Topic Objective	Introduce ways to adjust to different management styles.
Topic Summary	Adapting to Their Style Practice adapting to different styles.
Materials Required	Worksheet 1-Style
Planning Checklist	None
Recommended Activity	Break the class into pairs. If you have an odd number, partner with one of the students. Have each pair role play following the directions on the worksheet.
Stories to Share	Share any personal or relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What allows you to turn a negative style into a positive situation?

Anticipate Their Needs



Your job is to reduce the number of distractions or minor tasks that your manager has to handle. You should not expect every need to be clearly outlined for you. For example, your employer should not have to explain that they should not be interrupted during a meeting with the CEO. You should anticipate this need. Anticipating managerial needs is an essential skill that every assistant should learn.

Anticipating needs requires using common sense with each task. For example, if you schedule a flight and book a hotel, the need for boarding passes and directions should be anticipated. By paying attention to the demands placed on your manager and anticipating needs before they arise, you will make yourself an invaluable employee and respected assistant.

Estimated Time	5 minutes
Topic Objective	Introduce ways to anticipate needs.
Topic Summary	Anticipating Their Needs Discuss anticipating needs.
Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	Brainstorm a list of different work scenarios when a manager has a request, such as schedule a meeting. List these on the flipchart. Then, create a list of anticipated needs for each situation.
Stories to Share	Share any personal relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What should you Not expect when it comes to employer needs?

Getting Your Responsibilities Defined



While your job description will provide most of your job responsibilities, it is necessary to clarify certain aspects of your job with your employer. Much of this is based on their personal preferences. You should initiate a discussion to clarify information if your manager does not. Your responsibilities will change with each manager, so you should have a conversation whenever you work for a new manager.

Responsibilities to define:

- Is phone, email, or face-to-face communication preferable?
- Do you have a reminder system?
- Do you schedule meetings with or without consulting your employer?
- Is any training necessary?

Once you have your responsibilities outlined, you need to write them down. This will ensure that you do not forget anything.

Estimated Time	10 minutes
Topic Objective	Introduce defining responsibilities.
Topic Summary	Getting Your Responsibilities Defined Practice defining responsibilities.
Materials Required	Worksheet 2-Define Responsibilities
Planning Checklist	None
Recommended Activity	Break the class into pairs. If you have an odd number, partner with one of the students. Have each pair role play following the directions on the Worksheet.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Where will you find most of your job responsibilities?

When to Take the Initiative



Managers expect assistants to take initiative. However, it is important that you do not overstep your bounds. The key is deciding when it is appropriate to take the initiative. The answer will be different in every situation. Understanding when to take initiative requires you to know your employer's needs and expectations. Some managers are more comfortable with employees taking initiative than others, so you should act slowly.

Regardless of who your manager is, you need to begin with smaller tasks until you earn a sufficient level of trust. For example, you could conduct research for a project your manager needs to complete. Later, you could create a PowerPoint presentation or volunteer to draft correspondence and weed out emails. Remember only to take initiative when it is appropriate and based on your manager's wants or needs. It will be easier to discern when it is appropriate to take initiative the longer that you and your manager work together. However, if you believe your manager would be uncomfortable with you taking on a project, you should discuss it before taking action.

Estimated Time	10 minutes
Topic Objective	Consider ways to take initiative.

Topic Summary	When to Take the Initiative Discuss when to take initiative.
Materials Required	Worksheet 3-Initiative
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What do managers expect of assistants?

Practical Illustration



This is Karen's second position as a personal assistant. She is sure that her new manager will be pleased with her and does not feel that she needs to discuss her responsibilities with him. Karen chooses to communicate with her boss using email, which her last employer preferred. She also takes over scheduling meetings because it had always been her role. Her manager soon called her into a meeting and expressed unhappiness with her performance. He only checked email at the end of the day, and he considered several scheduled appointments to be a waste of time. Karen took this opportunity to clarify her manager's expectations.

Module Two: Review Questions

1.) What risk does the pessimistic manager pose to you?

- a) Lack of trust
- b) **Becoming a counselor**
- c) Micromanaging
- d) Cannot question

Pessimistic managers always look on the negative side. You risk becoming their counselors if you do not approach them correctly.

2.) What should you never do with an authoritative commander?

- a) Phrase concerns as questions
- b) Complete projects on time
- c) **Volunteer update**
- d) Remain professional

The authoritative commander has expectations about how things should be done and cares more about the product than the process. Only provide updates when asked.

3.) What is necessary to anticipate needs?

- a) **Common sense**
- b) Expectations
- c) Communication
- d) Professionalism

Anticipating needs requires observation and common sense. Understanding the task will help you identify needs without direction.

4.) What will help make you an invaluable employee?

- a) Common sense
- b) Interest
- c) Communication
- d) **Anticipating needs**

Anticipating needs is an essential skill. This skill makes an assistant an invaluable employee.

5.) What should you do if your manager does not invite you to a conversation about specific responsibilities?

- a) **Initiate one**
- b) Adhere to the job description
- c) Determine responsibilities on your own
- d) Wait for the discussion

A discussion of specific responsibilities is necessary. If your employer does not begin the conversation, you should initiate one.

6.) What should you do after defining your roles and responsibilities?

- a) Initiate one
- b) Adhere to the job description
- c) **Write them down**
- d) Wait for the discussion

Once you understand any roles and responsibilities that are not part of the job description, you should write them down. This will make sure that you do not forget them.

7.) What must you understand to take initiative?

- a) Your skill set
- b) **Manager's needs and expectations**
- c) Write them down
- d) Wait for the discussion

Initiative should be based on the manager's needs and expectations. Only take on a project that you know will help meet your manager's needs.

8.) What should you do before taking on a project that you are not sure your manager would be comfortable with you doing?

- a) Take the initiative
- b) Ignore the idea
- c) Ask a peer
- d) **Discuss the idea**

It is important not to overstep your position when taking initiative. If you have an idea that you are not sure about, ask your manager.

9.) What is the most important quality of an assistant?

- a) Conversation skills
- b) **Adaptability**
- c) Etiquette
- d) None of the above

All assistants work to make life easier for their employers. This requires assistants to be **adaptable**.

10.) Assistants always get to choose their employers?

- a) True
- b) **False**

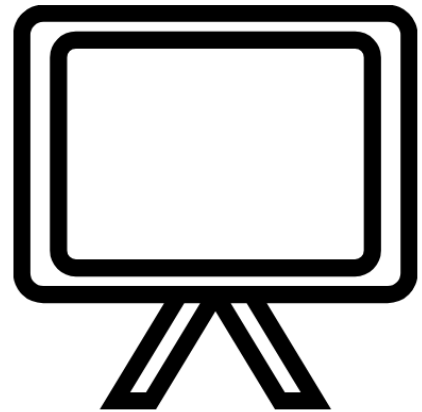
False: You do not always get to choose your manager.

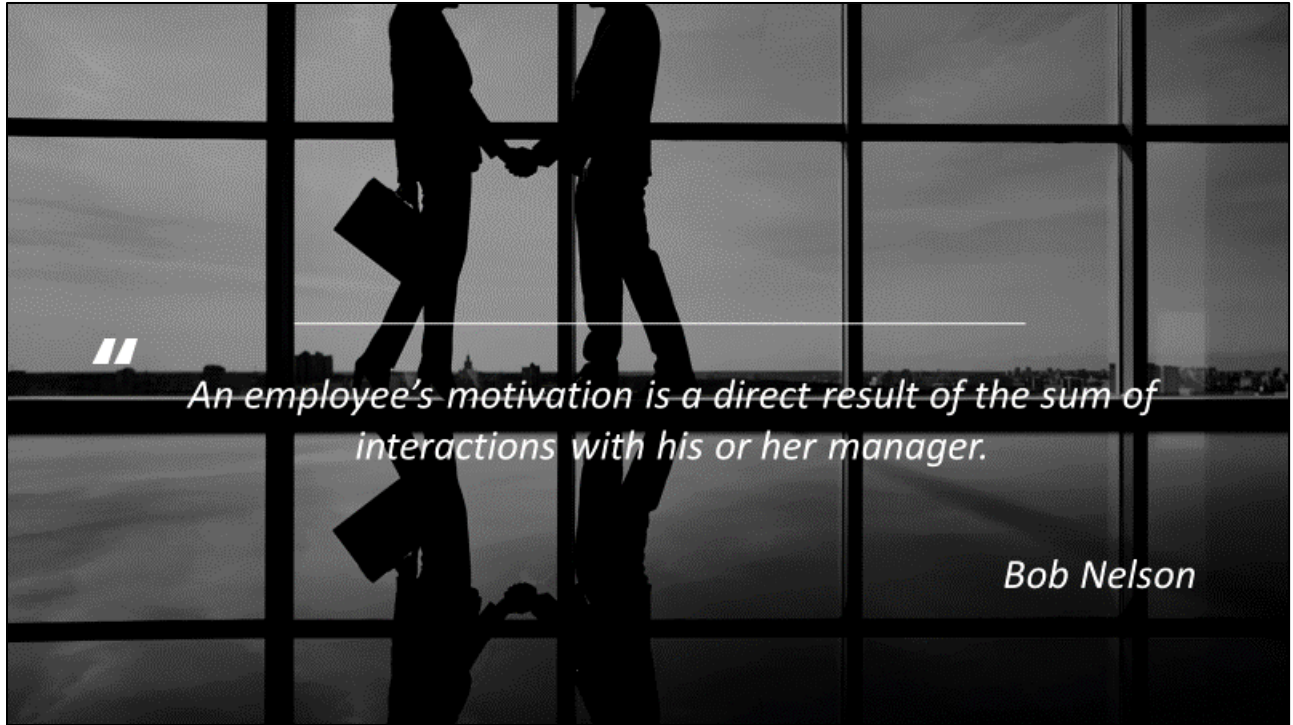
PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





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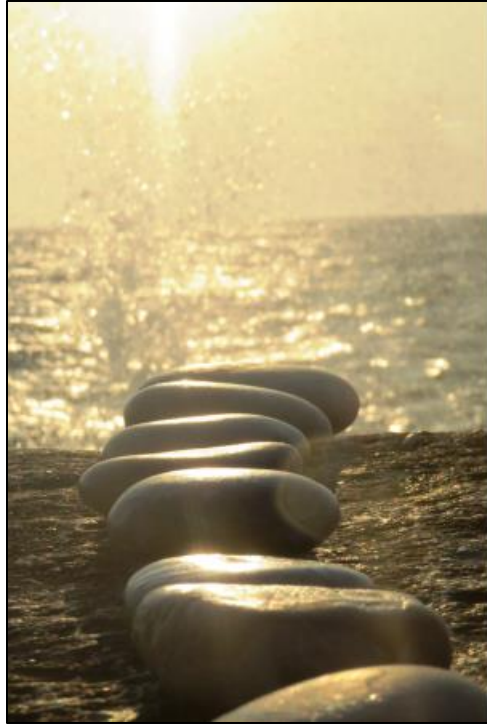
An employee's motivation is a direct result of the sum of interactions with his or her manager.

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MODULE TWO

Working With Your Manager

All assistants work to make life easier for their employers. This requires assistants to be adaptable.



Adapting to Their Style

Authoritative Commander

Pessimistic

Control Freak

Anticipate Their Needs

An assistant's job is to reduce the number of distractions that a manager has to handle.





Getting Your Responsibilities Defined



When to Take Initiative

Regardless of who your manager is, you need to begin with smaller tasks until you earn a sufficient level of trust.



Practical Illustration



- Adapting to Their Style
- Anticipate Their Needs
- Getting Your Responsibilities Defined
- When to Take the Initiative

Module Two: Review Questions

1. What risk does the pessimistic manager pose to you?

A. Lack of trust

B. Becoming a counselor

C. Micromanaging

D. Cannot question

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Executive and Personal Assistants

Quick Reference Sheet



Social Intelligence

Ways to Improve Social Intelligence:

Pay attention to others: It is easy to become caught up in our own lives. Paying attention to others, particularly you manager, will improve your social intelligence.



Practice cues: Practice interpreting social cues that you see in others. Learn to interpret facial expressions, and become culturally aware of those around you.



Self-monitor: Before you blurt out a response in a social situation, think about its appropriateness. This will improve your social intelligence.



Office Management

An assistant must also operate as an office manager. This requires you to take on specific roles that are necessary in order for the department to move forward. Poor management skills will impede productivity for everyone.

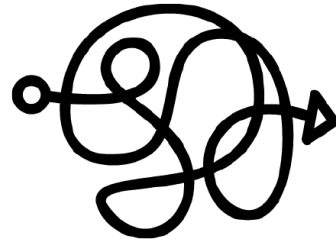
Skills:

- **Plan:** Plans are essential for success, but the assistant must drive the plan forward by making sure the steps are executed.
- **Schedule:** The schedule and its details are typically the domain of the assistant. For example, you would make a list of people to attend a meeting, contact them, and book the location of the meeting.
- **Organize:** The assistant must keep everything filed, organized, and accessible. This includes paperwork, schedules, travel, financial papers, etc.
- **Order:** You will be responsible for ordering supplies. This requires you to keep a careful inventory, and to order at the correct time.

Dealing with Difficult People

Handling difficult people:

- **Speak assertively:** A passive tone indicates that you are uncertain. Be assertive, but respectful.
- **Address the request:** Make it clear that you are rejecting the request, not the individual.
- **Avoid sarcasm:** Do not use sarcasm, and address it when it is used toward you.
- **Restate:** Restate the problem in a different way for another point of view.
- **Compromise:** You need to be willing to compromise in certain cases.



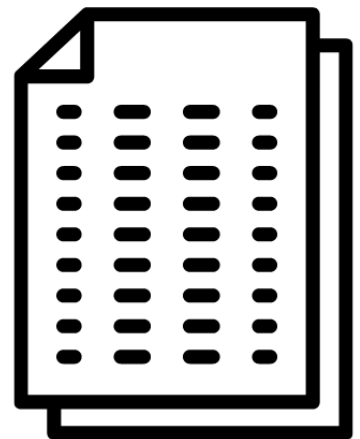
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 3

Initiative

Think of ways to take initiative in the following scenarios.

Your manager is running late.

You schedule a meeting concerning a new project.

Your manager is behind on thank you notes to business associates.

Icebreaker: First Impressions

PURPOSE

To get participants moving around and introduced to each other.

MATERIALS REQUIRED

- Name card for each person
- Markers
- Paper and pencils/pens

PREPARATION

Have participants fill out their name card.

ACTIVITY

Ask participants to form pairs. Explain that you are going to ask participants to guess their partner's favorite things. As you call out items, participants will write their guesses on paper.

For example, you might say: What would you guess is your partner's favorite

- TV show
- Vacation destination
- Food
- Sport
- Hobby

Give participants a few seconds to write each response. When you have gone through your list, ask participants to share their guesses with their partners.

After participants have had a couple of minutes to share their guesses, you might ask:

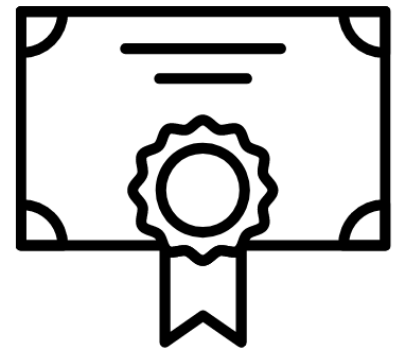
- What did you base your guesses on?
- Did anyone guess everything wrong? Did anyone guess everything right?

Wrap up by making the point that in any personal interaction first impressions are often misleading. When we start a negotiation, the guesses we make about another person can lead to false assumptions about what the person wants.

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Executive and Personal Assistants

Awarded this _____ day of _____, 20____

Presenter Name and Title
