

How to Leverage Your Personal Assistant to Create the Ultimate Business Team

He or she knows your:

1. Goals
2. Priorities
3. Preferences and working styles
 - a. Taking in info
 - b. Giving out info / delegating
4. Schedule
5. Key players you work with
6. The assumed vocabulary you've created (your personal glossary)
7. What your expectations of him or her is
 - a. Responsibilities
 - b. Work schedule
 - c. Your interactions
 - d. Etc.

Orientation for New Employees

Big Picture of Companies

Abbr.	Company Name	Type	State	Purpose
HB	Holding Back, Inc	S-Corp	CA	Real Estate Investment
FFU	FurnitureForU, LLC	LLC	NV	Active Furniture Business
FD	Front Door, LLC	LLC	WY	Investment Holding Company

Each of these companies has a binder that has all of this info & more in it.
(Located in David's Office and as a scanned PDF file in Efiles.)

Important People

Name	Role	Location
FFU		
Theresa	Assistant	WA
Lisa Lee	Controller	AZ
Meghan Smith	Store Manager	FL
Mark Crow	Technology/ Computers/Website	CA
David's People		
Andy Morgan	Bookkeeper	MA
Barry Nolan	Attorney for Business/ Partnerships	FL
Susan Sullivan	Attorney for Estate Planning	WY
Joe	Hosts & Manages Client List : Maintains websites	CO
Edward Maz	Graphic Artist	UT
Gary Leverage	Insurance Agent	VT
Jerry Lawrance	Personal Banker	MI
Keith Manager	CPA	FL

Tips on David's Work Style and How to Best Interact with Him

- David gives out info audibly, but prefers to take it in visually.
- When David is giving info, having a recorder is key as he gives info quickly.
- Record his phone calls as well (asking permission always first)
- When giving David info, give him lists and compilations.
- He prefers 1 email w/ lots of info vs. lots of emails w/ little info. (e.g. bundle or “chunk up” info)
- Schedule:
- Monday & Wednesday = “Push Days”...He gets lots of work done, outside meeting days, schedule meetings these days.
- 8-10:30am is his “Prime Time”...he gets a lot of work done. – No meetings during these times
- 11-2 is meeting time or if needed to 4pm
- After that is clean up time...his least productive time.
- Tuesday & Thursday = “Focus Days”... He does a lot of his writing or content creation these days. PROTECT THIS TIME!
- Your best days to contact David are M and W.

Telephone – Office

- USE THE PHONE LOG when making a call. Keeps a great record.
- David's local office phone number. Use discretion in whom if anyone you may give this too. This is the BEST place to leave a message for David while he is traveling. If urgent, text message him on his cell.
- Assistant to answer office phone as “Good Morning/Afternoon, David Finkel's office”.
- Assistant office voice mail greeting: “Hello – You have reached the office of David Finkel. We are either on the other line or temporarily away. Your call is very important to us - please leave your name, telephone number, and specifically how it is that we may help you and we will return your call right away. Thank you for your call and have a great day”.
- Call David on home number only for emergencies or to notify David of other extreme occurrences.
- When leaving phone messages for David make sure to list name, number, and subject in a slow and easily understood tone. Be clear and concise, leaving necessary info so he can handle or take the next step.
- Recording – it is best to record in person meetings, telephone meetings. Use a hand held recorder for in person meeting and a telephone recorder when David calls. This allows you to tape the conversation and review what David's assigned tasks were in detail and list to the project list. (Always ask for permission first before you record any calls.)

67 Things You Could Ask Your Assistant To Do

1. Liaison with bookkeeper
2. Making sure all tax filings and payments are ticklered on calendar and that the checks and forms get done at right time and sent to right place
3. Handle billing disputes
4. Help setting up bills onto auto debit or draft
5. Turn recurring bills to auto cc or safe auto debit to checking
6. Address and mail cards, letters, packages....
7. Corporate formalities, tax and licensing formalities for all entities and personal...coordinate with bookkeeper, attorney, CPA, and resident agent companies
8. Write checks and deposits
9. Handle billing issues and expense reports
10. Updating database and backing it up
11. Blog Updates
12. Help in putting together home study courses and workshop materials
13. Updating my contact list and creating "calling sheets" and other key info worksheets
14. File
15. Create electronic files and scan in updated files
16. Organize audio files and CD backups
17. Dictation (Transcription of files, can outsource to dependable source)
18. Setting up phone appointments
19. Create calling lists for me to use for week
20. Weekly fax and email of my schedule, key tickler items, key info so the right info pops up at the right time for me
21. Phone and email contacts for me to outside people
22. Screen phone and email
23. Help making phone calls for book promotion etc
24. At times I'll point my work phone to them
25. Setting up calendar of appointments
26. Email me in outlook: contacts, appointments, calendar stuff
27. Keep a master chart/list/calendar of my projects and deadlines and help me make sure I meet my commitments
28. Tickler all birthdays and anniversaries, and holidays or other important days and give me heads up and even for things send DF email or flowers etc.
29. Keeping project list and updating it after each conversation and emailing it to me at least weekly
30. Oversee all tax filings and business filings for all entities and papering corporate trail
31. Get mail, sort, open, forward, handle, shred
32. UPS account set up

33. Figure out long trip mail and house care/ forwarding....
34. Screen low level email
35. Mailing packages, etc for me
36. Early client support problems
37. Potentially help record video for online content.
38. Help syndicating podcast, rss feed, or syndicated articles
39. Computer trouble shoot (organize and oversee)
40. Running computer back ups or reminding me to
41. Set up email to cc them on “public” email and to have a private one for them to use of all correspondence (make sure a copy is kept on the server for me to backup in case her computer crashes etc)
42. Using recorder to dictate emails and letters and writing
43. Handling order returns for me and catalog ordering
44. Order magazine subscriptions
45. Any household errands or items to facilitate
46. Check in several times a week when traveling
47. Organize repairs
48. Ordering of catalog items:
49. Gifts
50. Flowers
51. Dictate notes from meetings and key people and have her transcribe and file
52. Be a notary
53. Learn to read my handwriting so you can transcribe my notes, letters, journal, books, etc.
54. Glossary creating
55. Schedule all travel arrangements (becoming an expert on what I like, don’t like, and interfacing with me on travel, business and personal)
 - a. Airline
 - b. Hotel
 - c. To and From airports and hotels
 - d. Making sure to minimize stress and to have things go smoothly (e.g. food in hotel rooms, vegetarian meals, alt travel plans if delayed and need to be there)
56. After any trip we schedule a face to face for me to hand her all the loose ends and scraps of notes form the trip to organize and handle....I’ll keep rough place folders on notes as I travel and then we’ll quickly go through the whole list (record if needed) we could even do some of this as I travel
57. Some meeting planning for business or personal events
58. Ownership of paper and electronic filing system
59. Helping me to streamline my office
60. Creating of systems to handle all your jobs (worksheets, spreadsheets, samples, checklists, etc)

61. Transcription
62. Correspondence
63. Household items to take things off my plate (repairs, services, etc)
64. Basic updating of websites
65. Getting audio files I need on computer
66. Getting computer tech stuff fixed (with outside help)
67. Taking on more and more projects as I am able to trust you to handle them and own them.

David's 800lb Gorillas When Choosing A New Assistant

1. Resourceful
 - Finds a way
2. Hyper-organized
 - Large variety of projects at same time
 - Details get done
3. Finisher
4. Strong sense of self
 - Can they deliver bad news or will they hide it?
 - Do they ask questions or pretend to know?
 - Can they handle direct feedback from me?
 - Can they be direct with me and tell me to do something?
5. Independent

Your Assistant's Project List

- This is the lynchpin for all interaction with David
- Excel spreadsheet listing tasks, and projects assigned by David. Excellent way to track what needs to be completed or worked toward. Assists in eliminating tasks becoming dropped or forgotten. One list to manage together to assure tasks are accomplished

SET UP

- Set up project list like this: Number/ Priority/ Project Description/ Date Assigned/ Date due or completed/ Status/ Notes/ Questions for David
- C = Completed/ P = Pending/ A = just been assigned
- Once it is completed and David has seen it you can put it in another sheet on your spreadsheet called "Archive"
- Worksheet tabs are to be set up: Project List/ travel/ Expenses/ Key reminders/ archive/ notes/ weekly bottom line/ Time log

TIPS

- Put Project list up on GROOVE when finished/ Print out before going over David's for review with him
- When updating the project list mark all changes in RED from previous list sent to David. This allows David to review only the new items or items for his attention. Leave older and ongoing items in black. Once david has read he'll turn all text BLACK and put any of his comments in BLUE.
- **First thing** after meeting with David either by telephone or in person is to list new assignments into the project list. List project, assignment date, progress, notes on progress and email back to him ASAP. Format cells to "Wrap Text" to allow for additional space in the note section.
- Always set print area for the report before emailing to David on a daily basis. (all on one page/ 8pt type)
- Everything that he assigns (no matter how big or small) should go onto this list
- The Project List should always be updated and put on Groove assistant workspace within 24 hours after meeting.
- Prioritizing projects: Prioritize list – 1 most important/ 2 important (little bit more time on)/ 3 as tie permits. Always start with 1's and 2's then and only then do 3's.

Sample Project List

#	PR	Project Description	Date Assigned	Date Due	Status	Notes	Questions
1	1	Create manual for San Die	3/20/2008		A	MMO wealth training pictures	
2	2	Write checks out	3/20/2008		P		Next week to do at DF"s
3	1	confirm flights for San diego	4/2/2008	4/2/2008	C	confirmed flights/ put in project list	
4	3	call Suzie Q about webpag	4/3/2008		P	called on 4/3/ waiting for reply	
		THINGS TO WAIT ON					
5	3	Book hotels for Hawaii	4/3/2008		A		
6	3	email and call recepiants re: lake street project	3/31/2008		A		
		Computer Fixes					
7	1	Fix wireless	3/27/2008		P	waiting for part in?	
8	2	fix printer	3/27/2008		C		
		J's to do's					
		David's to do's					
9		Call Ms. Happy - 555 - 555 - 5567	3/31/2008		A		
10		Get manual proof to sandy	4/1/2008		A		
11		Review custom page	4/3/2008		A		

Sample Personal Info System

Sample "Personal Life" System David Uses with His Assistant

Physical address:

123 Main St
Charlottesville, VA 22903

Residence phone number:

434-555-1212

Property Insured by:

State Farm Insurance
Contact: John Smith
Contact #: 434-555-1234
Key Policy #'s:

Homeowners Association:

Opies Homeowner's Association

Contact:

Address:

Tax Information:

Albemarle County
<http://www.albemarle.org>
Paid by:

Real Estate Taxes Due:

June-Dec
Contact #: 434-556-2586
Parcel : 253R2-02-0A-03622 - Samuel Miller District

Utility Information:**Notes:****Cable**

Adelphia/Comcast
Contact #1-800-266-2278
Account # 464654-654-64565654

<http://www.comcast.com>

Address: PO Box 3005, Southeastern, PA 19398-3005
DSL Service
Autopay cc -5555

Electric and Heating

Dominion Electric
Contact # 1-888-667-3000
Account # 6546468787

<http://www.dom.com>

P. O. Box 26543, Richmond, VA 23290-0001
Autopaid by 1st Main St Bank

Water

Albemarle County Service Authority
Contact # 434-977-4511
Account # 02646546545

<http://www.acsanet.com>

Address: 168 Spotnap Road, Charlottesville, VA 22911
Monthly check

Telephone

Embarq/Sprint
Contact # 1-800-SPRINT1
Account # 564654654

<http://www.sprint.com>

PO Box 4191, Carol Stream IL 60197-4191
Paid by Personal CC ending 6545

Waste Services

Dixon Trash Disposal
Contact #: 434-978-2111
Account #: 646465

Address: 9005 Totier Creek Road, Scottsville, VA 24590
Monthlycheck

Checking David's Voicemail and Emailing Messages

David's Google Voice number is **222-222-2222**. The pin # is **333365**.

To access David's Google Voice, go to www.google.com/voice. The username is **davidvm** and the password is **R34dd56adddgfe3**.

Listen to the messages or read the text messages. In your Outlook email message to David, this is what should be included: Name of person, what company, if any, date, time, phone number, and message. Here is an example of what the message should look like:

To:	David Finkel
Subject:	3: Gvoicemails: Craig-State Farm Charlottesville, Paul Finkel
GVoicemails: <div>Paul Finkel Sunday 7/18/10 11:27 AM (818) 555-2222 - mobile Text: "Hi son Thank you both for a wonderful time I love you so much Xoxo. Dad"</div> <div>Craig w/ State Farm Insurance Charlottesville, VA Thurs. 7/15/10 1:12 PM (434)296-2515 He's hoping that you, Heather, and the twins are doing well. He just noticed that the policies need to be reviewed on yr end. He'll mail you the summary doc this week. Please review and let him know how you want to proceed.</div>	

These should be checked 2-3 times a day.

4) If there is a message that seems to be very important and you feel David needs to hear the message you can also go to the message on Google Voice to **download the .mp3 file**:

Click on box that says **MORE>**

Click on the box that says **DOWNLOAD>**

Download and **SAVE** to your Desktop >

Name the file using date and name of person>

Go back to email message and **ATTACH** the file from your Desktop to the email message.

Sample Daily Item Checklist David's Assistant Uses

Checklist Recurring Daily To Do's:

TO DO	DONE
Clean Emails	
Check Voicemails	
Check Action Folder	
Record Emails to InfusionSoft	
Verify Calendar Appts.	
Organize Appts.	
Check Blogs	
Work on UBS	
Update To Do List Excel	

David's Top 20 Picks for Time Mastery

Books (many also available in audio version):

1. **First Things First, (Covey, Merrill)**
2. Unique Ability (Nomura, Waller)
3. **Getting Things Done (Allen)**
4. How to Have a 48 Hour Day (Aslett)
5. **Scorekeeping for Success (Coonradt)**
6. Getting Organized (Winston)
7. Time Tactics of Very Successful People (Griessman)
8. **Focal Point (Tracy)**
9. Protecting Yourself From Business Lawsuits (Schweich)
10. One Minute for Yourself (Johnson)
11. Yes or No (Johnson)
12. Make the Most of Your Mind (Buzan)
13. Use Both Sides of Your Brain (Buzan)
14. The Fifth Discipline (Senge)
15. **The Power of Focus (Canfield, Hansen, Hewitt)**

Audio Books:

16. Time of Your Life (Robbins)
17. Master Your Time (Tracy)
18. Pure Genius (Sullivan)
19. **Accelerated Learning (Tracy)**
20. Focus (Covey)

