



The Assistant Playbook for Future- Proofing Your Role

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01

Introduction

In the wake of COVID-19, we unfortunately saw a lot of assistants being laid off by their employers. As a result, middle managers became even more squeezed as they were expected to pick up additional tasks with little to no support. But as we start to come out the other side of the pandemic, employees are demanding that support, and the need for Executive Assistants (EAs) and other support-focused roles has surged.

Unable to shy away from the need for assistant roles, organizations are leaning in. Many companies are doubling the size of their admin teams this year, specifically on the lookout for people who can step into Chief of Staff or EA hybrid roles. There is high demand for assistants who can take on a more strategic role and ultimately step into a leadership function.

Leaders and organizations around the world are re-thinking what the assistant role can look like.

While the assistant role is not new, it has adapted in many ways over the years. Gone are the days of the Mad Men era where every executive had a secretary outside of their office (thankfully). Today, Executive Assistants are a well-respected role in most organizations. But it's not an easy role to succeed in. EAs often work on an island; many of them falling into this role without any standardized training or degree programs.

Even without a clear job description across organizations, assistants are being asked to upskill. As EA teams become more commonplace and companies are looking for assistants who can fill a variety of

functions outside of supporting one leader, EAs have to learn how to become that strategic partner within their organization.

“By standardizing what excellence looks like for EAs, we can help assistants to get to that level of excellence as soon as possible. If we do that, we can help mold career paths for these individuals and educate organizations on the impact their assistants could have.”

- PAIGE MCPHEELY, CEO OF BASE



In this playbook, we'll cover the four key areas for you, as an assistant eager to build your strategic advantage and future-proof your role, to focus your efforts.

First, we'll discuss how to start uncovering and understanding the strategic value assistants can have on their organizations, including how to enhance your own strategic impact. Then, we'll look at some ways you can begin to develop your leadership skills, define your career path, and clarify what you want out of your role. Finally, we'll explore the part technology will play in ensuring assistants' long-term success and how it can help you show your tangible impact to the organizations you support.

02

Understanding assistants' strategic value

In a 2014 article, USA Today claimed we were in “the golden age of executive assistants,” as the role boomed across Silicon Valley tech companies. Nowadays, it’s not uncommon to find at least one assistant in any company, regardless of its size or industry. So with the role being so prevalent, why do assistants need to show their strategic value?

Why do assistants need to show their strategic value?

Well, there are a couple reasons. The first being the rise of new technology and automations aimed at relegating mundane, repetitive tasks to machines. This shift could impact assistant roles that are centered around alleviating business leaders from the time-consuming tasks of managing inboxes, scheduling meetings, tracking expenses, and organizing details. While we're a long way from technology replacing the interpersonal and emotional intelligence that good EAs bring to their roles, today's assistants would be smart to not only prepare for, but embrace this transition.

Second, the workforce as a whole is ready for more. Assistants are eager to move beyond calendar and email management and provide more impactful support and build long-term, meaningful careers for themselves.

Meanwhile, business leaders (and even middle managers) are overwhelmed and in need of more support with problem solving, decision making, and seeing around corners.

But this shift is unlikely to happen unless assistants are willing to take the reins and build the roadmap for themselves and the next generation of assistants toward a more strategic role.



How to start building the roadmap toward more strategic impact within your organization.

There are so many big and small ways you can start to enhance your strategic impact within an organization. On the following page are just a few ideas to get you started. Hopefully they help you to start thinking about where you can increase your knowledge and challenge yourself to think outside the box.

✓ Understand your company's strategy

Put simply, a company's strategy is the clear set of plans, actions and goals to achieve desired success. Their strategy likely includes a variety of different factors – from company culture to business systems – some (or many) of which your leader will be responsible for driving. Understanding this context will give you a broader view of your leader's role and impact within the company at large.

✓ Develop your business acumen

Having a clear picture of how a business operates, how a company makes money, and the role each team member plays in that process goes a long way in helping you think more strategically within your role. Don't be afraid to read, research, and explore outside of your role to gain a wider view of how a company functions.

✓ Ask good questions

Being new to something does not automatically make you unhelpful. Actually, it can help you approach situations with more curiosity and an open mind that others do not. Whether you're alone with your leader or in a big meeting, don't be afraid to jump in periodically or follow-up the meeting with clarifying questions. Not only will it help you learn, but it can help others see things from a different perspective.

✓ Find and fill gaps in expertise

As the eyes and ears of your leader (and therefore, your organization), you're in a prime position to notice things that others don't. So use that to your advantage! Take the initiative to not only point out gaps in the business, but offer your solutions, too. This shows that you are proactive and care about the success of the company as a whole.

03

Positioning yourself as a leader

Becoming a leader is not just about managing others or leading projects. Regardless of your role within an organization, you have the ability to think and act like a leader. You don't need permission or a specific job title. It's up to you to demonstrate you're ready to be seen as someone who can step up and take the lead. So when you're in a primarily supportive role, how can you start to bridge the gap between where you are now and where you want to be?

Start with your mindset

Having a leadership mindset means, first and foremost, that you believe in your ability to lead. Confidence in yourself is key. When you know you can handle anything that comes your way, you start to see challenges as opportunities to learn and grow – and you tackle them head on rather than finding ways around them. Building a leadership mindset does not happen overnight, but you are likely already part of the way there. Take some time to evaluate where your mindset is now, including both your strengths and where you can improve. Work on those things and, over time, it will become effortless.

Get outside of your comfort zone

It's easy to stick with what's familiar; where you can anticipate the everyday demands and challenges of your role without much stress. However, working through new experiences can increase your productivity, creativity, and push you into new opportunities that can expand your skill set and comfort level with new things. So don't be afraid to break your routine and take on a new responsibility every once in a while. And remember: failure is OK. The best leaders embrace failure as a side effect of growth and opportunity. Being afraid to fail will stop you from ever trying anything new.

Surround yourself with other leaders and mentors

The best way to learn how to be a better leader is to surround yourself with other leaders. Having a few different people who you can learn from is key — that way, you can improve in a variety of different areas.

Here are some ideas for different mentors you can seek out:

- **Your executive.** If you respect them and their leadership style, they are a great person to look to for advice and guidance. They will have the best understanding of your strengths and weaknesses, and will be most invested in your success (because it also makes them successful).
- **A sponsor.** Look to someone in your company or network who is a few steps ahead of you in their career and/or has a role you see yourself having in 2-3 years. This person has the ability to open doors and expose you to new skills and opportunities that will help you get to the next step.
- **An avatar mentor.** This person can be a high-profile figure or someone in your company. They are 10+ years ahead of you in their career and, honestly, don't even need to know you even exist. Their purpose is to be an inspirational figure for you, and to give you a roadmap that you can reverse engineer to reach the success you want out of your career.

04

Defining your career path

Because you're reading this guide, it's clear that professional development is important to you. But there's a big hurdle to overcome: Organizations often do not have a clearly defined path for assistant career growth. This means assistants who want to level up often have to build that path for themselves. So how do you start creating that path and have impact in a way that's meaningful to you?



Identify your end goal

The most important piece of building your career path is having a clear destination in mind. The great news is that EAs have highly transferable skills for a variety of roles, teams, and industries. As the glue that holds an organization together, the EA role is a great springboard for career paths that require business strategy, project management, and leadership skills.

The career paths outlined on the following page are in no way exhaustive, but they are the most common ones we see EAs take. Hopefully they give you an idea of the possibilities that are available to assistants.

✓ Chief of Staff

A Chief of Staff is often an EA who steps beyond the assistant role to help the office operate smoothly. Unlike an EA, a Chief of Staff doesn't manage one single leader. Instead, they function as a member of the senior leadership team, helping to enforce company policies, plan new initiatives, and connect with multiple departments to fulfill the company's objectives.

✓ Business Consultant

Many EAs, after their close proximity to many leaders and business practices, find themselves moving onto a consulting role, either starting their own business or working within a larger consulting firm. In this role, they help companies and leadership teams optimize and improve their overall business practices and overcome challenges.

✓ Career EA

While some assistants view their role as a stepping stone to other opportunities, there are many who find great success building careers as EAs. This could look like working with progressively higher level executives or moving into larger, more complex companies. Many EAs also find themselves leading a team of other EAs within their organization.

✓ C-Suite

Can EAs really be CEOs? Absolutely! Both EAs and C-level executives are skilled at prioritization, decision making, and understanding how today's efforts will produce tomorrow's results. Further, EAs have a front row seat to what makes a leader successful. They work with the highest levels of leadership on a daily basis and understand what they need to succeed.

Put it into action

Once you know your desired end goal, you can start laying the path to get there. One way to do this is to start setting yearly, quarterly, and/or monthly goals for yourself. These goals should both serve your career goals and tie into the goals of the company and the leader you support. [Check out our guide to goal setting for assistants](#) for more information on how to set impactful and strategic goals.

Another thing you can do is set up regular 1:1s with your leader. Or, if you already have them, consider if you need a new structure. Oftentimes, assistants get stuck in a loop of status updates and letting their executive drive their day-to-day responsibilities. However, this doesn't give you much opportunity to push your career forward. Instead, you should be taking the lead and using these



face-to-face conversations to set expectations for what you want out of your role. Watch this on-demand webinar, [Wow Your Exec with Thoughtful and Strategic 1:1s](#), for tips and tricks on how to get more out of these meetings.

05

Modernizing the way you work

The final piece of the puzzle is one that is often forgotten. As important as soft skills are to leveling up your role, hard skills and the tools you use matter, too. The modern assistant maximizes their strategic advantage by being smart about the resources they use and how they spend their valuable time. That's why it's important — as we move into the future of work — for assistants to become more tech-enabled and standardize their output.

Embrace technology made to support you

One thing assistants often forget is that they need support, too. Many EAs find themselves on an island, feeling like they have to recreate the wheel at every new organization or role because the individuals they support have such unique needs. Meanwhile other teams have tools at their disposal (like sales teams and their CRM platforms) that help them do their jobs more quickly, efficiently, and consistently.

Here's the good news: Technology exists today to standardize what excellence looks like for assistants. Once you embrace it into your everyday workflow, organizations will start to take notice. This type of technological support can help you not only get to the

highest level of excellence more quickly, but can help mold your career path and show organizations the high-level impact you can have.

“The level of interpersonal intelligence that you must have to be a truly good EA is a long, long way off being replicated by technology. That being said, I do think we might see more tech-enabled assistants in the next 10 to 20 years.”

- PAIGE MCPHEELY, CEO OF BASE

06

The modern assistant is strategic and tech-enabled

No matter how much the workforce shifts over the next handful of years, one thing will never change — the need for more impactful, strategic, and comprehensive support. If you're prioritizing that in your everyday work, chances are you're future-proofing your role.

Today's assistants carry so much untapped potential

Assistants know the value they can bring to their leaders and organizations. But when they can show their strategic contribution and embrace technology that makes them more streamlined and efficient, organizations are able to better quantify the impact. This measurable value not only opens doors for assistants, but proves them to be a vital resource in the future of work.

Then, unlike the major shift away from support at the beginning of the pandemic, companies and leaders will think twice before eliminating these supportive roles from their teams. Organizations will invest in assistants – and even teams of assistants – who can support the company as a whole, not just one single leader. And overall, we'll see a future of work where everyone is more fully supported.

Proposed times HOLD: Team Meeting Save Finalize

Availability Responses

4 Responded

Time Slots

Mon, Nov 29

11:30 AM - 12 PM 1 vote

12 - 12:30 PM 1 vote

Wed, Dec 1

10 - 10:30 AM

10:30 - 11 AM 4 votes

Thu, Dec 2

1 - 1:30 PM

1:30 - 2 PM

Today < > Nov - Dec 2021 Week

GMT EST PST MON 29 TUE 30 WED 1 THU 2 FRI 3

5 PM 12 PM 9 AM

6 PM 1 PM 10 AM

Digest Builder Preview & Send

Daily Digest

Hi Lisa,

See below for today's schedule, questions, and tasks on my plate. I'm looking forward to hearing your thoughts on how last week's partner meetings went for you.

CALENDAR REVIEW

- 08:00 AM [video] Planning Session
- 09:30 AM [video] Team Roundtable
- 11:00 AM [video] Interview | Head of Product
- 11:30 AM [video] 1:1 | Lisa and Phil

QUESTIONS

Decision Stream - Press Inquiries: 3 pending questions

TASKS ON MY PLATE

- Research for meeting with Susan Holt on sponsorship
- Email draft re meeting with Insight Partners for tech demo

Tasks

Open Tasks Completed Trash

Open Tasks

Task name	Due date	Priority
Get budget proposal before the next LT session	Jun 10	High
Arrange private shuttle to pick up VIPs for 6/17 leadership meeting	Jun 12	High
Prepare agenda for bi-weekly Sales touch base	Jun 16	Medium
Email draft re meeting with Insight Partners for tech demo	Jun 26	Medium
Remind Lisa to take insurance cards to dental appointment	Jun 25	Medium
Research for meeting with Susan Holt on sponsorship <small>project</small>	Jul 03	Medium
Send MSA to legal by 7/14 to meet deadline	Jul 14	High
Collect documents for portfolio and resume review <small>business</small>	Jul 17	Medium



Base is a workspace for the modern assistant, maximizing strategic advantage by combining communication, organization, and scheduling tools into one unified platform. More than 6,000 assistants use Base to streamline their work and free up time for more strategic initiatives. Assistant teams at trailblazing companies such as Loom, Terminus, and Superhuman rely on Base to manage everything from creating executive briefings, fielding emails, tracking projects, scheduling meetings, keeping track of important context, and more.

For more information, visit basehq.com.



Learn how a platform built solely for assistants can help you provide more impactful support.

Talk to us today.