

# Training, Talk and Trust Help an Assistant Succeed

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- *Executive assistants need to be agile and empowered.*
- *Getting there requires special communication and training.*

When last we met, a client of mine was drowning in a sea of routine tasks. We threw him a life preserver – an executive assistant. I asked you to e-mail me your best efficiency tips. You did!

Three activities emerged – training, talk and trust. If you do not set up systems, communicate and train each other (yes, it's a two-way street), neither of you will be successful. And trust – well, that develops from repeated positive experiences.

When I talk about “systems,” most of my clients cringe. They want to sell, not waste valuable time setting up systems. Time spent setting up a system will save time far into the future and allow you to generate more revenue.

How?

## **Set the bar**

A client told me his assistant doesn't respond well to customer inquiries. Had he told his assistant what a good client response looks like, sounds like, and the desired outcome of each inquiry? No.

Don't assume everyone knows what success looks like to you. Be clear on the outcome of each task and interaction. “Be pleasant” is not an outcome, it's a trait. “Obtain a phone number, e-mail and the caller's product question” is an actionable outcome.

## **Tighten follow-up procedures**

All salespeople know they should follow up, yet often do a poor job of it. When you leave a sales call, get in your car and immediately call your assistant with “tag team” actions to reinforce the sales call. Western Associates, a firm that sells promotional items in Charlotte, excels at teamwork. Haines Maxwell leads the operation: “Our sales people can dial the phone as they drive away from an appointment and ask the support folks to send our ‘Penguin Letter.’ (You have to know them to understand.) Within 24 to 48 hours, our new prospect receives a personal mailing from our support sales person to thank them for this opportunity, and we make it clear that anyone on our staff is ready and willing to serve them.”

## **Give away power**

Maxwell's advice leads to the next step – empower others.

How? Provide clear guidelines on answers to routine requests.

“If a client asks us for something unusual, and the request is ethical, legal and moral, then make the right call for the customer and our company,” Haines said. “If the staff member is unsure, then call me.”

In the end, a great executive assistant is fast and flexible. “Every executive has a different system and way of doing things. Find out how the exec likes things handled, or doesn't,” says Debbie Walters, executive assistant at Whitehead and Associates. “Remember, there is no such thing as too much communication.”