

25 Top Tips Of Highly Effective PA's



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Every year I meet hundreds of people who are either working as PA's or who want to become one.

So I'm privileged to have been able to identify the common themes that have evolved into the 25 top tips that, blended for time and context, make for a highly effective PA.

Until recently, with the onslaught of the information technology revolution there was much talk of the demise of the Personal Assistant.

Indeed many business executives believed that they no longer needed this level of support as they could just as easily type their own letters. And who needs to send a letter these days when it's easier and faster to send an email?

Additionally, the advent of the World Wide Web meant that executives could easily book flights and accommodation on line themselves.

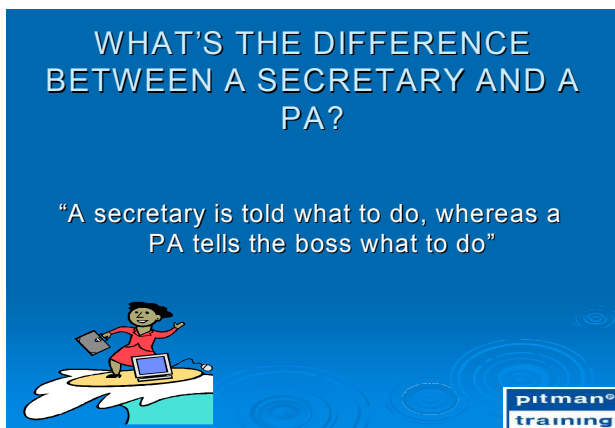
But in the last few years, the balance has changed. Extra demands placed on executives means that there is still one individual that is critical to their success

both on a professional and personal level. And of course it is no surprise today when I say it is the Personal Assistant.

Let me begin by posing the question of what is the difference between a Secretary and a PA?

The best description I've heard is this one:

"A secretary is told what to do, whereas a PA tells the boss what to do"



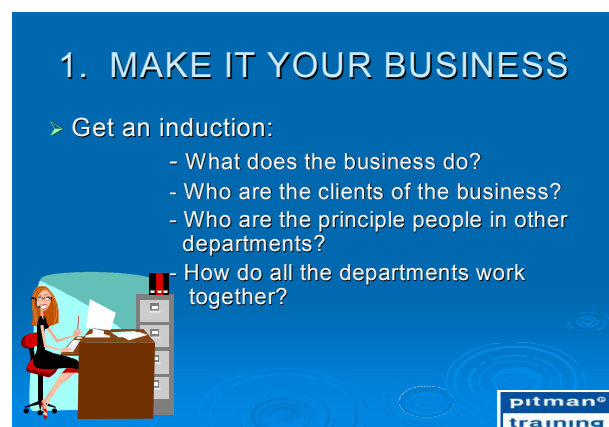
Does that sound bossy? Well they're not my words. They are those of a successful PA who works for a Director at a large company.

However, I think she's right and her attitude is exactly what I'd expect from a successful PA – one of absolute confidence.

So, now we are clear on that, let's move on to my 25 top tips of highly effective PA's.

1. MAKE IT YOUR BUSINESS.

From the outset it is imperative to ensure you gain a good knowledge of the business your boss is in and that you are in. When you start working at an organisation, hopefully they have an induction process. However, if they don't and you are just thrown in at the deep end, make it your business to get your own induction.



1. MAKE IT YOUR BUSINESS

- Get an induction:
 - What does the business do?
 - Who are the clients of the business?
 - Who are the principle people in other departments?
 - How do all the departments work together?

By that I mean you'll need to ask plenty of questions to find out the following:

- What does the business do?
- Who are the clients of the business?
- Who are the principle people in other departments
- How do all the departments work together?

2. CHOOSE CAREFULLY



The best PA's are often very different from the people they manage. They know that the relationship is a partnership and understand there's a kind of Yin/Yan philosophy behind it. For example an extrovert, flamboyant executive might be better suited to a PA who is quieter and task focused whereas a quiet number crunching executive would be better suited to an extrovert PA who can deal with all the

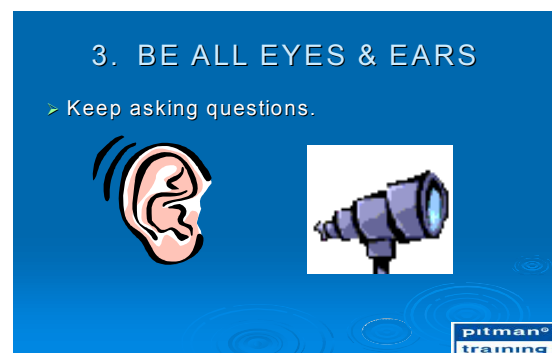
bits they would rather not.

In fact it's important from the start to explain your particular working style so that your boss understands clearly how you work and knows how you will help them to have more time to do the important things. For example, do you thrive when you are working for someone who gives clear guidelines and frameworks or do you love working independently and work best when there is plenty of variety?

3. BE ALL EYES AND EARS

Once you are in role, it's just as important to keep asking questions. As one PA recently put it:

“My role is to know as much as I can about what is happening in the business and to make sure I know everything that is going on around me within the divisions so I can make my boss aware of the key issues and develop action plans.”



There's no need to snoop around (you don't want to become known as the office snitch) however, if there is something that will affect your boss – remember where your loyalties lie.

This brings me neatly on to.....

4. **THINK PINK!** (I'm not talking fluffy here - I'm talking Financial Times)



Learn about the world of business. PA's don't need to be experts but do need to have an understanding of the issues that concern their boss and therefore the people he/she deals with. Expand your references and learn about the financial markets, world events and political issues. Particularly, find out what a balance sheet is, what a profit and loss statement does. Find out how the stock market works and

what influences the organisation's share price.

A good all round reading recommendation for this is "A Guide To Financial Markets" by Marc Levinson.

5. **POLISH UP YOUR COMMUNICATION!**

By this I mean think about the way you sound, the words you use and their impact on people.

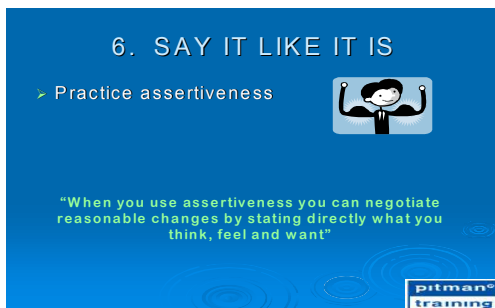
Firstly, how do you sound? Do you know? Have you got a clear strong voice or is it timid and quiet. Not sure? Record yourself, listen to yourself, ask a trusted friend and get to work on your voice. One of the most powerful ways to ensure a stronger voice is to slow down – it's amazing the impact that this can have – try it!



Next, I want you to think about the words you use. Cut the extra words. Keep your communication simple. You'll notice that nervous people will often babble using more words than necessary to communicate a simple message. However, confident people will get straight to the point. Before you speak, think about what you want to say. Rehearse it and then execute it precisely.

If there's one thing that annoys busy people, it's people who don't get to the point quickly!

6. SAY IT LIKE IT IS



Once you have polished up your language, the next tip is to practice your assertiveness on a daily basis.

Assertiveness is a way of confronting the unpleasant or difficult without getting squashed or squashing others in the process. When you use assertiveness you can negotiate reasonable changes by

stating directly what you think, feel and want.

A PA will constantly need to demonstrate assertiveness in his/her role both with their boss and other colleagues. Here are some great ways to sound assertive.

- When stating your preference or opinion;

"My preference is _____. "What I'd like is _____"

- When expressing your feelings;

"I feel _____ when _____." (make it specific)

- When making requests:

"The pay rise is not what I hoped for. I was expecting at least a X% increase."

- When disagreeing with someone;

"I disagree with you when you say _____." (make it specific)

- When saying yes or no without making excuses;

"I am unable to attend that function" (Say no more)

If you find it difficult to assert yourself, get yourself enrolled on a good course today.

6. Easy as ABC

Feeling overwhelmed, stressed, and burnt-out? Well, this is all too common a symptom for PA's. Most of this feeling can be overcome by following some simple prioritization rules that will help you deal with the important things first.

Here are some tips:

- Try to do your planning at the same time every day. Use this time to review actions already completed as well as listing future things to do.
- Use only one planner to keep track of your appointments. Keeping a separate business and personal planner creates confusion.
- Write out a To Do list every day. Be specific about the event. Rather than "investigate conference venues" write "Select 2 conference venues to view".
- Separate your To Do list into A, B and C priorities. "A" items are important. They are the ones you must do on that day "B" may be urgent but not as important and therefore they are ones that you could do on that day and "C" are those that would be nice to do if you get the time. Aim to do the important things first. Remember the 80-20 rule: 80 percent of reward comes from 20 percent of effort.
- Start with the A items. Don't work on a C just because it's easy to do. Also, break your A items into small manageable chunks, so they're easier to cross off your list.
- Cross off items as you complete them to give yourself a sense of accomplishment.

7. EASY AS ABC

Managing Time

- Plan at the same time everyday
- Use one planner
- Write a to do list everyday
- Prioritise your to do list
- Start with the A's
- Cross off items
- Leave time for emergencies



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- Don't jam your day full of activities. Leave time for emergencies.

7. AS EASY AS ABC

Managing Paperwork

- Block out time
- Handle paper only once
- Reduce filing trays
- Bin business cards

That's some basic tips on managing your time and your diary, here are some extra ones on handling paperwork that I hope you'll find useful.

- Firstly, block out time during the day to handle paperwork. Make time in your diary and stick to it.
- Never handle a piece of paper more than once. Avoid the "I'll just put this here for now" habit. Do something with every piece of paper that reaches you and put it in its proper place not just back on the pile.
- Extra storage space ends up getting filled up quickly. Try reducing or throwing out extra paperwork collectors. Limit your stacking trays to two: one for incoming papers and the other for outgoing papers.
- Don't keep business cards tucked away in a drawer. Enter them on a contact manager database, such as Outlook and then throw out the card. It's much quicker and easier to find contacts stored on a database than having to rifle through a whole stack of cards. And if you use Microsoft Outlook remember that these can easily be downloaded onto PDA's for easy portability which means that whenever or where ever your boss calls you for a number you'll never be at a loss. And if you don't use Microsoft Outlook - get learning today at one of our Pitman Training Centres in High Holborn or Notting Hill.

8. TAKE TWICE DAILY

Your role is to manage someone. To do that you need to communicate with them about what **you** are doing and what **they** are doing. Often executives get caught up in their day and forget about the PA who's holding it together back at the fort. So, top PA's know that from the outset they need to schedule two important meetings into the busy executive's diary. One is first thing in the morning and one last thing in the evening.



It's crucial for any PA to ensure that they have a task list for each day that they are able to discuss with their boss twice a day.

Your a.m. meeting will cover:

8. TAKE TWICE DAILY

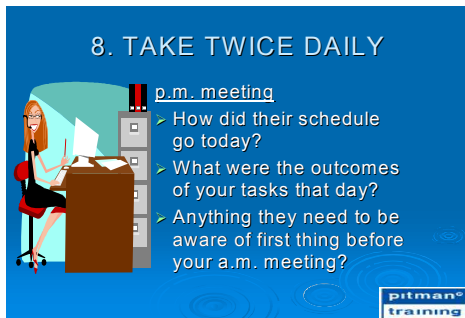
a.m. Meeting

- What are they doing today?
- What are you doing today?
- What other tasks need to be included on your list?

- What are they doing today? – are they prepared for each meeting?
- What are you doing today?
- What other tasks need to be included on your list?

This is a great start to the day; everyone knows exactly what they are supposed to be doing.



Your p.m. meeting will then cover:

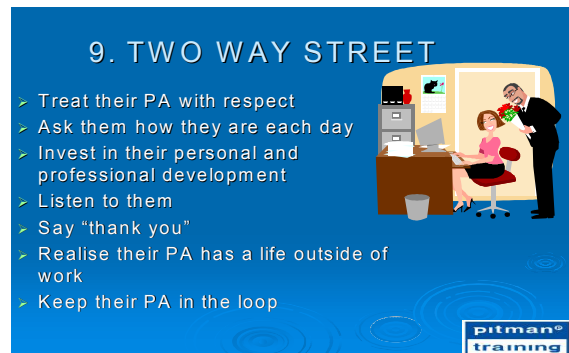
- How did their schedule go today? – are there any actions to take as a result?
- What were the outcomes of your tasks that day?
- Anything they need to be aware of first thing in the morning before your a.m. meeting?

That's it. Please make sure you keep it brief and to the point. Don't waste time chattering about the annoyances of your day. Your boss doesn't want to know! These conversations can happen face to face or over the phone. In any case, they should take between 10 – 30 minutes.

9. TWO WAY STREET

The relationship between a director and their PA is a 2 way street and it is equally important for you to understand what you can expect from a good boss.

Here are some basic things that good bosses know are important:



- Treat their PA with respect
- Ask them how they are each day
- Invest in their personal and professional development.
- Listen to them
- Say 'thank you'

- Realise that their PA has a life outside of work and accommodates these needs. They know that in return they will get an extremely loyal and hard working PA.
- Keep their PA in the loop. Share their successes with them, again creating loyalty.

If you feel your boss is not treating you in this way it's time to reevaluate your working relationship. Stop being a martyr. Start by being clear about what you want and explain how they will benefit from this change in working style. Maybe, you could pin up this checklist as a poster in the office to remind both you and your boss of what's expected.

If they don't change it's time to move on.

Switching tack a bit. Here are a couple of tips to make you a Microsoft wiz.

10. CREATE RULES



Get smart with Microsoft Outlook and create rules

Microsoft Outlook rules allow you to automatically perform actions on incoming and outgoing messages based on the criteria you establish. It can save time and make it easier to organize your e-mail. For example, you can:

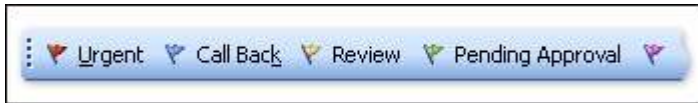
- Forward to your manager all messages sent by a specific person when they arrive in your Inbox.

Or

- Flag each meeting request or meeting update you receive from your manager.

You can flag messages in Outlook with coloured Quick Flags to help classify them or mark them for action. Flags can remind you to follow up on an issue, indicate a request for someone else, or set a reminder for a message or contact.

You can use the six coloured message flags to identify items for different kinds of follow-up. For example, use the red flag to mark messages that require immediate attention, and the blue flag for messages to read later. You can even create a customized Quick Flag toolbar in Outlook that matches your needs.



This is a great time management tool.

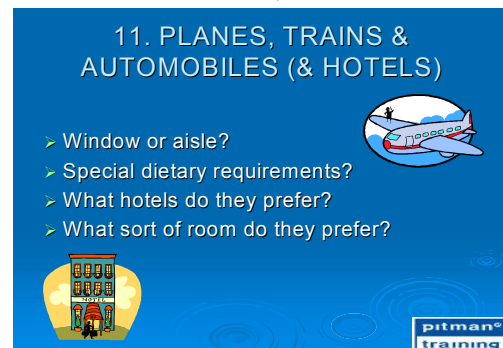
11. PLANES, TRAINS AND AUTOMOBILES (AND HOTELS)

Many PA's will deal with the travel arrangements for their bosses, even if their organisation has a travel department.

In this case, you'll need to make yourself familiar with all the web portals that will help you make easy travel arrangements. Add these to your favourites on Internet Explorer and they'll be easy to find.

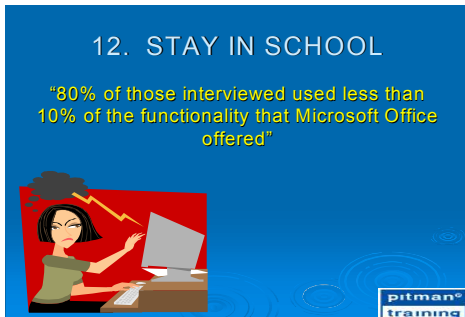
And don't forget to find out what your boss likes and doesn't like. For example:

- Do they prefer a window or aisle seat?
- Do they have any special dietary concerns?
- What hotels do they prefer?
- What sort of room do they prefer?



12. STAY IN SCHOOL

Make sure you're always ahead of the game by updating your IT skills. In today's fast paced world busy executives are too busy to work things out themselves. Make your life and theirs easier by training yourself to the highest level. You need to know how to create spectacular presentations, make reports look great



and produce valuable data and charts from complex spreadsheets. These are the things that will not only make your boss look great but help you become an invaluable PA.

But most people only know how to use a small part of each product's functionality and that puts them at a disadvantage in a competitive jobs market. A company we worked with recently carried out an audit on the use of

Microsoft Office by their legal secretarial team and found that a staggering 80% of those interviewed used less than 5% of the functionality that Microsoft Office offered.

Even in the case of MS Word, the team was using less than 10% of its functionality!

If you are not using Microsoft Office to its fullest then book yourself on a course, and obviously I'd recommend coming to Pitman Training at High Holborn, Notting Hill or Paddington.

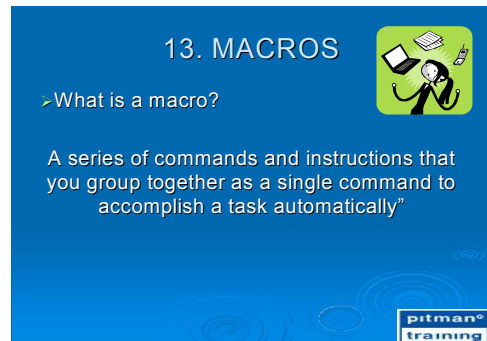
Here are two brilliant Microsoft tools you should learn to use.

13. Macros

Macros are a great productivity tool. They allow you to run a series of actions with the click of a button. Macros help you work smartly.

What is a macro?

Well, for example if you perform a task repeatedly in Word, you can automate the task by using a macro. A macro is a series of Word commands and instructions that you group together as a single command to accomplish a task automatically. Instead of manually performing a series of time-consuming, repetitive actions in Word, you can create and run a single macro — in effect, a custom command — that accomplishes the task for you.




Here are some typical uses for macros:

13. MACROS

> When would I use them?

- To speed up routine editing and formatting
- To combine multiple commands
- To automate a complex series of tasks
- Inserting standard text into documents



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- To speed up routine editing and formatting
- To combine multiple commands; for example, inserting a table with a specific size and borders, and with a specific number of rows and columns
- To automate a complex series of tasks
- Inserting standard text into documents

I don't have time here today to explain how they work, but get yourself trained up on them fast. They'll save bags of time.

14. PIVOT TABLES

I'd like to share with you a very powerful Excel tool. I'll make no bones that I'm a huge fan of them

They are called pivot tables and they allow you to pivot data via drag-and-drop to produce meaningful information.

A pivot table report is an interactive table that you can use to quickly summarize large amounts of data. You can rotate its rows and columns to see different summaries of the source data, filter the data by displaying different pages, or display the details for areas of interest.


Let's suppose you've compiled a large list of data—for example, sales figures for every product your company makes.

You're now ready to extract some meaningful information from the data, and find answers to questions like:

- What are the total sales for each product by region?
- Which products are selling best over time?
- Who is your highest-performing salesperson?

14. PIVOT TABLES

- > Interactive table that allows you to quickly summarise large amounts of data
- > Rotate, filter, or display the details for areas of interest



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To answer these and other questions, you can create a PivotTable report—an interactive table that automatically extracts, organizes, and summarizes your data. You can use this report to analyze the data, make comparisons, detect patterns and relationships, and discover trends.

For example, you can use the data in the following illustration...

| | A | B | C | D | E | F | G |
|----|--------------|-------------|-------------|--------------------|--------------|--------------|---------------|
| 1 | Month | Year | Type | Salesperson | Sales | Units | Region |
| 2 | Jan | 2003 | Dairy | Dodsworth | 2686 | 5611 | West |
| 3 | Jan | 2003 | Beverages | Davolio | 8725 | 6890 | North |
| 4 | Jan | 2003 | Produce | Buchanan | 6715 | 2652 | South |
| 5 | Jan | 2003 | Dairy | Suyama | 4356 | 5636 | East |
| 6 | Jan | 2003 | Meat | Suyama | 9662 | 3400 | North |
| 7 | Jan | 2003 | Produce | Davolio | 1328 | 2861 | West |
| 8 | Feb | 2003 | Beverages | Buchanan | 3571 | 5178 | South |
| 9 | Feb | 2003 | Dairy | Dodsworth | 6758 | 7817 | South |
| 10 | Feb | 2003 | Beverages | Buchanan | 4953 | 5889 | West |
| 11 | Feb | 2003 | Meat | Davolio | 4923 | 124 | South |
| 12 | Feb | 2003 | Meat | Suyama | 2666 | 744 | West |
| 13 | Feb | 2003 | Produce | Buchanan | 1450 | 234 | West |

...to create a PivotTable report that displays how each product is selling in each sales region, as shown here.

| | A | B | C | D | E | F |
|---|--------------|-----------|---------|---------|---------|-------------|
| 1 | Sum of Sales | Type | | | | |
| 2 | Region | Beverages | Dairy | Meat | Produce | Grand Total |
| 3 | East | 35,233 | 39,444 | 33,406 | 28,675 | 136,758 |
| 4 | North | 51,832 | 63,418 | 17,062 | 26,799 | 159,111 |
| 5 | South | 30,172 | 27,889 | 58,025 | 39,074 | 155,160 |
| 6 | West | 40,392 | 44,110 | 8,435 | 36,466 | 129,403 |
| 7 | Grand Total | 157,629 | 174,861 | 116,928 | 131,014 | 580,432 |

When PA's are able to understand how to manipulate data to this extent it makes them invaluable.


Again, get learning and I guarantee it will do your career the world of good.

And don't forget that our training centres are often open in the evenings and Saturdays so you don't have to worry about when you'll fit it in.

15. BECOME A PROJECT MANAGER

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- What's the objective of the project?
- What departments are involved in this project? And which particular people?
- What partners, suppliers and other parties are concerned in the project?
- What is the budget and where has it come from?
- What specific plans have already been proposed



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Many Executives rely on their PA's to help manage projects with them, or you might be organising a conference or PR event.

Help yourself become a master in managing projects. Now mostly, you'll be involved in projects that have already been given the go-ahead, so what you'll need to find out is:

- What's the objective of the project?
- What departments are involved in this project? And which particular people?
- What partners, suppliers and other parties are concerned in the project?
- What is the budget and where's it coming from?
- What specific plans have already been proposed

So, imagine it was your responsibility to organise a conference the next thing you'll need to do is grab a big piece of paper and scribble down all the areas you need to work on, such as:

- Caterers
- Transport
- Printing
- Visitors
- Press information
- Venue
- Speakers
- Equipment
- Final checks
- Miscellaneous

15. BECOME A PROJECT MANAGER

- Caterers
- Transport
- Printing
- Visitors
- Press information
- Venue
- Speakers
- Equipment
- Final Checks
- Miscellaneous



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Next to each of these titles you then need list each individual task required, when you must have the task completed by and the person who will be responsible for completing the task (don't forget to ask for help and get others to help). Now you are almost ready to go, but before you do look at your plan and make sure you've

included everything and check with your boss to ensure it meets his understanding of the project then get organising.

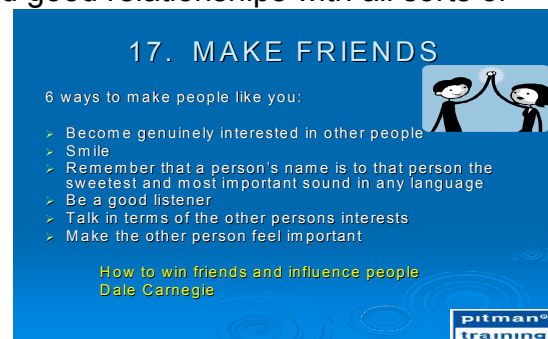
16. BECOME A CRITIC



PA's are forever organising venues and restaurants for their bosses. It's often a scary task as you hope that the venue will be suitable. Firstly, find out likes and dislikes and then make your life easier by staying on top of the scene. Get to know websites that can make your life easier. For example www.deskdemon.co.uk contains an easy to use venue searcher. For restaurants I prefer websites that contain reader reviews such as www.toptable.co.uk or for London's best restaurants, bars, spa's and salons, www.urbanpath.com is my personal favourite.

17. MAKE FRIENDS

You'll need to be someone who can build good relationships with all sorts of people so that you can get the job done. The image of the fiery gatekeeper PA no longer holds true. Successful ones know that to get ahead you need to make friends. Good PA's know that if they are helpful to people, they'll be helpful back when it's needed.

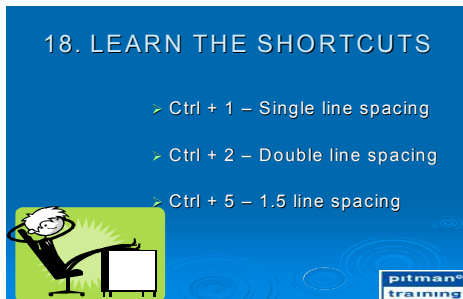


According to Dale Carnegie, there are 6 ways to make people like you:

- Become genuinely interested in other people.
- Smile.
- Remember that a person's name is to that person the sweetest and most important sound in any language.
- Be a good listener. Encourage others to talk about themselves.

- Talk in terms of the other person's interests.
- Make the other person feel important - and do it sincerely

18. LEARN THE SHORTCUTS



Save time and effort when typing documents by adjusting line spacing with this easy tip:

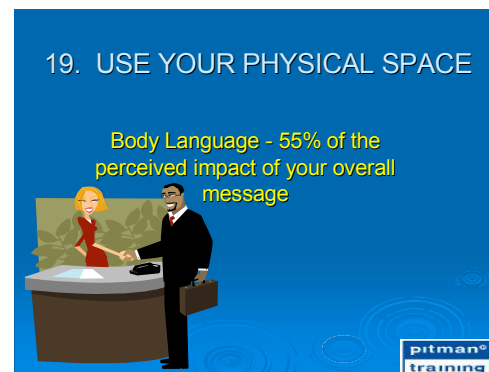
Ctrl + 1 - single line spacing
 Ctrl + 2 - double line spacing
 Ctrl + 5 - 1.5 line spacing

Don't forget to use the right mouse key to speed up common tasks. For example, simple cut, copy and pastes are easily accomplished by right clicking on the mouse. Also, copying or moving folders and documents is easily done by moving folders while holding down the right mouse key. And if you don't touch type please don't wait a moment longer and register for our course at www.holborntraining.co.uk.

19. USE YOUR PHYSICAL SPACE TO CREATE AN IMPRESSIVE PRESENCE

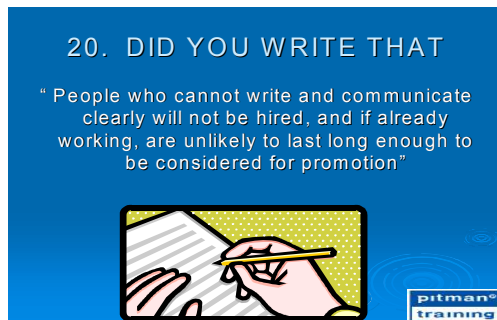
Your credibility is very important in this role and to establish yourself with everyone you meet make sure that when greeting people you stand up and move out from your desk, shake their hand and introduce yourself. This puts you firmly in control from the very beginning and gives the visitor the impression of someone who is extremely professional and welcoming.

Your body language can increase the effectiveness of your communication, creating as much as 55 per cent of the perceived impact of your overall message.



20. DID YOU WRITE THAT?

The National Commission on Writing, a US Body found in a recent report that:



“People who cannot write and communicate clearly will not be hired, and if already working, are unlikely to last long enough to be considered for promotion.

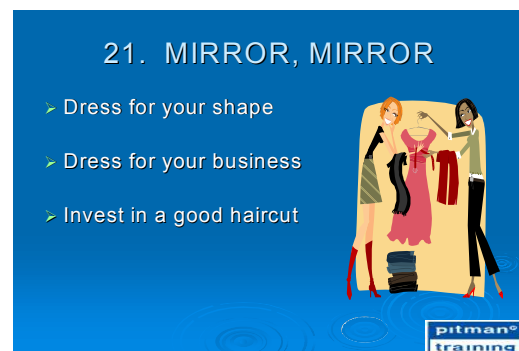
Half of responding companies reported that they take writing into consideration when hiring professional employees and when making promotion decisions.

Also take into account that every piece of written communication you send out represents your boss and the company. Spelling mistakes, poor grammar and punctuation will make your boss look silly. If you're not confident in your writing skills enrol on a course, buy a book or do something about it.

21. MIRROR, MIRROR

OK, let's get this straight; we're not talking high heels and tight skirts. I'm talking about smart, professional clothing and grooming. So, here are my top tips

- Dress for your shape – if you're not sure what suits you pay the £100 or so pounds to get someone to tell you what looks good on you or take along a friend or a colleague whose style you admire and try on different outfits.
- Dress for your Business. Business dress is changing dramatically these days so if you work for a company that's more laid back you'll need more



casual clothes. Casual clothes are dangerous, as we sometimes get confused. My tip is it's better to err on the side of looking more professional than casual.

- Invest in a good haircut – it's the one thing that can make a dramatic difference.

22. SHHH – CAN YOU KEEP A SECRET?



Your boss should feel that you can be trusted to be truthful and use discretion, not repeating what you hear to anyone. You are going to hear a lot of confidential information so be prepared to keep it to yourself. Breaking that confidence will seriously damage your career.

23. AT A LOSS FOR WORDS

Always consider carefully before you respond to others or make conversation. It is important that you never say anything which could affect you or your boss adversely.

If you can't make up your mind what you should say, then it's wise to say nothing.

People don't generally expect an immediate response to statements or questions and so you can take your time to consider the likely result of any information you need, or want, to PA'ss on to others.

A blue slide with the title "23. AT A LOSS FOR WORDS" at the top. Below the title is the text "Instead of 'No Comment' try:" followed by an illustration of a man with a question mark above his head. Below this are three bullet points: "> 'I am unable to reply to that'", "> 'I will do what I can to help but I can't guarantee the outcome when others are involved'", and "> 'I will pass on your comments, but I can't promise that he/she will return your call'". The "pitman training" logo is in the bottom right corner.

23. AT A LOSS FOR WORDS

Instead of "No Comment" try:

- > "I am unable to reply to that"
- > "I will do what I can to help but I can't guarantee the outcome when others are involved"
- > "I will pass on your comments, but I can't promise that he/she will return your call"

Try to build up a mental library of polite and tactful things to say.

Instead of "no comment" try saying

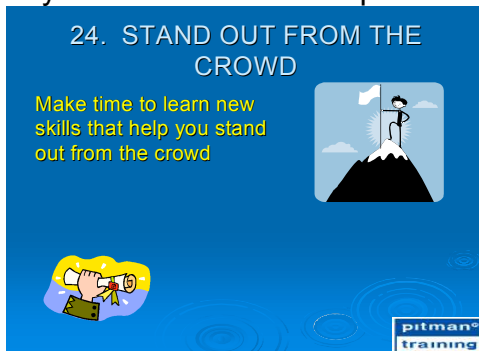
- "I am unable to reply to that."

- “I will do what I can to help you but I can’t guarantee the outcome when others are involved.”
- “I will PA’ss on your comments, but I can’t promise that he/she will return your call.”

24. STAND OUT FROM THE CROWD

Very recently at Pitman Training we had a student who had spent a great deal of time temping in various secretarial and office manager positions. She realized she desperately wanted to become a full time PA. Not only did she want to prove her experience but also offer something different. She decided to study a web design course along with her PA Diploma. She knew that with this not only would she have the broad range of skills needed for the role but also a specialism. The job offers came streaming in and Lydia landed herself a great full-time PA position.

If you are already in a job, it’s time for you to take hold of your own career development and if there’s an appraisal system in place, make your boss aware of your main areas of responsibility, achievements and loyalty to the company



over the previous year, requesting training, promotion and a salary increase where appropriate. You’ll need to justify such requests, spelling out the added value you feel you’ll be able to give your boss and company - so get a business case together. If there’s no formal appraisal system, then get your case together and schedule a meeting with your boss.

So, make time to learn new skills that really help you stand out from the crowd

25. DON’T LOSE YOURSELF

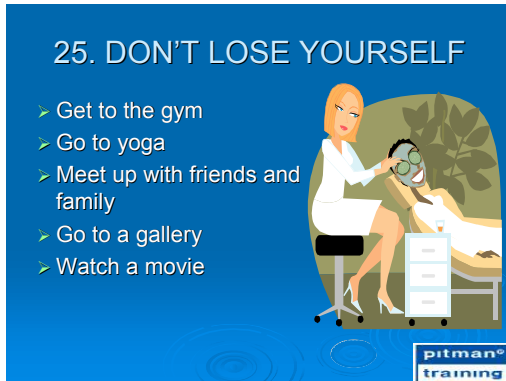
Many PA’s get so caught up in managing their boss they can forget about their goals and aspirations. Once a month make sure you take some time out to evaluate the following:

- Are you where you want to be?



- Are you enjoying it?
- What have you done this month that's grown you?

Successful PA's know that it is important to make time for themselves.



- Get to the gym
- Go to yoga
- Meet up with friends and family.
- Go to a gallery
- Watch a movie

Try to do something at least every other day and I promise you you'll have more energy for your boss.

I hope today that I have given you a range of ideas that will help you in your roles. Every PA I have met is different and every boss is different, however the one thing that's for sure is that every great PA I've met or read about never got complacent and understood that by keeping their skills current and working on their people skills they would continually be in demand.

If you would like to receive a transcript of this speech please go to:

www.holborntesting.co.uk and submit your details and we'll email you a copy.

Thanks for listening and good luck in your career!