



*Executive Assistant
Standard Operating Procedure (SOP)
Guide*

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North Star Principles

1. **Protect the CEO's Time:** Filter all inbound requests to identify and prioritize those that are important and help keep an eye out for them.
2. **Efficiency in Calendar:** Be as efficient as possible. Be clear, committed, and include context.
3. **Appreciates the Response:** Whether that's a clear 'yes' with the appropriate calendar info for an upcoming meeting or a 'not at this time' reply, every email and correspondence should be answered clearly and kindly.
4. **Read the Play:** Be preemptive. Come prepared and aware of all the moving pieces and how to address them ahead of time. Work from the hour, to day, week, month, quarter. Zoom in / Zoom out.
5. **Prioritize Revenue:** Order tasks based on what will yield the most significant outcome in support of revenue. Profit solves all problems. Making or saving money is a priority.
6. **Capture Preferences:** Questions should only be asked once. Save. Share. Reference for the future.

Key Areas of Responsibilities

Email and Communication Filtering: Regularly check and prioritize incoming communications to ensure the CEO addresses only the most critical items.

Meeting Coordination: Schedule and organize meetings to ensure they are necessary and productive.

Calendar Management: Maintain a clear and organized calendar that balances work and personal commitments.

Travel Planning: Arrange all aspects of travel, including itineraries, accommodations, and transportation.

Event Planning: Organize and oversee corporate events to ensure they align with business goals and the CEO's availability.

Financial Monitoring: Monitor expenses and budgets related to the CEO's activities and office.

Project Tracking: Stay informed about key business projects and deadlines to advise and update the CEO as needed.

Time Management: Continuously seek ways to optimize the CEO's schedule for greater efficiency.

Networking Coordination: Manage contacts and networking opportunities, aligning them with business priorities to maximize effectiveness.

Personal Appointments: Handle personal appointments to ensure a balanced lifestyle for the CEO.

Confidentiality Management: Safeguard sensitive information to ensure privacy and security.

Task Prioritization: Regularly assess tasks and priorities to align with the CEO's strategic goals.

Team Communication: Act as a liaison between the CEO and other staff members or departments.

Feedback and Reporting: Gather and relay relevant feedback or reports to the CEO for informed decision-making and informed decision-making.

Problem-Solving: Anticipate and address potential issues before they reach the CEO, ensuring smooth operations.

Task Cadence

Daily

This is the daily flow of the CEO's Admin.

1. [Review the CEO's Calendar](#) for the day ahead
2. [Process the CEO's Inbox](#)
 - a. Goal: 0 Inbox by 10 AM EST and again at 5 PM EST
3. Process your Inbox
 - a. Schedule any calls or meetings requested (outside of clients)
 - b. Sure up any speaking engagements

4. Create a to-do list for the day and complete it by EOD.
 - a. Add to it any ordering
 - b. Voxer requests
 - c. Slack message request
 - d. SMS requests
 - e. Processing emails that require specific actions (Like signing legal documents, or customer service requests)
5. Prepare for the meeting with the CEO
 - a. Update your [Admin Agenda](#)
6. Research/ book any requested travel
7. Briefly review the CEO's Calendar for the 6 weeks ahead
8. EOD, before signing off:
 - a. Go through your inbox and address all lingering questions,
 - b. Write summaries or notes to emails you'll work on tomorrow to denote any progress you've made.
 - c. Compile your 'To Do' list for the following day.

Weekly

1. Audit the CEO's Calendar for 6 weeks ahead:
 - a. Confirm all calendar invites have been accepted, follow up if not
 - b. Review all client programs in the calendar
 - c. Confirm that there are weekly meetings with the CEO's wife to discuss the calendar and upcoming events/travel, etc.
2. Review the travel schedule and update accordingly.
3. Review and confirm family commitments

Monthly

1. Review the CEO's travel calendar for the 2 months ahead
2. Review the suspense report / Exec Report
 - a. Find any missing support

Quarterly

1. Schedule a separate Family Boardroom Meeting with each of the CEO's kids
2. Schedule a quarterly retreat with the CEO and his wife

Annually

1. Semiannually, schedule dentist appointments for the CEO.

Other Odds & Ends Responsibilities

1. Creating an invoice in Stripe

Admin Meeting

As a new admin, meeting with the CEO will help you clarify expectations and outcomes. First, you will meet with the CEO every day. After 4-6 weeks, you'll meet three times a week. After three months, you will meet once a week.

Building Your Meeting Agenda

Building and maintaining an up-to-date meeting agenda is a vital daily activity. Every meeting agenda should include these eight parts, in this order:

1. A Title. Outlined like so, "Admin Meeting, [your name] & CEO, [date]"
2. Meeting Action Items. List the names of all meetings the CEO has had since the last time you spoke. Confirm there is nothing that you need to do for those.
3. Calendar review. Have the calendar open and ready so that the CEO can easily follow along.
4. Previous Meetings. For each meeting the CEO has had since the last meeting, ask them if there's any follow-up or action required.
5. CEO's Agenda. Ask the CEO if he has any feedback or anything on his list that he'd like to discuss with you.
6. Closing the Loop. List any action items that have been resolved or finalized since you last met.
7. Assistant to Review. Present any challenging emails or opportunities that the CEO might be interested in.
8. Projects. List in order of importance all the projects you are working on that need assistance from the CEO to resolve. Be succinct and offer three resolution options for any problem.
9. Questions for the CEO. Create a list of questions to help you better understand the business and the CEO. If you have extra time during your meeting, run through as many as possible.

Running Your Admin Meeting

1. Come prepared. Have all necessary documents, links, or items that need to be reviewed, opened, and easily accessible.
2. Begin by sharing your screen so that the CEO can follow along with the meeting agenda and review the calendar.
3. Stay succinct, summarize all points as quickly and clearly as possible.
4. Take notes on any action items that need to be addressed after the meeting.

5. Ask questions. This is your time to get to know the CEO and ask as many questions as you have.

Processing CEO Calendars

Purpose: To help design the CEO's calendar so that he knows precisely where he needs to be, with all relevant information required for the meeting, and with no surprises.

During travel, please add any relevant documentation, times, and confirmation numbers so that the CEO can work from the calendar and receive reminders when possible.

CEO's Perfect Week

Before committing anything to the CEO's calendar, refer to this basic schedule:

Monday to Friday:

Mornings: Reserved for creative work & workouts (ideally, this time is used for only block time, nothing else is to be scheduled during this time)

Lunch: 12:00 - 12:30 pm

Afternoons: Ideal time for meetings

Evenings: Family Time

Late evening: This is for an emergency and must be approved by the CEO. (just like mornings - *it's possible* - just not the default plan)

Fridays:

Weekends:

Saturday/ Sunday: Family day - non-negotiable, nothing gets scheduled for business

Special Considerations:

- Try to book as many calls as possible during driving time, especially when video is unnecessary.
- Do not schedule any video-related activities after a workout, unless it's with the team.
- Always book 30 minutes of prep in the morning of a speaking event / Masterclass, to ensure slides are up to par.
- Schedule multi-day events to appear at the top of the calendar and schedule them individually so that they block off each day of the calendar, ensuring the CEO does not mistakenly overbook his availability.

Creating Calendar Invites

1. Rules for Creating Invites

1. Do not schedule morning meetings unless requested by the CEO.
2. If the CEO is the one requesting a call schedule in the next 1-3 days
3. If someone else is requesting the CEO's time, schedule in the next 1-2 weeks
4. The default is 20-minute meetings
5. Batch calls together when scheduling, as the CEO doesn't want any "dead" space in his calendar.
6. Never provide the CEO's personal cell # unless approved or with individual contacts.
7. Always ensure that an agenda is included and the other person's phone number is provided in the invitation.

2. Creating the Perfect Calendar Invite

Creating the Invite:

1. Naming a Meeting ...
 - a. Sync (general meeting)
 - b. Private Coaching
 - c. 1on1
2. Add in start/ end times, in the correct time zone
3. Always include the location.
 - a. For phone calls, if the CEO needs to call someone, include the number in the "location" line & have the CEO call the other participant.
 - b. For all meetings, include contact information (even with Zoom)
4. In the description, write the contact information (phone number) and agenda to help the CEO determine what the event is about.
 - a. If there isn't an agenda, the CEO won't attend ;)

Adding Guests:

- Add the emails for any guests being included in the event, and send calendar invitations

Length of Calls:

- *Default time is 20 minutes to keep people on track / focused
- 15 min - typically for someone wanting the CEO's time, and/or someone he doesn't know, or someone just picking his brain / quick question
- 55 min - interviews/podcasts, etc.
- 60 minutes for the masterclass if books were purchased

Order of Operations for Scheduling:

1 — Health: All workouts take priority over any other block on the calendar

#2 — Client Commitments: Client sessions should not be rescheduled and never for meetings of a lower priority, especially Private Coaching calls.

3 — Meetings the CEO Has Asked For: Calls, Podcasts, Intros, Date Night, etc.

4 — Team Requests: Use creative time to block out time to move the ball forward on team projects

5 — Meetings for the CEO's Time That He *Hasn't* Asked For: Calls, Podcasts, Intros, etc.

#6 — Team meetings: Meetings with team members can be adjusted and rescheduled as needed.

Examples of Using Specific Colors for Events:

1. **Blueberry** - Block time to achieve business, personal, or family goals + personal appointments
2. **Red** - Client Calls
3. **Yellow** - Calls / Meetings / Team meeting
 - Ex. Weekly Team Meeting, Call with/ friend or non-client
4. **Sage** - Travel
 - Examples include flights, Hotel check-ins, rental car pickups, etc.
5. **Peacock** - Fitness + Meal Reminders
 - Ex. Crossfit, Breakfast, Lunch
6. **Grape** - Speaking Engagement / Paid Engagement
7. **Basil** - Networking Engagement
 - Ex. Founders' lunch / Dinners, Community support

3. Adding a Day-Of Calendar Entry

- Must SMS the CEO of any same-day calendar changes

4. Time In-Between Meetings

- How much of a buffer do you need in between meetings?

5. Scheduling Drive Time for Out-of-Office Events / Appts

- When scheduling out-of-office appointments, schedule drive time separately from the event (to and from the appointment)

6. Notifying the CEO's Wife of Events

- When the CEO's wife is not attending an event, she still needs to be kept informed about travel arrangements and matters at her house. Add her to the calendar invite and set it as 'Optional' next to her invite so she knows it's a heads up.

7. Final Checks

- Have you verified each part of the calendar invite: subject, location, date, start and end time, timezone, CEO's calendar, color of event, etc.?

- Have you added a number in the location if the CEO is supposed to call someone?
- Have you included all the contact details in the description, including a cell phone number for backup?
- Have you included an agenda to guide the conversation?
- Have you sent out a calendar invitation to the guests?
- Have the guests confirmed?

Checking the Calendar

Purpose: Even with absolute diligence when setting up a calendar invite, phone numbers and links can be missed, other team members might put it on hold, and attendees may not confirm. This is why it is VITAL to check the calendar first thing in the morning *every* day. The importance of this process cannot be overstated.

1. First thing in the morning, open the CEO's calendar and click on the first invitation of the day. Ask yourself:
 - a. Is the title correct?
 - b. Is the location there?
 - c. Has the attendee confirmed?
 - i. If not, send them an email (see below)
 - d. Is the description of the event filled out correctly?
 - i. Location + Agenda + Contact info with/ Phone number
 - ii. If there is no phone number, send them an email (see below)
2. Continue to review each invitation throughout the day, filling in any missing information / adjusting the calendar invitation to ensure it is perfect.
3. Once a week, on Fridays, open up all the invites for the next week to figure out who hasn't confirmed, what info you're missing, and to have a better gauge on what is coming down the pipe.
4. Look forward to an additional 5 weeks to continue familiarizing myself with upcoming events.

Calendar Confirmation Email Templates

Attendee confirmation:

Hey [Name],

Hope you're well. I'm confirming your call with the CEO today at [TIME]. Please confirm with me here, or on the calendar invite.

All the best,
[NAME]

Phone confirmation:

Hey [Name],

Hope you're well. I'm confirming your call with the CEO today at [TIME].

If you could also pass me your phone number, in case the CEO has any tech issues, that'd be great.

All the best,
[NAME]

Scheduling Speaking and Podcast

The CEO prefers to have one virtual podcast on his calendar per week, but this is quickly becoming less effective, and in-person meetings are now the preferred method.

Scheduling a Podcast

1. When podcast requests come in, check to see if they're a good fit (*see Researching Potential Podcasts/Interviews below / Past guests / Weekly views / If there is a prior connection). If it looks promising, send a message asking if they record in person.
 - a. Things to consider to have the CEO on their show
 - i. Reach the show has
 - ii. Number of Apple Reviews
 - iii. Social following
2. Calendaring Podcasts ...
 - a. Include connection
 - b. Phone Number
 - c. Apple Podcast Link
 - d. Instagram AND LinkedIn Pages
3. After Podcast Day
 - a. Follow up with a thank you note, cc'ing the videographer
 - b. Ask for the raw podcast with video to be sent along to the CEO when complete

Requesting Recordings of Speaking Engagements

- When adding speaking engagements to the calendar, there are a few key elements that should always be included.
 - Duration of the Talk
 - Title
 - Connection to the host
 - How much did they pay to have the CEO speak

All speaking engagements should include the videographer in the calendar entry. After the event has been recorded, if there was any video, send the following email:

Hey NAME,

The CEO had a great time being on X Show on DATE.

When available, would you please pass along the raw footage (with video) of the recording to me and the Videographer (cc'd here)? We'd love to have a copy of it to keep for our records.

Appreciate your help!

Talk soon,
[NAME]

Scheduling Founder's Dinner

1. Find the Founder's Dinner list here.
2. Whenever the CEO is headed to a new city, he typically will want to host a Founder's Dinner for 10-12 people.
3. Add to Admin Sync to verify the list, and then reach out to ensure the individuals are able to attend.
4. Once confirmed, add them to the calendar invite.

Processing SMS

Purpose: Every day at 10:00 AM CT and 4:00 PM CT, it is necessary for the admin to check and process any SMS requests that have come through from the CEO or the CEO's wife.

1. Open SMS and read all messages that have been received
2. Add each item to your immediate to-do list

3. Reply to the message, and respond to what you've done to push the message forward.
 - a. Ex. Sent Intro Email or reached out to XYZ to confirm the podcast.
4. Once the task has been completed, add to your Closing the Loop.

Booking Travel

Purpose: Creating a procedure that reduces the time, guessing, and back-and-forth to create a fantastic travel experience for the CEO. All aspects of travel should be booked with sufficient time beforehand to secure the best pricing, options, and notice to everyone involved in the trip. Below is a comprehensive list of details and preferences for booking hotels, flights, and other travel arrangements for the CEO, along with instructions on creating the master trip file for the CEO's reference.

Expectations and Timelines

4 Weeks Out	6 Weeks Out	8 Week Out
<ul style="list-style-type: none"> • All Canadian Flights Booked 	<ul style="list-style-type: none"> • All American Flights Booked 	<ul style="list-style-type: none"> • All International Flights Booked

1. Block out days right away so that the schedule doesn't allow calls to be booked that day(s)
2. Block out 1 day before and after for travel.
3. Block out events from "date to date" and include name of event and dates in "subject" for quick view of availability (multiple dates are shown as a thin line across top, not as visible to the CEO)
4. Block out the start and end times for each day that the event is taking place, so the specific times appear in the calendar, and block out times to be scheduled by third-party scheduling apps.
5. Complete the calendar invite as above; however, include all travel information in the description, i.e., hotel information, flight information, parking details, event itineraries, etc.
6. For flights, include the full flight # in the subject line for easy reference.

Steps to Booking Travel

1. Determine Travel Dates

- Before presenting the event to the CEO, ensure you have *all relevant* pieces of information about the trip.
 - Who / What / Where / Why / How
- If attending an event, determine what time the event begins and ends
- If the CEO is speaking, find out what date and time, and any other expectations/commitments (ie, speaker dinners)
- Confirm with the CEO the approximate preferred arrival and departure dates and times, as well as preferred airports for both departure and arrival
- Confirm dates with the videographer
- Add travel dates to [Travel Schedule](#)

2. Create a Trip File in Google Drive

- The TRIP file should be created as soon as the event has been confirmed
- This file becomes the master record of the complete event and is used for all planning purposes
- Details such as people, locations, accommodations, flights, etc, are to be added ASAP to the trip file.
- In Google Drive, open the template and copy and paste the title and body into a new Google document: TRIP - [Cities, Cities,] - [Month Departure Day - Return Day] - [Short Event Name/Reason]. Save to the TRIP folder in the playbook.
- Include all relevant trip information that the CEO would need to reference, including confirmation numbers and contact details.
 - Flight details (including booking # numbers and electronic boarding passes when received)
 - Transportation information (ie, Uber, Car rental details, etc.)
 - Accommodation information (including wifi and parking information if applicable)
 - Itinerary of each day (including flight info, restaurant details for dinners, etc.)
 - People to connect with (names and emails of anyone the CEO wants to meet up with while in town)
- Research nearby gyms and include the link to their website, schedules, address, and price information for drop-ins.
- Attach any relevant documents (e.g., event PDFs, insurance, etc.).

3. Research Trip Details

- If attending or speaking at an event, research the event details, such as start and end times, venue, recommended hotels, planned activities, and dinners.

●

4. Create Calendar Reminders

- Create a calendar reminder to book flights (for domestic flights: book at least 3 weeks ahead, US flights: book at least 4 weeks ahead, all other international flights: book at least 6 weeks ahead)
- Create a calendar reminder 24 hours ahead of each flight to check in

- Create a calendar reminder to check in with the CEO if work needs to be done on the car while he is traveling, + add those details to the calendar event

5. Create Calendar Events

- Create an “Extended Calendar Event” from date of departure to date of return (mark as “all day” and “busy” so no calls can be scheduled) (This event will go on the top line of the calendar screen and span the whole trip time selected)
 - Add the link to the Google Drive Trip file to the top of the description
 - Copy the details from the Google Drive Trip File to the Calendar event
 - Add the CEO’s wife to the calendar event
- Create a calendar event for the CEO to have a trip planning session on Sunday from 9:00 am -10:00 am AST, 7-10 days before he travels
- For trips longer than 5 days, add a 3-hour session from 9:00 a.m. to 12:00 p.m. on the first business day back from traveling, called @inbox, for the CEO to process the inbox and catch up.
- Create/duplicate calendar events for any booked activities, conferences, or speaking engagements, as well as travel for the trip, in their designated time slots. **(Verify all in proper time zones!)**
- Create a 1 hr calendar event the night before travel for packing
- Create calendar events for any lunches, dinners (Add time of dinner/ lunch with time zone into the calendar event title as well)
- Create calendar events for any scheduled Fitness Classes
- Create a calendar event for Rental Car pick-up if needed, directly after the flight
- Create a calendar event for Hotel check-in, directly after the flight
- Create any other relevant events to the trip that will put the CEO in the right place at the right time, with all the information that he needs at his fingertips

Book Accommodations/Transportation

Flight Preferences:

- Duration:
- Connections:
- Airlines:
- Class:
- Seats:
- Time of departure:
- Time of arrival home:
- Time away:

Hotel Preferences:

- Book as early as possible to secure the room and the room rate
- Always book refundable rooms and make a note of the cancellation policy
- Add hotel name, address, URL, phone #, confirmation #, and any other important information (ie, parking details, etc.) to the trip file and the extended calendar event description
- When booking a group rate, ensure that the CEO's Wife's name can be added to the reservation.
- When attending or speaking at events, book the venue hotel where the majority of speakers or attendees will be staying
- When booking hotel rooms, request:
 - Highest floor/best view,
 - Near the elevator,
 - All booked rooms are near each other,
 - King-size bed,
 - Latest possible check-out
 - Add a microwave and fridge for meal prep

Transportation Preferences:

Uber:

Car Service:

- List of preferred places to hire a car, based on location

Car Rental:

- List of car rental companies that are vetted or have a previous account

How to Update Calendar with Flight Information

- Add all of the flight details to the main extended calendar event, including the booking number.
- Create a specific event for each leg of the flight, including the flight number in the title. Ensure that the departure time zone and arrival time zone are accurate, and change the color to green.
- Invite the CEO's wife to the departure flight from home and the arrival flight home.
- Do not include travel time to and from the airport or the time required to be at the airport before check-in in the calendar.
- Add a reminder to the assistant's calendar 24 hours before check-in of both departure and return flights to check the CEO in

How to Handle Delays or Cancellations

- Refer to the Google Drive Trip file for all relevant information

- Always keep the CEO's Wife in the loop in case she needs to make arrangements for the boys
- For delayed flights that result in a layover, research hotels with a gym and be prepared to book a hotel to keep the CEO productive and make sure he gets a workout in
- For cancelling flights, call the airline and if available, always get a credit or refund to the credit card instead of a credit with the airline
- Cancel hotel
- Cancel transportation (if applicable)
- Cancel any Founders Lunches or Dinners (if applicable) by canceling the calendar invite and reaching out to each attendee via email.
- Cancel with any event organizers, if applicable (ie, in case of a speaking engagement)
- Cancel any attendees, if applicable (ie, in case of us hosting the event)
- Cancel any planned events, if applicable
- Remove all calendar events from the calendar and reset normal daily activities and meetings, if applicable.
- If items are being shipped to the hotel, make necessary arrangements

Final Checks

- Have you researched all the event details before discussing travel arrangements with the CEO?
- Have you added a calendar reminder to book flights at the appropriate time ahead?
- Have all of the travel details been added to the CEO's calendar?
- Has each day been blocked off individually in the calendar (ie. So the CEO can see it in his calendar, and so Calendly knows)?
- Has a reminder been set to check in the CEO 24 hours ahead of their flight(s)?
- Has the CEO been checked in 24 hours ahead, and an aisle seat been selected? (if available)
- Have credits or promo codes been used?

Processing CEO Inbox

Purpose: The goal of processing the CEO's email inbox is to ensure that he has a clear understanding of which messages require his attention. Secondly, so that senders receive a responsive reply when it doesn't need their attention (e.g., scheduling). Finally, to reduce the amount of time the CEO spends on emails and be able to guard his time accordingly. This is done twice a day.

Expectations and Guidelines

CEO's Inbox Expectations

- Initial email response - X day(s)
- Email resolution - X day(s)
- Online order - X day(s)
- Notification of Payment owed - X day(s)

Assistant's Inbox Expectations

- Initial email response - X day(s)
- Email resolution - X day(s)
- Online order - X day(s)
- Notification of Payment owed - X day(s)

How to Process the CEO's Inbox

1. In the CEO's inbox, starting from the oldest and working up to the newest, identify the type of email according to the categories listed below. Begin sorting each email into its respective locations.
2. Emails that require review with the CEO during your sync are placed in the Review Folder. These emails include potential opportunities for the CEO (speaking engagements, travel, and investments within his network), as well as personal emails that you're unable to identify the connection to. Clean up as many of the emails as you can on your own without bringing them to the CEO.
3. Unsubscribe from as many newsletters and emails as possible, unless it's a newsletter from a friend.
4. Receipts should be tagged into the receipts box and archived.
5.

How to Handle Unique Email Situations

1. For emails asking for the CEO's opinions, answering questions for a blog, or an article:
 - Pass going forward unless from my clients or good friends.
2. If someone is looking for the CEO's recommended books, send them this blog
3. The CEO does not typically collaborate on content unless it's a well-known brand (e.g., NYT, Forbes, Steve Harvey, Slack, etc.).

Rules for Labeling Emails

To Respond

1. Any emails that the assistant can respond to (after a response has been given, remove *To Respond* and apply *Responded*)

To Review

1. Emails that need to be run by the CEO
 - a. Questions
 - b. Run an event/opportunity for him
 - c. Unsure of how to respond

Responded

1. Any emails that the assistant has replied to

Waiting on

1. Emails that you are “waiting on” a reply to take action

Financials

1. All “Daily Cash”

Investment

1. All Investment Opportunities

Receipts

1. Any emails reflecting a purchase or a charge

Newsletters

- Comments on blog posts/YouTube video

Archive

1. If the email does not require any further action and has been appropriately labeled, it can be archived.

How to Respond on the CEO’s Behalf

When responding on the CEO’s behalf for the time being, use this basic template:

This is [Your Name], [CEO]’s assistant.

I received your email before he did and thought you’d appreciate a speedy reply.

Common Requests and Responses

Try to use the basic templates for responding on the CEO's behalf. They save time and are the approved ways of responding to someone.

1. When responding to pass on an investment opportunity

This is [Your Name], [CEO]'s assistant.

I got your email before he did and thought you'd appreciate a speedy reply.

Thank you very much for considering [CEO] for this investment opportunity in [XYZ product]. Unfortunately, at this time, [CEO] is heads down working with coaching clients and is not looking at any new deals outside his immediate network.

We wish you all the best on your journey of innovation, growth, and success :)

All the best!

2. When responding to pass on an event invitation

This is [Your Name], [CEO]'s assistant.

I got your email before he did and thought you'd appreciate a speedy reply.

Thank you very much for inviting [CEO] to [XYZ Event]. Unfortunately, at this time, [CEO] is heads down working with coaching clients and is not available to attend.

We wish you all the best with your event!

Thanks!

3. When passing on a writing or blog collaboration

Hi [Name],

This is [Your Name], [CEO]'s assistant.

I got to your email before he did and thought you would appreciate a speedy reply.

Thank you very much for compiling these pitch ideas. Your desire to collaborate with [CEO] is flattering. [CEO] is very committed to creating great content; unfortunately, he isn't currently collaborating on his site.

*Keep up the writing :)
[Your Name]*

Final Checks

1. The main Inbox is at zero (everything is sorted (labeled) and/or replied to)
2. Inbox has been checked a minimum of twice / day (ie, by 11 am and 4 pm CST)
3. Check Spam for misplaced emails

Coordinating with the House Manager

The house manager can help confirm deliveries, inform you of what needs to be ordered, process returns, pick the boys up from school, watch them over weekends, and drop things off around town, among other tasks. She is very accessible and should be utilized to free up the CEO's time as much as possible.

When booking events at the CEO's house, add the house manager to the event as 'optional' so that she is aware of what is happening in the house.

The house manager's regular hours are:

- Mon, Tue, Wed, Fri 10-6 pm
- Thurs 12-8 pm

For scheduling times that fall outside her regular schedule.

1. Confirm with the house manager via email that she's available as soon as the event is confirmed—ideally two weeks in advance.

Purchasing for the CEO

Purpose: Purchasing is a broad category encompassing various sections. When purchasing for the CEO, follow the guidelines for buying for the CEO.

Types of Purchases

- Company Purchases
- CEO Personal Purchases
- Gifting for:
 - Clients
 - Friends
 - Family

CEO Preferences

Refer to this document.

How to Make Larger Purchases

Purchases over X amount that cannot be paid with a credit card will require a wire transfer. Wire transfers take between 2 and 3 days to complete, so planning and securing payment ahead of any due date is imperative. Work with the financial controller to send the wire, and ensure that all payments are made on time.

1. Confirm the purchase with the CEO and obtain all necessary information to place the order.
2. Confirm all banking information for the recipient. You will need:
 - a. Name of the recipient's organization
 - b. Address of the recipient
 - c. Name of the bank
 - d. Address of the bank
 - e. Bank code
 - f. Transit number
 - g. Account number
 - h. Swift code (for wire transfers out of Canada)
 - i. ABA routing number (for US transfers)

Purchasing Gifts for Others

General Gifting Checklist:

1. Research Host or Event Organizer Information
2. Search for Gift or Communicate with the Gift Company
3. Get the Approval of the Gift from the CEO
4. Purchase Gift
5. Track Shipping and Update CEO