



# THE ART OF APPLYING®

**POSITION TITLE:** Executive Assistant

**MANAGER'S POSITION:** CEO

**SUMMARY:**

To free up the CEO's time, energy, and attention for the highest priority strategic objectives and visionary projects by managing the daily operations of the business.

The right candidate will have an instinctive ability to recognize, retain, and respect the talent within the organization, and help guide team members to reach their full potential through support and mentorship.

This dedicated leader will develop and maintain control of all business operations and will be an experienced and efficient leader with excellent people skills, business acumen, and an exemplary work ethic. The ideal individual will also be a strategic planner with the essential ability to specify, strategize, and define opportunities.

**WORK LISTING:**

**Strategic Work:**

1. Serve as the champion of getting The Art of Applying consistently using a business operating system such as Scaling Up/Rockefeller Habits or EOS (Entrepreneurial Operating System)/Traction
2. Participate in the creation of the company handbook outlining company policies, norms, and procedures
3. Implement the company's hiring process for new positions (outside of Enrollment Specialists, which is handled by Head of Enrollment). Play a significant role in the hiring process of all new team members: scouting and reaching out to candidates, reviewing applications, conducting preliminary interviews, and providing feedback on candidates, and recommendations for hiring.
4. Oversee daily operations and make adjustments as necessary, ensuring the organization is consistently "rowing" together in the same direction
5. Work with the CEO to create the quarterly and annual business plan, and

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then execute the business plan, achieving or exceeding established P&L objectives

6. Collaborate and stay on the same page with the CEO at all times
7. Filter and translate the CEO's ideas into functional plans for the company
8. Develop comprehensive goals for performance and growth strategies
9. Effectively resolve issues - must be comfortable with conflict, addressing issues, and solving problems in a practical and healthy manner
10. Identify areas of opportunities for capital improvements across the organization, including opportunities to improve revenue, increase margin, reduce cost, and increase profitability throughout the organization all while improving efficiency
11. Attract, retain, and develop a high-performing team (with an emphasis on new back office team members being A players co-located in Cebu City)
12. Lead, manage and hold direct reports accountable for achieving agreed-upon commitments
13. Cultivate and manage healthy relationships with strategic partners and vendors
14. Consistently demonstrates a passion for values alignment, focus, simplicity, and clarity across the organization

**Tactical Work:**

1. Complete highest priority tasks related to Customer Service, Administration, and Marketing as we fill these roles.
2. Have a daily huddle with the CEO each business day to discuss priorities
3. Run the weekly team meeting, ensuring the team stays on task and within the time limit of the meeting
4. Prepare slides and/or reports for CEO to use when running the Monthly All Hands meeting
5. Recommend to the CEO improved policies, procedures, and systems to help the business' overall operations run more smoothly and efficiently
6. Document company policies and procedures according to our company guidelines and serve as the main point of contact for keeping company policies and procedures updated
7. Organize existing and new procedures properly inside Google Drive and Basecamp
8. Ensure files get named to our naming protocol, then filed to the proper location in our online company filing system
9. Organize, declutter, and rename (if necessary) the existing files in the company Google Drive
10. Research and test software for use in our day-to-day operations, focusing on streamlining operations and costs
11. Troubleshoot software and website issues with support professionals (no coding or highly technical skills needed)

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12. Process emails in Kaneisha's personal and professional email inboxes according to the process for email processing
13. Manage all of CEO's personal and professional appointment setting, dealing with all the back-and-forth of scheduling
14. Handle cancellations and update calendar accordingly
15. Ensure all meeting info (agenda, time zone, directions, other person's bio, etc) is set
16. Monitor who gets onto CEO's calendar; blacklisted people never get on
17. Reschedule any appointments due to last-minute changes in plans
18. Periodically solicit, review, and compile customer, email subscriber, team member, and consultant feedback into reports for CEO
19. Serve as the onboarding point person for new hires, including setting them up with accounts they will need and access to company files they will need
20. Upload company bank statements to Bench each month and serve as a contact for Bench
21. Process invoices from vendors and contractors
22. Process payroll for U.S. team members, Canadian team members, and Canadian contractors
23. Help gather all required documents for income tax filing
24. Serve as the primary contact and organizer of internal team-only company events as well as external client-facing events
25. Update or create content for company website (e.g. forms, informational pages, sales pages, etc.)
26. Handle tech issues when they occur by reaching out to our technical team or contacting tech support for the particular software
27. Review company expenses periodically and look for ways to create efficiencies, streamline costs, and increase profitability
28. Document CEO's preferences for flight bookings, accommodations, dining, groceries, and entertainment, and create reference documents outlining guidelines and standards for meeting CEO's expectations when making plans
29. Book accommodations, flights, ground transportation, and dinner reservations for CEO's business and personal needs
30. Keep CEO informed of business, social, and entertainment options that fit her interests and book tickets when necessary
31. Order groceries for CEO's office and home as well as for travel
32. Ensure CEO's repetitive personal errands such as dry cleaning and housecleaning are completed consistently and to standard by serving as the point person with vendors and service providers
33. Schedule CEO's personal grooming and bodywork appointments

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**STANDARDS:****Position-Specific**

1. Alert CEO with at least 72 hours notice if proposed work schedule will result in you working more than 40 hours in a week.
2. Receipts for all business-related purchased are to be uploaded to Bench within 24 hours of the expense being incurred.
3. Receipts for all personal-related purchases are to be stored given to CEO within 24 hours of the expense being incurred.

**Company-wide:**

1. All work will be performed in accordance with all government laws, regulations, ordinances, and court rulings in those jurisdictions in which the company operates.
2. All work will be performed according to company policies and standards, in the spirit of the company's strategic objective.
3. All work will be orchestrated and quantified when appropriate.
4. All routine work will be documented in the online operations manual. The information included in the operations manual is proprietary.
5. All client and proprietary company information will be held as strictly confidential.
6. All telephone calls, both internal and external, will be returned within two hours whenever possible, and within one business day at the latest.
7. Immediate manager will be notified of any issues that can not be resolved, or deadlines that can not be met, within a reasonable time frame, and before the deadline has arrived.
8. All innovation will be quantified, tested, and improved, then documented for routine implementation (i.e. well orchestrated once proven).
9. Problems with any system must be brought to the attention of manager in an exception report so the system can be improved, within the structure of the operations manual.
10. All Policy memoranda indicating changes in policy and/or procedure will be stored in the online operations manual, until the time an updated procedure is provided.
11. Team members will provide staff assistance as requested; each team member may be asked from time to time to cover other areas of accountability and/or departments.
12. Team members will respect each other's time, space, and need for concentration. Socializing and interruptions must not impede workflow.
13. Team members will have weekly, regularly scheduled meetings with their manager.
14. Team members are encouraged to recommend ideas for the improvement of their department and position that are consistent with the company's Strategic Objective.
15. Show up to work well rested, enthusiastic, and positive each day.

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