



YOUR TEAM SUCCESS PODCAST

## 7 Strategies For How To Effectively Work With Your EA

**Shannon Waller:** Are you looking for ways to maximize your teamwork with your Executive Assistant? Stay tuned for over a decade's worth of experience on how to make the absolute most of this incredible partnership. Hi, Shannon Waller here, and welcome to Team Success. Lately, I've been doing a lot of thinking about what makes for a really, really great relationship between a leader, entrepreneur, and their strategic or executive assistant. And yes, this is because I'm very excited about doing a book collaboration with my good friends, Steven Neuner and Ryan Cassin on the book *Superpowered*. And yes, this is what it's about. But Katrina and I were sitting down, she's my brilliant support partner, and we were talking through, what are we doing that really makes this work? And I've given a lot of thought to it, gave a lot of thought to it when I was working with my previous brilliant support partner, Nicole Pitcher. And I think Katrina and I have built on that and made it even richer and more expansive. But the most important part for this conversation is more conscious. So we've identified seven. There might be a few bonus ones towards the end. I'll keep you posted. But I thought if you are really looking to make it work at a much higher level, not just at a good or excellent teamwork level, but if you really want to take it to that unique level, that superpowered level, I just want to share with you what I know works. And I've been working on this for well over 10 years, despite having had part-time assistance for much longer than that. So I feel like we finally got it dialed in. And I thought, I don't want to keep this a secret anymore. I want you to know too. So if you don't have a Strategic Assistant, please go get yourself one. And if you're not convinced, the book *Superpowered* will definitely convince you that you are 100% worth the investment. And yes, you have enough work to keep them busy. And it's amazing the multiplier impact that you're going to have when you do that. But just having someone versus how to really maximize it, which is one of my drivers, is there are some fine distinctions there. So I am very excited to talk about what we and I have really found that works.

Number one is you have to find the right Who, okay? And what's a great support partner? And by the way, I use that term very, very intentionally. When you are advertising for someone in the general marketplace, yes, executive assistant is the term that you will need to use. Emphasis on executive. So it's just really important that you know the language. But when they come in to work with you, you say, actually, we advertise for this. And what this role looks like is that you'll be managing me, not the other way around. which I was very, very clear about. So this role is about being a support partner. And you can put some other great adjectives in front of that. Nicole likes Strategic Support Partner because she had four out of five strategic strengths per CliftonStrengths. You can make that whatever you want. Katrina loves support partners, so we've gone with that. She's also very strategic, in case you're wondering. So really, it is identifying the person who knows that they love being in that support role. Don't hire someone who wants your job. They'll just be competing with you. That's not the point. If you're really fast-paced, you probably want someone that's even-paced. DiSC is a great profile for this. You want someone to be complementary to you in terms of your Working Genius. You



## YOUR TEAM SUCCESS PODCAST

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want someone that's probably complementary to you in terms of your Kolbe, but that might depend on what your Kolbe is. So there's lots of ways, and I've talked about those fairly incessantly in other podcasts. We can go deeper if you want, just let me know. But really it is, you know, be very, very clear that that's the type of person that you're looking for. Now, once you've got them, then what? How does this work? So, one of the things that I did, actually, pretty much with anyone who works closely with me, is we use a tool that I created for the Strategic Coach Team Programs called the Communication Builder. And the Communication Builder identifies communication patterns and preferences that we all think are incredibly obvious, but only are to us. They are not obvious to anyone else. So how do you best like to give information? How do you least like to give it? How do you most like to receive information and least like to receive it? You know, what do you need when you're tired or stressed? Do you need to be left alone or do you need someone in there, you know, encouraging you? And if that's a mismatch, let me tell you, that has led to some very, very big teamwork conflicts. So don't do that. You know, those are the types of questions. And then once you each fill it out, it takes about five minutes. It's really fast. It takes longer to talk it through than it does to answer it. Then you compare notes. You're like, oh, this is how this can play out. For example, one of the things for me is that I'm kind of a day-night person, not a morning person. And so it is really useful to know that, you know, I love connecting with Katrina first thing in the morning. It's going to be over a cup of tea as we ease into our day. Now, if I were the kind of person who gets up at 5 and by 9 o'clock I'm like chomping at the bit because half the day's gone, that's different, okay? And I know people who had a mismatch with that and once they negotiate it, they're like, oh, okay, I need to gear up for you, I need to ramp it back down for the other person, what have you. But you can match each other better when that becomes conscious and obvious rather than just expecting that everyone else operates the same way that we do, because they don't. So doing the communication builder has been huge. Katrina was just saying, I think everyone should do that for every new working relationship. I'm like, yes, could not agree more. It's available at [yourteamsuccess.com](http://yourteamsuccess.com). Free download with The Positive Focus, which is another tool that I'm going to recommend.

So let me go on to some of the daily habits that we do. So first of all, making sure you look for and attract the right person who knows that they wanna be in a support role, who's complimentary to you in terms of all the profiles, that's key. Number two is once you start working with them, do The Communication Builder. Useful for most relationships, even spouses, by the way. Guarantee it will solve some problems there too, but at least with the person who'll be working most closely with you. So, one of the things that really works, and we're kind of shocked when we hear how rarely other people meet, we meet when we're in the same city or if I'm not off in an event, we meet at least once a day, often more times than that. As I like to say in my weekly planning calls, I do not like to buffer alone. We have Free Days, Focus Days, and Buffer Days in Strategic Coach, and I'm great at Free Days. I'm really good at Focus Days, Buffer Days. You don't want to leave me unsupervised for too long. So if there's a



YOUR TEAM SUCCESS PODCAST

## 7 Strategies For How To Effectively Work With Your EA

bunch of buffer activities, I want my hand held. As I said, I don't like to buffer alone. And so she will sit with me on Zoom or in person as we kind of bang out emails, things that take more time that cause my brain to slow down, which takes effort. So that's a big part of it. And then a big part of it in terms of the first daily check-in is just, hey, how are we doing? What's up for the day? What's top of mind? Here's a reminder, all of the things. We also start the daily meeting with a Positive Focus. This is huge. Again, this is a download that's available from Your Team Success. Positive Focus is, what are you happy about? And I think it was yesterday, we met three times. Well, at the beginning of each of our conversations, here's the Positive Focus that happened since the last time we talked. We met twice today and I jokingly said, what's your Positive Focus since I saw you three hours ago? It's kind of fun. And there was something. So you get to pick on the big, the little. What are you excited about? What are you happy about? Could have been that you got some exercise in at lunch or you ate well or whatever, good meeting, what have you. So really starting with a Positive Focus means that we are bringing our best selves to that conversation. Crap could have happened, no question, but we're not dwelling on that and we're letting each other know what is working in our day, what's giving us energy. And that tells you a lot about someone, what they find important. So you can go, wow, that's great. So happy that happened for you. So just that personal connection takes a few seconds, does not take long, really keeps the relationship from being transactional and leads it to being a better relationship and ultimately transformational, which I think is fine. I know that's what I want. Hopefully you do too. All right, so those four things now. So great person, Communication Builder, daily meeting, Positive Focus. So we're at four. I have way more than seven, just saying.

The other thing is I was originally going to call this podcast How to Pass the Baton, because I talk about that a lot with Unique Ability Teamwork. There's a very specific strategy. Again, it's not going to sound like rocket science, but it doesn't mean people do it. And that is to CC, which stands for carbon copy, if anyone's old enough to know that, but you copy your partner on the email. And this goes both ways. So if I'm responding to a client and I'm saying, hey, want to set up a meeting, I'll include Katrina on it. Often I'll mention her in the email, or sometimes I'll CC it if it's an internal and she knows that that's me passing the baton to her. So just copying people on emails is a very, very simple way. And I also do that when I'm traveling and when I'm on events. So often I am moving quickly. I'll meet someone. They want me to be on their podcast. You know, I'm going to have them on mine. But I don't have a lot of time in between running from place to place. And so we just today decided on an emoji. It's going to be a baseball. In other words, I'm throwing this to you. Please catch it. They didn't have a catcher's mitt, unfortunately. So it's more like ask me about this and I'll say podcast with so-and-so. And so that goes on Katrina's list. And when we have more time together, then she'll bring that up. And I'm like, oh yeah, here's what it is, right? I don't just send the baseball symbol. That would be dumb because I won't remember, but I'll put, you know, just my super bottom line, Quick Start way of communicating. But she knows she's catching that. And that's



## YOUR TEAM SUCCESS PODCAST

# 7 Strategies For How To Effectively Work With Your EA

something to bring up later. So doing that both in terms of emails and chat, just making sure you pass that bloody information across is so, so critical. The other thing is, as a backup, Katrina also has access to my email and has full access to my calendar. And I don't calendar either. I give direction about when my Free, Focus, and Buffer Days are, but I do not schedule. Occasionally, if she's not around, I can do one exchange of, does this time work for you? But if it takes more than that, I'm out. I'm just out. I do not have the bandwidth for that. She's got tons of it. Scheduling is Tetris to her. To me, it's not fun. So she has complete access. There's nothing that gets in the way. She has unfettered access to everything she would need to actually run my calendar. So that's really key.

The other thing that happens, well, there's actually two. One is that we are very much in a state of appreciation for one another. I say thank you a lot. Now, I happen to know that one of her deepest motivations, per the PRINT Profile, is to be needed and appreciated, but that's not why I do it. I know it's a benefit to her, and if I left it out, it would do harm, but my mindset, my attitude, is that I am so blessed to have someone of Katrina's caliber, with her capabilities and her intelligence and her expertise, be willing to support me, who without supervision could easily be a hot mess, right? I have some really, really great talents in a very narrow area, and the rest of it needs a ton of help. So the fact that she is willing to be in teamwork and partnership with me, I just feel so grateful. So I'm coming from an attitude of gratitude, if you want to say that, and I continue to keep earning that. I do not take it for granted. I mean, am I the boss? I guess in some dimension, yes. But really, as I said, she manages me, not the other way around. And so it's a partnership. It's an exchange. And I want to make sure that she knows how grateful I am that she is able and willing to do all that stuff. I know she finds joy in it where I don't and vice versa. She would never want to be doing this. Let me tell you. So it works out really, really well. But I'm so, again, grateful, appreciative, whatever word you want to use for that teamwork. So that just is a ground of being for me. And I have no issue expressing it. And I let her know very specifically when something works. And she will congratulate me when I've sat down and done an hour's worth of emails that I don't find fun. They need to get done. I care about the people on the other end, slowing down to that pace is hard, good job, Shannon. Or if I switched something yesterday and today, and so I got something that was due tomorrow done today. And she was like, yay, good job. I'm like, thanks, right? So I accept praise is the flip side of that. So really making sure that you appreciate when someone else is contributing their capabilities, their talents, their efforts on your behalf, I think that's a big deal.

And then another one is we have a strategic planning meeting every five to six weeks. Again, we were just talking about this, and we catch so much stuff. I'm running fast, a million miles an hour, as I like to say, jumping across the lily pads. Don't sit on any of them for too long. Bad things could happen. But it's this meeting to kind of prompt the next six weeks, maybe even longer, depending on the project. And what has to happen now, tomorrow, next week? What are the deadlines that we have to work backwards from? That is huge. This has been such a



YOUR TEAM SUCCESS PODCAST

## 7 Strategies For How To Effectively Work With Your EA

game changer. Initially created by Nicole, she goes, how do you know what's coming up? I'm like, I don't know. We just look at it occasionally. She goes, we're going to have strategic planning meetings. So this has been a 10 and a half year practice at this point. And it is, again, a total game changer. I think of things, it's a prompt in my brain to think about things. Oh, by the way, we need to have this happen. I need to get this person involved. I need to have this conversation. I need to do an Impact Filter, a Strategy Circle, whatever, one of our Coach tools. So it sets me up for success because otherwise, when do I tend to think about it with my brain? I tend to think about the day before. It's really tough to have great teamwork to set people up for success when you're asking for something or only delivering it the day before. So this makes sure that I look organized, that I am organized, because I've allowed enough time for other people's teamwork to kick in. So that strategic planning meeting is huge. I love that.

So those are really the main things. And the only other thing I will say for bigger projects is The Impact Filter. So if there's something that I'm not getting immediate alignment on or if I convey it in my brief way and other people are like, hmm, don't quite get what you're talking about, Shannon, then I will sit down and take the time to do an Impact Filter and talk it through with the people who are involved. And sometimes I forget to give it to everybody. So I'm like, oh, I did one, but I didn't tell you about it. So I'll just try and really make sure that I get my thinking down on paper. Impact Filters are brilliant for figuring out the purpose, importance, and ideal outcome, the best and worst results, best if it's successful, worst if we don't do it, or if it goes poorly, and then the success criteria to ensure the best and to prevent the worst. So that really lays out the thinking and that just opens it up for people to go, what about this? What about that? Oh, I love this or not. So me getting my thinking out in a way that's clear, that is such a brilliant way, again, to pass that baton. I mean, Katrina and I talk so often, it doesn't really feel all that formal, but I'll say, here's what I'm intending. This is my intentionality on this. So it tends to be a bit more conversational, but then as soon as it needs to go outside our little teamwork bubble, that's when Impact Filter is really necessary. So that's the other thinking tool that I use to help make sure that I'm as clear as I can be and as open to teamwork as I can be.

So anyway, I'm excited to share this with you because I think that a lot of people have quote unquote assistance, that it's kind of transactional, it's piecemeal, it's tactical, but I want to increase this to the level of being strategic, and for it to be Unique Ability Teamwork, and for it to be ultimately the support partnership that I'm talking about. That is the ultimate. And here's the payoff, in case you're wondering, because this has been very much a how-to. The payoff is that you will triple if not quadruple your productivity. And it will happen easily, without stress, without working crazy late hours, without compromising your Free Days, all the things, because you are so strategically organized, because you are so clear, because you've got someone you know, laying out the path ahead of you and picking up stuff from behind you. It is so powerful to have this. So I'm hoping that you feel superpowered by this conversation. And then if you do have a great person working with you, that you both listen to this and go, hey, what are we doing that's really working? What can we do differently that could make it better?



YOUR TEAM SUCCESS PODCAST

## 7 Strategies For How To Effectively Work With Your EA

What can we add in? Download The Communication Builder. I guarantee it will either help you figure out why it's working so well and make it more conscious, or what it will do is help address some issues. You're like, oh, you're a morning person. I'm not. I need a couple cups of coffee before I can deal with new stuff. Or I've already done all this stuff. How long is it going to take you to keep? You'll be able to have those conversations in a light, loving way, let's be clear, and it will really assist you in terms of just really getting that incredibly high-level teamwork. This is all about maximizing your teamwork so you can have a very strategic, effective, and joyful experience working together. I hope you find this useful. I hope the list wasn't too long and it's inspiring and again, something you can put into play. If you have any questions, let me know at [questions@strategiccoach.com](mailto:questions@strategiccoach.com). And as always, here's to your team's success.