

# The Essential Handbook For Personal Assistants

Tools For Becoming Or Hiring  
The Ultimate Personal Assistant

C.S. Copeland

# **The Essential Handbook For Personal Assistants**

Tools For Becoming Or Hiring The Ultimate  
Personal Assistant

By C.S. Copeland

©2006-2008, All Rights Reserved.

## Contents

### Introduction

# Part 1: History And Evolution Of The Personal Assistant ..... 8

- Chapter 1: What Is A Personal Assistant? ..... 8
  - How The Personal Assistant Came To Be ..... 9
  - What The Personal Assistant Is Today ..... 10
  - How This Book Can Help You Reach Your Goal ..... 11
  - Note to Employers ..... 11
- Chapter 2: What’s Going To Be Expected Of You .....
  - How Your Position Defines You .....
    - Don’t Expect A Typical Day .....
      - Demands Of The Job.....
      - New And Already In Demand.....
- Chapter 3: Can Anyone Become A Personal Assistant? .....
  - What Is Your Background? .....
  - Do You Have What It Takes? .....
  - Does This Job Suit Your Lifestyle? .....
  - What Kind Of Personal Assistant Do You Want To Be? .....

# Part 2: Secrets For Getting Hired..... 12

- Chapter 4: Finding Where The Jobs Are .....
  - Creating A Resume That Gets You Noticed .....
  - References: What Yours Say About You .....
  - Personal Assistant Organizations & Affiliations.....
  - Salary Guidelines.....
  - Networking - A Must! .....
  - The Interview .....
  - What To Wear.....
  - Who You’ll Interview With .....
  - Negotiating Your Contract.....
  - Are You Ready To Leave Today? .....
  - Always Request A Confidentiality Agreement .....
  - When to Ask For a Raise .....
  - What If They Aren’t Sticking To The Agreement?.....

# Part 3: Becoming A Kickass Personal Assistant .....

- Chapter 5: Killer Techniques For Making Yourself Invaluable! .....
  - Understanding Your Role .....
  - Your First Day.....
  - You Are the Gatekeeper .....
  - Having The Right Tools.....

Knowing All The Players .....  
 Watching The Clock? .....  
 What Will Be Expected Of You .....  
 Know the Team .....  
 Be Punctual .....

**Chapter 6: Preparing And Looking Like A Pro .....**

Are You Ready?.....  
 Can You Juggle? .....  
 Staying On Top Of It All .....  
 Clothing .....  
 Electronics.....  
 How to Handle: .....  
 Keeping Good Records .....  
 Follow-Up And Follow-Thru .....  
 Make Your Job Easier.....  
 You're Expected To Know Everything.....

**Chapter 7: Your Position .....**

What Kind Of Personal Assistant Are You Becoming?.....  
 How Assertive Should You Be?.....

**Chapter 8: Becoming Indispensable.....**

Little Things That Make You Shine.....  
 Are You Clairvoyant? .....  
 Be Prepared! .....  
 Knowing When To Be Invisible .....  
 Secrets Of The Trade.....

**Chapter 9: Travel.....**

How To Prepare .....  
 Who To Prepare .....  
 Last Minute Change Of Plans .....  
 Do You Go Or Stay? .....  
 Working Mobile .....  
 Living Out Of A Bag .....  
 I Want The Food I Get Back Home! .....  
 Traveling With Children And Pets .....  
 Home Sick .....

**Chapter 10: Lord of the Manner .....**

Lessons On Managing Houses, Estates, And Mansions .....  
 Overseeing The Staff .....  
 Dealing With Contractors .....  
 Treat Their Home Like Your Own.....

**Chapter 11: A Sample "Day in the Life..." .....**

Okay, Let's Try That Again .....  
 So When's The Next 12 Step Meeting? .....

**Chapter 12: The Perks.....**

About Those Holidays... .....  
 Rewards of The Job.....  
 Gifts.....  
 Connections .....

**Chapter 13: Ready To Move Up?.....**

I'm Just Using This As A Stepping-Stone .....

Chapter 14: How To Never Get Fired.....

- No Job Is Secure.....
- Knowing When Your Time Is Winding Down.....
- Looking For A New Job (While Still At The Present One).....

Part 4: Keep Your Value .....

Chapter 15: Knowing Who’s Who.....

- Learning Your Boss’s Habits.....
- Reading His Moods .....
- Dealing with Allergies .....
- Keeping Track Of Medications .....
- Their Favorite Things .....
- Keeping A List.....
- Equipment.....
- Computers, Phones, PDAs, Etc. ....

Chapter 16: Resources To Hone Your Craft .....

- Courses You Can Take.....
- Books You Can Use.....
- On The Job Training.....
- Insightful Magazines .....

Chapter 17: The Invaluable Bible .....

- What Is The Bible? .....
- Laminated List Of Important Contacts .....
- Up-To-Date Contact Database.....
- Palm vs. Blackberry vs. Windows vs. Paper?.....

Part 5: Employer’s Guide.....

Chapter 18: Tips Every Employer Needs!.....

- What Kind of Assistant Is Right For You?.....
- Beginning Your Search .....
- First Round of Interviews.....
- How To Review A Resume .....
- Can I Trust My Instincts? .....
- What Is Fair Compensation?.....
- Agencies to Help Your Search.....

Chapter 19: A Final Thought For The Seasoned And Not-So-Seasoned .....

- About The Author .....
- Resources..... 13

## Special Note

Throughout this book you'll notice that the words *Personal Assistant* are not abbreviated. The reason for this is that in the entertainment world the PA is known as a production assistant, and though the two positions hold many similar challenges, they are very different positions. This guide focuses on the many areas related only to that of the Personal Assistant.

[With the purchase of this guide you will also have access to many downloadable templates to help make your job more efficient and run smoothly.]

## Introduction

Who hasn't dreamed of soaring through the skies in a private luxury jet, relaxing in a plush, soft leather seat that engulfs and surrounds you while being served poached salmon by a beautiful hostess at a thousand feet up?

Or imagine how cool it would be to have Carte Blanche access to exclusive, A-list Hollywood events or rubbing elbows with tomorrow's megastars?

Perhaps you've always wanted to be a liaison for the world's foremost diplomats, scientists, researchers, heads of States, or rulers of countries. You'd love nothing better than to attend a United Nations conference, shake hands with the President, or enjoy a front row seat while watching Congress deliberate over a heated issue.

The dream is real. You can do all of this and more. In fact thousands of people do every day. They're not rich, don't have celebrity status, don't own a fancy house, and they don't even possess a large bank portfolio. So who are these people? They are the Personal Assistants who work for the rich, the famous, the tops in their fields, the crème de la crème.

The world of the Personal Assistant can be exciting and fast paced. It can take you through a hundred new experiences in a week and promises to always keep you challenged. The job can make you laugh and it can make you cry. Its addictive nature can thrill you, making you beg for more. It can also devastate you and make you wish you never even heard the words *Personal Assistant*.

This is a book about the very essence of being a Personal Assistant. In it you will find the tools, the experiences, and the secrets about the lives of this elite group. You will learn all you need to perform this job with confidence and success.

If you take the time and study the guide before you, it will teach you how to succeed in this amazingly frenetic but wonderful field that is fast becoming increasingly popular, highly sought after, and more respected with each passing year.

The tools you walk away with are ones you'll be able to use in almost any job and almost any situation. It doesn't take money or success, but it does take drive, smarts, confidence, ambition, and hard work to obtain a great job as a Personal Assistant. The opportunity is there for you to take, but you must want it or you'll never get it.

I challenge you to learn and take as much as you can from this handbook and do your best! Because once you see how exciting it can be, you may never want to work in another occupation, again.

Outlined in this guide are the tools and techniques for getting, doing, keeping, and excelling at an exciting career working as a successful Personal Assistant. And for those who already are working as Personal Assistants, there are useful sections inside that will increase your talents and secure your position in this field. Employers will benefit by knowing who to hire and how to hire the right person for them, how to keep the best person, and never hire wrong again.

# Part 1: History And Evolution Of The Personal Assistant

## Chapter 1: What Is A Personal Assistant?

You know about them, you've heard of them, but rarely will you ever see them. At least not the exceptional ones. They run in the circles of the rich and famous in a "Where's Waldo"-like fashion. They speak on a daily basis to the A-list celebrities, heads of State, creators of multi-million dollar corporations, sought-after lawyers, doctors in demand, top athletes, powerful executives, and brilliant entrepreneurs, yet you rarely ever take notice of them, or hear of their amazing deeds. These little known yet integral parts of our society have been around for many years. They go by the often ambiguous title of *Personal Assistant*.

Some think this term fits a wide range of jobs from secretary to runner to administrative assistant. In fact, because this job encompasses so many skills, employers often assume that anyone can fit the role of Personal Assistant. This is not the case. Most often the untrained person who is hired as the Personal Assistant gets so overwhelmed that they end up leaving, or is fired because they could not keep up with all the high-pressure demands. A good Personal Assistant can do a variety of unusual tasks that require experience, knowledge, and a drive to succeed.

Can a secretary, runner, aide, gofer, pa (production assistant) administrative assistant, nurse, or seamstress, become a Personal Assistant? Yes, perhaps. But it takes more than just the fundamentals of these job skills. There is a mental attitude that goes into the mix. Part is a desire to serve and help others. Part is to derive a satisfaction after completing a tough or challenging task. Part is a unique ability to jump headfirst into a new challenge or situation and be able to successfully get through it. Also important, are the abilities to work alone, unsupervised, and stay on top of things. The Personal Assistant can be part clairvoyant, part protector, part parent, and part caretaker. A good Personal Assistant must know how to drive any car, prepare meals on the fly, sew a button, be good with children, be a diplomat, know where to find a mean cup of coffee, or they may possess only some of these skills. Part of the draw is the excitement of being around power and money, but the bottom line is to always get the task completed - because however the results are accomplished, succeed or fail, it is always the Personal Assistant who is accountable.

## How The Personal Assistant Came To Be

Many occupations have taken on titles that not only explain their function, but also help to define it. Secretaries slowly transformed into administrative assistants. Stenographers found themselves becoming court reporters. And runners became production assistants. Each of these new career titles gives the job a clearer identity, and helps to define its purpose. But what about the Personal Assistant?

One of the most ambiguous and misunderstood occupations, Personal Assistant has become a catch-all term for everything from the multi-tasking receptionist, gofer, administrative assistant or executive assistant. Look at the help wanted ads from people searching for a Personal Assistant. Most of them use descriptions that tell you the tasks are simple and imply that the person doing the hiring doesn't have time to take care of himself. They think they know what is expected of a Personal Assistant, but, in reality, have no idea what the position actually entails. The bottom line is that they are requiring *honed skills* and experience but offering *low pay* as compensation. They have no clue as to the skill-set that is required.

To most, the title of Personal Assistant fits any job description. Employers somehow latched onto the idea that if you do office work, and they throw in a personal errand every now and then (fetch coffee, pick-up dry cleaning, take the dog for a walk), that they can label you a "Personal Assistant." And this is where a lot of the confusion begins. Since a low paid runner or production assistant or mailroom person can do these things, then why should they be obligated to pay more for a skilled Personal Assistant?

Let's examine the difference between a production assistant and a Personal Assistant. By its very nature, the production assistant is usually a kid who is fresh out of college or is the son or daughter of a friend and is enticed by the "Hollywood" carrot being dangled in front of them by some executive who tells them that if they work hard and pay their dues they'll be rewarded with a great job in the future.

Very often, a beginning production assistant will have little or no experience, but they take this opportunity to get their foot in the door. It is how the entertainment business continues to draw people in for little or no pay. That doesn't mean that the production assistant isn't smart, in fact, a number of them have masters and college degrees, and again, this is their opportunity to break into an exciting field. However, production assistant is usually not their career job of choice and the low pay can often equate to minimal effort.

A Personal Assistant, however, is someone who usually comes to the table with some skills in one or two areas and is able to pick up other chores, yet never dropping the bigger responsibilities.

The Personal Assistant is not merely someone who fetches, they're able to multitask. They need to understand what they are fetching, and how best to fetch. But

this is just one of many duties that will be required of them. Again, their job is to take care of the minutia so that their boss has the freedom to concentrate on work, home, or anything else important enough for them to need and hire the Personal Assistant. You are a master juggler, a supreme multi-tasker. Yes, most anyone can walk a dog, but can they do it while making sure the calls are handled, correspondence is typed, appointments are met, bills are paid, houses are managed, travel is arranged, and their favorite Grande double-latte is served up piping hot.

One of the earliest mentions of the Personal Assistant was in the film called “*All About Eve*” (1950). In the film, a young girl, Eve, is so infatuated with Broadway star Margo Channing, that she works her way into Margo’s world and shortly thereafter becomes her Personal Assistant. Researching the history of the Personal Assistant uncovered that some of the first Personal Assistants were attached to film projects as production assistants, or they were actually stagehands, runners or often assistant secretaries – maybe even someone from the typing pool, who was assigned to attend to the needs of an actor or actress. Their job was to make sure that the actor or actress was “happy” while filming. This entailed everything from making sure they had their favorite drink, hobnobbed with other elite members of society, lived in the lap of luxury, or was protected from their own destructive habits. Working on a movie in the 40s and 50s they were assigned the task of sticking close to the star of a film and getting him/her whatever they desired to keep them happy during the shoot. There were also secretaries who were asked by their boss to pick up the dry cleaning or get lunch, or sometimes to escort a star or client to a social engagement.

### **What The Personal Assistant Is Today**

Unlike the glorified secretaries of yesterday, today’s Personal Assistant is so much more than a human dictation machine, coffee maker, or errand person. The Personal Assistant of today is someone who is smart, quick on his feet, resourceful, diplomatic, continually learns, is open to new experiences, and thrives on new challenges.

There’s a movie that stars Anthony Hopkins entitled, “*Remains of the Day*” In it he plays a butler who is a seasoned professional at his position. His every move, every thought, and every fiber of his being is dedicated to the service of his employer. While you won’t be expected to be this myopic, it’s important that you understand that in order to be successful as a Personal Assistant, you need to be thinking about your every move. Much like playing chess, what you do today can have repercussions seven moves from now.

This is a fun and exciting field filled with adventure and Personal Assistants are often rewarded in surprising ways. And while it can be hard, sometimes overwhelming, and a constant challenge, it’s never dull; it’s a job that gives back as much as you put into it. You will come away with great knowledge, experience, solid contacts, and a proud feeling of accomplishment that you did your best at an amazingly difficult job.

The only thing that makes me sad about this field is that the Personal Assistants who work primarily for celebrities are usually the ones who are honored and recognized. There are however so many more Personal Assistants in less glamorous fields who are often overlooked, when more often than not they are nothing short of amazing in their role as Personal Assistants. This book is dedicated to them.

### **How This Book Can Help You Reach Your Goal**

By the end of this book you will have been given all the tools needed to perform your job with confidence. You will be able to jump in and handle almost every situation you encounter. You'll know when and where to get the help you need to complete any task. You will become a valuable asset to your boss.

This book will teach you how to develop or enhance your skills to become a better Personal Assistant than you'd ever thought possible. And, you'll be surprised at how simple these steps are. In fact, you'll probably kick yourself when you discover how many of these skills and secrets you already possess.

You'll be shown every aspect of what a Personal Assistant needs to help him or her stay at the top of their game. Here is where you will find useful examples and tools that will make you invaluable to your boss. Using this guide will help you reach your peak.

Whether you've got the entertainment bug, you like working in the private or corporate sector, whether you're already a Personal Assistant, or even if you're just starting out, this book is written as a guide that you can use to help hone, perfect, develop, and understand the craft of the Personal Assistant.

### **Note to Employers**

Employers will find this book useful too. If you're thinking about hiring a Personal Assistant to help you out, or you've had bad luck in the past hiring Personal Assistants that weren't right for you, this book will help you understand why that happens, and what to look for to ensure you have a great Personal Assistant. You'll learn how to successfully find, interview, and hire a Personal Assistant that best suits your needs and personality. It's often assumed that anyone can become a Personal Assistant, and for this reason alone there are many cases where a Personal Assistant didn't work out. Using this book, you will not only know how and where to find the Personal Assistant that's right for you, but you can be sure that they are ready to jump in and help you get things done.

As you can see, the Personal Assistant is always changing and growing. The different styles and various types of boss's that emerge, dictate what new and unusual skills the Personal Assistant may need to acquire. And while there are always basic duties and recurring themes in our role as Personal Assistants, there's always some new task that has never been encountered before and will have to be learned and adapted to. Let's get started!

## Part 2: Secrets For Getting Hired

Of course the best way for getting hired is to have a referral or recommendation from a close friend or associate of the person seeking to hire the Personal Assistant. If you don't have these kinds of connections in your arsenal, then you will need to be resourceful in finding where the jobs are. You can be assured that by the time you find the position others have also found it, but the second part of getting hired is to stand out. In the next few pages, we'll discuss the *secrets* you can use to rise above the competition and how to make yourself look like the perfect selection for becoming their Personal Assistant...

## Chapter 17: The Invaluable Bible

Of the many tools of the trade you will use, a number of Personal Assistants have found the bible to be one of the most invaluable tools in your arsenal. Not only can it save you hours of pain and headache, but you will be able to make it available for anyone in the household to refer to and it can also make your job really convenient.

### What Is The Bible?

Simply put, the bible (Household Management Reference Book) is a collection of everything that is important to running and maintaining the household and/or the office. If created properly, it gives you answers to most situations right at your fingertips. You can know on the fly who to call if the power goes out, where the water main is kept should there be a major leak or pipe breakage. You can list everything from important travel information to passport numbers, expiration dates, birthdates, purchase dates of equipment and household items, warranty information, emergency contact numbers for doctors, schools, auto, and more.

If you have the capability, the bible can keep a colored photo copy of credit cards (front and back), insurance documents, passports, driver's license, frequent flyer cards, auto registration and much, much more.

The purpose of the bible is that anyone in the household who needs this important information can obtain it quickly and it also frees you up to do other important tasks. Instead of...

# Part 5: Employer's Guide

## Chapter 18: Tips Every Employer Needs!

### What Kind of Assistant Is Right For You?

How many Personal Assistants have you gone through? Perhaps this is your first Personal Assistant and you don't know what to look for or what to expect.

The kind of Personal Assistant you want will almost always be someone whose personality matches or is similar to your own. Keep in mind that you will be working with this person day in and out and sometimes you will be together more than you are with a spouse.

The second thing you need to look for is someone who can meet your needs. The best way to do this...

## Resources

### Tools Of The Trade

#### Career Info:

[Do What You Are: Discover the Perfect Career for You](#)

#### Cleaning:

[How to Clean Anything](#) – Online Authority for Free Cleaning Information

#### Concierge Tips:

[The Concierge Manual](#)

[The Concierge: Key to Hospitality](#)

#### Databases:

[IMDB](#) – Internet Movie Database

[Who Represents](#) – Contact info for Celebrities and their Representatives

#### Entertainment:

[Seeing Stars.com](#) – Celebrity Events and Happenings

[Visualnet](#) - The Film, TV & Video Production Link

#### Etiquette:

[Complete Guide to Executive Manners](#)

[The Modern Gentleman: A Guide to Essential Manners, Savvy & Vice](#)

[How to Be a Gentleman: A Contemporary Guide to Common Courtesy](#)

[A Gentleman's Guide to Etiquette](#)

#### Everything Legal:

[Forms Guru](#) – Legal Forms

#### How Things:

[eHow](#) – How Things get Done (tying a tie, negotiate a raise, win at Monopoly)

[How Stuff Works](#) – Info on how almost everything works

[Consumer Search](#) – Info about Products and how they perform

### Managing A Household:

[Butlers & Household Managers: 21st Century Professionals](#)

[The Insider's Guide to Household Staffing](#)

### Miscellaneous:

[Brain Bank](#)

### Organizing:

[The Organizer : Secrets & Systems from the World's Top Executive Assistants](#)

### Parties & Events:

[Party Planning](#) – Everything for putting on a Party

### References:

[RefDesk](#) – Fact Checker for the Internet

### Restaurant Reservations:

[Open Table](#) – Restaurant Reservation Booking

### Self Improvement:

[Change Your Life in Seven Days](#)

[Instant Confidence](#)

[The Power of Charm](#)

[Behavior in Public Places](#)

[Strengths-Based Leadership](#)

[The Art of Speed Reading People](#)

### Shopping:

[Paris Personal Shopper](#)

[The Lucky Shopping Manual](#)

[Fabulous Gifts: Giving Perfect Present](#)

### The Office:

[The Valuable Office Professional](#)

[Administrative Assistant's and Secretary's Handbook](#)

[The New Office Professional's Handbook](#)

Travel:

[Trip.com](#) – Deals on Travel Rates and Prices

[Travel & Leisure](#) – Hotels, Restaurants, Destinations

Training Services:

[Starkey International Institute](#)

**Additional Tools to Download:**

With the purchase of this guide you will have access to many downloadable templates to help make your job more efficient and run smoothly.

- Household Bible (How to find/operate things, important numbers, contacts, travel, and auto info fast)  
(Access Code: 555555)
- Monthly Calendar
- Call Sheet
- Expense Report
- FedEx Log
- Gift List
- Grocery List
- Household Numbers
- Limousine Request Sheet
- Non-Disclosure Agreement
- Daily Projects
- Travel Checklist
- Travel Itinerary
- Weekly Project Schedule
- Weekly Restocking List
- Weekly To Do List
- Xmas List