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Insider
SECRETS

The Essential Handbook For Personal Assistants

Tools for Becoming or Hiring
The Ultimate Personal Assistant

Craig S. Copeland

2nd Edition, Updated and Expanded

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The Essential Handbook for Personal Assistants

Tools for Becoming
or Hiring The Ultimate
Personal Assistant

By Craig S. Copeland

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To my dog North.
The best damn Personal Assistant
I ever had.

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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*.

Also, you'll notice that I switch between using *her* and *him* throughout the guide to indicate the employer.

**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.**

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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, they don't have celebrity status, they 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.

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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; which 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

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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. Equally as 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. Over the years 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 more clear identity, and helps to define its purpose. But what about the Personal Assistant?

It's 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 explore 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 while never dropping the bigger responsibilities.

The Personal Assistant is not merely someone who fetches, they’re able to multitask. They also 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 very 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. Typically, they were female. 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. There were also Secretaries whose boss asked them 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 an errand person. The Personal Assistant of today is someone who is smart, quick on his feet, resourceful, diplomatic, lifelong learner, 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 complete with adventure and surprising rewards. 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 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 stay at the top of their game. This 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.

Special 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, this book will help you understand why it happens, and what to look for to ensure you have a great Personal Assistant working for you. You'll learn how to successfully find, interview, and hire a Personal Assistant that best suits your needs and personality. Using this book, you can be sure that the Personal Assistant will be ready to jump in and help you get things done.

The Personal Assistant is always changing, growing, and evolving. The different styles and various types of bosses 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!

Chapter 2:

What's Going To Be Expected Of You

How Your Position Defines You

There's an unspoken rule that the Personal Assistant must recognize and always be aware of: "You're not hired to be, and may never become your boss's friend." This is the black hole of the Personal Assistant's universe. Yet like a moth drawn to a flame, this is where many Personal Assistants gravitate towards since it seems like such an inviting, open, welcoming place. Because you'll spend many hours in close proximity to your boss; joking, talking, sharing a story; it can seem like you're becoming fast friends. It's not that this can't happen, but it's almost always the reason a job can end abruptly. While it's true that great friendships *have* been forged out of these working relationships, the exceptions are extremely rare.

It's important to remember not to get caught up in the social aspects of the job, and that the true role of the Personal Assistant is to cater to the needs of the employer – whatever that might be.

So what exactly is the role of the Personal Assistant? What function does she or he serve and where does she draw the line of unacceptable tasks?

The Personal Assistant can be many things to many people. Since you may be involved with both the home and the office, depending on the needs of the employer and the requirements of the job, duties can often overlap. The Personal Assistant becomes a trusted member of the household staff, handling all of the confidential responsibilities for the employer. Duties may include; hiring, training and supervising

staff, making and scheduling appointments for the employer, taking charge of all correspondence to and from the employer, handling all travel arrangements and creating the itineraries, doing or assigning maintenance work to be done on the home(s), acting as a liaison, and any other personal requests the employer may make.

A Personal Assistant may also perform only secretarial responsibilities, i.e.: typing, emails, letters, memos, and thank you notes, taking dictation, proofing and transcribing important correspondence or business documents, answering the phone and taking messages, opening, sorting and/or answering mail, setting up and managing files for letters and other important documents, or any other kind of clerical work.

Though a number of employers do have Business Managers, the Personal Assistant may also be asked to act as Bookkeeper and manage the family finances, track expenses, manage records for tax purposes, research and keep track of investments, or obtain quotes on major renovations of the home.

In today's world of fast-paced technology, the Personal Assistant needs to have excellent computer capabilities and will usually maintain extensive warranty and inventory files (e.g. **The Bible**, which we'll discuss in Chapter 17 – also known as a *Household Management Reference Book* and, is an invaluable tool which anyone in the household can quickly reference to find answers fast).

The Personal Assistant may be asked to travel with their employer and keep them company on a long arduous film, tour, or business trip.

Whatever your job, you'll begin to see a pattern emerge that will dictate what kind of Personal Assistant you're becoming. Who you report to, which staff members you interact

with, whether you begin your day at their home or the office, you'll begin to understand if you're becoming a behind-the-scenes Personal Assistant or if you are becoming someone who needs to be at the wheel, taking charge of every task as it arises.

Don't Expect A Typical Day

You can plan, prepare, and anticipate what will happen tomorrow, and when you arrive you're told by your boss to cancel everything because he's going off to play golf for the day. In other words, there will be times when, no matter how meticulously you plan, things can change on a dime. Breathe, exhale, and start rearranging the schedules. Often, you will find that this is a roll up your sleeves, roll-with-the-punches kind of job.

One of the most common tasks of a Personal Assistant is doing the personal shopping for the lady or gentleman of the house. Therefore you need to be aware that the shopping habits of the wealthy are very different from the average person's shopping habits. Whether it's for groceries, clothing, or gifts, a wealthy person has no problem spending large sums of money for their personal needs. They may tire of last year's car or want to add to their collection, or they may want to spend a million dollars on a wedding. You may therefore be asked to help design part of an estate, or locate a new home. You may not only plan the family vacation to the Four Seasons in Punta Mita, Mexico, but you may also go along. You might handle dinner reservations at the premium restaurant in town, listen to how their day went, or perhaps go grocery shopping for them. They may have you contact Vera Wang because they need a new dress for an awards show.

Now imagine the power of having access to someone's credit card, checking account, or petty cash, and finding yourself being sent to some of the most exclusive stores in town like, Barney's of New York, Dolce Gabbana, Prada, Neiman's or

Saks; it can be very enticing to sneak an extra little item you think you deserve onto the shopping list. This is why it is so important for the employer to make sure that the person being hired is well screened, has signed a confidentiality agreement, and has undergone a thorough background check. These should be performed by a licensed private investigator, background service agency, or attorney. As a Personal Assistant, you'll be given a lot of financial freedom with someone else's money and it's imperative that not only do you have their trust; but that you do not take advantage of it once it's given.

So who typically hires a Personal Assistant? Here are the people most likely to use the services of a Personal Assistant:

Celebrities – To the general public this appears to be the most prevalent group of people who use Personal Assistants, but it only looks that way because celebs are always in the limelight.

Entrepreneurs – People who invest, invent, or create and are always on the go and need someone to assist with their schedule to keep things in order.

Business Executives – Usually their Assistant is in the office but can also take on duties in the personal life of the employer.

Directors – Because they travel or are always on the set or in production, they have little time to manage their personal lives.

Athletes – Like entertainers, they travel a great deal and sometimes need assistance on the road or assistance with the family while they are away.

Producers – Like the Director, they can be on location or in a busy office.

Authors/Writers – Keep up with their work as well as some personal chores.

Politicians – Mainly they have an Executive Assistant, but they also have a need for personal services.

Doctors – They have Secretaries who help them, but some need help in their private lives as well since the demands of their job leaves them little time to attend to personal tasks.

Lawyers – Their hours are often long, so they can often be in need of additional help to keep their lives on track.

Real Estate Agents – They usually work on multiple listings and need someone to attend to their schedule, field the calls, sit at an open house, handle correspondence, and also take care of the personal chores; dry-cleaning, auto, groceries, etc.

Music professionals (Artists, Producers, Label Execs, etc.) – This is another group whose schedules are random and chaotic and they simply don't have the time to even think about something as simple as dinner or travel arrangements.

In essence, anyone who has the money, but not the time, inclination, or the ability to do the task for themselves can be in need of a Personal Assistant.

When you get to chapter 4, check out the section on "Who You'll Interview With" to understand the process so you can come prepared.

Demands Of The Job

The President of the United States has a Personal Assistant known as a *Body Man*. His job starts an hour or two before the President's and entails everything from carrying an overcoat for outdoor speeches, to the smaller tasks like having his favorite power bar available. But he will need to know everything about his boss's day and what to prepare for. Example: He knows that President Obama likes MET-Rx chocolate roasted-peanut protein bars and bottles of a hard-to-find organic brew - Black Forest Berry Honest Tea. He keeps a supply of both on hand. He has a list of immediate contacts at his disposal, VP, doctors, White House attorney, etc. He knows when to stay in the shadows and when the President needs him to interject for a well deserved break. And, he knows how to keep the pressure on President Obama when he's controlling a basketball on the court.

Like the coveted *Body Man*, a good Personal Assistant is prepared. He knows how to organize for the coming day. He reviews everything on the agenda, then prepares his employer's day and schedule accordingly. He's aware of his employer's entire world. Let's say for example, your employer's an Entrepreneur. You read the news daily and notice that there is a new merger happening with a company that he's been keeping an eye on. This information, along with who the players are, can be invaluable information to your boss. Or let's say that because you keep your boss' calendar, you may know the upcoming birthday of a friend or relative and you need to alert him about a party, or discuss purchasing an appropriate card or gift.

Thinking ahead is one of the many talents a good Personal Assistant possesses, and it's not hard to master. One of the ways to keep on top of things is through a laptop or smart device, which allows you to program reminders days, weeks, or even years in advance, and then set alarms twelve days prior

with a reminder alert notice that an event is coming up soon. This allows enough time to stay on top of every event without having to cram it all into your head. And this way you give your boss a good heads-up well in advance. This can include; birthdays, annual charity events, award shows, upcoming travel, holidays, rent, bills (theirs and yours), anniversaries, etc.

Another useful tool is preparing a yearly calendar. Events may change or new ones may be added, but at least you'll have an overall view on everything that can occur with few or no last minute surprises.

A good Personal Assistant is not afraid to get his hands dirty. You may be asked by an employer to call someone in to replace a screw, a light bulb, move furniture, buy flowers, change the oil in a car, fix the timer on the oven, TV or DVD player. It amazes them when a good Personal Assistant is able and willing to do these things his self. (It's rumored that Liza Minnelli was surprised that her assistant knew how to use an iron, wondering where she'd learned it.) However, you only should do these things if you know how, and if it doesn't take you away from something more pressing. Sometimes it's more important to outsource these tasks. We'll discuss when it's best to do so.

A good Personal Assistant can tackle a situation without any handholding. If your employer gets invited to an event at the last minute and doesn't have a clean suit, needs an appropriate gift, or needs to book an immediate appointment for hair or manicure, you need to be on top of it. Or maybe the charger on his cell phone breaks down (always keep one or two extra on hand). You'll look like a miracle worker when you have a replacement on hand for something that fails to work properly.

Sometimes a good Personal Assistant is merely a good listener. This important people skill is one few have mastered

and takes some practice, and it can benefit both you and your boss if you can be supportive when she needs it.

Brand New And Already In Demand

From the moment you are hired you may find yourself thrust into several important tasks. Don't be surprised at how much trust you're given so early on in your new position. A lot of people think that you need endless hours of training to be a great Personal Assistant. While it always helps to improve your skill level and can only make you better at your job, you might not realize how much training and skill you already possess. For example, have you ever visited another city or country? Taken a CPR class? Are you organized? Have you ever put a bookcase together? Obviously you've shopped before. Are you computer, Internet or email savvy? Can you cook? How are you with children or pets? How are your phone and people skills? Do you enjoy driving? Do you know your way around the city you live in? If so, you may already have many of the skills required to be a good Personal Assistant.

So what about training? You might be someone who already travels a lot but has never flown on a private jet. There are ways you can acquire the know-how on a particular subject. For instance, you can learn if there are luggage limitations on private planes. Can a jet take off or land in different kinds of weather? Are there restrictions to the time of day a jet can fly? Do you know where nearby alternate airfields are located? What the regulations are about dogs flying on private jets?

All this and more can be learned. Sometimes, you'll be thrown into a job and have to learn as you go, but the better prepared you are before hand, the easier you will make it for your employer. And this might be the difference between hiring you or someone else.

Understanding what's going to be expected of you can make the difference between doing a good job or a great one. It can also determine how much you enjoy your work and how long you'll survive in this business. Don't be afraid to ask questions. It shows a desire to learn, an ability to communicate, and it tells your boss that you're thinking about the job. The more you understand what's expected of you, the better prepared you'll be.

REVIEW SAMPLE ONLY

Chapter 3:

Can Anyone Become A Personal Assistant?

Yes and no. It depends on your motivation and your background. Are you in it for the money? Does the possibility of world travel excite you? Are you enamored with the film industry? Or are you simply trying to get a leg up or use this to acquire new skills, contacts, or leverage yourself into another position with the company?

What Is Your Background?

Do you have a desire to serve? Are you the kind of person who likes to do volunteer work? The real answer can be found in looking at your attitude. Do you and can you put other people first? Are you willing to miss out on things that matter to you?

Here are some examples of professions that feed nicely into Personal Assisting

- **Secretary** – Office skills, diplomacy, organization, tact, resourceful
- **Executive Assistant** – Gatekeeper, guide, liaison, partner, right-hand
- **Runner** – Gofer, errand person, coordinator, assistant
- **Newbie** – Adaptable, enthusiastic, fresh, willing, energetic
- **Student** – Capable, learned, smart, savvy, eager
- **Nurse** – Caring, patient, tireless, nurturing, take charge
- **Waiter** – Prepared, alert, quick learner, endurance, friendly
- **Actor** – Quick study, personable, adaptable, jack-of-all
- **Mother** – Mature, sensible, experienced, wise, supportive

Another *important* thing to think about is how thick your skin is. When you become a Personal Assistant you are sometimes the closest thing to your boss, closer sometimes than a spouse or family member. And often, when things don't go her way, the frustration can rain down on you. So the question is; "Can you handle things without taking them personally?"

You have to remember that number one, this is a job; it's not personal. Two, that your boss may not be mad specifically at you but at something else entirely. Third, you have to be willing to do whatever it takes to help fix the problem. (Sometimes this isn't possible. It's true that there are some jerks out there who are always on a power trip, but that goes for any business, not just entertainment.). See the movie *Swimming With Sharks*, starring Kevin Spacey.

The funny thing is that most Personal Assistants are women who in general are more empathic than men. This can be both a good and bad thing. Women can (sometimes intuitively) sense what is going on. The problem is that they can also take too much to heart, so when their boss yells or is frustrated, the (female) Personal Assistant can take it too personally and begin to think it is her fault. Many Personal Assistants have shared their stories while crying that their employer hates them or constantly yells at them. This is especially prevalent within the entertainment business.

Do You Have What It Takes?

There are going to be many days and many employers who will beat down on you verbally and make everything your fault. There is actually an amusing book called; "It's All Your Fault!" about this phenomenon. There are going to be days when you'll find that no matter how carefully you've planned, how meticulous you are, or how good your intentions, something will go wrong and fingers will point at you. It is inevitable that at some time in your career as a Personal

Assistant, someone is going to say something to you or does something that will make you feel like the lowest common denominator. (One high-level T.V. executive does it just to keep her Assistant from developing any ego, and constantly berates the Assistant whether it's warranted or not.)

Still, female Personal Assistants aren't alone in this arena. There will be times where you cannot fix the problem. That doesn't mean you don't try everything in your power to resolve the situation.

Does This Job Suit Your Lifestyle?

Do you know what type of person you are? Are you someone who is close to your family? Do you spend every holiday, birthday, anniversary, and special occasion with loved ones? It's important to know as much about yourself upfront so there are no surprises in the near future. Since we understand that there is no typical day in the life of the Personal Assistant, you can also be assured that there is no typical lifestyle as well. There are Personal Assistants who travel *everywhere* with their boss. There are some who don't travel (perhaps a second Assistant), who work long hours, sometimes twelve to fourteen hours a day. And there are Personal Assistants who come home at the end of the day. They might be married, have a pet, or simply have done the 24/7 thing for many years and now want a more structured work environment. Dennis Hopper's Personal Assistant was someone who, before going to work for him, traveled everywhere at the drop of a hat. Her schedule was chaotic and she was always on the go, often missing important family or social get-togethers. After many years of living this kind of lifestyle, she decided to reexamine what her life was like and what was important to her. So, she began to seek out a Personal Assistant position that would allow her time to socialize and have more *personal* time.

What Kind Of Personal Assistant Do You Want To Be?

Are you someone who's adventurous? Are you a person who is meticulous and always crosses their "T"s and dots their "I"s? Do people tell you that you're a nurturing person? How hands-on are you? Are you the type that gets in there and gets a job done?

When beginning to understand which direction you want to go in, it helps to understand where you're best suited. It's not enough to just say; "I love being on a movie set or attending a premier", because in reality, while you may be present at those events, it's very likely that you'll be running around taking care of all the last minute details that somehow fell through the cracks. Watch or read *The Devil Wears Prada* if you think differently.

If you've decided that you want to work for an athlete, then your project is to figure out everything that working for one might entail. Most athletes travel frequently, they may have several houses in different cities, the better ones have multiple cars. Some have families and you might stay home while your boss travels to help take care of the children, pets, or to meet with contractors while they're away. Or you may travel with them and help coordinate their press and publicity schedules with the publicity agent. They may want you to set up their hotel room a particular way, or shop for special foods, maybe even help them purchase clothing. They may have you handle all correspondence because they're busy at practice or preparing for a game. If you travel with them, you may very possibly be responsible for packing and unpacking, possibly ironing, dry cleaning, and occasionally sewing. You may have to act as gatekeeper for those who want to get close to your boss.

Once you decide what kind of Personal Assistant you want to be, your next step should be to research that field as

much as possible to see if this is something you really want to pursue.

This is a very fun and exciting business but it's also all consuming. Once you commit, it's a roller coaster ride that can have some crazy twists and turns that you may not be prepared to handle. It's best to investigate and explore as much as you can about the kind of Personal Assistant you want to be. A good step towards understanding what direction you are suited for is to have a comprehensive analysis about the type of person you are. Two great sources are *www.analyzeyourcareer.com* or *Myers & Briggs*. Here you'll find a number of aptitude, personality, and occupational tests whose results will tell you where your strengths lie and your weak spots are. It will help you to see clearly what types of occupations and employers you are best suited for.

Part 3: Becoming a Kickass Personal Assistant

Chapter 5:

Killer Techniques For Making Yourself Invaluable!

Congratulations! Or if you're already working, glad to see you're still working! Okay, this chapter will take you through what you will need to understand to begin your job. The key here is to keep in mind that you are part of a team. Whether it's just you and your boss, or a whole staff behind you, all the other contractors, vendors, consultants, business associates, family and friends are already part of your boss's team and you're kind of like the assistant coach. Your boss will give you the general scrimmage, but it's up to you to see that all the team members – so to speak, carry out the play and make your boss proud of the results. Remember, your team may not always win, you may fumble the ball sometimes, and there will be times when you feel like you're being benched. But there are also the wins, the team victories, and the better prepared you are, the more practice and experience you get under your belt, the more successes you're going to have. Ok, enough with the sports analogies and on with the journey.

Understanding Your Role

You're the point person. Very often you are and will be the most direct contact to your boss. You'll be expected to check in daily, prepared with the day's agenda, and make sure your boss is apprised of any and all meetings, calls, projects, and scheduling. You may be asked to be quiet as a mouse and remain in the background until called. Still, that doesn't mean you shouldn't be prepared when called upon. And while you're being quiet, you can and should have a lot to do. You should know what the day's schedule is like, what the week holds in store, both in business and personal dealings. You need to know where things are and who's who. You'll want to

familiarize yourself with habits, routines, and anything else that your boss expects you to know.

Your First Day

The first day can be different for so many people. There's a chance that someone who preceded you will be there to acclimate and train you. Then again, there may not. You may show up and the first thing in the morning, you'll be asked to get (important) so and so on the phone. Or you may be sent to get their favorite coffee. You may be nervous your first day and rightly so, but one of the key things to remember is, don't be afraid to ask questions. Until you get used to things, you can't be expected to know how your employer thinks. So if she asks you for a tall cappuccino, ask questions. Decaf or regular? Do you take sweetener? Any special way? Extra hot, extra foam? Do you want a scone or muffin?

Don't stand there and have a five minute conversation either, just ask, write it down, and go. Your job is to get the information succinctly, and get the task done.

You Are the Gatekeeper

Part of your job will also be to protect and be a buffer for your boss. This role may make you the bad guy or the heavy to outsiders, but the key here is to screen and not let anything through that could possibly annoy, disrupt, or disturb your boss. Remember, you're there to help her do whatever she does best. And because she is successful at it, she can afford to have you assist her. So, one of your jobs is to screen calls. To do this you need to learn who you should screen, when to screen them, and whom to let through. You can keep a list that has A people, B people, and C people. See the section on *Keeping Good Records* in Chapter 6.

Another role of the gatekeeper is to know the schedule. You're responsible for knowing where your boss is at all times in case an A or B person needs to get hold of her. As the gatekeeper you may have to roll calls, conference calls, take dictation, set up meetings, and return calls. As gatekeeper your job will be to limit all of the unnecessary, potentially wasteful interruptions, and unexpected interference that may negatively impact your boss's workflow or productivity. Any unsolicited, meaning *uninvited* inquiry requires screening.

Basically, your boss is the Queen of England and you're her guard. Nothing gets past you without specific approval from the Queen.

Having The Right Tools

Just what are the right tools for doing your job? It's different for each employer. Remember the President's *Body Man*? If you're traveling, your tool of the trade could be a messenger bag with many travel items, gum, water, pens, pencils, tickets, phones, batteries, ear plugs, band aids, aspirin. If you are an office employee perhaps it is a pad and pencil, a calendar of events and scheduling. If you're on set, a copy of the script, water, your boss's cell phone, a favorite food item. The right tool could be a computer, fax machine, iPhone or smart device. The right tool for the right job.

Know your arena. By knowing who you are working for, and what's required of you, you'll quickly get a sense of the needs of the job and what you must have to provide good assistance. Again, in the beginning, don't be afraid to ask questions. This is one of your first important tools to acquire. Ask, be brief, listen, and always observe.

Knowing All The Players

A big part of your job will be keeping up and keeping track of who the players are. Your boss may have a big entourage or a small household staff. You will be interacting with most of these people on your boss's behalf and it's good to know who they are and what they do.

The *Business Manager* - is responsible for most everything financial for your boss. He can keep track of payroll, big purchases, expenses, petty cash, financial contracts, household properties, taxes and more.

The *Attorney* - Is involved with all contracts, legal negotiations, sometimes investments and purchases, and again there could be financial endeavors which he handles as well.

The *Agent* - Handles meetings, appointments, contract negotiations, and anything involving career and career moves.

The *Press Agent or Publicist* - Deals with everything media. They are responsible for any and all public events; which means that if your boss is attending a public event for publicity, there is a very good chance one of their reps will attend alongside your boss. You may be there too, but they will be responsible for knowing when to move him along and watch his back for potential media opportunities or paparazzi trouble.

The *Manager* - Is the one who puts all the people together. They help to open the doors of your boss's career, they check in with the agent to make sure your boss is being handled and shopped properly, that she is making good career choices.

The Players can also be people in your employers field that he has never met or worked with yet knows of. It's good to learn some about these people.

Watching The Clock?

One of the quickest ways to know this isn't the business for you is to take notice of how often you check your watch or the clock on the wall. This is a job that goes beyond time. This is the quantum arena of positions. Time is different here and like many people in the entertainment business can tell you, the day is done when the day is done. You may be lucky and have a structured nine to five lifestyle, but you may not. It all comes down to getting the job done.

What Will Be Expected Of You

Remember way back when, someone at some time asked you what you wanted to be when you grow up? Was your answer "everything"? This is the kind of job where your boss may not know all about your background and experience, but will surely want you to know how to get something done when he asks. See the section heading: *You're Expected To Know Everything* in Chapter 6 for more details.

Know the Team

No matter how big or small the staff is you must be able to work with them. Even if your boss doesn't have anyone but you, there is still a team. This can include the travel agent, the phone company, auto service, dry cleaner, the gardener, pool man, delivery, etc. You are representing your employer when you interact with any of these people and you must know how to work well with them to get the best results. Ultimately, if something goes wrong or someone is upset, it reflects badly on your boss.

If there is already a staff in place it's often good to defer to the staff members since they know your boss's habits best and can provide you with some good insights until you learn the ropes. You're still ultimately responsible for how things

turn out so, while you can't give all the power away, you can use their work history with your employer to see how things have gone in the past.

If you'll be working with a team you must keep in mind that they are there for a reason and have a specific task to perform. You must never demean them especially when you're asking for something from them on behalf of your boss. They can make or break you. This means they can make the outcome difficult or easy. Of course they too work for your employer, but how you treat them and handle them can determine how well they will work with you. And remember, you're the new kid on the block. They already know the ropes.

On a different note, an unspoken part of your responsibility is to get the best out of the team. If you're demeaning, rude, condescending, or annoying, they're not very likely to help out, and may even drag a task out to frustration. You need to become a diplomat and show that you too are a team player and that you respect and appreciate their job, and duties. Again, the players are also staff members. Everyone has a job to perform. Learn to be a team player and get to know your teammates.

Be Punctual

Another important criterion of a good Personal Assistant is to be on time. This is simple; you're being paid to be there. Whatever the excuse, it is just that, an excuse. Figure it out and find a way to not let it affect your job. You've been given a rare opportunity to really have an exciting job and career opportunity. If you're a compulsive over-sleeper, get over it. If your car breaks down, get a cab and call on your way there. Deal with the ramifications later. But never be late. Yes, for those of you who have to whine right now and find the one exception to this rule (family medical problem, or whatever), I can safely say that you will always look for these excuses and

this disqualifies you from ever being a good Personal Assistant. Just as important, don't be too early either; especially if you're working in someone's home. They may need and covet their private time so be respectful.

Chapter 6:

Preparing and Looking Like a Pro

At some point in your career almost everything will be thrown at you. You'll have some challenges you can handle with ease, perhaps because it's something you've encountered before, and there'll be some challenges that will give you a run for your money.

The trick is to prepare for anything that arises. I'm sure you're saying; "Easy enough said..." The best way to prepare is to visualize the position. Actually visualize it. Picture the place you'll be working, the surroundings. Once you've figured out what type of Personal Assistant you will be, then you can prepare. Example, let's say a part of your job is the grocery shopping. The easiest way to look like a pro here is to go through the entire fridge and pantry and make a list of absolutely everything. Once you have this list you can type it up and print it out. Put a check box next to each item and then you can do one of several things. You can post the list somewhere and let the family members or housekeeper check off an item when it's getting low or runs out. You can go through the kitchen periodically check things off yourself. You can make a project for the kids to help you out. If there is a chef, check with him or her about their needs as well and add that to the list.

You can incorporate this same technique with many aspects of the household; office supplies, household items, Kleenex, parking change, sunglasses, toilet Paper, toothpaste, cleaning supplies, and more.

By visualizing your job you can add value by anticipating needs and tasks which may arise. Another technique is to get to know the other employees and ask them

what your employer likes and what his preferences are. This can also give you greater insight into his habits and behaviors.

Your BEST Weapon!

If you want to do your job right and in a way that makes your life easier while getting everything handled faster, this is tip is key; buy a writing pad. The smaller, 5X8 lined, yellow pads are great but anything similar will do.

Some people will still insist on using their iPad or smart device but before you decide, consider this. Having something you can look at immediately without having to turn it on and off will save you tons of time and headache. Your life will be infinitely better and the ciaos dramatically reduced.

You should never have more than 10 items on your list. While your boss may ultimately give you more than 10 things, try not to add to the list until you've completed the 10 tasks. Why?

If you have more than 10 things on your list you'll become overwhelmed. Also, with 10 things to do, you actually figure out how to do them faster and in a logical order.

As you accomplish each task, you'll put a checkmark in front of the task or cross it out, but leaving it legible so you can see what the specific task was. There is something quite satisfying about seeing the results of a completed objective.

When you have accomplished each of these tasks, start a new sheet and write down the next ten items to be accomplished

CREATING A TASK LIST

Limit it to no more than 10 items.

This can be chores, errands, tasks, or goals.

- | | |
|-----------------------------|------------------------------|
| <input type="checkbox"/> 1. | <input type="checkbox"/> 6. |
| <input type="checkbox"/> 2. | <input type="checkbox"/> 7. |
| <input type="checkbox"/> 3. | <input type="checkbox"/> 8. |
| <input type="checkbox"/> 4. | <input type="checkbox"/> 9. |
| <input type="checkbox"/> 5. | <input type="checkbox"/> 10. |

Using this method, you'll noticed that you are cranking out your tasks and errands in no time, and you are no mastering the overwhelm.

Are You Ready?

Being ready can mean, researching your new boss (finding out about his background and his business), the Internet can give you lots of insights into who you'll be working for. Interviewing the person you are replacing and perhaps talking with some of the team to know what's to be expected; likes, dislikes, protocol, etc.

You'll need to know how to dress, where to park, and what time to arrive. If you can have his favorite morning beverage or breakfast ready, so much the better.

Carry a notepad and pen at all times. Simple things like wearing a watch, knowing the weather for that week, carrying a pen knife, tiny flashlight, a small sewing kit. Whatever it is, be prepared.

Can You Juggle?

On your very first day you may have several things thrown at you at once. You arrive thinking that you'll be going over the daily schedule and you come in the house only to find out that your boss needs a ride to an appointment in ten minutes, then you have to pick up a last minute wedding gift, have a rip in his suit jacket repaired and pick him up from his meeting.

Can you do all of this while scheduling his travel, making luncheon reservations, and getting a stock quote? You'll need to be able to handle everything that is thrown at you. If not, you need to rethink this field as a career for you.

Don't think you'll ever be in this situation? So your task is simply picking up the kids from school. What if just before you leave the house to pick them up, the pipes break and water is pouring into the master bedroom (See Chapter 17 on *The Bible* for tips on how to quickly handle this). Try having to pick up the kids from school and dealing with this at the same time.

Can it be done? Yes. Will it be easy? Of course not. Will your boss flip out? Maybe, but this will all be part of how well you can juggle.

Staying On Top Of It All

One of the most important things to keep in mind is that you can never let things overwhelm you. By planning and preparing, you can keep on top of your duties. There will always be something that can throw a wrench in the works as we just discussed, but if you review and keep up with your list of tasks, you can handle most surprises that come your way.

Write it down!

Try not to keep everything in your head. If someone calls you and requests something of you or changes an appointment, write it down then and there. This helps you two ways. Writing it keeps it better affixed into your memory and, because you've written it down, you can add it to your task list.

Clothing

Always dress nice. This doesn't necessarily mean a suit or nice dress, but it does mean having clean, nice smelling clothes. If you smoke they will smell it. Keep your outfit simple but contemporary. Try not to outshine your boss especially if she or he is someone who is always in the limelight such as an actor or high profile personality.

It's also good to have some back-up clothes with you. This could mean a second outfit if your first one gets a tear or spill on it. It may be that you have to work late and are being taken to a dinner or public event. It's always good to have a black blazer or simple but contemporary black dress and some nice but comfortable shoes that look good in the evening. Black is always simple and doesn't make you stand out too much, but still allows you to fit in.

This can't be stressed enough: make sure your nails are cleaned, your teeth are brushed and breath is fresh (a deal killer). Limit jewelry. Comb, brush, or style your hair. Press your clothes. Don't wear colors that are too flashy. IMPORTANT: Perfumes and colognes are deal breakers!! Time after time people have actually been let go for coming to work "stinky". Resist the urge to scent yourself. Watch gum popping or chewing, no low-cut blouses, no shirts flashing chest hair. Wear matching socks and polish or clean your shoes. Replace torn or worn shoe laces. No piercing or tattoo surprises (unless

okayed). Check facial hair and nose hair. Avoid too much eye shadow, lipstick, or extra long fingernails.

SECRET: Always, always, always have comfortable shoes. You're never going to know how long you'll be on your feet, how much walking you will do, how much climbing, lifting, carrying you will be asked to do. So comfort is going to be your saving grace. But DO NOT come to work in ugh-boots or fuzzy slippers!

Electronics

If you are not gadget savvy, learn. Find a friend, salesperson, or neighbor who can show you how to use a piece of electronics that your boss uses. If there is a particular software program they use, learn it. If you are uncomfortable using a mouse, practice. Know how to sync an iPhone, update a Blackberry, and backup a contact, use the Cloud to backup their favorite photos, documents and contacts.

You should know how to work ANY cell phone or learn fast. You'll need to be able to sync a via Bluetooth phone to a car, work the stereo, navigation system, or even how to adjust the driver's seat. Simple? Perhaps. But it can and will be asked of you at some point. Remember, you are an employee and not a buddy. Your boss does not want to hear you say, "Yeah, I have problems adjusting my driver's seat too."

Learn what devices they use and learn the basics of how to work them. It is also important to know a technician that can tech support the devices should they malfunction.

How to Handle:

▪ Production

Here are some basic tips to knowing production. You should know how to keep and maintain your boss's files while on location or on set. Learn the system and who the members of

the crew are; Director, 1st AD, 2nd AD, Production Manager, Line Producer, Writers, etc. Know how to find things in a heartbeat; contracts, scripts, NDAs, permits, releases, etc. Have your call logs prepared every day. Know the contact sheets and make sure you have a revised copy at the end of each day. Have a three ring notebook with the current script and any changes (page and script changes are usually notated with a different color paper to keep track of the last update or rewrite). Build a relationship with the caterer and craft service people. Also, know your surroundings; stores, pharmacies, gas stations, restaurants, Post Office, shipping place, clothing stores, hotels, etc.

▪ **Premiers**

When your boss attends a premier, if he is an actor he may have a PR rep to escort them down the carpet. If not, you will have to keep an eye out for news, media, and photo ops, and know who is looking to meet with them. If you know names, you may be required to whisper them to your boss. He may also be asked to do what's referred to as *Step & Repeat*, which means standing in front of a banner filled with sponsor logos while the paparazzi takes photos. Acknowledging fans is also important. You are like their guide dog, and you must look out for them and try to anticipate everything that will come their way.

It can also be as simple as keeping a sharpie (black or silver pen) on you for signing autographs (have a couple on hand). Having their sunglasses if it is still light out. Being able to get them water fast. Knowing where to go in the immediate area. Carrying wet wipes.

▪ **Meetings**

Will this be a dining meeting or not? Will drinks be required; water, sodas, etc. Is catering required? Do they have

pens and notepad? Does your boss have all his files and documents? Is there a phone for conferencing? Do they have all the proper phone numbers and conference access codes? Will they need a special line for long-distance calls?

Do the guests need parking validation? Is there a Xerox machine nearby, a hole punch? A video monitor? Computer and DSL hookups?

Make sure there is plenty of time in between meetings for your boss to prepare, unless she or he specifically says that they want back to back meetings. Don't argue this point with them as they know best how they like to work.

Have any and all papers and documents, notes and numbers that they will need to prepare them for the meeting.

▪ **Rolling Calls**

Your boss is out and about. Can you get the call to him while he's out? If you are out you may receive a call and need to get an important call through to him. Can you forward a call from where you are? Are you able to listen in and take notes if needed?

The term 'rolling call' can be best described as follows: If you receive a call from your boss and he in turn makes you call other people, while he and you are still in conversation. In such cases you put both, your boss and the person he has made you call on a conference call. However you too will have to be on the call until the call is complete and then follow up with the conversation after your boss has finished.

One might face problems when there are other calls coming in during a rolling call. In such a situation, you are expected to put the conference call on hold and deal with the incoming call. But it has to be fast enough before the conference

call gets disconnected. Some phones nowadays allow you to put the other two on hold without disrupting while you handle other incoming calls, and then you can return to the rolled call without any interruptions or delays.

- **Messages**

This is a very important area. You must keep good notes on messages you take: Time, date, person, alternate contact numbers, and, specific notes about the call. Try to anticipate questions your boss may have about the call and if you're feeling comfortable, ask some of them yourself. "Is this the best number for him to reach you?" "Can he call you next week?"

Also, if you can, keep a detailed call log to reference so you can follow up on any missed or incomplete calls. There is a sample Call-Log included with the attachments for this guide.

- **Recapping the Day's Events**

Some employers may want a recap of the day's events. This can also include things that didn't get handled or even a sub list of what to expect for tomorrow. This also helps to keep you on track.

- **Scheduling**

This is never a perfect arena. Your boss's schedule could change several times throughout the day. You could plan for an upcoming event and at the last minute find out he will be playing golf that day and you need to reschedule it all.

Another part of scheduling is to try and give your boss some breathing room. Try to space things out, or if your boss is willing, try to schedule his week so he ends up having one or two "free" days.

- **Errands**

Try to coordinate your errands with your boss being out; shopping, dry cleaning, the bank. This may sound anal, but if you can map out your errands and put them in order so you use the least amount of time, this can help you get more done in case something comes up which changes your day's plans. Make sure that wherever you are you can be easily reached. While you are out and about make sure you have the day's schedule with you at all times as well as any contacts or information you may be asked to provide.

- **Driving**

Be comfortable with driving a variety of cars. Simple things like how to operate power windows and the stereo can be important. Know the city you are going to be in. There will be times when a surprise errand will arise and you may need to know the closest fast food place, drug store, shoe repair, or gas station.

If you're driving your boss or his family or associates, stay calm, drive with the flow of traffic. If you are typically a honker, resist the urge. You don't want to do anything that will cause your boss, his family, or his associates any discomfort or anxiety.

If someone cuts you off, let them. Always make sure you're prepared and if you know you'll be driving that day, make sure the car is gassed and clean. Periodically check the oil, window washer fluid, tire pressure, spare, jack, etc.

If you have auto club, work it out with your boss that if you are going to be a regular driver that they should pick up that tab. Keep your own auto insurance current. If you drive their vehicles they may put you on their policy, but you'll still need your own insurance for your car.

Do you know that if you have your boss's permission, you are legally allowed to drive their cars? But check with the state you are in for the specific rules and regulations.

If you employer has a driver or uses a service make sure you know names and cell phone numbers. Keep in close contact and give them as much advanced notice as possible so they have time to wash and gas the vehicle and prepare any beverages or foods as required.

- **Friends and Family**

Learn who friends and family members are as soon as you can as you will be likely to be contacted by them. It's helpful to begin a list that you keep with notes about each person; birthdays, numbers, addresses, family members, etc. Keep collecting and gathering as much info as possible. You never know when it can be of good use. Always treat everyone with courtesy and respect, even if it is not returned in kind.

- **Shopping/Returning**

Keep a file of purchases and receipts. You might want to keep a notebook with Xeroxed copies or a file with receipts readily available. Sometimes your boss may lose or break something and want an exact replacement. It's also good to know where you purchased the item.

Keeping Good Records:

Taxes, auto records, children's school testing, home repairs, purchases and more. This is all a small part of keeping good records. At the time you'll least expect, you will be asked to find a legal file, a transcript, an old screenplay, or the kid's medical history. It is a good idea to have the files in a neat, logical and easy to find order. If you leave tomorrow, the

person replacing you should be able to come in and find the files because they are easily and simply organized. Instead of having a file for every appliance, toy, computer, and shoe purchased, simply put them under a larger file labeled *"purchases"*, and another under *"Home Appliances"*, *"Auto"*, *"Computers"*, etc.

Then under each you can sub-label the manila folders, i.e. under the main category of **"Auto"** you can have a sub-folder for; *"Mercedes"*, *"BMW"*, *"Insurance"*, *"Servicing"*, *"Auto Club"*, etc.

- **Files**

Make sure that your files are neat, legible and in logical order, so that ANYONE can find a file or document. Keep in mind that if you are not there, anyone should be able to locate a record. This also saves you from having to rush to the office when something is needed. And it will be simple to locate.

- **Records**

Keep any notes, updates, or changes together with the records. Always put the most current date on any updates. If these records are something that needs updating, keep a reminder in your smart device about this item. Example: If you spoke with someone about health insurance, write a note directly on the inside of the file folder with their name, the date, contact info, and briefly what was said. If you've updated a warranty, make sure you have all the updated information, contract numbers, and service numbers.

- **Documents**

Create a filing system that allows you to quickly find a document and depending on the importance of the document, you may want to keep a log that has immediate information

reflecting what is in the document, including, date, title, and summary.

- **Private Info**

Any private info must be protected. If you need to keep information with you make sure it cannot be lost or stolen. If you use an iPhone, Blackberry, iPad, or other smart device, make sure it can be securely locked and protected, and that it requires a password to access it. There are great, new encryption programs which can also safely protect passwords, credit card numbers, phone numbers, and much more from prying eyes. The same goes for your computer. It needs to be password protected if you're going to use it for work. There are certain items your boss will not want out of the house. If you do use a laptop and keep any work related information on it, make sure you have to log in a password before it can be accessed. Go over all of this with your employer to make sure you're both on the same page.

- **Emergency Info**

You'll need to have a list at your fingertips of emergency contacts. This includes doctors, children's doctors, hospital numbers, insurance and insurance card information, nearest hospital locations and numbers, allergies, medicines, and prescriptions, immediate family members. This list may also include fire and police in your neighborhood. It could also include locksmith, plumber, glass repair, auto towing, etc.

- **Contacts**

Keep a contact list which includes business associates, family members, friends, restaurants, spas, hotels, contractors, schools, doctors, pharmacies, florists, etc. See Chapter 17 under *Laminated Lists of Important Contacts*.

▪ A, B, C, Lists of Important People

What is the idea behind the ABC List? It's merely a way for you to know when to bother your boss with a matter or call. His business may depend on having immediate access to certain people in his field and vice-versa. In his personal world, he may have some friends who are closer, and more important to him than others. The same may go for his family. He may have one brother he's closer to than the other. Part of your duty as the gatekeeper is insulating your boss. Again, this never needs to be handled in a curt or rude manner. In fact, you need to make sure that while you're screening your employer from people, at the same time you are making each and every one of them feel like they're the most important person to your boss. Why? Because you're the face of your boss. You're representing his interests.

The list goes as follows: *A people* are announced. *B people* may sometimes be announced and sometimes you will tell them he or she is in a meeting or tied up. "She wishes she could talk, is there a number she can call you back at?" *B people* might be a relative, someone important they met with last week at an event. Put them on hold and check with your boss. Very quickly you'll get a sense of how to handle them. *C people* get a message taken. *C People* might be contractors, sales people, a doctor's appointment.

Follow-Up And Follow-Thru

At 2am, when you are finally getting some well deserved rest, you are awakened out of your much needed sleep by the annoying sound of the phone. Your boss is wondering why she doesn't have the reservations you were to arrange. She's in Las Vegas with some important friends and the club they are going to does not have them on the list. What do you do?

Always, always, always, follow up and follow through. It's not only about making sure all the aspects of the trip are handled, but making sure that all reservations are confirmed, that everyone involved is on the same page and has all the information; your boss, the club, the limo driver. Get names, re-confirm, write it down, include the last date and time you spoke with someone. Remember, if it can fall through the cracks, it will.

Make Your Job Easier

Resources are a vital part of your job. Know how to get something fast. Keep a growing file of contacts who know specific things; plumbers, handyman, auto shop, travel agent, specialty tailor, etc. Make sure you keep good relationships with vendors and contractors so that when you need something fast, they will come to your aid.

You're Expected To Know Everything

Is it unreasonable to ask something of you and expect you to know the answer? Of course. But knowing that you will be given some challenging tasks, the real question is; can you figure out how to get it done?

A lot will be asked and expected of you. A great deal of which you may not know how to do or don't know where to begin. To be successful you are going to have to be resourceful. A big part of your position will be delegating to others who do know how to handle a specific task. You are not always expected to do everything yourself but you are expected to get it done. Your network will help you gather the resources to accomplish this, but in the beginning you may also need to do research and build a support team of your own.

Being resourceful is also a matter of figuring out how to find the answer or where to look for the source. Example: If

you're asked; "What's the name of that Sushi place with the funny hostess on Westwood Blvd?"

Where do you start? You could begin by SMS Googling "Sushi" and "Westwood Blvd." Next you might try "Japanese" and "Westwood Blvd." Next try going to Google on the Internet. Can you add any information? "Japanese restaurant on Westwood Blvd. near the crest theater" Since you know it's near the Crest Theater can you call them and ask the name of the restaurant? Do you have time to drive by there and look? Is there a friend of your boss's you can ask that has eaten there?

Apps have come a long way. Now you can use tools like *Where*, *Yelp*, or *Around Me*, to quickly locate a venue your boss wants you to find. And since they all can search by current location, zip code, or city, it makes your job that much easier.

There are many ways to begin searching for your query but whatever the results you need to at least try. Fortunately smart phones are miracle assistants. *Siri* can make the job even faster. If you want to be good at this job, invest in a smart device that has the apps you need to make your job run smooth. And the better Personal Assistant will know how to use many creative resources to get the answers that are needed.

So what's the point of going to so much trouble for such a minor task? Well it's your job of course but more to the point if you really think about it, you're also honing some skills which can not only make you very useful, but a valuable commodity. Who knows where you'll end up next, and when competition is involved it's good to have the edge. (Not a Sun Tzu quote)

Chapter 8:

Becoming Indispensable

Little Things That Make You Shine

It can be as simple as washing a dirty glass in the sink and putting it away, or, filling the car with gas. Little can also mean putting the latest updated schedule on your boss's desk so it's the first thing he sees when he arrives. Maybe it's having his favorite beverage stocked in the fridge. These small details can seem trite, and sometimes you may not hear anything about it, but your boss will appreciate your attention to detail. Keep in mind that a big part of your job is keeping your boss as stress free as possible. One of the best ways to do this is to anticipate something before he comes to you and asks you to go out and get it.

Are You Clairvoyant?

After a while, you'll begin to read what kind of mood your boss is in and often you will know why. So mind reading is simply the technique of anticipating this before it comes up. For example, if the weather is becoming colder, start preparing their sweaters and jackets, and begin preparing to put away summer items. If you know that after a stressful day your boss likes to unwind by plopping down into their favorite chaise lounge with a bowl of Hagan Daaz and a good video, have the ice cream and video ready to go. If he regularly eats out on Friday nights, have a couple reservations at his favorite places secured. You can always cancel.

Be Prepared!

Always have a spare pen or pencil with you. Always have a little cash for parking or change for the meter. If you drive your boss, keep extra water, gum, Chap Stick, aspirin, and sometimes an additional cell phone or battery handy for her.

Visualize. Try to envision what your day will be like. Actually picture yourself going through the motions. This can help you plan better for what's to come. For example, if you know that tomorrow you are going to be driving your boss from Malibu to Downtown Los Angeles, does the car have a working spare tire? Is there washer fluid for the windows? Gas in the car? Do you have a map with you? Have you checked the day's traffic conditions? Maybe at the last minute your boss wants you to come with him. Do you have a sport coat ready to go in case you meet with clients?

Visualizing the day can help you plan and prepare for many of these events.

Knowing When To Be Invisible

There is a golden rule, *"Do not speak unless spoken to."* As a Personal Assistant this may not be the case for you, but you may need to practice, *"Remain in the background until needed."* Some positions will require you to be in sight at all times. Others will want you to stay out of sight until needed. Sometimes it is because they want to feel like their home is still theirs. Sometimes your employers just need some down or alone time. Learn to be sensitive to your employers needs and try to work on accommodating their desires even if sometimes it's unspoken.

Secrets Of The Trade

Remember Scotty from Star Trek? Whenever the captain asked for something Scotty would always claim that it is nearly impossible to do and it will take weeks. When the captain says they only have hours and Scotty does pull through, he looks like a God.

It's good to always have things in your arsenal for such occasions. For example, let's say you're traveling with your boss and you're out and about in another State or country. There're no power cords around, no chargers, etc. and of course, his cell phone dies. His battery ran out. He forgot his ear buds. But what if you kept an extra battery with you, or an extra charger? How about keeping a second cell phone incase his breaks? A back-up hearing aid? A spare shirt? Of course you can't always carry everything with you, but you can have it nearby or plan out your trip by finding a local place that can get a replacement fast! Picture the place you will be traveling to and try to think about what might be needed on the trip. Before you leave for your destination, research what stores are in the area that can be useful to you.

If you're on a film shoot in another city or country. Do you have access to the same water your boss drinks when at home? Do the hotels have the same pillows your boss is used to and will have to sleep on for six to eight months? Can you find his favorite shoes if his get wrecked? Think about foods, movies, medicines, software, batteries, etc.

A good Personal Assistant will have this all on hand or know how to get it. A great Personal Assistant can do it faster. Looking like a star is all in the preparation. Don't rely on others to have the things you may need. Take it upon yourself to have all of this ready.

SECRET: Want to know one of the best tools you can have with you at all times? It's something that will always come in handy and save you again and again? And, it only costs \$2.00.

This valuable tool will be used more than anything else you can pull out of your bag of tricks.

So what is it? A small pocket-sized notebook and pencil.

You'll have many other things to deal with as well, travel arrangements, contacts, documents, scheduling, clothing, and more. The notepad is just one more tool that can alleviate some of the strain when these obstacles come at you fast.

Chapter 16:

Resources To Hone Your Craft

Courses You Can Take

There are not many classes out there on learning to become a Personal Assistant, in fact, less than a handful, but this is not the only area where you will need an education. *Kerri Campos Agency* of Los Angeles used to be one of the very best at training and placing Personal Assistants but the agency no longer exists. However, *Bonnie Low-Kramen* worked for 25 years as a top Personal Assistant for actress Olympia Dukakis and has been a strong and respected presence in the business as the co-founder of New York Celebrity Assistants. She has taken over the mantle as one of the better companies for training Personal Assistants as she runs workshops throughout the country. Her book, *“Be the Ultimate Assistant”* will give you a great set of tools and insights into this profession.

Here is a list of companies that can give you the training you need:

- **Bonnie Low-Kramen:** www.bonnielowkramen.com (NYC)
- **Professional Domestic Services:** www.housestaff.net (OH)
- **CPAI:** www.celebritypersonalassistants.com (Atlanta)
- **Starkey International Institute:** www.starkeyintl.com (Denver)
- **Donna Coulling:** www.donnacoulling.com (London)
- **Marguerita King:** www.personal-assistant-tips.com (London)

Depending on the position and the duties that will be required of you, you may need to take other courses which can

only strengthen your position; travel, computers, gift wrapping, electronics courses, security, etc. And if it is directly relevant to the position you are in, you should discuss with your employer about his picking up the tab.

Also, depending on your roll, there's value in taking household and domestic training, courses on private and commercial travel, management classes for working with contractors, computer and technology instruction and more. It would also be good to have some basic knowledge of what to do in an emergency situation as well. If there are children and they swim, taking adult and child life guard courses, first aid, and CPR courses are all helpful. Some general first aid can be useful too.

Again, anything that would be relevant to your position and makes you a valued asset to your employers will be priceless. You can find many courses on what you need in your local area; First Aid – Red Cross, Swimming – YMCA, Travel – A reputable Travel Agency, Electronics – The Geek Squad (or similar organization), Computers – Apple Store (or similar organization).

Books You Can Use

The good thing about today's society is that there is a book on almost everything. And now we have ebooks. There are many books that can improve your knowledge about running and maintaining a household. Books on how to shop, how to dress, there are books on auto repair, and while you shouldn't do the work yourself, it is good to have a comprehension of the work being performed. You can research many topics on Amazon, your smart device, or the Web.

- The Concierge Manual
- The Concierge: Key to Hospitality
- The Lucky Shopping Manual
- The Modern Gentleman: A Guide to Essential Manners, Savvy & Vice
- The Insider's Guide to Household Staffing
- How to Be a Gentleman: A Contemporary Guide to Common Courtesy
- A Gentleman's Guide to Etiquette
- Behavior in Public Places
- Fabulous Gifts: Hollywood's Gift Guru Reveals Secret to Giving Perfect Present
- Butlers & Household Managers: 21st Century Professionals
- The Organizer : Secrets & Systems from the World's Top Executive Assistants
- The Valuable Office Professional
- Administrative Assistant's and Secretary's Handbook
- The New Office Professional's Handbook
- Strengths-Based Leadership
- The Art of Speed Reading People
- Do What You Are: Discover the Perfect Career for You
- Change Your Life in Seven Days
- Instant Confidence
- The Power of Charm

On The Job Training

Every day is a learning experience. You will no doubt be introduced to many new things while on the job. Did you know that a tire filled with nitrogen retains optimal pressure longer, leading to more uniform tire wear and better gas mileage? Or that peanut butter used in a mouse trap doesn't do as good as peanut shells? Or if a parking meter says "fail" you're allowed to park there for a minimum of thirty minutes? Are you aware that Coca Cola can help to relieve a terrible migraine if used the right way? There are many things you'll learn on the job. Some as silly as these and some much more valuable that you can take with you anywhere. One of the most important things you'll learn on the job is what your personal limitations are. Use your creativity to push passed them. The more you challenge yourself the more you will grow with every challenge. Don't be afraid to step up to the plate and swing.

Insightful Magazines

Every industry has a magazine that is useful to that business. Depending on what your employer does, you can always find magazines which give you current information on that industry. If your employer doesn't subscribe, you may want to think about suggesting it to him or even subscribing to the online version. These are some of the magazines that may be useful to your job:

RealSimple

Sunset

Vogue

In Style

Elle

GQ

Travel & Leisure

Architectural

Digest

Better Homes &
Gardens

Food & Wine

Bon Appetite

Gourmet

Time

Entertainment Weekly

Sports Illustrated

ESPN

Women's Health

Men's Fitness

Depending on your employer's field of endeavor and his personal interests, some magazines for him or her may include:

Inc. 5000

Fortune

Time

Money

HR

Entrepreneur

Forbes

Fast Company

The Economist

The Nation

Huffington Post

Wired

Scientific American

Variety

Hollywood Reporter

Vanity Fair

LA Confidential

The New Yorker

The Atlantic

Town & Country

Smithsonian

Condé Nast Traveller

Chapter 19:

A Final Thought For The Seasoned And Not-So-Seasoned

Take pride in your work. Use the tools provided in this guide. Excel and work hard. But most of all enjoy your life. Don't forget that you don't live to work, you work to live. Take a moment to appreciate the things around you. You may not know it but a big part of why you were hired in the first place is due to the life experiences you've gathered. Your outlook on life and the world, your manners and behaviors towards others, how you feel, think, and breathe all contribute to the type of person you are.

Spend time with the people you care most about. Go to a concert. Travel. Seek out a restaurant you are passionate about and enjoy every bite of food, and every sip of wine. Walk through your favorite museum. Take a drive along the coast, or through the mountains. Sleep in. Take a picnic to the park, lay on the grass and look at the clouds. Take your shoes off and walk in the hot sand along the beach. Buy yourself a piece of chocolate and savor the moment. Share a glass of wine. Go to a bar and watch your favorite team. Head to Las Vegas. Read books and magazines. Go to the movies and don't forget the popcorn. Volunteer at some charity organization. Buy yourself a gift.

Once you've done any of the above, you're ready to work as a successful Personal Assistant because your present or future boss will see a light inside of you and know you're a force to be reckoned with. You're someone who is in control, who understands what it takes to have a successful, fulfilling life. You're someone they can't do without. You are the next, successful Personal Assistant. Congratulations.

About The Author

THE *Best* OF THE *Best* HOUSEHOLD PROFESSIONALS PERSONAL ASSISTANT

CRAIG COPELAND

Copeland has been a personal assistant for the last 15 years and has worked for celebrities and other high-profile employers. What he loves about his work is the diversity and challenge it presents - there is never a dull moment because he is always anticipating his employer's needs to make sure that every eventuality is covered. (For example, he always makes sure he has cell phone batteries or a second cell phone on a trip.) He has worked for celebrities such as Katey Sagal and Lenedra Carroll, who was managing her daughter, "Jewel" Kilcher, and has always found it rewarding to take care of the many details and areas of his employer's lives while they are busy doing the things that they have to do. For Craig there is no such thing as a typical day - he has to be ready for anything. Or, as he says, "Preparing for change is your best gift." He is currently working off a top celebrity and earns a six figure salary. His favorite work tool is his cell phone, which he also uses for essential tasks like tracking flights and viewing emails.



Celeb Staff Magazine

Craig has worked for A-list actors, Grammy winning performers, heads of major corporations, top producers, directors, and entrepreneurs. He landed one coveted Personal Assistant position by being the first of fifty people to find a rare exotic car (one of only three hundred made). He scored a private box for a Madonna concert one day before the concert, and when my employer wasn't happy with the location, He was able to get a second, more coveted, private box on the day of the concert. He's lived on a secluded island with moguls like Paul Allen, and flown in everything from puddle jumpers to private jets, Citation Tens, Gulfstream IV & Vs, to the now retired Concord, the fastest commercial plane. He's also washed dishes for eighty, cooked for twelve, thrown parties together for 200-1000 people, arranged transportation for an Ocelot (an American wildcat), shopped at the top fashion stores in Los Angeles and New York, held off a screaming mob of fans, held someone's hand while they were getting a tattoo, changed diapers, light bulbs on the front porch, and the oil in a car. The point is, he's done a number of jobs both large and small and learned to take pride in every task given to me. It's what is and will be expected of you too as a Personal Assistant.

Resources - Tools of the Trade

Airport Escorts:

Airport Assistance Worldwide –

www.airportassistance.com

RML - www.airportconciergeservices.com

Career Info:

Book: Do What You Are:

Discover the Perfect Career for You

Cleaning:

How to Clean Anything –

www.howtocleananything.com

Online Authority for Free Cleaning Information

Concierge Tips:

Book: The Concierge Manual

Book: The Concierge: Key to Hospitality

Databases:

IMDB – us.imdb.com

Internet Movie Database

Who Represents – www.whorepresents.com

Contact info for Celebrities and their Representatives

Entertainment:

Seeing Stars.com – www.seeing-stars.com
Celebrity Events and

Etiquette:

Book: Complete Guide to Executive Manners

Book: The Modern Gentleman:
A Guide to Essential Manners, Savvy & Vice

Book: How to Be a Gentleman:
A Contemporary Guide to Common Courtesy

Book: A Gentleman's Guide to Etiquette

Everything Legal:

Forms Guru – www.findlegalforms.com
Legal Forms

LegalZoom - www.legalzoom.com

Happenings:

Visualnet - www.visualnet.com
The Film, TV & Video Production Link

Hiring Service Professionals:

Angie's List - www.angieslist.com

REVIEW SAMPLE ONLY

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How Things Work:

eHow – www.ehow.com

How Things Get Done

(Tying a tie, negotiate a raise, win at Monopoly)

How Stuff Works – www.howstuffworks.com

How almost everything works

Consumer Search – www.consumersearch.com

Info about Products and how they perform

Managing A Household:

Book: Butlers & Household Managers:

21st Century Professionals

Book: The Insider's Guide to Household Staffing

Organizing:

Book: The Organizer : Secrets & Systems

from the World's Top Executive Assistants

Parties & Events:

Party Planning – www.party411.com

Everything for putting on a Party

References:

RefDesk – www.refdesk.com

Fact Checker for the Internet

Restaurant Reservations:

Open Table – www.opentable.com
Restaurant Reservation Booking

Self Improvement:

Book: Change Your Life in Seven Days

Book: Instant Confidence

Book: The Power of Charm

Book: Behavior in Public Places

Book: Strengths-Based Leadership

Book: The Art of Speed Reading People

Shopping:

Book: The Lucky Shopping Manual

Book: Fabulous Gifts: Giving Perfect Present

The Office:

Book: The Valuable Office Professional

Book: Administrative Assistant's
and Secretary's Handbook

Book: The New Office Professional's Handbook

REVIEW SAMPLE ONLY

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Travel:

Trip.com – www.trip.com
Deals on Travel Rates and Prices

Travel & Leisure – www.travelandleisure.com
Hotels, Restaurants, Destinations

Air BnB – www.airbnb.com

Training Services:

Bonnie Low-Kramen: www.bonnielowkramen.com
(NYC)

Brian Daniel: <https://www.findcelebrityjobs.com/>

Udemy Personal Assistant/Office Assistant Training:
<https://www.udemy.com/course/personal-assistant-pa>

CPAI: www.celebritypersonalassistants.com (Atlanta)

Starkey International Institute: www.starkeyintl.com
(Denver)

IAP Personal Assistant Online Course:
<https://www.iapcollege.com/program/personal-assistant-course/>

Marguerita King: www.personal-assistant-tips.com
(London)

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.

Email: info@personalassistantguide.com to get your templates

- 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
- Purchase Report
- Travel Checklist
- Travel Itinerary
- Weekly Project Schedule
- Weekly Restocking List
- Weekly To Do List
- Xmas List

“An important resource for Personal Assistants. Written from deep experience, Craig paints a spot-on depiction of the work in useful detail and thankfully, with great humor. The book delivers on its promise in spades.”

- Bonnie Low-Kramen, Author of *Be the Ultimate Assistant*

“Finally, a true "insiders" guide. As a recruiter placing very high level Personal Assistants, I found this book to be extremely informative, useful and with a ton of good ideas and pointers. Wish I had written it myself!”

- Lori Zuker Briller, *The Grapevine Agency*

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 about their amazing deeds. These little known, integral parts of our society have been around for many years. They go by the often ambiguous title of Personal Assistant.

In this book you'll find all the tools, experiences, and secrets you'll need to do this job with confidence and success.

In this guide you'll learn:

- How to successfully land a job as a Personal Assistant
- Where the best jobs are
- Tips for beating out the competition on interviews
- The best tools you need for the job and how to get them
- Where to find the best training
- What they look for when hiring you
- When to ask for a raise and get it
- How to perform your job with confidence!
- Learn about the coveted “Bible” and discover how it can make you a Rock Star Assistant

“Don't let the size fool you. This little black book is FULL of important information and tools for anyone who is an experienced Personal Assistant or starting out as one.”