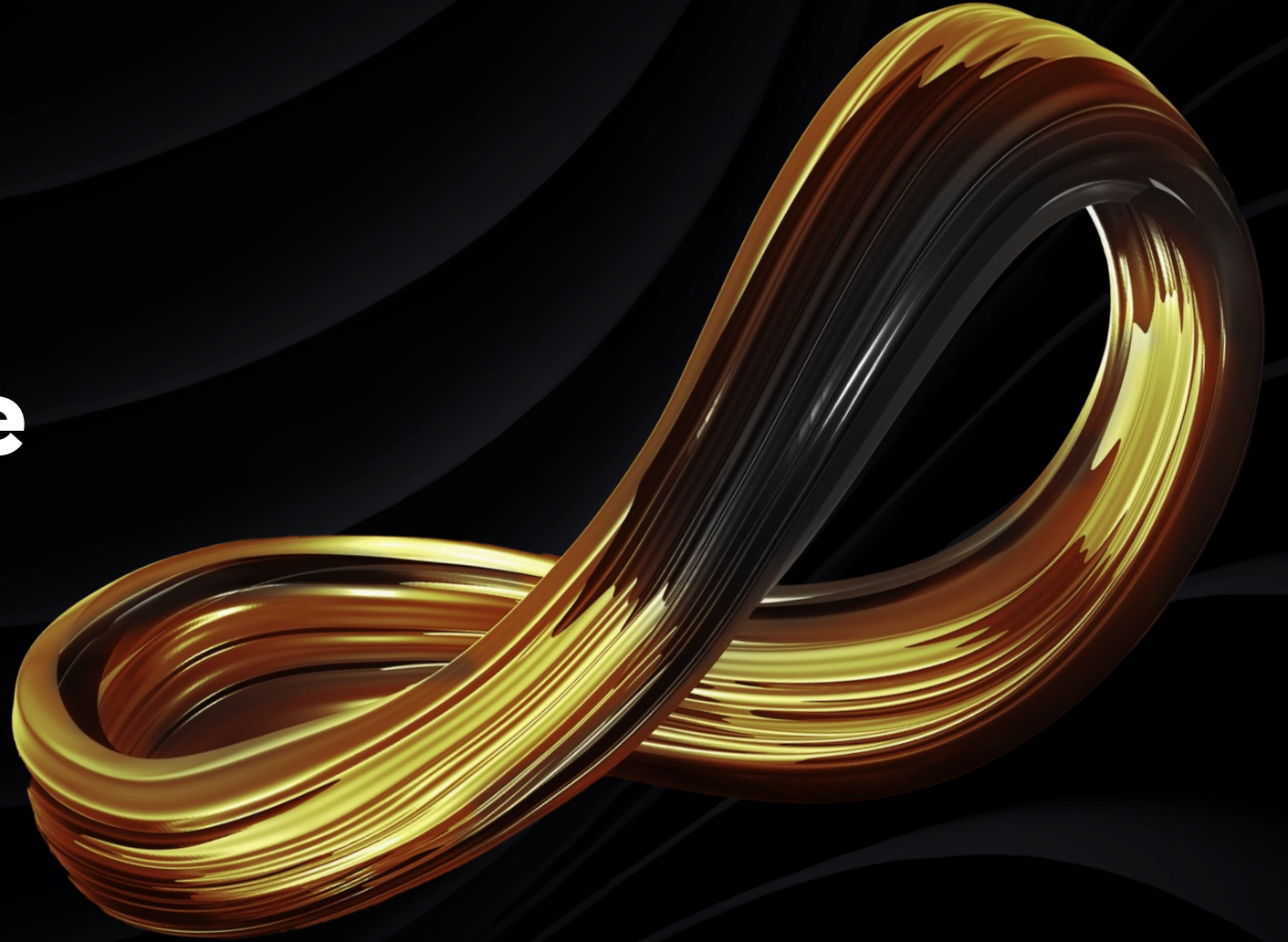




The EA Playbook:

Achieving Time Freedom



Let's start with a quick self-reflection.

How much time do you think you spend on low-value work like responding to emails, making phone calls, managing your schedule, and other routine tasks?

Our best guess? Probably more than you'd want to admit.

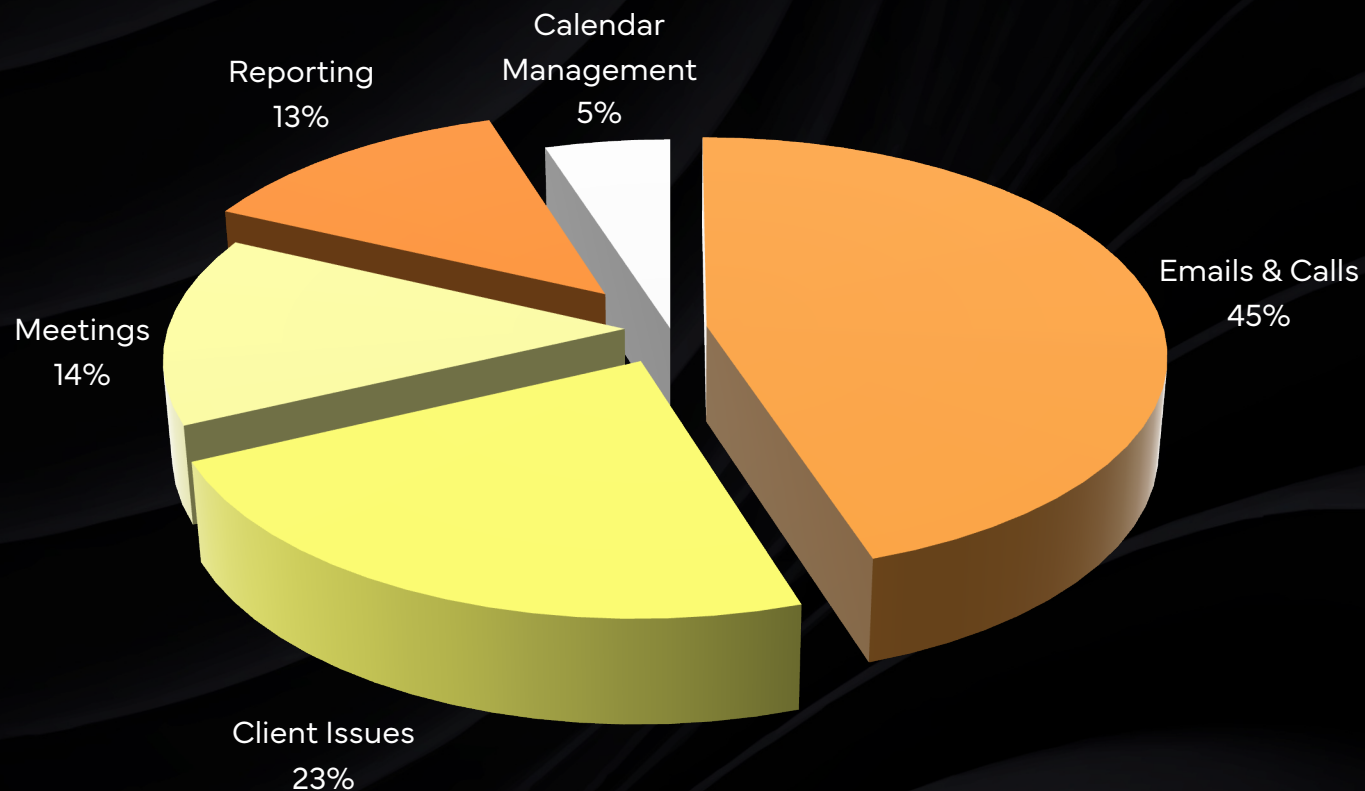
If you're anything like the 212 firm leaders and accounting professionals we surveyed, you'll most likely share their frustrations around these common time management and productivity obstacles:

- + Spending 1.5 to 2 hours per day on emails and communication
- + Not having enough time for high-value deliverables
- + Working long hours leading to poor work-life balance
- + Not having enough time for business, personal, or professional growth

Here's what a typical day looks like for our survey respondents:

If your day-to-day looks anything like this chart, chances are you barely have enough time and energy to focus on growth, strategy building, client relationships, and other high-impact work.

The scary part? It's so easy to fall into this vicious trap without even realizing it, especially if you're used to doing it all. But stretching yourself in too many directions comes at a cost: your productivity, well-being, and your firm's long-term success.



How EAs can Give Your Productivity an Instant Boost

One of the costliest mistakes many firm owners and business leaders make is trying to do everything themselves rather than delegating to their team. As a leader, it's crucial to know where to channel your time and energy—and it's certainly not on endless admin and low-value tasks.

So how do you remove yourself from routine work without throwing your daily operations into shambles?

That's where having an Executive Assistant (EA) can come in handy—a simple, proven, time-tested solution.

Here's why every firm owner needs an EA:

Reclaim Your Time for What Matters Most

How does unlocking 30+ hours in your week sound? Having an EA takes a ton of administrative burden off your shoulders, freeing up valuable hours of your day. Rather than wasting hours on end handling routine yet vital aspects of your operations, you can refocus your time and expertise on areas where you bring the most value, such as strategic planning, client acquisition, and driving innovation in your firm.

Build a Stronger Team Culture

With an EA managing your day-to-day, you can be more present for your team. Giving those under your stewardship your undivided attention builds trust and fosters deeper relationships. Even something as simple as a 15-minute conversation about their weekend plans can go a long way in showing your team that you care.

Improve Work-Life Balance

Long hours and constant multitasking don't just affect your business; they take a toll on your personal life. An EA helps you delegate effectively, so you can step away from work at the end of the day and spend quality time with your family and friends, pursue hobbies, or simply recharge.

Refocus on Growth and Leadership

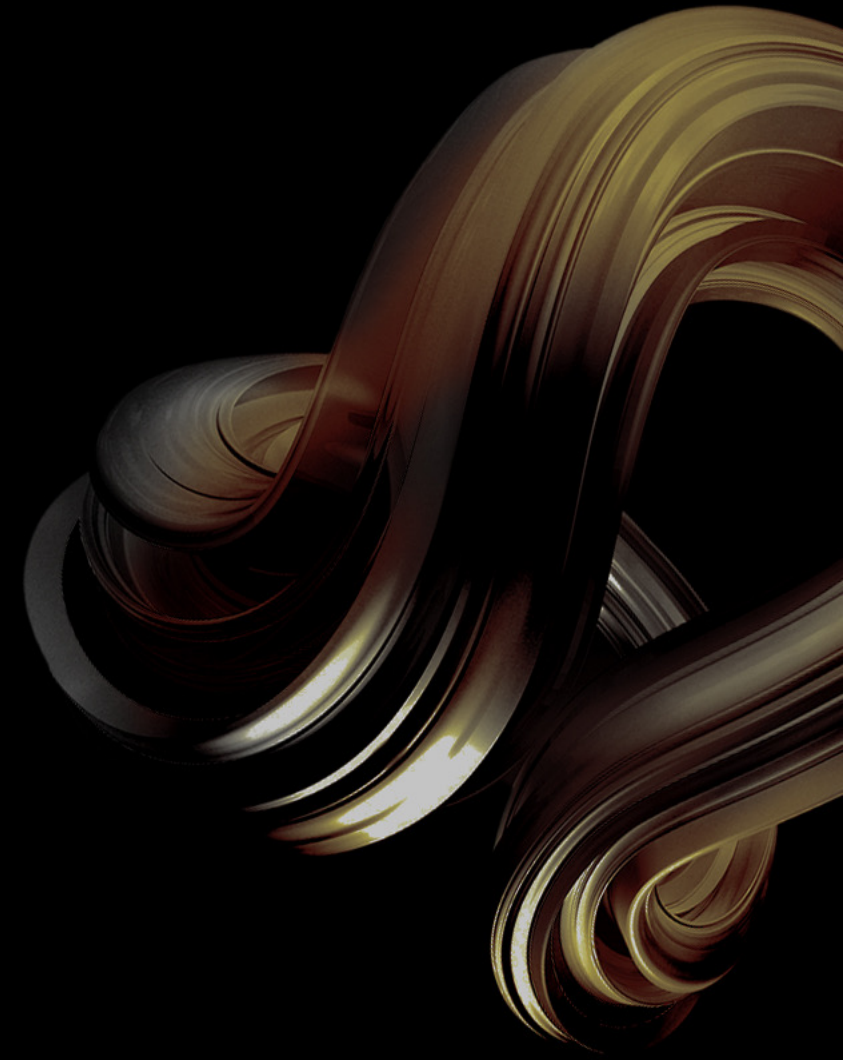
Scaling your firm requires a laser focus on growth opportunities and building a strong team culture. Especially as your scope and responsibilities grow, juggling multiple priorities will inevitably get you burned out. By entrusting administrative tasks to a skilled EA, you'll have the bandwidth to lead your firm with vision and clarity.

Enhance Client Relationships

When you're not constantly bogged down by day-to-day minutiae, you'll have more time to nurture client relationships and deliver exceptional service that sets your firm apart. Just like how being present for your team strengthens culture and improves retention, being there for your clients also fosters deeper connections and improves client satisfaction.

The Anatomy of an Effective EA

Now that you know the benefits of having an EA, it's time to understand what makes an effective EA and how to accelerate their impact on your firm.



What is an EA?

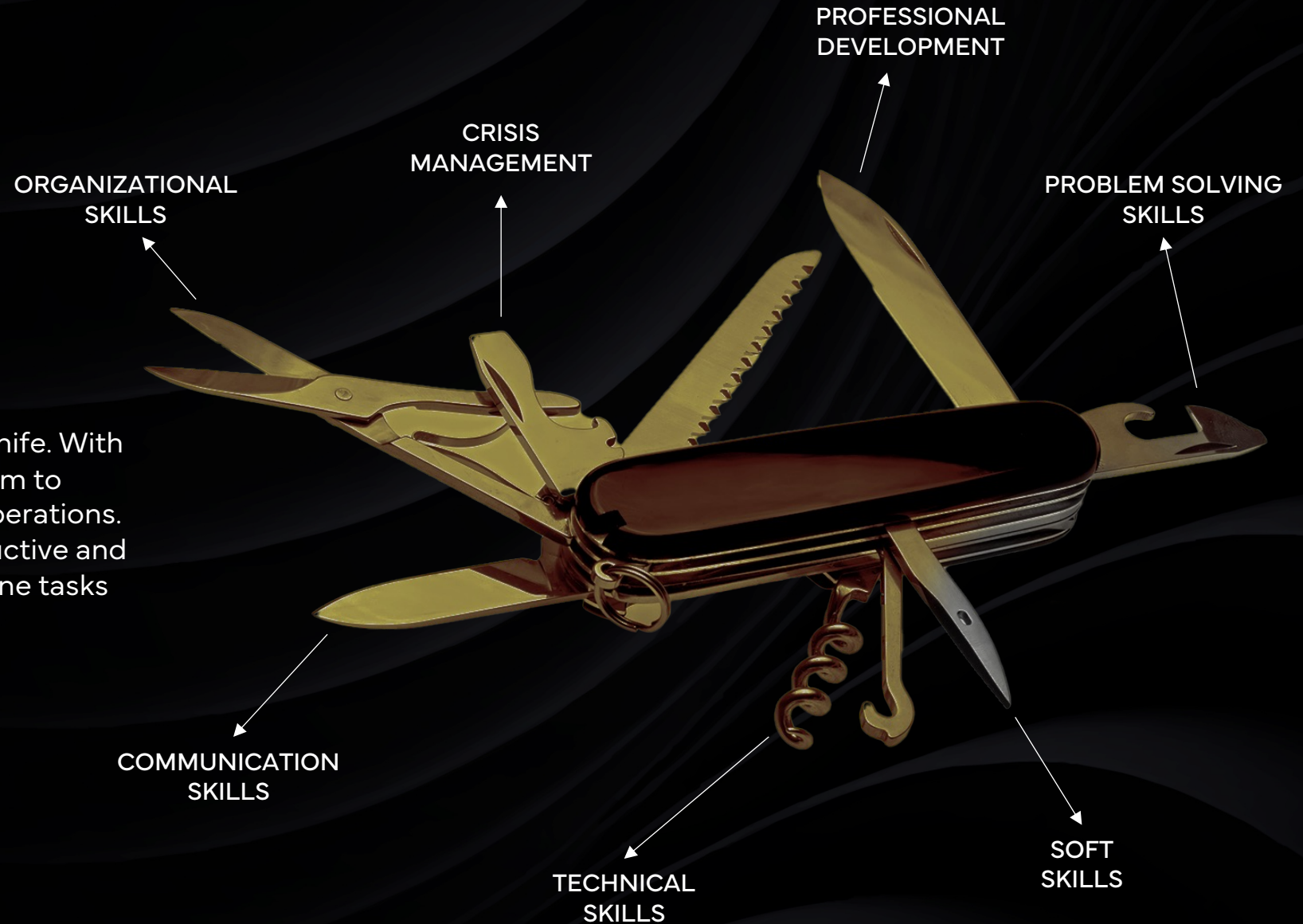
Before we get any further, let's first define what an EA is.

Executive Assistants or EAs are professionals with expertise in providing high-level administrative support to upper management and executive roles. They bring a well-rounded skill set and impeccable versatility, making them adaptable to perform a variety of tasks and functions.

Here at TOA Global, our EAs aren't just support staff—they're a strategic partner in your success. Besides having relevant experience and the right attitude, we only hire EAs who possess the core skills below. This ensures that they can hit the ground running immediately with little to no training.

Core EA Skills

Think of your EA as your firm's Swiss Army knife. With their diverse skill set, you can depend on them to manage various areas of your day-to-day operations. You'll be surprised at how much more productive and effective you'll be when you don't have routine tasks bogging you down all the time.



Organizational Skills

Executive Assistants are time management gurus, efficiently managing your appointments, meetings, and events to keep your schedule organized. They are also adept at handling multiple projects simultaneously while giving equal attention to detail and focus on each task.

Communication Skills

Whether it's verbal or written communication, our EAs excel in liaising within and outside your firm. They possess excellent interpersonal skills, allowing them to build and maintain professional relationships with clients and across internal teams and departments.

Technical Skills

EAs are exceptionally tech savvy professionals. Whether it's Microsoft 365, Google Workspace, or other mainstream office programs, our EAs possess intermediate to expert level proficiency of numerous digital tools and software systems.

Soft Skills

Assessing soft skills is a crucial part of our vetting process. Not only do our EAs possess elite technical abilities, but they are also emotionally intelligent, dependable, and adept in stress management.

Problem-Solving Skills

Elite EAs stand out for their ability to think critically and find effective solutions to complex challenges. They approach obstacles with a proactive mindset. Their resourcefulness and quick thinking make them an asset in high-stakes situations.

Professional Skills

Our EAs are lifelong learners dedicated to continuous improvement. They actively seek opportunities to enhance their skills, stay updated with industry trends, and adapt to evolving business needs.

Crisis Management

In moments of uncertainty, you can rely on our EAs to stay calm under pressure and handle crises with composure and strategic thinking. Whether it's prioritizing and managing tasks or communicating with stakeholders, an elite EA can maintain order during challenging situations.

Scope of Work

To fully maximize your EA's skills, assign them tasks and responsibilities that align with their strengths. Here are where our EAs' strengths lie:

Administrative

- Calendar management
- Manage calls, emails, and all other communications
- Travel coordination and event planning

Financial Management

- Assist in budget preparation
- Track and manage expenses
- Accurately create expense reports

Confidentiality & Discretion

- Handle sensitive information with the highest level of confidentiality
- Represent the executive and organization with utmost professionalism
- Liaise with internal teams and clients

Project Management

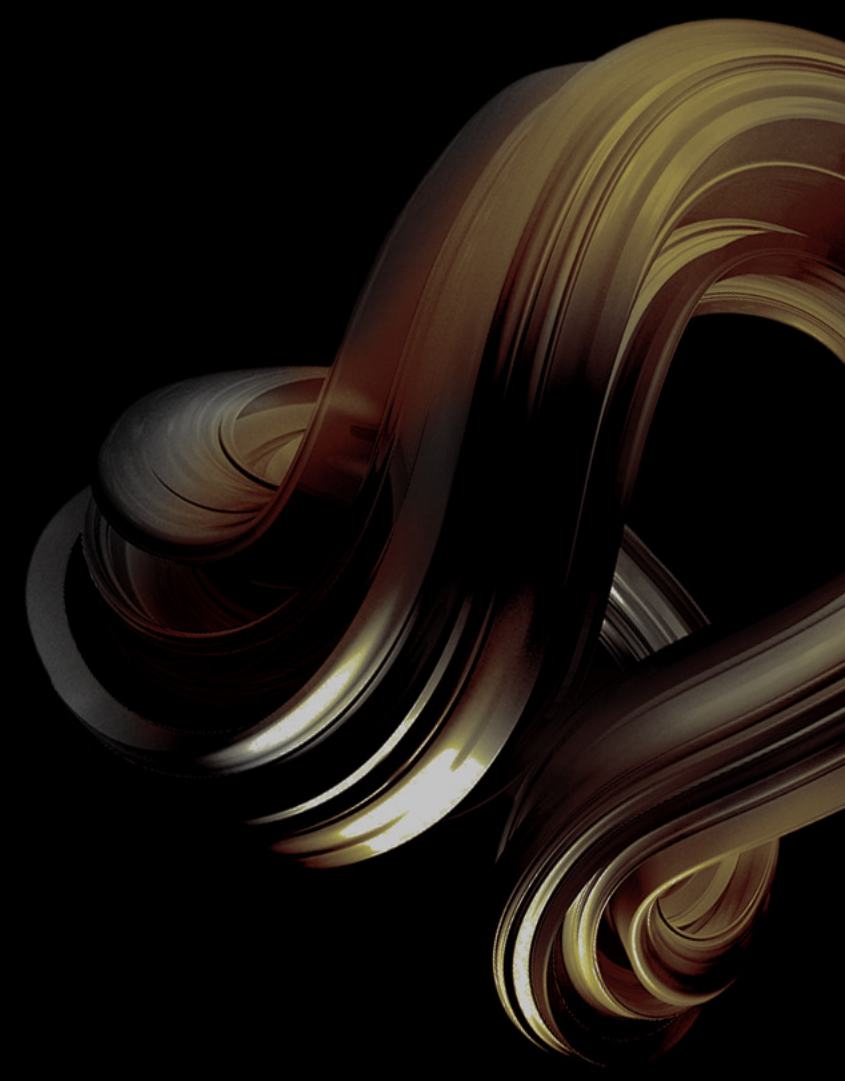
- Assist in project planning and execution
- Monitor project completion and deadline adherence
- Coordinate with project stakeholders

Research & Data Entry

- Write meeting minutes
- Prepare contracts and presentations
- Document management

Getting Your EA Up to Speed

While our EAs require little to no technical and soft skills training, the onus is still on you to show them the ropes on how you, as an executive, operate. Clearly outlining your expectations along with your daily, weekly, and monthly routines and agenda will help them integrate into your team and deliver value faster.



If this is your first time having an EA or have had a poor EA experience in the past, here's what an effective task cadence looks like for their daily and weekly flow:

Daily

1. Review your calendar
 - Organize your schedule
2. Manage your email inbox
 - Review correspondences
 - Highlight/flag important items
 - Respond when necessary
 - Schedule call or meeting requests
3. Update to-do list or daily agenda
4. Arrange any travel plans
 - Book flights and accommodations
 - Set reminders and coordinate with counterparts
5. Brief you of your day (meetings, events, tasks, etc.)

Weekly

1. Conduct an audit of the past week
 - Revisit notes, meeting minutes, and agendas
 - Update task and project statuses
2. Conduct a calendar audit for the next 6 weeks
 - Review all calendar invites to confirm if they've been accepted; follow up if not
 - Review travel plans
 - Finalize any pending arrangements
 - Confirm flight and accommodation bookings
 - Coordinate event plans
 - Review personal commitments

Key Performance Indicators (KPI)

Once your EA has gotten up to speed with your workflows and processes, it's time to see how they perform. Measuring an EA's performance can actually be tricky. Unlike other roles where you can impose quotas or a set number of deliverables, EAs' tasks and responsibilities are highly dependent on your activities and agenda, making their KPIs somewhat challenging to quantify.

But that isn't to say that it should just be a guessing game. You can follow these key metrics and grading system to accurately measure your EA's performance:

Metric	Description
Quality of work (efficiency)	<p>This pertains to the general quality, accuracy, and speed at which the EA performs tasks and deliverables. This should answer the following questions:</p> <ul style="list-style-type: none">• Does the EA complete their tasks?• Are tasks completed according to set standards and/or communicated brief and expectations?• Are tasks completed within set deadlines?
Executive satisfaction	<p>This is your subjective assessment of your EA’s attitude, enthusiasm, and receptiveness to feedback.</p>
Reliability & accountability	<p>This demonstrates your level of confidence in your EA to always stay on top of things and fully aware of your needs. This also includes:</p> <ul style="list-style-type: none">• Attendance adherence (absences and tardiness)• Feedback from clients and other team members
Proactiveness	<p>This pertains to the EA’s ability to independently make decisions, provide smart recommendations, and take on extra projects without being told.</p>
Collaboration	<p>This refers to your perception of how easy or challenging it is to work with your EA. You should also consider feedback from other teams and departments that they’ve collaborated with.</p>
Rating Scale	<div><div>1</div><div>Poor – Significantly below performance standards</div></div> <div><div>2</div><div>Needs Improvement – Barely achieves performance standards</div></div> <div><div>3</div><div>Satisfactory – Generally achieves performance standards</div></div> <div><div>4</div><div>Exceeds Expectations – Frequently exceeds performance standards</div></div> <div><div>5</div><div>Excellent – Significantly exceeds performance standards—goes above and beyond expectations!</div></div>

Do More, Be More with TOA EAs

In our 10+ years of experience providing elite talent solutions to firms worldwide, we've learned that *most leaders don't really want to do it all* — they just struggle with trusting others to manage their day.

Giving up control over some of the most critical parts of your day can indeed be daunting, especially if you rely on established routines to get things done. *But you can't be in two places at once.*

It's impossible to get tied up with the daily grind while still having the time and energy for business-critical and growth-focused work.

If you wish to grow your business and grow it fast, you need to break free from pesky admin tasks so you can pour all your attention on what matters most: clients, revenue, and growth.

Here at TOA, we don't just stop at connecting you with elite, job-ready EAs. Our Learning Pathways provide them with bleeding-edge, role-specific training to ensure quick and seamless integration. While our personalized onboarding process prepares you for a smooth, pain-free transition.

With a TOA EA, you can trust that you're not just passing on essential admin work to any assistant, but to an elite professional equipped and committed to enabling your success.

Remember, a freer you is a more productive you

Talk to us about starting your TIME FREEDOM journey today!

Book a FREE Consultation

“

Just offered another TOA employee a position in our admin team. Been using TOA for quite a number of years now.”

Allan Godbee,
GFA Strategic Accountants

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“

Four years of unparalleled dedication and excellence – introducing Kevin, the backbone of our CEO's office. With his expertise and commitment, he keep our operations running smoothly day in and day out. You truly deserved to be in the spotlight!”

Stone Wealth Strategies

With a TOA EA, you can trust that you're not just passing on essential admin work to any assistant, but to an elite professional equipped and committed to enabling your success.

Remember, a freer you is a more productive you

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“

The TOA experience has exceeded all expectations and is now an ingrained significant part of our operations. A fantastic team of experienced professionals complementing our range of services. Very highly recommended.”

Kevin Adams,
Audit Director, DFK Benjamin King
Money