

Future 10X Company - Executive Assistant

Accountability	Priority	Percent	Success Factors	On track?				Notes
				Yes	Inc	No	N/A	
President Support 1 40%								
Manage Cyndi's calendar (gatekeeper)			Additional time supporting President was experienced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Manage Cyndi's email			President was able to accomplish Rocks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Distractions removed
Prioritize Cyndi's time			No avoidable travel surprises were experienced	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Coordinate monthly sales Zoom			Increased President productivity was experienced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Great job with NERVE
Prepare PowerPoint presentations			Inbox zero end-of-week was experienced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Support with community outreach			Positive charity feedback was experienced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Book travel			Positive board feedback was experienced	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assist in sourcing and screening select positions								
Attend one-on-one meetings with President								
Drive huddle time								
Team Future 10X Company 2 10%								
Create newsletter			Reviews were completed on time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Edit marketing materials			Newsletter was created timely and regularly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
LMA team			"Approachability" was demonstrated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Conduct 360 reviews			Leader feedback form scores were consistently 3+	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Back up direct reports			Attendance at team events was demonstrated	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Participate in company events			Core values were demonstrated	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Pursue personal/professional development			Promotability of direct reports was demonstrated	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Demonstrate core values			Personal development was accomplished	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assist team members (trusted advisor)			Meetings were attended on time, prepared, and engaged	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Participate in community events								
Mentor and coach team								
Special Projects (Events) 3 25%								
Manage special projects (new office building)			Projects plans were met	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Zoho challenges
Assist planning and execution of events (schedule, assist sales - 1 per quarter)			Project plans were in place	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Approve event purchases			No avoidable surprises were experienced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Update team on project status			Positive event feedback was received	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
			Project budget was met	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
HR Activities 4 15%								
On board new employees (office and manufacturing)			Reduced time in HR was accomplished	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monitor HR email			New employees were on boarded and oriented successfully	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Liaise with Insperty			Onboarding checklist was completed for each new hire	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Process HR paperwork (performance reviews)			New hires demonstrated core values awareness	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	missed on Find A Way a couple of times
Coach supervisors on performance management tools			Quarterly performance management scores were completed and documented	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assist in hiring process			No legitimate regulatory issues were experienced	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Conduct office new hire company orientation								
Maintain employee files								
Triage employee relations								
Office Management 5 10%								
Coordinate team			EOS meetings were well documented	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Share information (hub)			Ninety was updated real time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Document L10 meetings (3) and EOS meetings			Positive team feedback was received	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Act as SME Ninety EOS system				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Act as Google SME								
Support office product challenges								
Coordinate Monday company-wide huddles								

Accomplishments
NERVE conference a success
New bank transition
Hired new marketing firm

Personal Development
Received Hubspot google certification
Read 10 books
Took 3 Masterclasses

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Next Period Goals
Complete Zoho conversion
Launch 3 new YouTube ads

Core Values Demonstrated
Three - filled in for Sue
Find - NERVE packages ontime
Oxygen - 11 Free days