THE ADMIN PRO HANDBOOK

Tips and Solutions for Standout Assistants

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Introduction

A note from the editor… about one powerful little word

Years ago I foolishly left a cozy administrative assistant's job to take a "me" break in life—at which point I promptly ran out of money. My job search became more frantic, and finally I had to choose between working as an admin in a stuffy accounting firm or waiting tables at a barbecue joint.

I can never remember whose plate of food is whose, so there I was back in the admin game. And something happened at the new job that mystified me.

Just as in previous admin positions, I was promoted within six months. More responsibility followed, as did yet another boost up the ladder. More money came with it. Soon enough I had the chance to latch on to a very cool department and be less admin and more manager.

Why does this keep happening wherever I go? I thought. *I'm not really better or smarter than anyone I work with. I'm not an Excel expert, I'm nervous on the phone, and my energy level is only so-so.*

Then it came to me. I was doing the one thing that so many of my admin colleagues simply didn't seem up to.

I was saying yes *all* the time.

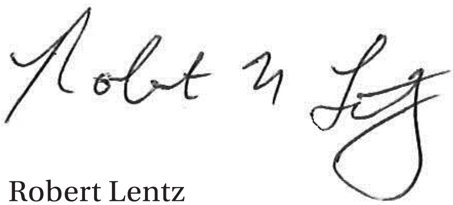
Yes to every assignment that came my way. Yes to tasks that felt a little over my head. Yes to unpleasant business that seemed like it was being delegated incorrectly. Yes to the work that was going to make me miss my bus.

It was just my passive personality at work, but "Yes" was truly a secret weapon that got me ahead quickly. I didn't need four years in college to use it. I just needed the will to help everyone in the office and to forget about the supposed unfairness of my workload—and forget about the fear of failure, too.

As you use this book, I hope you keep in mind what managers want more than anything else from the people they delegate to is peace. Become an employee who causes your boss not a moment's headache or hesitation when delegating work assignments, and you quickly become the most valued member of the team—without having to go through a single extra training session.

Every task you tackle is one in a series that is merely serving to build up your stellar reputation. Chances are very good that the more quietly and humbly you conduct yourself under pressure, the quicker you'll move onto the short list of employees destined for bigger and better things.

It all starts now!



Robert Lentz
Editor, *Administrative Professional Today*
Business Management Daily

PART I: THRIVING IN THE WORLD OF THE ADMIN

1 Forging a Winning Relationship With Your Boss

As an administrative professional, your relationship with your boss is key to your success. This section is designed to help you make the most of that relationship through understanding, adaptation, negotiation and initiative.

Sizing Up Your Boss

Why do you need to size up your boss? What do you gain? As an important half of a working team, your skills should complement and enhance those of your boss. So you need to have a firm grasp of who your boss is—their characteristics and quirks, their strengths and weaknesses—to maximize your team's smooth functioning and productivity.

All too often, we tend to label our bosses and others with whom we work as single-faceted individuals: *He's a hothead. She's a superwoman. He's a workaholic. She's aloof.* In reality, your boss is more well rounded and more complex than such descriptions reflect. They are more than a person who delegates, demands and expects. In fact, your boss is as complex as you are, with unique talents and abilities, as well as the inevitable shortcomings. The time you spend probing beneath your boss's most obvious traits is time well spent.

Observe your boss closely. Certainly, no boss is perfect. Indeed, we all bring our personality traits to work with us. As a result, conflicts and communication barriers between boss and employee exist at all levels and in almost all work situations. Unless you identify both your boss's weaknesses and your own, and learn to work around them, these roadblocks can impede your career progress.

You need to observe your boss closely and adopt strategies for dealing with their quirks. The steps outlined below will help you do just that:

Take the initiative in making the relationship work. Don't assume that it's your boss's responsibility, even though they may be older, better paid or more experienced than you. Don't try to change your boss. Instead, change the way you react to their particular style. While this may sound like you are investing all the effort to improve the relationship, think again. In any relationship, it usually takes one person to "break the ice" by making an initial attempt at better communication. Why not take the first step? You have nothing to lose and much to gain.

Study your boss scientifically. How does your boss act and react in different situations? Studying your boss will enable you to approach them with information, problems, concerns, good news—even a request for a raise—at just the right moment.

Cross-reference your observations with colleagues who have worked with your boss in the past. Try to understand your boss's background and life experience, rather than assuming that they see the world from your perspective. Strive to understand their motives and goals.

Don't make assumptions about your boss's goals. Ask for clarification of what they are trying to accomplish. Only then can you prioritize projects and point out inconsistencies when certain tasks aren't advancing their goals.

Focus on your boss's strengths. Focusing on weaknesses only fuels the negative aspects of your relationship. Shift your attention to the traits you value, even if they are few in number. If they are disorganized and occasionally drive you crazy but goes to bat to get your request for a pay raise approved, focus on the loyalty and support they have shown you. If they are always late for the appointments you schedule and yet has earned the respect of all their colleagues for their problem-solving ability, respect that skill, too. A relationship that is built on respect is a better, stronger one.

Got a reserved boss?

Introverts are "energized by being alone, and are depleted by being with people," says career coach and behavior expert Robert Holmes. So, if your boss or co-worker seems to fall into this category, ask permission to enter their office, and once you're in, keep it short.

Set a tone for communication. You and your boss will be much more productive as a team if you are able to talk about how you are doing together. Choose a level of openness that makes the relationship work most efficiently. But proceed slowly and cautiously. When establishing business relationships, many people seek the same level of openness they enjoy with friends. In a professional setting, that can be risky and counterproductive.

Use psychological momentum. Arguing in favor of your position is often the least effective way to reach agreement. When your boss opposes you, accept their verdict. But listen closely to their specific objections, and try to move to a position of agreement. Learn what arguments your boss finds persuasive—just how they think—and you'll be able to reason convincingly for your positions and views. Do they value time, "perfect" work, cost savings or efficiency?

Tap your creativity. When asked to do a new task, tap your creativity and consider a wide variety of possible procedures and approaches. But also consider the parameters that your boss is likely to set. Pick the solution that is closer to the middle ground when you are trying to gain more authority or responsibility. It takes time to build up trust in any working relationship.

Upward management requires tact, assertiveness and common sense. Most importantly, it requires going beyond the passivity that society programs into us when we're in a subordinate position. It means taking initiative in appropriate situations and having the courage and perseverance to bring your relationship with your boss to a higher, more productive level. The payoff for your efforts will be very real: You'll gain more responsibility, the chance to prove yourself at new and exciting work and greater personal and career satisfaction.

Synchronizing Your Work Style With Your Boss's

Now that you understand your boss a little better, it's time to analyze their work style and how it meshes with yours. More often than not, there will be incompatibilities. They may treat every assignment like an emergency, while your style is to plan and prioritize. They may let work sit on their desk for a week and give it to you at the last minute. The key is to harmonize your individual work styles to maximize your productivity—and preserve your sanity in the process.

What kinds of work styles can cause the most problems? Here are some general types of bosses to be on the lookout for, along with some advice on coping with their particular approaches:

The cliffhanger likes the stimulation that comes from last-minute pushes to get projects done. But that can mean lots of overtime for you. And unless you're calm under fire, it can prevent you from producing your best-quality work.

Solution: As soon as you suspect that a project is in the pipeline, start working on it and press your boss for details and input. Waiting for a cliffhanger to delegate will have both of you dangling from that cliff.

Press your boss for information on the actual deadlines that must be met. Take the initiative, and draw up a schedule that identifies dates when key subtasks must be completed. Concentrate on those deadlines and on getting results on time. Ask that you and other key department members be told at once about any developments that could affect the project. If your work is polished and on time, your boss may be forced to forgo the last-minute frenzied activity.

The allergic-to-detail boss likes to think in terms of concepts and plans. This boss is a creative person who likes the planning and the "big picture" of a project so much that they never get down to the details. But you may lack the data or information you need to get the job done.

Solution: Ask your boss to create a file for each project, and suggest that every pertinent piece of paper be stored there at the end of the day. Draw up a list of key information that will be needed, and solicit your boss's help in identifying the likely sources. Here again, you'll have to take strong initiative. Meet with your boss regularly to ask for help in filling in all the missing pieces.

The fence-sitter wants to do everything right the first time and spends too much time gathering information and weighing the virtues of different approaches to a problem. You are stalled by their inaction and in the dark as to which direction to take.

Solution: Set up intermediate deadlines for making decisions on each project and the dates when these decisions should be put into effect. Remind them of an upcoming decision point, and periodically reassure them that their decisions are sound and the project is moving along well.

The hopper likes the excitement of jumping from project to project more than the satisfaction that comes from concentrating on one until it is completed. You are at loose ends and constantly frazzled, worrying about how the highest priorities will get done while they're busy focusing on projects of little immediate consequence.

Solution: Decide for yourself which projects or activities need to be done first, and direct your own efforts at them. Along the way, ask your boss for input, information and guidance. In this way, you'll be able to draw your boss into the process and direct them to focus on a more limited number of activities.

The perfectionist may or may not be seeking perfection. In all likelihood, such a boss is afraid to relinquish control over work and feels more authoritative when calling every detail of your work into question.

Solution: Get agreement ahead of time about as many details of the job as possible. If you are preparing a report, ask the perfectionist how long it should be. What format should it follow? Who should receive copies? When you nail down as many details as you can ahead of time, you reduce the likelihood that your perfectionist boss will require work to be done over again. At the same time, you allow a detail-oriented boss the opportunity to exercise their habitual approach to managing work and time—without hamstringing you in the process.

The procrastinator may warn you that you may have to work late once in a while, in "an emergency," but it soon becomes the rule rather than the exception. In these cases, the source of the problem is not the boss's busy schedule but their work habits. Procrastinators often spend much of the workday on matters that really do not require an administrative professional's presence—such as reading trade journals or returning phone calls. You may be light on work during these times. Then, an hour or so before quitting time, the procrastinator boss calls you in to give you several assignments that they want finished before you finish the workday.

Solution: Hold Monday meetings. These don't have to be formal or even scheduled—just casual discussions that might take place not long after you and your boss have said good morning to each other. At that point, you can inquire about what is on the agenda for the week. You may not always get a detailed answer, but at the very least, you should start a few wheels turning or establish a rough timetable for certain assignments.

If Wednesday arrives and you detect no signs of what you talked about on Monday, you may want to ask a casual question ("How are you coming with the survey?") or drop a hint ("I'm free for whatever data entry you might have this afternoon.").

The poor communicator gives vague instructions, at best, and says little about what they expect of you. They voice dissatisfaction or ask for favors through innuendoes, instead of direct statements or requests. In short, a poor communicator expects you to be a mind reader on one hand and a "wait-it-outer" on the other.

Solution: Although you shouldn't have to play detective, the reality is that some bosses operate in covert ways. It's in your best interest to take the initiative in decoding indirect messages before major problems develop.

Answer ambiguous messages with direct ones. For example, you have just informed your boss of a customer's dissatisfaction. She says, "It might be a good idea to follow up on things like this," and walks away, leaving you wondering, *Does she mean that she wants me to follow up on it?*

Your best recourse in cases like this is to state clearly what you need to know—and why. For instance, "I didn't understand whether you wanted me to call the customer, or whether you will handle it yourself." This might also be a good time to lead into a discussion of the overall problem. You might say, "There have been several times recently when I didn't get a clear picture of what you wanted me to do. I want to do all I can to help, but sometimes I really need more information."

By routinely countering indirect messages with direct questions and picking up on vague allusions to see if they hold water, you will encourage your boss to communicate more clearly. Get into the habit of setting deadlines ("I need to know about taking the personal day by this Friday.") and asking specific questions ("Do you want me to handle reservations, or should that be Cam's job?").

Also, show that you respond well to direct, constructive criticism, that you are not shattered at hearing unpleasant news, and that you do not think badly of your boss for making unpopular but well-founded decisions. In that way, you will help your boss see the advantages of being more direct when communicating with you.

The nitpicker always changes their mind about the work. They may give you a report to type, complete with charts; then when you are midway through, they will ask for it back to make changes. Even after a job is completed, you can expect still more changes. This kind of boss may see themselves as trying to do the best possible job, but they can make life difficult and nerve-wracking for you.

Solution: Try to see the big picture. If, for instance, there is a lengthy report that needs constant revising, the changes may be coming from someone up the line rather than from your boss. Knowing this could lessen your sense of irritation and thus make it easier for you to get the job done, in spite of all the changes.

Get more involved in the process. It's possible that your nitpicking boss needs someone to share ideas with and discuss possible revisions. Try to play this role, advocating one course of action or the other, or take part in the thinking-out process before the final plan is activated. By putting yourself in a position to head off unnecessary changes in the planning stage, you may save yourself extra work.

The vacillator has difficulty making final decisions. Their response always is, "Don't bother me with that now. Bring it up in our meeting tomorrow morning." To make matters worse, their decisions are often urgently needed by someone else in the organization—other executives who are waiting for them to finally decide. You know that when you tell them, "They promised to give me a final answer tomorrow," chances are good that no decision will be forthcoming. And you're the one who must keep giving the bad news and making excuses. It's an awkward spot at best.

Solution: Take it on your own shoulders. Sometimes, administrative professionals ask their bosses for answers to questions they should be deciding for themselves. It might be worth scrutinizing your own practices to determine whether you have been guilty of this. If so, try to take greater risks in the types of decisions you make yourself.

If you're not part of the problem, there is no reason why you can't help find a solution. Try to come up with the answers your boss seems to lack. You may find that your boss's indecisiveness diminishes with some input from you.

In novels, movies and television shows, top-flight executives are always decisive. But in the real world, sound decisions often take time. What counts, after all, are the right decisions—not how fast they are made. Still, when your own interests are involved, there's usually no reason why you shouldn't find a way to help speed the process along. Your initiative will continue to reward you with a better working relationship with your boss.

Realizing Your Potential

Many administrative professionals feel that their skills are being underutilized. Typically, their bosses are terribly overworked. They start work early, eat lunch alone quietly and finish their workdays late—and still can't keep up with the demands of their job. Yet they simply are not utilizing the assistance their administrative professionals can provide.

If your boss isn't using your skills to full advantage, don't look upon the situation as a problem. Instead, view it as an opportunity to advance your career. Once you have demonstrated that you possess the skills, smarts and temperament to take over a portion of your boss's duties, there will be no limit to what you can learn and, in time, accomplish.

Here's how to get started on realizing your full potential:

Find out as much as you can about your boss's job. Try to see beyond what seems to be the daily routine and to perceive the reasons behind it. Establish where your boss really is in the chain of command, the responsibilities that their job entails and the overall mission in terms of what the company produces. In other words, just what contribution does your boss make to the company? Use this information to get a better idea of ways you can help out.

Get to know the important people. They may be the ones on whom your boss depends, or vice versa. They may be important suppliers with whom your boss usually deals or someone who works with your boss in preparing marketing projections. And, of course, there are those, up and down the line, who have daily contact with your boss. Be alert to what is going on around you, and ask your boss the right questions at the right time.

Come up with some ideas. After you have reached some understanding of what your boss is trying to accomplish, you should be able to find several duties to take on yourself. Perhaps there are letters or phone inquiries that you could handle for your boss, or some writing or editing assignments. Or maybe there are liaisons with other company departments that you could supervise or maintain. Whatever you suggest, though, be sure it's something you feel fairly confident about doing well.

Find ways to help without asking permission. Sometimes, gaining the opportunity to help is as simple as jumping in wherever you can, rather than asking permission. In many cases, this primes the pump and allows you to begin helping without even realizing that permission has been given. It can start with a simple statement to your boss such as, "I see you're working up some numbers. I'd be happy to enter them into my spreadsheet program for you when you're ready."

State your purpose. If you state clearly that your objective is to become a better assistant, there is good reason to expect that your boss will support you and agree.

There's no question that some managers are uncomfortable with the idea of having an administrative professional, or anyone else for that matter, take over part of their job. That's why you might do best to assume duties as quietly and unobtrusively as possible at first. Don't allow yourself to be too unsettled by backsliding—those times when your boss gives you an assignment and then takes it back again. As you take on more and more varied assignments—and score success after success—your boss will become comfortable with your new role and wonder why they didn't give you more responsibility sooner.

Selling Your Ideas to Your Boss

A great deal of your job satisfaction and career potential depends on your ability to conceive new solutions to workplace problems and then to get your ideas approved by your boss. But getting approval for ideas can be a sticky problem for many administrative professionals. You may have a boss who says they are eager to hear new ideas and solutions; yet when they hear them, they may pull them apart ruthlessly. Or you may succeed in getting your ideas accepted, but your boss may never act on them.

Consider whether you are presenting your suggestions and ideas in the most effective way possible. Bear in mind that timing is a major part of getting ideas across to anyone. We all have received an unenthusiastic response to one of our ideas, only to get a wonderful response at a later time when the boss is calmer, less distracted or not involved in some major project. While it's hard to know exactly when the time is optimal to present your idea, you may want to start your presentation with the simple question, "Is this a good time to bounce an idea around with you?" Even the most idea-resistant boss will likely clear their mind and listen more attentively to your proposal.

Once you have their attention, follow these tips on the fine art of persuasion:

Be succinct in presenting the problem and its solution. State the problem you see, the solution you propose, the specific benefit that will result—and do it in one or two crisp sentences. For example, one administrative professional wanted to write up reports during her train trip home on focus groups that she helped run in other cities. "I need a laptop to use on the train," she told her boss. "It will decrease the turnaround on finishing reports by 30 percent and free me for my more pressing duties as soon as I return to the office." She got the laptop.

Show how the change will make your boss look good and your company more reputable. Obviously, you must be subtle about this. But if you stress such benefits clearly in the way you present your ideas, your boss will be more likely to give you a green light.

Stress cost, speed and quality. Ideas that promise to improve all three have a far better chance of acceptance, especially in the current business climate of cost-cutting, streamlining and efficiency. But don't inflate the benefits you foresee or underestimate the cost of change. Give your boss your best conservative estimate.

Present your idea in a format your boss favors. Some bosses prefer the liveliness of hearing new ideas in an informal meeting. Others will entertain new ideas only when they have been fully developed and put down on paper in an organized way. So before presenting an idea to your boss, take a moment to consider his preferred format—as well as the format that might best suit your particular idea. An idea that proposes to save money, for example, may need a few pages of supporting data; a proposal to buy new equipment may need sheets of product specifications or brochures.

To the persistent go the answers

People usually have at least two reasons for accepting or rejecting your ideas: one that's meant to sound good to you, and another that they keep to themselves. If you want to uncover that hidden reason, politely ask: "In addition to that first thing, what *else* is stopping you from liking this?" That way, they'll understand you're determined to look more deeply into them, and you just might win them over on their terms.

Categorize the problem. Your boss will mentally try to do so anyway, so streamline the thought process by stating that your idea falls into a definable area, such as productivity, accuracy, efficiency, understandability, quality, timeliness, reliability or repeatability.

Give three reasons why your idea should be accepted. This may sound very basic, but it is a simple preparatory step that can go a long way toward strengthening your presentation.

Anticipate the three objections you are most likely to hear, and have a response ready for each one. Often, people whose ideas have been rejected say afterward, "I knew they would say that." The important step to take, therefore, is to anticipate what they will say and have a plan for how you will counter. Of course, if there is a way for you to address likely objections in your proposal, be sure to do so.

Demonstrate the price of inaction. If another company is about to gain an edge over yours by setting up live online chat for their customer service agents, you might point out the potential costs of not following suit with a system of your own. Pointing out the perils of inaction often eliminates the common tendency among bosses to kill ideas through procrastination or indecision.

Invite your boss's input on your proposal. They will be far more likely to approve your idea if given a chance to help shape and refine it. You might say, for example, "I think I'm onto something important here, and I need your help in deciding how to proceed." Once your boss becomes involved, getting approval may no longer be necessary.

Selling an idea to your boss can be a special challenge when your idea is different from or, even worse, diametrically opposed to one of theirs. For example, maybe you have heard that a recently hired junior administrative professional is being let go, and you believe she should be given more time to get up to speed on the job. Or perhaps a meeting has been set up, and certain people you believe should be there have been excluded.

In situations like these, where you have disagreed with your boss, you may have had doubts about the best way to present your views. But there is a really easy way to offer your opinion. The trick to getting your boss to see your point of view is to suggest your way of thinking as an *equally valid alternative* to the situation or problem, not a better solution. By taking that approach, you can tell your boss you're right without ever saying, "You're wrong!" Here's how to go about it:

Be sure of your facts. Are you certain that some people are being deliberately excluded from the meeting, or is it an oversight? Is it true that the new junior administrative professional is going to be fired, or is it merely a rumor? It is wise to investigate as much as possible before going to your boss with a problem that may turn out to be nothing of the sort.

Consider your boss's viewpoint. If you look at the situation from your boss's vantage point, you may see the issue in a different light. For example, your boss may have taken an action due to pressures from his superiors or other external factors that you knew nothing about. In other words, there may really be no alternative course of action.

Test your alternative critically. Distance yourself emotionally from the problem or situation. Make sure the solution you want to propose is sound. Try to poke holes in your idea or plan. Make sure it is a feasible option before bringing it up to your boss.

Make your case cogently and diplomatically. In the above example of the junior administrative professional, your solution might be to volunteer to spend your lunch hours helping her in areas where she's weak. In presenting this solution to your boss, you might say, "I understand that there are plans to fire the new administrative professional. She seems to be a strong team player and an asset to the firm, although I agree with you that her computer skills aren't what they should be. What if I were to work with her on Excel and OneNote during the lunch hour every day? I'm sure she would make a lot of progress in just two weeks, and we'd avoid having to search for a replacement."

Presenting an alternative plan and having your boss change course accordingly can be a valuable learning experience for both of you. You may find out that your boss is more flexible, open-minded and receptive to your ideas than you ever imagined. You may also learn that you have more ability to control work situations than you had realized—a welcome discovery. And your boss may become convinced that your opinions are a valuable, untapped resource.

So have the courage and self-confidence to present your views to your boss—even when they might differ from theirs. After you have become successful at selling your ideas to your boss, you'll be ready to take the next step toward becoming an indispensable partner: becoming a problem-solver for your boss.

Becoming a Problem-Solver for Your Boss

"Imagination governs the world," Benjamin Disraeli once commented, and certainly there is a great deal of truth in his statement. Usually, it's the creative individual—the person who constantly comes up with new, fresh ideas or who addresses situations and problems in a way no one else has considered—who makes it to the top in a field of endeavor.

The same is true for the administrative professional. You must be able to propose creative, workable solutions to problems. You must cultivate the ability to see things as others do—and also as they do not. Creative people take nothing for granted; instead, they challenge, they dream, they improvise. And, in so doing, they escape the limits of a particular frame of reference and see things in a new, clearer light.

There are some specific steps you can take to break through your preconceptions and view problems and situations in new ways that will help you become a problem-solver for your boss:

Turn the situation upside down. To get a new perspective on a landscape, a Japanese artist starts by looking at it upside down—literally. They bend down and peer between their legs at the scene. Not a very dignified position, but one that enables them to break their old frame of reference and examine the landscape differently.

When you're faced with a problem that doesn't seem to have an easy solution, turn it upside down—and get a fresh perspective on it. Here are the kinds of questions that can help you get started:

- *What if this were reversed?*
- *Could what is now last be placed first?*
- *If it's inside, suppose it were now outside? If it's long, suppose it were now short?*
- *Could some negative aspects be considered positive, and some positive aspects negative?*

Challenge your assumptions. In every frame of reference, there's the silent acceptance of certain assumptions. Sometimes they are sound; sometimes they lead you through blind alleys. By discarding the old assumptions, you can open your mind to new thoughts and ideas.

To challenge your assumptions, try questions like these:

- *Does it really have to be this way?*
- *Does it have to be done here; why not there?*
- *Just because A has always done it, is there any reason why B or C can't instead?*
- *Suppose nobody ever did it before. How would I start?*

Tear the problem apart. One way to shatter the blocks that hamper your thinking is to take the problem apart, piece by piece. List the elements. Then go over them one by one, looking for new relationships among the parts.

Rearrange it. Once you know the parts of the problem, you can do a great deal to change your frame of reference by simply rearranging them. Take the case of an administrative professional who found herself in a rush every Wednesday at lunch because she had to enter budget figures into a spreadsheet before her boss's 2 p.m. directors' meeting. She attended the 11 a.m. accounting meeting every week to get the figures, and the turnaround time between the two meetings was just too short. She decided to try rearranging the sequence and asked accounting if it would be possible to get the figures earlier than 11 a.m. It turned out the figures were actually available each Tuesday by noon. So not only was the administrative professional able to update her boss's spreadsheet in plenty of time for his meeting, but also she began arriving at the accounting meeting with an understanding of the company finances. Just rearranging the order of doing things made her day more pleasant, and people began remarking that she had "a head for figures."

Find the analogy. Dr. William Harvey is famous in medical history for being the first to explain how the circulatory system works. His discovery was based on a very shrewd idea: He thought of the heart as a pump. This gave him a new frame of reference. He could understand blood vessels as part of a unified pumping system.

To find the analogy to your particular problem, free your imagination by answering questions like the following:

- *Are some elements in that situation similar to those in mine?*
- *What does this remind me of?*
- *What can I borrow from another situation that would apply to this one?*
- *Whose approach could I copy?*
- *In relation to this problem, can I finish this sentence: "I will treat this as if it were ...?"*

Like anything else, creativity and problem-solving take practice. But the personal and professional rewards you will achieve by being a problem-solver for your boss—and the thanks and respect you will receive—will prove that the effort was well worth the time and trouble.

Make your call more like a movie trailer

Promptly return calls (and create a little mystique) by adding a teaser to your voice mail message whenever you can. *Examples:* "By the way, I may have found the solution to your distribution problem" or "I've come across some very interesting information that should save you serious money." This shifts the power of the dialogue subtly in your direction.

Managing a Difficult Boss

Solving problems for your boss is one thing. But what do you do when the problem *is* your boss? We've all heard people lament about their supervisors:

- "He's all demands and no recognition."
- "I've been working for her for a year, and she has never once said thank you."
- "Why doesn't he respect my work?"
- "She is very competent and accomplished, which I respect, but she lacks consideration for other people."

And the list goes on and on. Let's take a look at some of the tough bosses you may have encountered at some point in your career. Then we'll discuss ways that may make it easier for you to work with them.

Credit-grabbers. This kind of supervisor will rework the email you sent them (the one with your *big* idea) and forward it on to upper management as though they had come up with the idea themselves. Credit-grabbers aren't always blatant—many will pass your ideas along anonymously, as though the ideas had been a department-wide effort. Or they will slip your thought into a plan or memo without citing you as the source. If you confront a credit-grabber, the response is often the same. They simply forgot, or they didn't believe it was necessary to give credit to *everyone* who contributed. It's a ploy to make you feel petty for ideas that are rightfully yours. And that, of course, is absurd.

Bullies and tyrants. Their aim is to intimidate other people into working hard. As one psychologist explained this management style, "Bullies assume that the way to keep productivity high is to keep the people who work for them unhappy, and they promise happiness as a reward for 'good' work. Once this 'good' work is produced (which it never is, since the bully characterizes everything as 'bad'), the promise is that the bully will stop being a bully and become nice. Of course, this never happens."

Other-directed bosses. These types are not abusive or unpleasant, but they are nonetheless extremely difficult to work for. One type is the entrepreneur who is too busy networking and raising capital to direct their attention to running the company. Another is the boss who is more involved in some other project than their job. The "other" activity could be nearly anything—managing a job search, starting a company, working for a charity, writing a book. People on the job want answers and results from your boss—answers and results that you are hard-pressed to get from them.

Burned-out bosses. These may be the most difficult bosses of all. For whatever reason, they have simply ceased to care about their jobs. When you work for a burned-out boss, finding meaning and direction in your own work becomes a great challenge. Even channeling a great deal of energy and enthusiasm into your work will rarely cause a burned-out supervisor to take interest in the job at hand.

Overly political bosses. These supervisors take part in all work activities on two levels at the same time: on the level of the actual work being done and on the political level. In a meeting about a new marketing plan, for example, the overly political boss is more concerned about its political context than about the plan itself. If the plan gets approved, will one of this boss's adversaries be in a position of increased strength? If they support the proposal, will that support be seen as a "favor" that they can later expect to be returned when they need support?

The administrative professional who works for an overly political boss often is hard-pressed to remain aloof from political intrigue. The boss may want them to gather "intelligence" regarding various work matters—a request that can put the administrative professional in a very awkward position vis-à-vis their co-workers. They may feel like the boss's spy.

Powder kegs. These bosses seem calm most of the time, but their ability to blow up when provoked is a constant threat to those around them. If you work for a "short-fuse" individual, you end up tiptoeing around the areas that have "set them off" in the past. If, for example, a powder keg boss once blew up because a client's phone call was not returned immediately, you may try to prevent another incident by always calling clients back at once. This style of "management by terror" may be effective at correcting certain problems, but it's very shortsighted supervision and thwarts more progress than it promotes.

You may recognize your boss among these descriptions—or perhaps you work for a different type of difficult boss. Regardless of the type you're faced with, consider the following advice:

- **Differentiate between work relationships and personal relationships.** There's no reason to finish the workday frustrated and upset because your boss doesn't like you, respect you or communicate well. If you let a difficult boss get to you on a personal level, you have let yourself be drawn into a situation where the boss is manipulating you. Remember: The point of a working relationship is simply to get the work done.
- **Don't get drawn into playing the boss's game.** Stay above all that. Focus instead on valid work issues. Keep focused on bigger issues, such as company goals, cost cutting, customer service and the overall quality of your work environment. In this way, you present a consistently professional image that is not tarnished by a difficult boss.
- **Find ways to minimize the effects of the bad behavior rather than trying to correct the behavior itself.** Chances are, you will never "reform" a problem boss—make a bully into a considerate supervisor, for example, or convert an overly political boss into one who strives only to do a good job. You can, however, identify some of the negative effects of the behavior and try to minimize their impact on you.

  When working for a burned-out boss, for example, you may conclude that the chief negative effect on you is that you are experiencing no new challenges. If that's the case, you might try to organize a "task force" that brings together administrative professionals from many departments to try to correct problems and institute new plans. Or you might ask for more autonomy—for the leeway to develop and present certain ideas to upper management. Chances are, a burned-out boss won't care too much what you do—as long as they don't need to expend any effort on it. By finding ways to minimize the effect that the negative behavior has on you, you may be able to keep your own work and career focused and on track.
- **Remember that you're not alone.** People who work for a difficult person rarely are aware of the fact that bad behavior radiates upward within an organization, as well as down. In other words, your boss's boss is undoubtedly aware of your boss's quirks and shortcomings and is possibly as affected by them as much as you are. You may be admired by upper management for your ability to produce good work despite your difficult boss. And when management decides to

replace them, or your boss finds another job, you may be singled out for some important new opportunity.

- **Establish a mental "cutoff point" that your boss may not go beyond.** Despite all your efforts to make the relationship work, there may come a point when it is no longer feasible to continue working for them. No working person should allow themselves to be the target of truly abusive language or behavior, for example. No one should continue working for someone who is so unpleasant and difficult that their own feelings of self-esteem and self-worth begin to erode. If a boss is really that bad—and some are—it's time to go to human resources, approach your boss's boss or take other strong action. You have arrived at one of those rare "no-win" work situations. Since you have no chance of winning, you also have nothing to lose by taking steps to sever the relationship and move on.

  The key is to be in control of that move—to control your own career. Until you know the time is right, it's in your best interest to remain professional and do the best job you can.

We are often tempted to try to "figure out" difficult behavior. We like to ponder, *Why do they act in such an immature way?* But understanding a problem boss rarely gives you the tools to correct what they do. That's why it is usually better to concentrate on identifying the negative effects of a bad boss's behavior and then develop a set of specific tactics to counter them.

Don't present an empty head

Never go to your boss and simply say, "What should I do?" They may begin to wonder if you're really cut out to be a boss yourself someday. If you do need advice (and there's nothing wrong with that), it's best to think of a possible solution first, then ask, "What do you think of this approach?"

Straight From Your Peers

What do your fellow admins think about building strong boss/admin relationships? For years, we posed tricky questions to our readers on the Admin Pro Forum and collected their best responses. Here are some of their answers.

Q How can I ease the transition to a new boss?

"I've been an assistant to a senior vice president who has retired. His successor was hired from outside the company, and the two of them are as different from each other as possible. Any tips on how I can make a smooth transition to my new boss?" *—B. Graham*

The day my new boss started, I went to his office, closed the door and we laid the cards on the table. He told me what he expected from me as his assistant, and I told him what I expected from him as my boss. We talked a little about ourselves and became very good friends. I find that being upfront with whomever you work with is the best policy; that way, no one is surprised. *—L.D.*

Sit down with the new vice president and ask him what he expects from you. If he isn't sure, explain how you're now doing things. Make sure he realizes that you understand you're now his assistant and you want to understand his needs and wishes on how things should be run. Be willing to adapt and change, and that will take care of most of the problems. *—C. O'Connor*

List the responsibilities you handled for your retired boss, as well as additional responsibilities you'd like to take on, and meet with your new boss to go over them. Don't fall back into: 'Why do I have to do that now? I didn't do that before' or 'I've always done it this way. Why does he want to change it now?' Remember that your job is to provide assistance to the customer … your new boss. *—Sandy*

Q How can I build a relationship with a reserved boss?

"I recently became the executive assistant to a vice president who is a very serious person. I'm very outgoing and bubbly. Aside from my skills and experience meeting the job requirements, I was hired mainly because of my personality. I know that my boss likes me because another vice president for whom I used to work told me that my new boss is really happy with me and thinks that I'm a pleasure to be around. I just wish I felt some of this satisfaction directly from her. The problem is my new boss just isn't very open and friendly to me. She doesn't chat with me and hasn't initiated any small talk. I've tried to break the ice in various situations, but I'm not having much success." *—D.B.*

I'm in the exact same situation, and what I'm finding helpful is scheduling a weekly one-on-one meeting with my boss to discuss his calendar, my calendar and other items. I'm using this as an opportunity to have open communication with him, to ask open-ended questions prepared in advance in order to get a feel for where he's coming from and what he's looking for as well as informing him of my challenges or successes. I'm beginning to feel more comfortable now, though we still have a way to go. Give it time and ask questions. *—Anonymous*

When I first started working with my boss, he would stop before going into his office, say good morning to me and then wouldn't say another thing to me until he needed something, and sometimes not even then (thanks to email).

Start scheduling monthly meetings with your manager to address any issues. This is also a way for your manager to stay abreast of what's going on with you. If you are unsure how your boss feels about your performance, address this with her. Create an agenda before the meeting that allows her to provide feedback on projects you worked on during the previous month. Holding regular meetings with your boss may make it easier for you to develop a relationship.

Also, remember that not every manager is comfortable developing a relationship with staff members. I worked with my boss for almost a year before he knew I had a son. He isn't personable, but we've come a long way from the stop-and-greet relationship we had before. *—Anonymous*

Some people who are very reserved and quiet, really like friendly, talkative, outgoing people—not only because it takes the social burden off them, but also because they admire qualities they don't possess themselves. However, there's usually a threshold of tolerance that they don't want you to cross.

If you know your boss likes you and is pleased with your work, and she doesn't frown on your sociability, then I think you need to be content for now.

I worked for an attorney with a similar personality who was simply too reserved and businesslike to ever consider giving me the kind of direct feedback you seem to want. You may have to be content with raises, good reviews and a pleasant manner. *—Anita*

Q How can I work effectively with a boss who's almost never in the office?

"My boss is a VP who splits his time among four different sites, so I see him only one day a week on average. I work well independently, so his absence isn't a problem. But when he's in the office, I usually have a pile of things to run by him. I don't want to take up too much of the limited time he spends in our office, but I often have a lot of ground to cover with him. How can I better organize this weekly briefing so it takes less time?" *—J.M.*

Prioritize the things you need to run by your boss. In most cases, a note from you attached to the items that he can take with him gives him the freedom to peruse it in his travels and communicate instructions to you at his leisure. Cellphones and email work best for us. *—Ivy*

What I used to do was have [the boss] call me when he was on the road. We would discuss the business of the week, and this kept him in the loop. It also helped with setting the priority of documents to be signed when he did come into the office. *—Helena*

When my boss and I conduct our briefings, I bring in:

- A list of things to discuss, prioritized by importance
- A notebook and pen
- Prioritized folders.

The folders are labeled 'Immediate Attention,' 'Signatures,' 'Events and Conferences' and 'Periodicals,' in that order. When mail, email, faxes and phone messages come in, I sort them into these folders, and then I prioritize the contents of each folder. Anything needing discussion, feedback and further action from me goes at the front of each folder. I make sure we cover those items first because he will take calls and allow visitors to enter the office while he is in with me. So if we're interrupted, I stand a better chance of receiving my answers and moving forward with my work.

I never just leave important things on his desk, or he will allow them to sit while he attends to his priorities. Then, I would run the risk of forgetting about them. Anything with a low priority, not needing feedback or further action from me, I leave with him in the folder. *—A.C.*

At a previous assignment, I had instituted an online mail list to keep track of mail that required responses. I listed the date received, the person who sent it, the subject, and when and if a response was needed. I put a copy in my tickler file and called the person who was handling the reply for a status update before a response was due to keep everyone on track. In this way, we could locate each piece of mail immediately should the need arise, and I could keep my boss abreast of progress and delivery.

With my traveling boss, I improvised and used it as a tool to deliver information to him so he could respond to me. I gave him a mail list, with the mail attached, so he could review it on the plane. I used three headings: 'Important,' 'RSVP Needed' and 'FYI.' He reviewed the list and the information attached and wrote his instructions on how to handle it on the list. When he returned, he gave the entire package to me so I could facilitate his instructions. I made copies of any pieces of mail that couldn't be replaced, in case something was lost.

When my boss was traveling, I faxed him the mail list and he'd fax it back to me with his instructions. This process ran extremely well, and my boss was pleased not to have mounds of mail waiting for him when he returned to the office. *—Pat*

If I have an important message, I text my boss. If it's just an FYI, I leave voice mail. I never send email messages when he is out of town due to the volume he receives. I also advise his staff to do the same thing. *—Mary*

Q How can I tactfully organize my boss?

"My new boss is not 'ideally' organized, and I feel that it is partly my responsibility to help develop a system to move things smoothly within our department and organization.

"Many of the things that he agonizes over are things that I should be helping him complete. He frequently misplaces information and/or forgets that he has received things.

"I try to be proactive by visiting him regularly to determine pending items, expense reports, projects, etc., to keep him within timelines. Because he doesn't know where things are on his desk, or in an attempt to cover his weaknesses, he graciously lets me know he will get something to me soon. I feel that my asking to help him sometimes makes him feel that I am 'on his back.' I don't want to appear to be pushing him. How can I help him (help me) without invading or usurping his authority?" *—Anonymous*

➡ I have found it helpful to go in when my supervisor is out of the office and tidy things up for her.

Recently, I purchased several vertical desk organizers and labeled each so that she could readily identify their contents. Also, I labeled expandable folders (i.e., "Today's Mail," "Junk Mail," "Brochures," etc.). I sort the mail into these folders, and this way, she knows what needs attention or what she can look at leisurely.

I also have color-coordinated folders labeled "Signature Required" and "Please Review and Return." *—Carolyn*

➡ I print out a table with all the current projects listed in one column. I have a column to describe the project or state its status, followed by a column outlining the next step, who is responsible for it and by when.

I request a few minutes to review the table with my boss at regular intervals to keep me up to date. (My boss suggested two-week intervals. Now that she has seen what doesn't get done and noticed who isn't doing it—ahem!—she says we need to review this table more often. So now we do it weekly.)

I'm careful not to blame my boss for anything that's overlooked or not done; so with her input and instruction—and, therefore, her agreement—I simply record the next step, who will do it and the deadline. I ask, "Will we be able to do this, this week?" … even if "we" actually means her. Therefore, she sets the timetable. If she doesn't complete her part, it's her issue, and I have a documented account of planned activities.

Also, I ask, "Should I have any other projects on this list?" That gives her a chance to be the "boss" and give me information and instruction, which I need and want anyway. *—Anonymous*

➡ To organize a boss who doesn't have time management skills, start with the basics. Organize a tickler file for each day of the month. Also, create monthly file folders to store information for upcoming months. Order your boss a desk organizer, and create folders with labels for any ongoing projects he or she may be working on.

In addition, you may want to use color files for ongoing work needing attention. For example:

- Green for financial information
- Red for priority items
- Yellow for follow-up needed
- Blue for items waiting for response
- Orange for upcoming events.

This system has helped my boss find things in my absence. —*Sherry*

I have the same problem: My bosses lose information, data, reports, cost quotes/bids, etc. So, I decided years ago to always make a copy of everything for my files before it leaves my desk. That way, I always have at my fingertips the information they need and have misplaced or don't remember ever seeing. —*Trudie*

Q What does it mean to 'manage up'?

"I've been hearing a lot lately about the concept of 'managing up' and how I should be more aggressively working with my supervisors, and even leading them toward decisions, so I can get ahead. Do any admins out there have examples of what they've done to be more like a manager of the people above them instead of just reacting to their needs? And did it get the result you wanted?" —*Martha*

I've "managed up" successfully many times over the past decade in my job as an office administrator. I believe I was successful for two main reasons: (1) I kept a humble attitude, and (2) I offered well-thought-out solutions. One of the larger initiatives I "managed up" was identifying the need for a single database of information on our "clients" (in this case, church attenders). We had multiple silos of information, with each executive keeping their own database. I researched options, selected the one I felt would most meet our needs, and presented it to my immediate supervisor. He was impressed that I had not just "complained" about a needed change, but offered a viable solution. With his support, I then presented to a number of different stakeholder groups, and eventually received approval to purchase the software and train everyone else in using it. —*Maureen*

Managing up (and sideways) is something that I do frequently! Fortunately, I work with an amazing group of people who don't have superiority/power issues, so they're completely open to the concept.

In my situation, a great deal of this involves teaching. Last year, I noticed that a lack of communication had become a growing problem in our department. First, I pointed this out to my boss and told him that I thought I could help our team grow in this area. Then, I participated in a communication web conference and attended a live one-day conference. From what I'd learned, I created a presentation that I first gave just to my boss (the dept. VP). Then I presented it to our leadership team (managers). We began to implement the new techniques and saw immediate results. I will present it to the entire department, and it's even been suggested that I present it to the entire company.

Recognizing an area in which those above you and around you can grow, acknowledging it, and taking the initiative to teach is just one way that you might manage up. Realize that your ability to manage up heavily depends on your superiors' openness to the concept. At my place of work, we laugh about it and joke around that I'm "the real boss."

Caution: Those who try to bully their way into power are NOT successful at managing their superiors. Being aggressive, disrespectful, or outright rude will not work. "Can you please help me with this?" will encourage people to want to follow your direction. Sincere thank-you's when they do will also go a long way. Ultimately, managing down, managing up and managing out are all about growing as a team. Only when you have everyone's best interest at heart will you be able to do this effectively. *—Ce*

Q How can I capture my boss's undivided attention?

"My boss tells me that we need to keep communication lines open, and we need to have daily 10-minute meetings so I can see what I can take off his plate and to answer questions that I may have on assignments.

"When I go to his office for these meetings, he often says he doesn't have the time, or when we get into a discussion, he takes phone calls or answers his email, so I don't get his full attention. Then he surprises me with assignments that he has known about for months, and we're both frustrated.

"Can you give me some tips so I'm not here until 9 every night finishing my work?" *—Nicky*

First, when your boss answers the phone during these sessions, get up and leave. Do not maintain eye contact so he won't be able to motion for you to stay (this is a waste of your time). If he starts answering email, ask, "Shall we continue this later?" Even if he says no, keep asking him this question each time he diverts his attention.

Second, make him aware of the negative consequences that occur when you don't have that time together each day. For instance, if you make a decision about scheduling that he dislikes or work overtime for a last-minute project, you can point out (in a general, noncritical way) that these problems might have been avoided if you had a clearer sense of his expectations. For instance, say: "It's too bad I had to ask you to OK my overtime last night. It's so much more effective if I can work on that month-end report over several days and during regular hours so I can double-check my figures with accounting. Why don't I put it on my calendar to ask you about this report on the 25th of each month? Then we can discuss it at our daily briefing." *—Anita*

My supervisor and I meet only once a week, on Monday, but for a full hour in a closed-door, phone-sent-to-voice mail, computer-locked session. Her calendar is printed each day and posted next to her door, so when I send the invitation through Outlook for our meeting, I type "Do Not Disturb" after the title. This way, others who drop by with a question or to visit know to come back later.

I go through her mail and all the piles on her desk with her, as well as look at her calendar to see what's coming up during the week. We both leave that meeting feeling better. She loves the help with organization, and I love knowing that nothing major will pop up during the week (at least nothing that she knew about on Monday). *—Jennifer*

Q How should I handle another executive's questions about my boss's activities?

"Several times a day, an executive who reports to my boss asks me questions: 'Who's he talking to?' 'Where is he?' 'Who's in his office?' 'What's his meeting about?' I feel it's a betrayal to my boss, not to mention the people with whom he's meeting, talking to, etc., to answer those questions. If the executive really needed that information, I'd feel better about giving it to him, but he doesn't.

"I mentioned it to my boss, and he suggested that I go to this executive's office, close the door and tell him I'm uncomfortable with being grilled on my boss's activities. I'm chicken! I hate that kind of confrontation and know it would be embarrassing to both of us. Is there any other way to stop this behavior? I thought about just constantly saying, 'I don't know,' but he knows better than that since I keep the calendar and make the appointments for my boss." —*Anonymous*

I support the CEO/president of a very large health care system. I'm constantly interrupted and being asked where she is, whom she's meeting with, when she will be back, etc. If I feel that the person asking doesn't have a legitimate "need to know" and he or she continues to ask, I often reply, "Why do you ask?" It works for me. —*Anonymous*

Build up your nerve. The next time the executive asks one of those questions, tell him that he's putting you in an uncomfortable position. Tell him that if he had a need to know, he'd have been invited to the meeting. Better yet, why not ask him why he needs to know? Something isn't right here, and you have the power to stay out of it. I would exercise it. —*Alice*

Don't say, "I don't know," but be vague. Then find a way to put the ball in his court. For example, when asked, "Who's he talking to?" or "Who's in his office," say, "He's speaking to one of the managers. Do you want me to let him know you want to speak with him when he's done?" or "Why? What's up? Do you need help with anything when he's done?"

To "Where is he?" say something like: "Oh, he just stepped out for a little bit. I'll tell him you stopped by when he gets back."

Be polite and professional but firm. Change the wording to match your style, but find a way to give a nonspecific response and end with a question. That way you prevent the executive from asking further questions—he ends up answering yours. —*Yanee*

Look him straight in the eye and if he asks:

- "Who's he talking to?" say, "Do you need to talk to him right away?"
- "Where is he?" say, "Do you need me to find him for you?"
- "Who's in his office?" say, "Who are you looking for?"
- "What's his meeting about?" say, "Do you want me to have him call you when he's finished?"

Continue to smile and look directly into his eyes until he goes away. —*Anita*

Since there are two executives involved—your boss and the "nosy" exec—I suspect there may be more going on between these two than what you've indicated. You don't want to get in the middle of a potential power struggle, so I would recommend against having a conversation behind closed doors with the offending party for such a minor annoyance. You don't want to play a part in escalating the problem.

Instead, try to engage your boss in a conversation that will elicit more direction from him. Ask your boss if he has any objections to posting his daily calendar to cut down on interruptions and general inquiries. If he agrees, you can just refer those who inquire to the posted daily calendar. If you keep an Outlook calendar, print the daily view, which provides the basic information. If the person isn't satisfied with the posted information, it will be much easier for you to state simply that your boss has authorized the posting of his calendar for general inquiries. If he presses for more information, you can then offer to schedule a one-on-one with your manager and the nosy exec. Chances are, he'll take the hint.

If your boss doesn't permit you to post his calendar, you may have been given a clue about what could be driving the inquiries. Wait until the nosy exec stops by and asks again. When he does, simply state that you've talked with your boss about making his calendar public, and he prefers not to do so for business reasons. Again, if he needs more information, you can then offer to schedule a one-on-one with him and your boss. *—Anonymous*

Q Are you your boss's chief excuse-maker?

"My boss is notorious for running late for meetings, being out of touch when he's supposedly working at home, forgetting about appointments … I'm often the only one who knows the real reasons for these problems, and they're rarely good ones, so it falls to me sometimes to make an excuse. I sense that people see through me when I do. What can I possibly say in these situations when I'm a lousy liar but I don't want to make my otherwise good boss seem like a mess?" *—Frazzled, San Mateo, Ca.*

One of my bosses asked me to lie for him and tell someone that he was not in the office when he was right in front of me. I responded by telling him I did not feel comfortable doing that, and if I was the type of person who would lie *for* him, I could also lie *to* him, which I am neither. My boss got the message that I am trustworthy, and not a liar. *—Van*

Co-workers know what your boss is like. They know his style, so they know you are making excuses for him. Don't do it, and never lie. *—Lisa*

Some time ago I mentioned to one of the folks I supported that it also reflected negatively on *me* when I accepted a meeting invite that said he would be attending but he didn't show up. He was very thankful and said he had never looked at it that way. The situation did change. *—Nell*

You don't just work for your boss; ultimately you work for the company, and you need to be seen as reliable and honest no matter who your supervisor is. Simply apologize for the inconvenience and offer to reschedule appointments that were set up as one-on-one. Redirect intense questioning to your boss. *—Laura*

Q Profanity in the office: Tolerable or a terror?

"I am an administrative assistant at a very large company and my cubicle is right outside the door of one of the directors. He happens to loudly use a particular common curse word whenever he's frustrated. I cringe every time I sense it coming. In most cases I try to scurry away from my desk so I don't have to hear it, but sometimes I do get caught off guard. Do you have any suggestions for how I can deal with this, or approach the problem directly?" *—Anonymous & Frustrated*

I was in a similar situation with a co-worker who sat just behind me. This person would curse, quietly scream and make gestures at the computer. I tried to let it go. I tried headphones. I finally decided that it wasn't worth the anxiety level and went to talk with the boss to hopefully come up with some possible solutions. Honestly, I felt I wasn't taken seriously about how disruptive and anxiety-producing this behavior actually was. The boss didn't feel it was appropriate to let me move to a different space and didn't feel it was necessary to intervene. Direct communication only worked as a short-term solution, and I had to make up my mind about what was healthy for me. I chose to take the new position. I couldn't believe how much stress that behavior was really causing me until I was working elsewhere. *—Anonymous*

Being straightforward with the director, while uncomfortable, is the best first step. Create a mental script of the conversation. Something like, "I can always tell when you're frustrated because you say the 'F' word. Do you mind if I close your door?" He may not be aware of what he's doing but by commenting on it in a nonthreatening way, he may get the message. Also, closing his door every time he curses will reinforce the message. *—Cristine*

It could be that he does not realize how often it's happened. For example, I periodically take my friends' kids to movies or dinner to give the couple some alone time. One day after saying a very mild curse word like "damn" or something like that, one of the kids said I should have to pay 10 cents every time I said any curse word and share the total at the end of every month with them. I said they'd never have money, because I hardly ever cursed. But WOW, I quickly realized that I did it a lot more than I realized. It may be the same thing with your boss, that he does it more often than he thinks he does. Of course, the nondirect way (if you are not comfortable talking about it) is to just accept it, realize it is not directed at you and don't let it bother you. *—Mark*

Q How do you work for someone you personally dislike?

"Five months ago I was hired as an admin at a telecommunications company. Recently I've come to realize that while my boss and I do get along, he's kind of a classic jerk—and everyone warned me about it. He's rude, condescending, argumentative and sometimes just plain mean; but he seems to get away with a lot because he's apparently terrific at bringing in profits. Does anyone but me feel there's something not right about working so hard for someone you find personally offensive, even if you need the paycheck and your work relationship is perfectly functional?" *—Valerie*

There is something wrong with this relationship. If he is rude, inconsiderate and a bully, he will not change his ways for you or anyone else. Things may be functional now, but that can change at any time once he arbitrarily decides the relationship isn't working for him. If that is the case, expect that he will turn on you, leaving you without a job. Let's face it, he's a manager who apparently produces results. Assistants are a dime a dozen to upper management while "good" managers take lots of effort to find … I have learned that no amount of money is worth being mistreated in a position, and no company is worth it if they treat their admins this way. Sadly, there are a lot of these companies around. *—Eline*

It may be offensive to others to work for a boss like him, but what is important is how *you* feel about working for him. As long as your boss is respectful to you and your relationship is functional, I do not see why you should not stay. It seems you can handle your situation fine, plus you are someone who may bring decency to your office and have a positive influence on your boss over time. Also important is how your boss treats you regarding opportunity for growth, and being accepting of your input because he respects your intelligence. Some people can thrive in situations where others might crumble; you seem to be one who can thrive, so if things are working well for you, why not stick with it? *—Anita*

Unfortunately, many people in leadership roles feel they either have a right to act how they want, or act that way out of fear of failure. If you have a "functional relationship" then you are fortunate. Many of us work for or have worked with someone we could call a "jerk," but have learned how to appreciate their point of view, their fears (both spoken and unspoken) and their challenges. Once you begin to put yourself in their place, you are more positioned to become an exceptional administrative assistant. You can forgive spurts of anger and hard words and usually you can moderate those actions with a loving spirit and by remaining silent until they are in a place to "hear" you. Humor and kind words go a long way in helping others moderate behavior. You have a good job in a bad economy. Count your blessings, walk in someone else's shoes and learn forgiveness. *—Lea*

I once worked for a place whose political views I strongly disagreed with, and I toughed it out for as long as I could; and I've worked for a boss who was kind of a louse, and I toughed that out too … and the lesson I learned from both places is that I just didn't feel good about myself when I was working there, so I should have left earlier. I say always go with your gut and never let a job make it feel like you're personally compromising your beliefs. Life is too short to spend eight hours a day around people or systems that make you unhappy. *—Earl*

Q Your company's throwing money away—how do you bring it up?

"The company I work for caters every meeting no matter how brief, spends thousands of dollars for a service to keep office plants looking nice, constantly renovates to add TVs nobody watches and parking spaces nobody uses. I guess we can afford it, but I'm considering discussing this with my boss. I'm wondering about other admins' experiences with bringing up the delicate subject of the company throwing money away on extravagant things. What's the best way to go about it when I'm not totally sure how else that money should be spent—only that it seems enormously wasteful?" —*Annabelle*

There is a lot of in-between "stuff" that would affect the decision as to whether the company is really wasting funds or not. Is it a large or smaller firm? Is it a chain? Are you a for-profit or nonprofit organization? Do you have frequent visitors? Appearance apparently matters to upper management. Are you a financial decision-maker or a concerned employee? Does the company or organization have a suggestion box? Do the employees get appropriate raises and/or perks, bonuses or free passes to parks, movies, restaurants ... If the company is going through a budget crisis and funds need to be reduced, your suggestions would be valued. If not, you may just have to sit this one out. —*Ramona*

I agree that businesses often spend on having a nice atmosphere as a way to attract and retain people—the sad part is that when layoffs come, and they always do, immediately you realize jobs could have been saved if everyone hadn't been living so high off the hog. I like working in a nice place, but it makes me sad to realize that so few people bother with our gym or our fancy outdoor deck. Plus the catering—wow. And I just know the day will come when I have to think about how many salaries those things equal. —*Tom*

Like beauty, wasteful is often in the eye of the beholder. Catering every meeting and making sure office plants look nice might be considered wasteful to some people, but to others it can be considered something that aids in enjoyment of the office environment. If your company was bleeding money, any expenditure that wasn't "needed" should definitely be examined. But if the company is doing financially well, employees are primarily happy, and owners or stockholders are getting a sufficient return on investment, I wouldn't say anything unless there are a number of co-workers who feel the same. —*Mark*

2 Strengthening Your Work Relationships

Success in your career also depends on your ability to get along with your co-workers and upper management. You may be the most skilled administrative professional in your company, but without the support, assistance and respect of your colleagues and supervisors, you will never realize your full potential.

Taking the time to develop and maintain a good working relationship with everyone in the office will work to your advantage. Make each day—and each contact—count.

Rubbing Shoulders at the Top

Nothing can put an administrative professional in a more uncomfortable situation professionally, even ethically, than contacts with top management that conflict with their responsibilities to themselves and their boss. There's a natural inclination to want to accommodate higher-ups—and that is as it should be. But it's also critical that you know where your allegiances lie and how to maintain your own sense of fair play.

Below are three situations that you may have encountered in one form or another in your workplace. Based on your experience, what action would you take in each case?

Scenario 1:

While your boss is away on a two-day business trip, the chairman of the board calls to say that he has managed to get a fantastic, top-level state official—"someone we'd like on our side"—as a luncheon speaker for the conference your boss is hosting in two weeks. You know that your boss has worked hard to set up the best possible program; you also know that no matter how top-level the chairman's choice is, your boss may not welcome any changes in the plans he has already made. What do you say?

A. "Yes, of course, Mr. Green. I'll call the printer right away and ask him to make the necessary changes in the conference agenda."

B. "Mr. Black will be back from vacation on Thursday. I'll tell him about your proposal immediately so that he can determine the best way to work things out."

C. "I'm sorry, Mr. Green, but the luncheon speaker has already been selected and the conference programs printed. It's too late to make any changes."

In this situation, solution B is the wisest choice. It's true that your boss may have to agree with the chairman's suggestions, but that is his decision to make, not yours. Chances are, your boss would strongly resent it if you did make the decision because it would deny him the opportunity to argue in favor of his own choice of speaker. On the other hand, he may agree that the top-level state official would be a splendid attraction at the conference. Solution B buys time to allow your boss a chance to assess the alternatives and make his own decision.

Scenario 2:

You have a full day's work ahead on an important presentation your boss is going to make. At 10 a.m. the executive vice president comes to you and frantically explains that her assistant is out sick. She asks you to do an urgent travel and lodging planning task for her that will probably take three to four hours. What do you say?

A. "Certainly, Mrs. Jones, I'll do it right away." You do the planning task, then explain to your boss that you won't have time to finish his work until the next day.

B. "I'd be glad to do it, Mrs. Jones, but I still have a great deal of work to do for Mr. Smith's presentation on Friday. Suppose we check with him before I take on any new assignments."

C. "I'm sorry, I just can't today, Mrs. Jones. You know Mr. Smith is making that big presentation on Friday, and I have to get everything ready in time."

Did they really say that, or do you just *wish* they had?

Ever played the game called Telephone, where a message is relayed along a chain of people to see how accurately it comes out after passing through all those connections? The office is like that, and those who play Telephone poorly are doing their co-workers a real disservice. Paraphrasing, dramatizing or re-imagining someone's words usually isn't fair to anyone; we tend to remember a tone or underlying message that suits our cause rather than the one that actually happened. There's no better way to generate resentment and misunderstanding than distorting what someone has said to you.

Again, solution B is the best choice. Making a decision on the basis of executive status alone (solution A) may appear rather high-handed. It also might be unfair to your boss. On the other hand, solution C could represent loyalty to a fault.

Solution B provides two distinct advantages. First, when the two executives compare notes directly, the more important task will probably win out. Second, you've avoided putting yourself on the spot between your boss and another executive up the line.

Scenario 3:

You deliver a memo from your boss to your company president, who asks you whether two people in your department who had been feuding have settled their differences. What do you say?

A. "Yes, they have. We're all working together beautifully." (This is a slight stretching of the truth since, on your way upstairs, you heard them arguing again.)

B. "Well, to tell you the truth, nothing much has happened. They're still out to get each other every chance they get."

C. "I really don't know, Mr. Baris. I try to stay out of other people's disagreements as much as possible."

In this case, solution C is the best alternative for a variety of reasons. Most importantly, it is never a good idea to become an informer about people in your department, regardless of who is asking the question. Furthermore, you may not really know much about the problem. Even if you do, you don't know how much the person asking the question already knows about the situation or how much your boss would like him to know.

In situations like this, there's no place for bending or minimizing the truth. Solution C is a pleasant way of communicating your own sense of discretion to your listener, which may enhance your reputation with him as well.

Top-level executives often seem formidable to those on lower levels in the organization. Some employees are so awed by high-level status that, almost without thinking, they give these top executives first priority, even at great cost to themselves and at the risk of putting their own bosses in a bad position. Certainly these executives and their requests deserve respect and consideration. But in most situations, you have several options. A brief moment of reflection, rather than a quick answer, can help you determine what those options are and then choose the best one.

Cooperating With Other Departments

One organizational reality that is common to most work environments is the friction between departments whose goals, methods and paces may vary. Coordinating projects with individuals whose working styles and priorities are different from your own can be difficult. But your ability to surmount those difficulties will mark you as a star admin—one who understands the new business focus on serving "internal" customers (colleagues in other departments) with the same high level of service that is accorded "external" customers.

Of course, internal service should work both ways. Oftentimes you must depend on another department for input on one of your own projects. When they don't come through for you, it can be frustrating and annoying. Your first reaction may well be to tell them how badly they have messed up.

But when you run into problems or disagreements, it's important to remember to control your emotions and keep a balanced perspective. You want to be fair in handling the situation and careful not to burn any bridges.

The following recommendations should help:

Try not to make judgments. Don't automatically declare an individual or a department guilty because they have let you down. You may have your suspicions, but that is all they are. All you really know is that you didn't get a work product or service that you expected from someone else. Withhold any conclusions until all the facts are in.

Seek out the facts. Go directly to the people with whom you have the problem and ask them what they think went wrong. Don't make accusations or vent your anger and frustration on them. Your objective is to get the facts, not to create more friction.

Hear them out. If the problem was their fault, they might apologize at this point. If it was not, they will tell you that. They may even hint that they regard you as the cause of the problem. Or, as is often the case, they may tell you that the fault lies not with someone, but with something—a machine breakdown, a delayed delivery, a corrupted file. Rest assured, the more accusatory you are, the less likely the blame will be claimed by the person you've approached. When this happens, the dust never settles.

Try to prevent future problems. Since you have tracked down the source of the problem (not necessarily who did it), you are in a better position to decide how similar problems can be avoided in the future. More often than not, miscommunication is a factor in someone missing a deadline or your not receiving what you requested.

It's crucial to explain clearly what you want done, how you want it done and when it is due. If you are experiencing a delay in the delivery of your project because another was done ahead of yours, you may need to discuss the problem with the head of the department instead of the individual so that you can work out a mutually agreeable policy regarding project requests.

One way to reduce future problems is to improve your image before the department in question. There are several ways to do this:

1. *Let them know you are human.* Preventing small problems from blossoming into major headaches calls for good people skills. Improving personal relationships can go a long way toward smoothing ruffled feathers or cushioning problems that may occur in the future. Having lunch with one or more employees in the other department can help solve a lot of little difficulties; then, if bigger ones do crop up, at least you will be dealing with friends.
2. *Put communications in writing.* Avoid misunderstandings about your expectations by putting your requests in writing. That way, if differences of opinion do occur, your written request should settle them immediately.
3. *Learn the code words.* Every department has a shorthand for its own operations and procedures. Be sure you understand the other department's meaning when they use their codes and, equally important, take the time to explain yours to them.

Cooperation is a fact of life in today's business environment. No man is an island, the saying goes, and neither is any department in a business organization today. Forge strong relations with other departments, and you'll have a stronger guarantee of career success.

Playing Positive Office Politics

Many people cringe at the term "office politics." To them, it suggests images of maneuvering, manipulating and jockeying for position. While some varieties of office politics may be unfair or underhanded, not all are negative. There are, in fact, many legitimate "political" activities that can assist your career.

If you are ambitious, think seriously about paying more attention to these positive political activities. Straightforward moves can strengthen your chances of career success—and make your working life more interesting and rewarding at the same time.

Here are some steps you can take to enhance your career:

Are you sure that thought can't wait?

One of the most subtle ways to undermine your own credibility is to be an interrupter. At a meeting or presentation, make sure a clarification is something you truly require in order to keep from getting hopelessly lost, and refrain from offering anecdotes to either support or challenge the speaker in midspeech. Chiming in with anything but the most game-changing fact can make you seem more like a stage-grabber than a valuable contributor. Almost anything can—and should—wait until the Q & A.

Maintain contacts with influential people. Contact with people in your organization who wield real power—those who are quoted widely, deferred to and highly respected—is not always possible, particularly in large organizations. But you can be on good terms with those who have a direct line to them: their assistants or department heads. You also can make your presence known to top management by acknowledging them with a smile and a friendly greeting when you meet them in the halls or elevators. You may be pleasantly surprised at how soon they begin showing an interest in you.

Take on added responsibility. Undoubtedly, you have heard of "empire builders," people who add new responsibilities and territories to those already assigned to them. There's no reason why you can't do the same thing, as long as you don't intrude on someone else's territory. In fact, if you have your present responsibilities well in hand, you should be looking for new challenges that will expand your experience and stretch your abilities. One way of doing this is to ask your boss to delegate more responsibilities to you. But don't stop there. Offer to help a co-worker who is overloaded, volunteer to chair a committee or look for jobs that should be done but that nobody is doing. These are all ways to help your organization and, at the same time, increase your visibility.

Extend praise and credit when due. Often, people are quick to praise an individual on the same or a lower organizational level. But when it comes to someone up the line—a boss, a vice president or the CEO—they hesitate, and the term "apple polishing" quickly comes to mind. Successful achievements deserve praise, no matter whose they are.

Fortunately, there's a way of praising that is appropriate in just about any situation: You simply praise the act, not the person. Saying "You're terrific" to the director of information services might be questionable, but telling them, "That new system you set up is really terrific—we get material a lot faster now," would be perfectly acceptable. Not only will you be extending credit where due, but also you will be helping this manager assess the effectiveness of their decision to go with the new system.

Notice and comment

Take the time to notice and comment on the photos and other objects that people display in their offices. Employees display them as an expression of pride. When you ask questions about them, you connect with people on a personal level. You can even do this when working remotely by politely commenting on something in someone's background on a video call.

Help newcomers. Most people, no matter how experienced, feel a little lost during the first days on a new job. If you can share information or provide direction, you can help ease the newcomer's concern—and in the process, possibly gain an ally. People are not quick to forget assistance of this kind and may prove to be associates you'd like to call on to return the favor sometime in the future.

Demonstrating honest interest in other people is one of the foundations of good interpersonal relationships. Often, this expression of concern results in the discovery that the two of you share ambitions and interests. In other words, you can mutually benefit. When you enter into such a relationship, you have formed a political alliance in the most positive sense of the term.

Negotiating for What You Need

Negotiating skills have taken on added importance in this era of cost-cutting. Employees at every level are expected to get more done with fewer resources. The ability to add to your resources by getting what you want can be a major advantage to your career. And, of course, negotiating skills come in handy when you approach your boss to request a raise.

Here are some tips to help you get what you want in a negotiation:

Know the person on the other side of the table. Do a little research to find out what their needs and expectations are and how they might have resolved similar situations in the past.

Identify your needs. Know the most important thing you want to get out of the negotiating process. Don't allow yourself to be distracted or drawn off course.

Set the stage. Consider the nature of your request and the comfort level that would best work to your advantage. If you are negotiating with your boss for the hiring of another admin, for example, would it be more appropriate to meet in their office or discuss it over lunch?

Make your opinion count

When asked your opinion, try to summarize your view in one sentence. Then pause to give others a chance to piggyback on it or ask follow-up questions. If you ramble on too long, you can undermine your own arguments and/or bore your listener. One reasonable argument is better—and more memorable—than a dissertation.

Say exactly what you want. Don't beat around the bush or camouflage your concern in a forest of other considerations. Lay out your argument and request a resolution. If you don't take advantage of the opportunity, you may have to wait weeks or months for another chance.

Know what your side of the bargain will be. Many people fail to recognize ahead of time that there is often a price for "winning." Your boss may allow you to drop a pesky ongoing task, for example, but only if you are willing to take on a heavier load of departmental duties. Understand ahead of time what you are willing to pay for winning, and be prepared to negotiate on that price as well.

Speak in terms of the other person's needs. Stressing only your own desires rarely wins anything. Talk about improved operations, lower costs and higher profits—concerns that the other person has and that you may even share.

Build a solution into your request. Instead of saying, "We need new software for our department," start out by saying, "We've hit on the solution for the problem that cost our department 15 hours in overtime last month." Stress benefits first, and costs later.

Remain calm. Showing emotion may reduce your effectiveness, particularly if you say things that you didn't really mean. Keep a level head and defuse whatever is thrown your way, whether it's aggression, passivity or stonewalling.

To break a deadlock, try an "if, then" agreement. For example, "If I can get a bid that will let us purchase the new equipment for under $3,000, then will you agree to let me go ahead with the purchase?"

If all else fails, let the other person tell you what to do. By saying, "Tell me what will get you to agree to this request," you are encouraging your opponent to tell you exactly what you must do to reach agreement.

Clarify and confirm the nature of the resolution. Before leaving a negotiating session, verbally review the exact conditions of your joint decision. Follow up quickly with a confirmation memo.

Common Objections and How to Fight Them

Ideas are like clay pigeons. There is no surefire technique that will shoot down every one every time. But let's look at the most common objections any idea is likely to face and some assertive means of overcoming them:

The head-in-the-sand approach. "Nothing's broken, so let's not fix anything" may be the attitude someone takes. To counter, point out the shortsightedness of this approach and predict problems that are likely to occur unless your proposal is accepted.

Allusion to a higher authority. You may have an opponent who says, "I agree with what you're saying, but the boss will never go along with it." In this case, ask whether you have permission to present the idea to the boss yourself—and agree to run the risk of not gaining approval.

Discordance with style. Another common objection is "That's just not how we really do things." Take pains ahead of time to make the idea fit in with the company's goals and culture.

Hostility. "That's the most absurd idea I've ever heard" or a similar remark may indicate hostility. The person is trying to tell you something else, and it's up to you to determine what it is. Probe to find out just where the real problem lies.

Sell the win hard to sound like a real pro

When you know that the positive outcome of a given project or task is certain, you have the opportunity to appear very strong when you speak of it. Don't pass it up. Instead of saying, "I am definitely going to have that report finished by Tuesday," try "That report is a lock for Tuesday—I guarantee it." Instead of "I'll know that information by Friday," try "Put that doubt right out of your mind—I'll get the information Friday, no matter what." The facts haven't changed, but your attitude has become a lot more impressive.

Intentional lack of comprehension. You may come up against someone who responds, "I just don't understand what you're saying or why you're proposing this." Without adopting a condescending attitude, you should restate your central point. Or, if your idea involves several parts, state them one at a time and ask whether each is clear. When you state each idea as a simple concept, the person who is trying to undermine you will be embarrassed to feign a lack of comprehension.

Lack of comfort with risk. "It's out of our realm of experience—much too risky" may be thrown at you. Anticipate the principal risks before making your pitch, and demonstrate how your plan would benefit the team and the company instead of putting it at risk. In these cost-conscious times, making a dollars-and-cents comparison of possible profits versus losses can win your proposal its due consideration.

Lack of focus or decisiveness. You bring an idea before an individual or a group, and it seems as though they can't bring themselves to focus and think about it. They either drift off into other business or seem determined to pass over the idea in a cursory way without making any decision. In this case, press for a decision on even a minor point. Offer to go ahead and make the next move.

The stall. "Let's wait and see what happens," a staller will respond to your proposal, or "Well, there's a lot of other stuff going on right now, so let's come back to this." Again, point out the strategic hazards of taking no action.

People who can't make up their minds or delay action defeat many brilliant ideas. Sometimes such objections are simple stalling tactics. More often, however, they are indications that the person is interested in the idea but wants to be thoroughly convinced that it is workable. That person has not taken the time to analyze the proposal and clearly identify exactly what he believes it lacks. In such cases, it's up to you to restate their objections in concrete terms and then, one by one, show how your plan meets them.

Fight Your Fears and Assert Yourself Every Day

At any given moment, you know quite well whether you're switched on or off. You can look around a conference table or at the panels in a video call and pinpoint which of your co-workers are on or off too. When you're switched off, you're low-energy, fearful, jaded or a little sarcastic. When you're on, you're paying attention, helping someone else to complete their thought without cutting them off and raising your hand to voice an opinion—even when you aren't sure it's right.

"Confident and assertive people don't turn themselves off," inspirational keynote speaker Susan Leahy says. They fully engage in whatever situation they're in. They're willing to share ideas even though they might not be embraced completely, and they try to find the nugget of truth inside even the most oppositional viewpoint. According to Leahy, the difference between these stars and those who work in quiet desperation can be summed up by defining the two separate worlds in which people exist.

If you too often allow **biology** to be the space where your actions come from, you're missing out. Your biology always wants to protect you in a difficult moment and doesn't concern itself with long-term consequences. When confronted with a fight-or-flight situation like a tough conversation or high-pressure presentation, your biology just wants to get you out of there in one piece.

This makes your base instincts happy, but succumbing to biology may keep you trapped in introversion. What you need to do is take a deep breath and think, "No, I want to be in my **humanity**. I want to participate in this. I'm going to create something here. Let's see where this goes."

In your humanity, you get to *choose* what you want to feel. Assertive people hear the voice of biology saying, "This meeting is scary, don't raise your hand," but they shake it off and go with their humanity. The confident hear criticism come out of a co-worker's mouth, and instead of listening to their biology tell them to "Lash out, it'll feel good!;" they summon their humanity to roll with the punches.

The result is a firmer, more mature grasp on every situation—and that gets noticed.

Pushing forward with the STAY model

Years ago, Leahy took Eleanor Roosevelt's famous quote, "Do one thing each day that scares you," to heart and decided to perform standup comedy. Naturally, she felt nervous, scared and inadequate; she had to try to push herself beyond it toward a target—a positive outcome she visualized before she took the stage.

"Confident people project themselves into the reality they want to create," she says. It's certainly not easy, but remembering the STAY model can help. The acronym stands for **S**top **T**hinking It's **A**bout **Y**ou. Your shyness, fear of failure and shaking hands make you crave the easy reward that deciding to flee the moment brings. If you do, you've lost that moment and the chance to build a relationship or assert your viewpoint. Ask yourself, *"How do I want this moment to turn out for my* career *and my* life, *not just the butterflies in my stomach?"*

Celebrate the creator in the next cubicle

Here's something to ask the office manager sometime: Why isn't the art on the walls of our office hallways done by our co-workers—or their children? Here's an easy chance to boost morale by giving people a chance to display their talents. It might even save money, even when the company pays to have everything nicely framed.

Being assertive: good ... Being aggressive: not so much

Leahy advises thinking of *aggressive* communication like arm-wrestling over an idea in a meeting. One person states a viewpoint, and it's challenged by another. The next thing you know, they're going back and forth and it becomes competitive; one side is trying to win. "*Assertive* people," Leahy says, "find a way to reroute people out of competitive communication." They acknowledge there are two or more sides to every issue and think in terms of everyone being on the same team with the same goal.

When a conversation with an *aggressive* person ends, the aggressive one may have gotten what they wanted—but little by little, they're seen as an intimidator, abrasive and tough to work with. With each positive interaction though, an *assertive* person is perceived as fair and rational. And *that* person gets listened to always—even when on the inside, the butterflies might still be having a field day.

Getting Along With Problem Colleagues

Problem colleagues come in all shapes and sizes, and they are a challenge for anyone, in any organization. You've doubtlessly run into some of them. Some problem colleagues are sullen and moody; others are stubborn or uncooperative. And some are back-stabbing, out to undermine your work or make you look bad.

It's hard to understand why these people act the way they do. *Why don't they just pitch in and cooperate?* you might wonder. But that's irrelevant. Getting along with them—or getting around them—is the tack you must take.

Here are some comments that will, in all likelihood, sound quite familiar:

- "I don't care if she is the president's assistant. What right has she to ask me to dig up information that she could easily get herself?"
- "Here I am, up to my ears in work, and the chairman's assistant tells me to drop everything and work on a presentation for him. It just isn't fair!"

Are complaints of this kind justified? The answer is yes if a top-level administrative professional is letting the position go to their head and is really throwing their weight around. There are always some people who will take unfair advantage of their position. But try taking another view.

Make an effort to understand their pressures. Keep in mind that these administrative professionals are often under tremendous pressure. The assistants to the top brass are, in a very real sense, people who have "made it" in the organization. Because of management policy, they may still be termed "administrative," but their jobs encompass a great deal more in the nature of the work they do, the responsibilities they handle and the authority they are given.

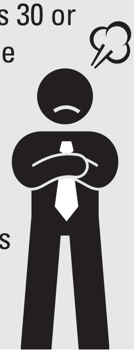
Acknowledge their importance to you and others in the organization. Top administrative professionals know the organization inside out; like their bosses, they have usually come up through the ranks. They know the right people to contact, the best way to get something done and the right approach to specific obstacles. The bottom line? You can learn a lot from them.

Be genuinely open and friendly. We're not advising that you cultivate a top-level administrative professional on a strictly "what's in it for me" basis. Nor should you make a pretense of being a personal friend if you really don't like them. But there is no reason not to exchange smiles, greetings or ideas, whenever the situation permits.

Adopt a spirit of cooperation when you're asked for help. Of course, you shouldn't be intimidated into automatically putting everything aside to "obey" the dictates of a higher-level assistant. If you explain the situation frankly (with no hint of panic or resentment), a compromise can probably be found. Someone else may be asked to handle the new assignment, or your boss may be willing to have their project temporarily shelved to accommodate a higher-up's work.

What's your Strife Number?

Sit down right now and think of how many people you work with who you genuinely dislike. Calculate that number as a percentage of *everyone* you have regular contact with in the office. There's your Strife Number (because you can never have too many silly artificial metrics in life!). If the number is 30 or higher, it could either be a sign of an unhealthy level of intolerance for the quirks of others, or a hint that you're in for a long road of stress with a group you just don't meld with.



It pays for you to keep in mind one of the core truths of organizational life: Not only are the people at the top the ones who can do the most for you, but also they are often the ones most willing to extend a helping hand.

Meddling Peers

Not all employees offer assistance and contribute to others' projects in an honest and high-minded way. Some co-workers may, in fact, view the chance to comment on your work as an opportunity for self-promotion or self-aggrandizement.

We all have seen instances of that behavior, as reflected in the following situations:

- **The "what-if" coup.** In a meeting where you present your work, another administrative professional begins asking a lot of questions that are designed to show that she would have done a better job than you. "What if you had done it this way?" the questioning begins, and then it's open season to criticize your good work.
- **The "you need me now" jump-in.** You've already finished half the work on a project when a meddling peer insinuates herself into the process, claiming to know a better way to do it. In the interest of cooperation, you agree to share the project with her. But, as a result, you lose the time you've already invested and stand to lose still more. As we know, sharing a project often requires more time than simply doing it yourself. How can you protect your work and your time from people who are determined to intrude—often for the sole reason of making themselves appear more intelligent or better informed than you are? The following approaches can work well with meddling peers:
  - **Give people a chance to participate early on, not later.** As you begin a project, offer people the opportunity to contribute their suggestions. Then, if they offer some different opinions or "assistance" too late in the process, you will be able to point to your deadline and say it's too late for them to participate.

A simple anti-nonsense tool

Once in a while, a co-worker will voice an idea or viewpoint that seems colossally dumb. (Naturally, this only happens to others, never ourselves. …) When you think someone's gone a little batty, try simply saying, "Sorry, can you repeat that?" This query has a double use: You're giving them a fighting chance to restate something they might immediately be wishing they could take back, as well as delicately but firmly pushing the faulty logic to the center of attention so others can scrutinize it.

— **Shield your work from people you suspect will meddle.** If you've run up against a last-minute intrusion into your project, it's worth establishing a direct link to your boss or to whoever is expecting your work. Then simply turn it over to that person without presenting it in a meeting or other public forum. There is no reason, even in highly democratic firms, for all your work to be subjected to broad scrutiny.

— **Create an alternative structure to handle the project from Day 1.** When you have a project that would benefit from a wide range of viewpoints, it's often worth creating a multidisciplinary team when you begin the project. Even though it may take longer to get the job done, the results may be better in the long run than if you had shouldered the task alone.

— **State your goals at the outset.** When you present your proposal, either verbally or in writing, it's often best to make a clear statement of its purpose at the beginning. For example: "My purpose is to solicit competitive bids from three suppliers" or "My aim is to present three possible content management system options as a basis for exploration and discussion." Showing what your assignment is, and how you intend to achieve it, is often an effective defense against quibbling peers.

Beware of creating 'silence fatigue'

Think of all the times you've asked a co-worker to complete a task, and days went by with no word on its progress, and no reason you can think of why it shouldn't have been finished already. It adds a small but aggravating layer of worry to your daily struggle. (*Do I have to remind this person? Will a reminder come off as bossy? Are they blowing me off? Can I afford to wait one more day before intervening?*) We owe the people we work with an acknowledgement that we're aware of an assignment, and if we've had to bump it down the priority ladder, an occasional update on where it stands. Simply reassuring someone you haven't forgotten their project allows them to focus their mental energy in more constructive places.

Hostile Peers

In an ideal world, competition between co-workers would be extinct. In its place, there would be a spirit of fellowship that is based on mutual acceptance and shared goals.

Unfortunately, that's not reality in many workplaces. Even in an era of teams and cooperation, interpersonal competition has not disappeared. In fact, you may see its clear presence in situations similar to these:

1. While preparing a lengthy report, you ask an administrative professional from another department for some supporting data to include. Then, when you are presenting in a meeting, she begins to refer to your work as "our memo" and tries to make it seem as if you both prepared the entire document together. Either intentionally or unintentionally, she is trying to increase her own importance—and possibly improve her own image—at your expense.

2. You go into a meeting armed with some ideas to present. But you soon find that another administrative professional is determined to undermine each one as soon as you present it. Her goal is to appear smarter than everyone else—or perhaps just to make herself appear smarter than you.

It's a mistake to become drawn into these petty conflicts. If you do, you agree to play a game according to a set of rules that you had no part in making. You have little chance of coming out ahead.

But it's an equally big mistake to refuse to compete at all. You can't just sit idle while another person claims credit for your ideas or tries to make you look ineffective. Here's how to compete on a higher plane and defend yourself without engaging in petty squabbles:

- **Focus on higher motives and agendas.** If a competitive person attacks ideas as you present them, don't dig in and defend each one. Instead, turn the discussion toward company goals. You might, for example, invite others to join in the discussion by making a comment such as, "My idea in proposing a suggestions channel in Slack was to address the concern you brought up in the last meeting: that workers feel unable to voice their interests and views. If a suggestions channel isn't a good idea, can we try to think of other means to meet our goal?"

  If a co-worker continues their petty behavior, it reflects badly on them—not on you. You have refused to be drawn into a pointless conflict and have made your point by taking the higher ground. You've also subtly blown the whistle on a problem employee—without looking like a tattletale.

- **Acknowledge the other person's contribution and move on.** If another administrative professional attempts to claim partial credit for your work, the best way to handle it is to acknowledge the help with a few words: "Yes, this report would not have been this good without your contribution of the data in the last chapter."

  By acknowledging and defining their contribution, you'll effectively show others that the bulk of the credit for the work goes to you. Without engaging in a battle, you'll come out ahead. And what's more, your generosity in letting your co-worker share the credit will reflect well on you.

Troubled Colleagues

Personal problems can affect anyone at work, even people who have been even-keeled for years. Sometimes the troubled colleague will come to you to ask for support or advice. Other times, you may observe changes in your co-worker's work habits or attitude, or someone may tell you about the situation.

In these cases, it's a good idea to find ways to provide strong yet respectful support during the difficult period. But a caution: Don't get too involved. Allowing another person's problems to create workplace problems for you does neither of you any good.

If you do decide to demonstrate your support, here are some ways you can show your concern tactfully and appropriately:

Express concern, but don't characterize the problem. Even if other workers have told you what the issue is, say simply that you are concerned and ready to help. Let them decide how much to open up. If the only response you get is a simple "Thank you," then you have done enough.

Limit your advice. If your colleague does open up to describe the nature of the problem, don't offer specific advice. There's a very practical reason: If your counsel does not work well, they may blame you later. Even if your advice does work, you will be associated with the problem in your co-worker's mind long after it has been solved. Instead, guide them toward finding a corrective course. If they have no ideas, suggest a professional referral for help. Perhaps the human resources department can refer them to an appropriate support group or counselor. By helping a troubled co-worker find sources of support, you provide direct help without becoming entangled in the negative aspects of the problem itself.

End on a positive, productive note. Remind them of past good experiences you have shared on the job, and point out that the company is aware of the excellence of their work. Finally, reassure them that things will soon be back to normal.

Backstabbing Colleagues

How can you counter outright hostility on the job? A letter in our file tells of an encounter one reader had:

"In a meeting, I made the mistake of saying, 'Maybe I'm a little thick, but I can't seem to get the sense of what these figures mean.' I was stunned when the head of another department said, 'You are thick, but we have learned to put up with it.'"

How should you deal with such overt aggression? Well, you could come out swinging ("You're the one who's thick because you prepared this thick report, and it's incomprehensible"), but that would be a mistake.

Here are some far more effective ways to deal with unexpected aggression:

Make a break in timing. Aggressive statements or actions beg for immediate responses. Refuse to give one. Break the pace of the aggression by pausing for a little longer than you would otherwise. It is often said that you should count to 10 before saying anything when you are provoked. That's good advice for this situation as well.

Refuse to play at all. There's nothing wrong with refusing to play the game at all—just clamming up or turning on your heels and walking away without a word. This is especially useful when the aggressor is known to be a problem in the first place. It makes their aggressive action stand out more clearly in the minds of the others present.

Refocus on your goal. Weigh the value of what you hope to accomplish. How much is it really worth to you? Is a plan under consideration that will really not have much bearing on you or your duties? If so, then you should invest a minimal amount of energy in fighting for it. If it's

Sell a meeting any way you can

Few people get excited when they see yet another meeting invitation float into their inbox. To intrigue and entice them more, give the meeting a title. A title suggests that a real narrative may emerge and reminds people in a subtle way to stay focused on the topic. Make it funny, make it dramatic … just make it seem like you care enough about the meeting to brand it.

worth a great deal more, of course, you must get ready to fight an intelligent, strategic battle. But remember that fighting for tiny wins and major victories with equal force only wears you down. Even worse, it shows that you lack the ability to put your priorities in order.

Show aggression in a different way. In a group situation especially, engaging in a one-on-one argument will only cause you to look as bad as your aggressor. But it may be a mistake, too, to let aggression go unacknowledged—to give the impression that you have backed down, especially when your grasp of a problem or your expertise has been called into question. Here are some ways to show you are aware of the affront—without playing the aggressor's game:

1. Adopt noticeably different body language. Rather than countering a verbal assault with one of your own, show in clear body language that you are aware of the affront and will not take it lightly. Avoid overtly aggressive actions, such as standing up and towering over the aggressor or raising your voice—that would will only pour gasoline on the fire. Good choices: Try to maintain eye contact with the aggressor; put your elbows on the table; respond in a quiet voice but speak clearly; or sit very upright in your chair.

2. Throw the ball to a higher authority. Turn to a higher-ranking person in the room and say, "Well, Mr. Edwards, do you understand what these numbers on line three mean?" If Mr. Edwards does understand, he'll explain them. You'll get the information you need from a neutral source and be able to get on with the business at hand. If Mr. Edwards doesn't understand them either, you have won a victory: Your aggressor has just called both you and Mr. Edwards "thick." You'll likely see your aggressor backpedaling with great speed.

3. Restate the problem in neutral terms. When you still want to press on toward an important goal (you need to understand those figures because they will be used to determine your department's budget for the next fiscal year, for example), reframe your inquiry without responding to the aggression. Say, for example, "I'll ignore that for the moment because I need to know what this figure is on line four, which seems to have little bearing on what we spent on supplies last quarter."

4. Press for consensus. You can turn to the group and say, "Well, if everybody understands all this and I don't, please don't let me stand in the way. I've only got one vote here. Why don't you go ahead and make a decision without me?" Of course, there will be lots of other people present who need to hear more and understand more before they are willing to come to a conclusion. In the process, you've made the aggressor look like a pushy boor who's trying to bamboozle the group into accepting something without devoting adequate time and consideration to the problem.

While no one likes to be the target of aggression, it's wise to remember that it does offer an opportunity to display your coolheadedness and professionalism under fire. These qualities are especially valued in business today. So while you should not welcome aggressive encounters, you should plan how you would react if they do arise. In most cases, a simple plan to remain cool, detached and professional will win out.

The Office Gossip

If there's one kind of person common to almost every office, it's the office gossip. They're the first one to know that Diana is mad at her boss and may quit, or John is having trouble with his wife. They're also usually the one who will be spreading both stories to anyone who will listen.

That's the important point for you to remember when it comes to office gossip of this sort: You don't have to listen. And there is a strong reason not to listen. Participating in office gossip won't do your career any good—and it could do your career great harm. The savviest professionals direct their time and energy into doing the best job they can. They don't have time for gossip.

Here's how to handle the office gossip when they come around to share their stories:

Look immersed in your work. Simply appearing busy will sometimes discourage people from settling in to talk. So whenever the office gossip looks like they're about to spring, try to be visibly occupied. They may take the strong hint and go elsewhere.

One word may turn a conversation aggressive

Ever notice that when someone is speaking to you in a slightly tense conversation, the use of your name has the effect of putting you slightly on the defensive? ("Well, *Diana,* as I said before ...") While it's a personable thing to do when things are casual, it can come off as an aggressive means of speaking when a problem is being discussed, so be careful of your tone when you name-drop.

Minimize your responsiveness. If the office gossip insists on launching into their latest piece of news, don't fall into the role of active listener. The less intently you listen and the more distracted you seem, the greater your chances of discouraging their stories. Equally important, avoid the various subtle signs we communicate when we are encouraging a conversation: nodding your head or interjecting comments. These behaviors will only lead to further conversation—which is exactly what you don't want.

Change the subject. Interrupt the gossip when they launch into their story, as if you have just had a sudden, important thought. "You've never told me how that new project you're working on is going," you might say. Or, "I forgot to tell you that we have hired a new junior administrative professional." Be sure to interrupt with a work-related remark to let the gossip know that you mean business and want to discourage them from sharing gossip with you.

If all else fails, be direct. Sometimes, you have no recourse but to be direct. Say to the office gossip in a calm, gentle voice, "Taylor, I really am too busy these days to take time out for nonbusiness matters. I hope you'll understand. I'd appreciate it if we could confine our conversations to business."

Tact and courtesy are key to handling any problem co-worker. In a very real sense, your best tack is to handle problem colleagues as if they weren't problems. If you do this successfully, you will probably find that those whom you regarded as problem colleagues are problems no more.

Quiz

The Problem Co-worker

This one's real simple to score—just circle every question to which you answer "False." Circle it again … and then again … and then one more time. And then take a moment to think:

1. I know for a fact that my co-worker behaves in a way I know *I* never have or ever would.

2. I know enough about my co-worker's home and personal life to be sure that *nothing* can explain the reason for their behavior.

3. I'm sure my co-worker is the exact same aggravating person outside of the office as inside.

4. I can't think of *anything* to talk about with my co-worker that we would have fun discussing.

5. The time I spend being irritated and complaining about my co-worker is worth it.

6. Just letting go of how I feel about my co-worker is *not* an option.

7. Other people feel more hostile toward my co-worker than I do—I'm not the #1 complainer.

8. I am confident that no one I work with has *any* complaints about me personally.

Straight From Your Peers

*What do your fellow admins think about building strong boss/admin relationships? For years, we've posed tricky questions to our readers on the Admin Pro Forum (**www.businessmanagementdaily.com/admin-pro-forum**). Here are their answers.*

Q Is there any way to compete with admins who put in extra hours at home?

Just a few things to think about: They will have to continue to work those unpaid, unauthorized hours indefinitely if they want to keep up their "miracle workers" status. Along with putting the company at risk with the U.S. Labor Department, they are also jeopardizing their own jobs. I imagine that your IT department has something in place that shows when and for how long each user is logged into the system. This could very well catch up with them in the long run.

If I were you, I'd just continue to do the best I can and not compare myself to the others. Try to find shortcuts or steps you could even skip, if possible, in some of your work processes to speed things up. *—Karen*

We have a policy that if you are to work from home, you first have to apply to HR for approval. Once you have that, you then need to fill in paperwork to state that your workplace (home) meets a certain standard.

I also mentor our admins across our large group, and I often counsel them that if they start taking work home to catch up, there will be that expectation that they are able to do all the work they are given, and as a result more and more work will be given to them, and therefore more and more work will need to go home with them.

I also counsel that if they can't do the required tasks in the time frame given because their skills are not up to standard, they should enroll in courses via our eLearning site and complete the courses on their own time; or, if there is just too much work for one person, they should bring this to the attention of their supervisor and ask what is to be given priority. *—Jackqueline*

It might be helpful to talk as a team about the workload. When working for multiple individuals, it is easy for managers to increase the work they hand off and not realize that others have done it too—and no one has pulled work back. If it has increased and important deadlines are being missed or everyone is just stretched to the max, you may need to work with managers to identify the top needs, reprioritize the work flow and ask the hard question of who picks up the slack—and that could mean managers doing a few things for themselves. It just might indicate a need for more staffing too.

In the meantime, do your best to focus and prioritize your own work, stay positive and hold on to your goal of leaving work at work. *—Laura*

Q How can I politely remain private?

"How do you handle office gossipers who want to know everything you do whenever you're not at the office? I can't take a vacation day without my supervisor and another person on our team asking a ton of questions about what I'll be doing. Even if I take sick leave, I get questions about whether I'm OK, etc. What's a polite way to say, 'It's none of your business,' without being labeled a 'private person?'" *—Anonymous*

When asked about my personal business, I simply ask the person why he or she wants to know. When and if they state their reason, I tell them it's of a personal nature and I'd rather not discuss it with them. *—Anonymous*

Personally, I don't see anything wrong with being labeled a private person. One response could be, "Oh, those things we all do when we have a break from the office," and then move the topic back to the questioner: "What happened at the office while I was gone?" As for being off on sick time, how about something like: "Thanks for your concern. It's nothing worth talking about. What happened here while I was gone?" My theory is, if you deflect the question back to the gossiper, he or she will gossip about the office and forget about your absence. *—Linda*

Unfortunately, there's always someone who feels it's his or her duty or right to know what everyone is doing every minute of the day. Once you divulge information, people then feel it's your duty to tell them all the time.

I've found that if I smile and say (in a joking manner), "I'm sorry, that information is strictly on a need-to-know basis," most of the time they'll laugh and go about their own business. If you do this often enough, they'll eventually get the implied message.

With the ones who won't give up, I've kindly let them know that I don't wish to discuss my personal business. Yes, the people may feel slighted, but if you don't tell them the details of your private time, they'll decide to find a new target.

You have to decide what you want: your private time remaining private and chancing that someone may get mad at you because you aren't telling him or her what you do every minute of your day, or constantly feeding the "need-to-know people." —*Tammy*

Q How can I handle a nosy co-worker?

"One of my supervisors is so nosy that when someone's in my office asking me questions or talking with me, she'll respond to the question or discussion from her office, which is next door. When I end a phone conversation concerning business issues, she'll ask questions or give her opinion on the discussion. She reads and goes through things on my desk, our boss's desk and the desks of her other subordinates.

"Even if I'm in the hall talking with another co-worker, she'll walk by and include herself in the conversation. When she goes to the printer, she reads everyone else's documents. Everyone's very frustrated, but no one will say anything because she's very nice and they don't want to hurt her feelings. "What should we do?"—*Anonymous*

➡ If you're close to this supervisor (or maybe you could find someone who is), approach her in a positive way and explain how she's being perceived.

When I join in conversations, announce activities, etc., it's with the best intentions because I see myself as part of the group and want to be included in it. I would want to know if I was coming across as a know-it-all so I could moderate my behavior. My intention is to be as helpful as possible. I would want someone to tell me kindly and with understanding that I should change my behavior. —*Connie*

➡ If she's nice, it's hard to come down hard on her, and if she supervises some of you, your options are limited.

If you can figure out why she acts this way, it might be easier to address the problem. Maybe she doesn't have enough to do, she feels insecure about her position or she feels she has to show off her superior knowledge in front of her supervisor.

If you feel comfortable doing it, you can use some of the more traditional ways to handle a nosy person: interrupting when she interrupts you; firmly and pleasantly continuing what you were saying; breaking off a phone conversation and asking her, “Can I help you?” or “Will you excuse me?” and then staring her straight in the eye until she walks away before resuming your phone call; and covering or turning over papers if she comes within reading distance and tries to see them.

Looking through everyone’s desk is outrageous, and I would address that directly. Say, ‘Why are you looking through my desk? If you need to find something, let me know and I’ll be happy to get it for you, but I have personal papers in my desk, too. I’d prefer that you ask me instead of looking yourself. *—Anita*

Q How can I stop a co-worker from interfering in my conversations?

“I work with a woman who seems to think she needs to answer the questions that are addressed to me. We share an office space with a wall divider. When people come in and address me with questions, she answers them as if they’re addressing her. She comes out from behind the wall sometimes and joins my conversations. When the boss asks me questions, she doesn’t give me an opportunity to answer him; she immediately responds. She also boasts about herself and is very critical of others. So far, my only outlet is to just stay focused on what I’m doing and ignore her. Any suggestions?” *—Toni*

Politely interrupt her when she starts to answer questions directed to you by saying, “Excuse me, but I believe [insert name] was talking to me.” Then you need to answer the person’s question while making full eye contact.

Your officemate has developed a rude habit, but if you’re persistent, you may be able to help her overcome it. Stick to this behavior even if it feels awkward at first. Eventually, she’ll get the idea. If you have a good relationship with your boss, he will probably notice you’re being more assertive and that you can stand on your own instead of always being “helped” by your co-worker. *—Jalane*

Simply ask the co-worker (in a nice manner) to please stop the interruptions. This person may not be aware that this bothers you. “Say what you mean, but don’t be mean when you say it.” *—J. Willi*

Q Rating your co-workers: Is honesty really the best policy?

"The one thing I don't like about my new admin job is that we have to rate our co-workers every year! I'm dreading filling out that form. It asks us to rate people on a scale from 1 to 5 in a number of different work categories. The ratings are anonymous, but I'm afraid being really honest will cause resentment and strife if someone receives an accumulation of mediocre ratings. Realistically, wouldn't it be better to avoid giving 1s and 2s no matter how I feel, and just let our manager deal with visible performance problems?" *—Monty*

I don't mind getting or giving reviews with my co-workers. We do this on a regular basis, to make sure we're on track with our project needs, as well as personal growth. Not all criticism is constructive. However, when you receive an evaluation comment that doesn't go along with everyone else who provided the responses, it makes you stop and think about what that individual has or might have seen that might be improved upon … I have had co-workers who were not able to do the work they were hired to do, and we advised management many times that this was happening. It took several years for the individuals to be terminated because management wouldn't or couldn't see it for themselves, until it was almost too late … I strongly recommend honesty in your evaluations. Be specific with your comments and suggestions. You never know what the supervisors can or cannot see for themselves. *—Lynn*

Few of us are good at seeing our shortcomings. While it is kind to consider how others may feel, managers may need this type of honest feedback, especially if they don't personally see each employee in action on a regular basis. Your feedback may only confirm what the manager already suspects, allowing them to help an employee improve. Since we all have room for improvement, over time this approach has the potential to improve the entire team. *—Laura*

I think it is a terrible idea to rate co-workers. How could this be constructive? Personal likes and dislikes of others will show up on the form. Some people can separate their personal thoughts regarding a person, while others would take this as an opportunity to hurt them. Leave it up to the boss to rate your co-workers. *—Lisa*

If we are not honest on an evaluation of our peers and managers, we undermine the exact purpose of the exercise. Mature adults will accept less than stellar results as an opportunity to grow. Some employees are not even aware of their shortcomings and could overcome them if identified. If one cannot accept constructive criticism, surely that is a contributor to poor job performance. At this level a 360-degree evaluation is not for the purposes of a popularity contest. This is a tool to evaluate the strengths and weaknesses of an individual, and hence the entire team. *—Deborah*

I've been on the giving and receiving end of 360-degree reviews. Although nobody likes receiving them, if someone's performance really is that bad, the review should be accurate. For example, if the majority of co-workers think someone rates with the lowest couple of ratings, either this is not the right job for this person or it's a wake-up call to their supervisor that they need a lot of coaching. ... The two keys, in my own opinion, are to rate them based on their overall performance over the entire year (too often people only think about the last few weeks or months and let that cloud the rating for the full year) and keep personal stuff out of it. By that last one, I mean that even if you can't stand the person—they just grate your nerves on a personal level—if they actually do a good job then they should get good ratings. *—Mark*

Q How do you defeat the new job jitters?

"I've always hated the queasy 'new job' feeling that makes the first week at work so uncomfortable and uncertain, and now that I'm settled in as the head of my admin team, I really want to make new hires feel completely at ease from the very first morning they come to work for us. Does anyone have any tricks for getting someone to relax and take the first few days totally in stride?" *—Wallace*

We have a welcome breakfast during our huddle, and then sometime during the first week, the new person, the HR director and anyone else go to lunch and chat about all nonwork topics. This allows the person to get to know us a bit personally and find common areas of interest that don't involve the office. *—Judith*

The best way is to take the newbie around the entire building and give the grand tour; introduce as many people as you can and provide openings for conversations. A welcome lunch or breakfast is always a good icebreaker. Adding a welcome at the next staff meeting or team meeting works well, too. Allow and encourage the newbie to explore and look into cupboards to learn the area. The deer-in-the-headlights look will disappear over time. —*Lynn*

➡ Honestly, I'm always happiest when one of the bosses brings in food! It may be bagels, but it gets our group in a more relaxed state; and we have the opportunity to talk for a few minutes, which helps build rapport. —*A.*

➡ We have a first-day pizza party whenever someone joins the staff, and everyone signs a "Welcome to the team" card.

Another thing we do that doesn't necessarily help the first day, but definitely the first week or two, is a "Tell us about yourself" questionnaire. The person answers this ahead of time, and at the next staff training session (we have these every other Tuesday for an hour before we open) someone asks them the questions, and the new person answers them. It's a quick way to not only get to know the person, but to find out what things you have in common with them. We've found that it aids quickly in bonding. —*Mark*

Q When is it OK to mention a co-worker's dramatic appearance change?

"A co-worker recently came back from a vacation during which she obviously had some cosmetic surgery done. We've all been pretending not to notice, since we're not sure how to compliment her new look without making her feel self-aware about how she accomplished it. Is this a case where we just need to keep mum even if we think she might possibly like that someone noticed the change?" —*Frannie*

➡ Maybe it's just because I'm a direct person, but I don't know why people feel the need to dance around the issue. If she looks great, what's wrong with just saying, "You look great; I like the new look"? After all, if someone who was overweight lost 50 pounds through exercise and diet and looked a lot better, you wouldn't hesitate to compliment that new look. Why should it be different just because this change was artificially done? —*Mark*

➡ We once had someone in our office who got collagen injections in her lips, and it was the sort of thing that we thought she might like her co-workers to forget about quickly since it was certainly not done with her job or any of us in mind. It was just kind of an awkward glimpse into her personal life in a way.

There are also some things that people do as a kind of "shortcut" to a better body, and I can see where it might be a little embarrassing if people you see on a daily basis obviously know you took that shortcut. I think I would just wait until that person brings it up somehow. *—Gail P.*

I think the answer is, "You look great!" and leave it at that. That way, if she wants to reveal how she got that way, fine. If not, you haven't specified or called attention to the surgery and could just have easily been talking about her new blouse. If she doesn't look so hot, probably the less said the better. I don't think I'd say she looked great unless I meant it—she might not be happy with the end result and is self-conscious about it. *—Jennifer*

Q Hired, then abandoned—how to become part of the team?

"I was really looking forward to working for the company that hired me a few weeks ago, but right away I got the sense that no one was very interested in making me feel like I was a valued part of a team. I wasn't introduced to anyone but my boss, and no one sitting near me has introduced themselves. I won't be working with them directly, but it still feels uncomfortable to go into work each day with strangers who seem to want to remain strangers. What course of action would you recommend to a person who's shy and doesn't want to walk around telling people who I am?" *—Maddy*

If you're allowed treats at your desk to share, I recommend you bake up a batch of cookies or bread, or get to the store to buy some. Get something nut-free, sugar-free or gluten-free if you can. This should cover most of the major dietary issues; just remember to label all items appropriately and keep the items with nuts away from everything else. … Walk around the office, stop at each person you see and introduce yourself while at the same time inviting them to partake of your goodies. You can say that you've just recently started and during that hectic time, you just weren't able to stop by to say hello. This should break the ice with some of the workers, who may be feeling as shy as you are. Those who are on a special diet will be impressed you took the time to think about those needs. *—Eline*

Speaking as a former shy person, I know how it feels to be in a room full of new people. Being that nobody acknowledges you, I wonder if there is an underlying reason. Is the turnover really high? Do the people not think it's worth it to get to know the new kid? Did somebody leave who they really liked? Is it a bad work environment and people just want to do their jobs and not be messed with? Do they talk to each other a lot? I work with a very friendly group of people and it's just odd to me that nobody would at least extend a hand of friendship to you.

I agree with the others—try to find the friendliest person. Or notice things on other people's desks: pictures, sports memorabilia, anything to be an icebreaker. Or if you see another woman wearing a pretty shirt or shoes, people love compliments. If you discover people's passions and interests, it will free up the shyest person's tongue. *—Annabelle*

As a shy person myself, I am greatly relieved when someone else is the first to introduce themselves and start conversation. Alternatively, it could be that they are thinking the exact same thing about you, wondering, "Why won't the new person come introduce herself to me? She must want to remain strangers." *—Mark*

My recommendation is to prepare a one- or two-minute "elevator speech." (I do this before I go into any new work environment; I worked as a contractor for three years.) End with a question asking what their background is. As they reply, find something that suggests they may be a go-to person in a certain area. Then ask if you can rely on them to assist you in that area as you familiarize yourself with the company. This has worked for me in many cases. *—Laurie*

Q What to do when the staff sees office supplies as fun freebies?

"We're having a real problem keeping office supply costs in check. When things are supplied for people free at work, they seem to get extra careless about their use, and the number of pens, sticky notes, plastic spoons, paper towels and cups we go through is staggering and expensive. Our admin team has been trying to come up with signs to place in the supply area and the kitchen reminding people that these costs add up. What could we possibly write that would have an effect?" *—Sula*

We have a huge workroom that unfortunately doesn't have many supplies in it because employees can't be trusted to take only one or two of what they need. Most of our supplies are locked away, and I take monthly inventory of everything (every box of staples, every pen, etc.). We also have "shared" items, like masking tape, that must be returned when the user is done. No one is happy about it (especially me, who has to police these items), but we've managed to keep things in stock longer that way.

To actually answer your question, there is no sign that will deter people from taking what they want. I'm pretty sure people know they're taking more than they need in the first place! Maybe the boss could address the issue in a staff meeting and state that "no more supply orders will be placed until xxx date" and that once items are gone, everyone is just out of luck. (Just be sure to set aside your own supply in a separate place so you can get by.) *—Jenni*

We have 300+ employees so we know firsthand how expensive these supplies cost. To offset, we stopped providing paper plates and cups. If a lunch is brought in, we negotiate with our caterers to include plates, cups, utensils, etc., at no additional cost. For the rest of the office supplies, everything is in a locked closet—only the facilities men and myself have the key. When we have a new hire, we set their desk up with the essentials only. I have been cutting all scrap paper into four parts and I pass that out to employees to use as sticky notes (everyone has a glue stick).

To further add to savings, we have three coffee machines in the building and you have to pay 25 cents for a cup. That money goes toward the cups, sugar and milk. It was tough to gain acceptance in the beginning, but everyone is now on board and you would be amazed at how much money we are saving! *—Karen*

When it came to cutting supply costs at my previous hospital job, we were not allowed to order any supplies for about three months except for paper. During that time we set up a supply exchange space after we cleaned out all hidden areas of supplies. Individuals could "shop" there when they needed something. We also created a distribution list for all the assistants so one email could request a needed supply. You would be amazed at all that was stored in out-of-the-way places. *—Cheryl*

I used to keep all of our stock in our open supply closet, and I was replacing handful upon handful of pens and pencils every day, particularly around the beginning of the school year. I've found that if an employee sees only five pens left in the closet, he's less inclined to take more than one.

Strangely, it seems to work. Batteries, which kept disappearing around Christmas, are now kept in my office. I know what equipment we have and the type of batteries each takes. If an employee needs batteries, he brings the old ones to me (to ensure that they will be disposed of properly), and trades them out for new ones. Finally, I'm the only female in a department of 35 linemen and engineers. I've learned that if I fuss at them a little in a joking manner, they usually take the hint, and that holds true for most things! *—Ce*

Q The job's fine—but what if the atmosphere puts you to sleep?

"I've been at my new admin job for three months now. It's going fine, except the place where I work has to be the stuffiest, least fun company ever. It's totally quiet all day with almost no interaction, and there's no real culture, no fun events to look forward to. If it weren't for brief friendly words in the kitchen with co-workers now and then, I think I'd go nuts! I don't expect to be able to change the office's ways—I'd just like to know how others have managed to stay upbeat and energetic in a sleepy atmosphere like this." *—Madison*

Maybe the reason they don't have fun is because no one's taken the initiative. Get permission first (either from your manager or HR) and if you get the go-ahead, maybe plan a little lunchtime gathering. It doesn't have to be a big deal, and it doesn't have to be expensive. You could order in pizza or do a potluck. I always bring the fun to my job. I also decorate my workspace for whatever holiday is coming up. It causes people to stop and comment, and brings a smile to people's faces as they walk by, even if they have nothing to say. *—Paula*

Be the change! Plan an after-work social, bring donuts on a Friday, send a personal note to someone who made your day, plan a potluck lunch on a holiday or special week, and on birthdays give a card or a cookie. The list is endless on how you can show others how to enjoy work. Some will join you and others prefer not to, but don't let it inhibit your initiative. There are many low-key things you can do to begin being the change. *—Tari*

I am the only admin in an office full of engineers, and my office is apart from where they all work. I started putting candy on my counter, and they have gradually started stopping by and chatting a little. *—Sara*

I too did the candy jar thing, and put my own spin on it by getting a cowgirl hat, as I'm a cowgirl at heart. People started stopping by, making comments and taking a piece of candy. It was a great idea to "break the ice" and a great conversation starter. *—Peggy*

Q Should you try to rescue an abrasive co-worker?

"I have a co-worker who is good at her job but keeps getting in her own way with her many personality quirks. She just comes off as insecure, untrusting, high-maintenance and loud. Little by little the team is abandoning her in subtle ways. I'd like to know if I should help her merely by being patient and loyal, or if it would really be better to explain to her why exactly it is that she has so few allies left. And how would I even do that?" *—Morgan*

Quirky personalities can be tricky, and losing allies is the opposite of success for administrative professionals. I had a similar co-worker on my team and I wanted to help improve her reputation, so I took a multi-pronged approach. Here are my suggestions:

1) Kindly ask them if they are willing to receive feedback about your observations. They may not be open to it, and that is their choice. No point of taking their unwillingness personally.
2) Talk to their supervisor confidentially about your observations; and ask how you can be supportive of the situation.
3) Find professional development articles targeted that could benefit this specific co-worker and share with your entire team.

Sharing information broadly with other administrative professionals in your workplace will help more people and not make anyone feel singled out. You can share additional articles about other topics in the future so it is not obvious that you are intentionally targeting one person about a specific issue. *—Leisa*

My thought is to have a brief conversation letting her know you have heard/observed some things, and if she would like some feedback, you would be happy to share some thoughts (in the vein of helpfulness, not criticism). If she asks for feedback, keep it short and factual, then finish by saying you are there for her. *—Kimberly*

As many have commented, I agree that you should first ask her if she is open to you discussing your observations. Many people will become automatically defensive if it is not handled properly. If they give the okay, then I'd proceed with helpful feedback. It might make all the difference in the world.

I'll use myself as an example. I am by nature not a people person at work; I value my privacy and don't talk much at all about my personal life. That means I don't, or I should say, didn't ask co-workers about their lives or their weekend/holiday activities, etc. It took someone sharing observations with me to realize this was putting a wall between me and co-workers and was alienating them.

It was suggested that I follow the "fake it until you can make it" approach, where I pretended to care about what was going on in their lives until I actually did care, and it worked! Others have commented that I show a lot more interest in them than I did before. I still don't talk about my life outside of work much except for my pets and the animal rescue groups I am with, and everyone is okay with that. They respect my privacy, but appreciate that I regularly share an interest in their lives. This never would have happened without helpful feedback. *—Mark*

3 Taking Control of Your Career

Beyond your relationships with your boss and others in your organization, there is one more person you need to pay close attention to each day: you. If you don't watch out for and promote yourself—selling your boss and higher-ups on your abilities, negotiating the best possible salary, keeping your future on track—no one else will.

Regardless of how good you are at your job, you can bet money that the day will inevitably come when you slip up and make a mistake. But it's not the end of the world—it's just a question of knowing how to handle it.

Promoting Yourself and Your Achievements

When you encounter company executives, do you smile and initiate a conversation? Do you make small talk? Or do you use the opportunity to talk about the good things that you and your boss have accomplished?

Some administrative professionals may believe that they should take a passive route and keep the encounter light. Generally, however, most successful administrative professionals work hard at promoting the work that they and their bosses accomplish as a team. They realize that their reputation for professionalism results, in part, from spreading good news about what they have done. It is vital, they believe, to display their full range of interests and talents, as well as their involvement in and concern for the organization.

The key then is to start talking. The next time an executive is standing near your desk waiting to see your boss, start the conversational ball rolling. Or take advantage of that elevator ride with your boss's boss, or a break during a video call with top management, to initiate a conversation.

Just what should you say? Here are some suggestions:

Talk about outside interests you share. Do you and the executive work remotely from the same area? Do you share a common fascination for the Yankees? By making contact on a personal level, you help bridge the status gap. It's much easier, then, for people up the line to see you not only in your administrative role, but also on the personal side.

Express interest in what others are doing. If one of your company's vice presidents has just returned from a meeting in Chicago, they will be impressed and flattered if you ask them how it went. The more specific you can be about the business that took them there, the better. So if you know that they gave one of the main speeches, ask them how it was received. Or, if you know that a manager's group is working on a big project, remark that you have heard great reports about their progress. Not only will you learn something from these conversations, but also you will signal your interest in what's going on in your firm.

Complimenting a colleague on a report or speech they recently presented is a good conversation starter. A measured amount of sincere flattery shows others your good judgment and discernment. It also marks you as self-confident. Some people are reluctant to compliment those on higher organizational levels, but the fact is, everyone, regardless of position in the organization, appreciates hearing about a job well done and receiving praise.

Talk about the work you and your boss are doing. Providing interesting information is one way to connect with others and make them more receptive to sharing news with you. If you know that an executive is interested in a speech your boss is going to make, you might comment on the group your boss will be addressing and some of the research you have conducted for the speech. Or, if you think an executive who is waiting to see your boss might be interested in a complimentary letter you received from a client, ask them if they'd like to read it.

Mention news you've read about your business or industry. A clear indication of your professionalism is evidence that you are knowledgeable and interested in what the organization is doing and where it is headed. A good move, therefore, would be to talk about an article you've just read or a discussion you heard at a recent seminar. By doing so, you are showing that you are career minded, not merely job oriented.

There are many advantages to letting key people in the organization know how intelligent, involved and serious you are about your work and your company. Your boss will regard you more highly as he sees the respect you have earned from higher-ups. And you'll find that this won't hurt at all when it comes time to ask for a raise.

Negotiating a Raise

Asking for a raise is probably one of the most difficult issues to discuss with your boss. It requires both of you to assess your job performance and come up with a mutually agreeable settlement. Some people start out at a disadvantage: They hate talking about money.

Don't feel embarrassed about asking for a raise, especially if you are not being paid what you believe you deserve. Take an active role in rectifying the situation; don't wait for your boss to come to you. Asking for a raise demonstrates two important qualities: initiative and pride in your work. Keep in mind that if you are a good employee, your boss is likely to do what they can to get you a satisfactory raise. Of course, your company's financial condition and the general economy may factor into your raise, but they should not stop you from asking, nor keep your boss from trying.

The key to asking for a raise is to proceed carefully. A well-planned strategy is absolutely essential. In a nutshell, you must be able to demonstrate some tangible work-related reasons that warrant a raise, and you must give a realistic picture of ways your work will continue to benefit the company. Here is a plan to help you present your case effectively:

Know your market value. Do some research on administrative salaries in your geographic area and industry. In many cases, the best way to get this information is to use your professional network. There may be online salary surveys for your profession in your geographical area—find out. Visit the Bureau of Labor Statistics' website (www.bls.gov) or sites like Salary.com and Glassdoor.com to see how your salary and benefits compare to others'. Your state labor office may also be able to provide you with some guidelines on salaries.

Obtain as much information as you can, and look at total compensation, base salary, benefits package, annual or quarterly incentive pay (such as profit-sharing plans and deferred retirement plans) and related perquisites. Know ahead of time whether you are asking for more money alone or for more benefits as well. For example, would you like to gain more flexible working hours or child care or education benefits? If so, plan exactly how you will bring these up in the discussion.

Gather "inside" information as well. Know your company's policy on raises before going in, and familiarize yourself with its current financial condition. Researching this information ahead of time shows that you have done your homework and are serious about your request. This information will serve you well as you think about the amount of additional pay or what added benefits you would like to receive. If, for example, the average pay raise last year for employees in your firm was 4 percent, a request for a 10-percent raise would probably be viewed as unreasonable.

Be aware of any salary and raise ceilings. It could be that your company has implemented a salary freeze or imposed a maximum percentage for any annual increase. If so, know what those figures are before you approach your boss to ask for a raise. If you discover such policies are in place, should you back off from asking? Not necessarily. If you can demonstrate to your boss that you have taken on many new duties and you enjoy a good working relationship with them, they may be willing to argue with upper management that you deserve a raise exceeding company ceilings.

Make a formal appointment. Don't confront your boss unannounced and start talking about a raise. Instead, schedule a time that's convenient for both of you. Try to make the appointment in the early morning or late afternoon, when the phones ring less frequently.

Make the presentation. Use the following effective strategies to make your case:

- **Get down to business quickly.** State simply that you want to ask for a raise and begin presenting your case.
- **Start with a point on which you both can agree.** If you recently heard your boss comment on his satisfaction with the department, you might say, "I think we both know that operations in our department have never run so smoothly." Or you might say, "I think we can feel good that customer satisfaction has soared, thanks to the changes we've made." This approach sets up a cooperative atmosphere.

- **Present a solid record of your accomplishments,** and rely on it as your key negotiating tool. Avoid saying, "I need more money to pay my bills" or "I've demonstrated my good work, and I deserve a raise." In general, these statements are not well received. It's your track record and your value to the firm that you should point out instead. Note especially those extra projects that you took on and the initiative you showed in going above and beyond your narrow job description. If you are part of a team who report to your boss, they may not be fully aware of your individual contributions.
- **Present complimentary letters** and other forms of recognition from clients, customers and colleagues. It is legitimate to point out any documents that will back up your argument for a raise.
- **Keep your tone positive.** Present your raise as a win-win situation. You've demonstrated your professionalism; more money will help you devote more energy and enthusiasm to your work. Again, focus the discussion on your past performance and the commitment you have demonstrated to your boss and the firm.
- **Name a figure without waiting for your boss to take the lead.** Refer to—and be ready to show—the support documentation you gathered before the meeting.
- **Control your body language.** If your boss says there are experienced administrative professionals in the company who do not earn the figure you are asking for, be careful not to nod in agreement. Rather, wait for them to make their next point, and don't be afraid of silence. Although it can be uncomfortable, silence allows both you and your boss to digest what has been said and to consider the direction the conversation should take.
- **Say no to a figure that's too low.** If your boss offers a raise of any kind, even if it's lower than you asked for, you have won a victory that you can probably make better. "Say that the offer is not enough, and wait for the next offer," advises one personnel director. "Often you will tack on a few percentage points by this simple approach."
- **And finally, ask when.** If you are leaving the session with a raise in hand, ask when it will become effective. If you have not been successful, ask when you and your boss can discuss the issue again. In three months? Six months?

Making a Win Out of a Loss

If you are about to emerge from your session without a firm offer of a raise, strive for a conditional agreement. You might ask whether you can discuss a raise again when you have reduced staff absenteeism by another 10 percent, for example, or increased the number of orders processed in your departments by a third. When you meet your part of the agreement, you are then free to approach your boss and say, “I’m ready to discuss a raise again. What would be a convenient time for us to meet?”

If there is something blocking your raise, such as a wage freeze, seek other rewards that your boss may be able to grant you. Try more supervisory or project management responsibility, more autonomy or a chance to interact directly with top company executives. Have ready a list of projects you would like to undertake, along with profit or cost-saving projections to show their benefit to the company. Such rewards build a foundation for future success—including higher pay—and they do not force your boss to exceed his budgetary limits.

Coming Back After a Mistake

You’re moving along smoothly in your career, working well with your boss, co-workers and other colleagues throughout the company. Then it happens. You make a mistake—and a pretty serious one at that. Maybe you said something in a meeting that has put your boss or your department in a bad light. Or perhaps you sent a memo with a major error to a client. Or maybe you lost an important document or missed a critical deadline.

You can turn things around—and perhaps more easily than you might have thought. Here’s what you should do:

Take an “I’m responsible” approach. You may believe, and rightly so, that you are not completely at fault. Someone or something else is involved. That aspect of the situation can wait, though, until after the mistake has been rectified and you have determined why it happened. No, you shouldn’t be the “fall person” for everything that goes wrong in the office. But a simple “It was my responsibility” makes it clear that you hold yourself accountable for all the work you oversee. That’s the professional approach to take.

Come up with possible remedies. Once the damage has been done, it's time to determine how to rectify it. In some cases, you may be able to come up with the answer yourself. In others, you may need assistance from your boss or co-workers in another department. If so, don't hesitate to ask for it. The immediate need is to find solutions to the difficulties the mistake has caused. The sooner this is done, the better for everyone involved.

You can't beat the Sunday night blues … can you?

You know that feeling: The week is done, the sun is setting and there's nothing left to do but wait for Monday to begin again at a job that's not 100% thrilling … ugh. One way to fight those blues is to deliver a shock to Sunday night's system by doing something well out of the ordinary. Turn off the TV and take a quick road trip, a hike, a swim or just sit with a cup of coffee somewhere totally new. Make Sunday night think it's Saturday and your smile will return.

Analyze why things went wrong. When all the fuss and furor have died down, take time out to try to piece together the events that led to the mistake. Who and what were involved? When did the problem begin? Again, this is not an exercise in blaming others or castigating yourself. Rather, it's a positive attempt to ensure that the same mistake won't happen again. To do that, you'll need answers to questions like these:

- Has your schedule become so hectic that you no longer have time to double-check important work, either your own or that of the people you supervise? If so, a discussion with your boss might lead to lightening your workload or some additional help.
- Were you given all the reliable information you needed to complete the project? The reasons for not having it will vary from situation to situation. (The figures that Manager A sent you were out of date, Accountant B gave you the wrong client list and so on.) But if you've had similar difficulties in the past, you'll have to find some way to avoid them in the future.

- Were you tripped up by tried-and-true procedures and routines that may no longer be equal to present-day demands? If so, you might want to suggest changes to bring them up to date.
- Can you pinpoint certain danger signals that should have alerted you to the fact that something was going wrong—a colleague was falling behind, for example, or a clerk in another department was not being cooperative? If so, can you devise a system that will make you more aware of such signals in the future?

Forgive yourself. Whatever you did or said, it wasn't representative of you at your best. However, if you continue to berate yourself, you won't improve. Admit to yourself that you made a mistake—then let it go. Relegate the incident to history and focus on the present. This stance will encourage others to do the same and channel your energy in a positive direction.

There are two ways to view a serious mistake: as a defeat or as an opportunity to learn and improve. If you take the latter view, you will stand to gain far more than you lose in the long run. You'll embark on a process of constant improvement and, as a result, you'll find more variety and enjoyment in your work.

Turning failure to your advantage

President John F. Kennedy's popularity soared after the botched Bay of Pigs invasion. Why? Americans admired how he accepted responsibility for the plan gone awry and displayed such forthrightness. Psychologists call it the "strategic pratfall effect" because you enhance your stature by demonstrating your mettle in the face of humiliation.

Taking Stock of Yourself

You know what your job is all about. It's juggling a million things at once, making dozens of people happy, keeping up with the latest technology, responding to requests both simple and impossible—the list is endless. But you do it and, what's more, you're good at it!

Nonetheless, from time to time, it's worth taking time out to make sure you are practicing the basic skills of your profession. Inattention to the basics could be a real career killer for any professional. That's why we have identified what we consider the 10 essential responsibilities that administrative professionals share:

1. **Serve as an effective representative of your boss.** In many ways, an administrative professional serves as a stand-in for their boss. Whether you are greeting company visitors at the door or interacting with people on the phone, your job is to convey your boss's image. Naturally, you have a style and image of your own, but you must modify it as needed to represent your supervisor effectively.
2. **Keep track of information in an orderly fashion.** Sloppiness is a cardinal sin in your profession. Part of any administrative professional's job is to process and retrieve information quickly and neatly, regardless of where it is stored.
3. **Honor confidences.** Correspondence and memos that administrative professionals are privy to often contain confidential information that needs to be protected. Always remember that some of the knowledge you have may be sensitive. Attempt to understand the importance of all information being given to you so that you do not inadvertently betray that confidence.
4. **Meet deadlines.** This is a basic rule of administrative performance. Work is expected to be delivered in a timely fashion. If chances are good that a deadline will be missed, it's your responsibility to inform your boss well ahead of time and to suggest ways the problem can be solved.
5. **Maintain high standards in all written work.** The ability to produce letters, emails and reports that look professional and are free of misspellings and grammatical errors is absolutely essential in this profession. Good written work should be any administrative professional's pride.
6. **Communicate information to your boss quickly.** Many relationships between administrative professional and boss have been damaged by the failure to convey information quickly. It is vital to find some way to get important messages and information to your boss in a matter of minutes. Developing a rapport that fosters this communication is up to you.
7. **Manage time skillfully.** Since many bosses do not manage their own time well, administrative professionals often serve as the gentle "prods" that keep a boss moving on schedule throughout the day.

It is vital for an administrative professional to be able to arrange her boss's schedule in an efficient way, allowing adequate time for meeting preparation, materials production and travel.

8. **Keep current with new technology.** In today's technological world, it is essential for you to stay current on new computer systems and software for writing, spreadsheets, remote communications and other applicable types of technology used in the workplace. As artificial intelligence continues to evolve, AI is proving to be impressively helpful for administrative professionals. Recognizing your deficiencies in this area and suggesting to your boss appropriate ways for you to gain this knowledge are your responsibilities.
9. **Be willing to give extra time to your job when needed.** A requisite part of the administrative position is a willingness to log extra hours in "crunch" times. Your willingness to do so, within reasonable limits, will reinforce your reputation as a professional.
10. **Adopt a standard of excellence.** There is much talk about "excellence" and "quality" in business today. Part of the distinction that an administrative professional brings to their job centers on providing that excellent, high-quality service to their boss, their company and the people with whom they interact on the job. It's not always easy, but high standards and hard work can bring endless satisfaction and pride to both you and your company.

Don't Sabotage Your Career

Let's take a look at the common pitfalls that can affect your job performance. These hazards can have serious repercussions for your career:

Not accepting responsibility for your mistakes. For instance, you're overwhelmed by work and you blame your boss. Ask yourself, "Could I have contributed to the problem by not planning properly or by failing to say no when my boss gave me a new assignment I knew I couldn't handle?"

Expecting failure. You basically get what you expect out of life. Program yourself to win by visualizing yourself giving an excellent presentation or accepting well-deserved praise from your boss. Adopt a positive, can-do mindset.

Engaging in self-judgment. If you are usually your own harshest critic, you'll tend to misread others' reactions to your work. For instance,

Make your commute … longer?

One method of dealing with stress is to put an end to the mad rush that makes your trip to work an unconstructive blur of fighting with traffic and looking at the clock. The longer your commute, the more likely you are to reach a state of calm and truly unwind; more miles and more time put valuable psychic distance between you and the things weighing down on you on either end of the trip. The key is that those miles need to be free of distracting competition, so back roads beat highway every time.

you may misconstrue your boss's cool response to a project you've already completed. Be honest about your strengths—and work to shore up your weaknesses.

Suffering failure paralysis. Don't let past setbacks keep you from moving on to new challenges. Successful people analyze failure, then decide what they can do differently next time. And don't expect perfection right away. Remember: Every new skill, task or assignment has a learning curve.

Forgetting your personal goals. If you often have a nagging feeling that you're wasting time, write down what you want out of your job and your life. By keeping these goals in mind, you'll be less likely to procrastinate.

In the next chapter, we'll help you focus on your career goals.

Planning Your Career

How do you see your career unfolding? Will you be content to stay in your present job until you retire? Do you want a better administrative job within your company or with a new employer? Or do you want to move into a totally different field, such as sales or management?

People who plan their careers move ahead more consistently and rapidly than colleagues who leave their progress to chance. Career planners decide how long they want to commit to a particular phase in their career and decide when it's time to move on and explore other opportunities. Yet, curiously, few people take a strong, active role in planning for their own success.

How do people fall down on the job of keeping their careers on track? These are the major areas that many seem to neglect:

- Keeping up-to-date professionally through staying up-to-date on social media, reading, studying and networking.
- Gaining valuable new skills that can create new and challenging career opportunities.
- Planning for job transitions and/or second careers.

Just as successful organizations routinely define their objectives, you can set your own objectives and then create a customized career strategy that will work for you. The logic behind goal setting is simple. If you have a map on which you mark your destination (a long-range goal) and then outline the route you'll follow to get there (a series of short- and midrange goals), you have a better chance of moving ahead than if you look at the map and think vaguely, "I'd like to go somewhere. I hope I'll succeed."

Goal setting builds the habit of organizing priorities and time so you can focus your energy more productively. You will have a straight path, as opposed to the circular one of people who lack direction.

Determining What You Want

Close your eyes and visualize yourself in the ideal work environment, as you see it. If you draw a blank (and some people do, at least initially), make the following lists:

- Things I enjoy doing.
- Things I find easy to do.
- Things I have received praise for doing.

Then draw from each list to create the ideal picture of where you want to be and exactly what you want to do. For example: assistant to the vice president of finance, earning $10,000 more in salary, supervising others. These, then, are your career goals. To determine how sensible they are, run each of them through this goal checklist:

- [ ] **Is this goal specific?** Pin down exactly what you want. "To make more money," for example, is not a workable goal. "To earn $10,000 more per year" gives you a definite target.
- [ ] **Is it realistic?** Daydreaming is a good tool for getting yourself started. But once you have created an image of what you want,

Can making a very simple list reveal your calling?

Discover your true passion by creating a three-column list, says career counselor Karen James Chopra. In the first column, write down every job you've ever had (including that lifeguard gig you had one summer). In the second, list what you liked. In the third, what you disliked. "I promise you," she says, "themes emerge."

you may have to modify it to make it attainable. For example, you might like to have your boss's job in, say, three years, but if you know that's not possible, you will have to reshape it into something more realistic: to hold a supervisory position in the organization, perhaps within two years. It's important, too, that your goal be in line with your talents and abilities. If you are a whiz at math but are not creative, aiming for a copywriting job would not be a realistic goal. A position as an administrative assistant in a financial institution would be a much better choice.

☐ **Is it compatible with your other goals?** Your dream exercise probably produced several goals: the position you want to hold, the salary you want to earn, the location where you want to work, the academic credentials you will have to earn. You're aiming for a total package, so make certain one goal doesn't cancel out another. For instance, if you want to break into the publishing business but would also like to move to a rural area, you might have to change one of those goals.

Now, for each long-range goal, list the steps you will have to take to reach it. These are your midrange goals—things you can accomplish in one to two years. Put them in priority order. Now list the steps needed to get to each midrange goal. These are your short-range goals—things you can do in one to four weeks. Prioritize them as well.

Here are examples of the three types of goals:

- Long-range goal: Become a management trainee in my company within three years.
- Midrange goal: Finish my associate degree in business in the next 18 months.
- Short-range goal: Obtain college catalogues this month.

Getting Started

Beginning something new usually involves breaking old habits and forming new ones, and that's not always easy. You can help yourself along with this three-step action plan:

Step 1: Make a commitment. New habits are easier to form when you have some sort of contract to live up to. That's one reason why diet clubs are so popular. Once you have made the commitment to yourself, formalize it by repeating it to someone else. You might try the "buddy system," whereby you and a friend or co-worker make a pact to complete your goals by certain dates and schedule "appointments" to follow up. Or, you might ask your boss or mentor to be your sounding board and have discussions on a regular basis.

Step 2: Take one step at a time. Big successes are built in small increments, so begin by listing on your calendar each day one thing you will do tomorrow to advance toward a specific goal. Make the actions simple ones at first, such as buying a book for home study or looking up potential courses of interest on websites like Coursera. The purpose is to get into the habit of working on goals, to show yourself you can succeed in reaching them. Small successes add to a feeling of accomplishment, which in turn can make it easier to stick to all the plans you've made.

Step 3: Build a routine. You have been methodical in planning your goals. Now it's time to carry through in your approach to reaching them. Just as you schedule time for the duties you perform for your boss, spend time each day on your goals. That means writing letters, making calls, doing research on the Internet, reviewing steps you have completed and planning future ones.

Choose a time when you can be alone—it might be the last 15 minutes of your lunch hour, the afternoon coffee break or a half-hour before the office opens. Just make sure you do it consistently on a daily basis. A regular routine reinforces commitment.

An Alternative Approach

After considering this advice on goal setting, you may find it difficult to project into the future. You may have virtually no clue what you would like to do beyond your current position. You're certainly not alone.

If you talk to successful people today, chances are they'll say candidly that their current activities did not result from following a 10-year plan but rather from a combination of hard work and good luck—"being in the right place at the right time."

If your dreams are eluding you, one interesting approach is to adopt a series of short-term strategies rather than long-term ones. Here are some you might want to consider:

Start telling others that you want a career. People can't know what you're thinking or how you're feeling unless you tell them. If they don't know, they may make assumptions about you that are off track. For example, if you have been in the same job for a number of years, people may readily assume you are content and not interested in making any great change.

Certainly, your boss should know about your career aspirations. But don't overlook other managers who might provide job opportunities. You never know when a good word from someone else could get you moving in the right direction. A contact of yours might have a friend who is looking for someone to fill a certain position. "Ah," your contact says, "I think I know just the person for you."

Break the clock to convey your dedication

What would you think of someone who finished work at exactly 5:00 p.m. every single day, not a minute sooner or later? Maybe that they had made a habit of keeping a very close eye on the clock, unwilling to spend a moment more working than they absolutely had to. A "work to rule" employee like this comes off as less engaged and dedicated than someone who sometimes departs 10 minutes later—or even earlier—so try to shake up the routine.

Don't narrow your sights unnecessarily. Unless you have very strong feelings (you either love being an administrative professional or dislike it; you're dedicated to the idea of returning to school to enter a certain profession), it's probably better not to confine yourself to a specific career path. If you do, you narrow your options, possibly closing out the opportunity to take advantage of an opening you had never expected. Let's say that, as an administrative professional, you believe your only possible step up is assistant to the president. But the incumbent obviously has the job sewn up for as long as they want it. So you let it be known that you are tired of administrative work and would like to get into something else. Then, astonishingly, the president's assistant quits. In light of your expressed preference, however, nobody considers you for the job. That's a scenario you obviously should avoid.

Talk to the right people. At a minimum, this includes the person in your organization who handles recruiting for administrative and entry-level staff positions. In many organizations, the people in these jobs are also involved in developing career paths for employees who want to advance. Thus, it pays to keep in touch with them, ask about possible paths to advancement, discuss your interests. Aside from what you may learn from them, you also want to make sure your name comes to mind when opportunities open.

Consider further training. Taking work-related courses will not only give you credentials but also demonstrate your seriousness about advancing in the organization. You might take courses in accounting, business law, management—anything that can improve your skills in your present job and qualify you for other positions in either your present company or another one.

Many successful people say they have achieved their positions through a "haphazard series of coincidences." The fact is, they undoubtedly helped those coincidences happen by being tops in their jobs and demonstrating that they welcomed greater responsibility. There's no reason why you can't follow this path too.

Straight From Your Peers

*What do your fellow admins think about how to make sure you're making your job part of a fulfilling career each and every day? For years, we've posed tricky questions to our readers on the Admin Pro Forum (**www.businessmanagementdaily.com/admin-pro-forum**). Here are their answers.*

Q How can I receive more recognition from my boss?

"I'd like to know how to get more recognition in my office without bluntly pointing out to my boss everything I do. Sometimes, I don't think he realizes all that I'm in charge of: administrative duties (booking events, helping my boss with work, taking minutes for board meetings), marketing duties (creating statement inserts and newsletters), technical support (helping our members with online banking issues and staff with computer problems), keeping our website up to date, and more.

"I know I can simply tell him that I do A, B and C, but I'd like to show him so that he recognizes it himself. Is there a good way to get credit for my duties without barging into his office and telling him?" —*Anonymous*

Submit a weekly status report to your boss. If you like, you can schedule a weekly meeting with him to go over your status report and discuss it face-to-face for more impact.

In your report, list your accomplishments for the week, including any processes you implemented, difficult situations you resolved and areas you'd like to improve. You may even want to recognize someone who helped you, mentored you or just did a great job with an assignment that benefited you. End with a few sentences about your focus for the following week. Keep these reports for your records. When review time comes around, you'll find it easier to talk about your accomplishments and your areas for development. The reports will also come in handy for updating your résumé. —*Marie*

My previous employer made comments that showed he didn't know how much I did. I began printing my completed task list from Microsoft Outlook and leaving it on his desk every evening. Soon he was telling me he didn't need 'that report' and stopped saying I didn't do anything.

For my current employer I create a one-page summary of the week's projects. Each project shows a brief list of some activities and a color-coded field showing the status (Done or In Process). The report also has columns, if needed, for the next step to take, a question to my boss about the project and his comments. I don't include many of the daily items, such as answering the phone, but may note an important call I made to solve an issue.

This helps him keep up to date on projects, gives us another opportunity to communicate, helps me focus on the most important projects and documents some of my work. —*D.L.*

Try mentioning things during normal communication, not as boasting but as casual conversation (such as, "When I was writing the newsletter for ..." or "If you get a chance to view the updated web page I completed, let me know what you think about the ..."). —*C. Crim*

Q How should I ask for the raise I deserve?

"At my annual review this month, I want to ask for—and believe I deserve—a good raise. Normally, the company allows a 5-percent increase for those with good reviews, but I feel 7- to 8-percent is more in line with what I have taken on.

"We started very small and have tripled in staff since then. I now handle four people in addition to my administrative duties. What is the best way to approach this? I know I work very hard, but I feel a bit insecure as 'just an EA' and want to feel more empowered." —*Anonymous*

State exactly what you stated in your question, but leave out the feeling insecure part. You must have confidence in yourself and your abilities when asking for a raise. Management would be lost without assistants!

Document your duties. I have an electronic administrative file that outlines all my duties in a step-by-step format. The file lists whom I work for and exactly what I do for each person.

Submit a copy of your file at the annual review to let your bosses see what you do, and state your main points. (Sometimes, our bosses are too busy to see what work we do for others.)

If your company allows only 5 percent increases, I wouldn't push for more. You can always discuss the possibility of another increase later (maybe in three to four months). —*Rose*

A couple of questions to address:

- Do you truly believe you deserve the raise? If so, why?
- What is stopping you from asking (besides a lack of empowerment and insecurity)?

Use your answer to Question 1 with your boss at your evaluation. Toot your own horn. To get past the insecurity, use your answer to Question 2 to help you overcome self-inflicted roadblocks. If you deserve the raise, you must stand up for yourself because no one else will.

Keep in mind the economy may have something to do with it. If your company is doing well, it's OK to ask. If it isn't, I wouldn't recommend it. —*C. O'Connor*

One way to help substantiate a raise is to propose changing your job title to reflect the work you actually do. Find out what that new job title pays in your company or research other companies in your city. —*Julie Miller*

Q How can I grow as an admin without becoming a manager?

"My company now requires all associates to have an individual development plan (IDP), and my boss asked me to write a first draft of my plan. My challenge is that I'm very happy being an administrative assistant. I don't plan (nor do I want) to enter management.

"Other than enhancing my computer skills, what can I write in my IDP to let my boss (and HR) know that while I don't want to go into management, I still want to grow in my chosen profession?" —*Pat Philson*

At my annual review, the question "Where do you see yourself in five years?" caused a slight panic because I, too, am happy where I am and have no desire to move up in the company.

I looked at my skill set for holes or weaknesses and focused on those. You might, for instance, talk about the kind of administrative training you hope to complete by that time. Or you might explain that you see a slight weakness and set up a hypothetical plan for how you can change it.

I said that I liked where I was professionally and was not interested in moving up the corporate ladder. I saw some weaknesses in the way my office runs, so I addressed those. Example: "I'd like my office to be as computerized as possible, and the Access training will enable me to ...” I also addressed ways the office at large runs and related it to how I do my job. Example: “I’d like to streamline such-and-such process so the engineers can pass most of the work on to my office, etc.” *—Stephanie*

I have been in a similar position. My strengths, skills and abilities make me a super administrative assistant, and I am very happy in that position.

I do have at least one yearly goal. Recently, it was to earn the Certified Administrative Professional rating. This year, it’s to take the Microsoft Office User Specialist certification testing, and I want to go all the way to the Expert level. I constantly take advantage of any classes that come along in computer programs and personal development.

Also, I’ve used my talents and desire to help others by developing and teaching two courses here at work for our human resources department: ‘The Administrative Professional’ and ‘Getting Organized.’

You should emphasize any computer program courses, personal development courses and certification courses you might be taking or plan on taking to strengthen your skills as a professional administrative assistant. *—Barbara Murphy*

You can expand your responsibilities without going into management. In addition to my “secretarial” duties, I have taken on many of the functions that were previously assigned to other departments, including human resources. These new responsibilities help keep me interested in my job by providing new challenges. *—Lisa, Tacoma*

Q How do I build a ‘social media presence’?

“I’m starting to read that in addition to having a good résumé when you’re looking for a job, it’s becoming important to have a solid ‘social media presence.’ I’m sure that by now hiring managers are taking a look at whatever they can find out about us online—but how do I build this ‘presence’ when I haven’t really had one before and need to start looking for a job in January?” *—Eva*

If you are on Facebook, Twitter, etc., be sure to keep everything private including your friends, photos and posts. You don’t want a potential employer to know anything about your private life that might sway their hiring to another person. I believe the “social media presence” articles that you are looking at refer to LinkedIn, which is a great tool to have. LinkedIn is the only social media presence that you should use for work. —*Lisa*

➡ I wouldn't go creating a Facebook page if you don't have one and don't need one—there is nothing more "suss" than an empty Facebook page. —*Jackqueline*

➡ The only time you should have a public Facebook page is if you are self-employed and using Facebook to market your business. That would also be a business page on which you post information related to your business and industry. —*Theresa*

➡ I can tell you that my company is totally obsessed with LinkedIn and it's the first place they go when they get a résumé. You need to make a good amount of LinkedIn connections, at least 20 or so. It's not hard, just start connecting with everyone you've ever worked with and know well. It's pretty much accepted behavior! And make sure every social media timeline you have is clean of negativity—don't cry about issues in the news, don't get into tiffs with other users, don't be needy or pushy. That's a huge turnoff to employers. —*Tom*

Q When goal setting, is it better to think big or small?

"I had an idea that I would set myself a target date for becoming the manager of my department exactly five years from now, and work to make that goal happen as hard as I can. I definitely have a few promotion levels to achieve before I get there, so do you think it's wise to set such an ambitious goal with such a specific timeline, or am I setting myself up for a possible disappointment that might be even tougher to recover from if I don't make it?" —*Mel*

➡ I say set that goal as high as you can—but remember, it's just like a New Year's resolution. It's something to shoot for but not expect. If you fail, congratulate yourself for thinking big and get yourself another big goal right away. Keep plowing forward and being ambitious, but treat it as a bonus when the best happens, and just shrug it off when it doesn't. —*Mark*

➡ I don't think it's necessarily bad to make a long-term goal unless you aren't making the short-term goals that will take you to the long-term goal. … Anytime you set a goal there is a possibility that you won't achieve it. You need to be able to deal with unsuccessful outcomes. What if instead of achieving this goal in five years, it takes six? What if three years in you realize that you are no longer interested in being a department manager and that what you really want to do is advocate for better education? … The bigger question you need to ask yourself: Can you live with the regret that you didn't try to achieve a goal because you might not achieve it? —*Theresa*

There is nothing wrong with setting goals for yourself, even ambitious goals … But realize that no matter how hard you try, there are many things outside of your control. Don't allow the fear of failure to keep you from trying. Speak your goal out loud. Write it down. That increases your chance of achieving your goal … The only real failure is in not trying for what you want. Persist. Persevere. Go for it. —*DeeCee*

Q Is a performance improvement plan the end of opportunity?

"I was placed on a performance improvement plan at work. I really think it's a way to slowly fire me, and it's such a morale killer to be under this kind of watch that I don't have much enthusiasm left for the job. Does anyone ever come back from being on probation like this to do really well with their company and leave the black mark totally behind? I sure can't think of an example." —*Violet*

I've not personally been put on a PIP, but I can tell you that we use it and it is a very successful tool. Of course, if your gut tells you otherwise, I would seriously trust your gut. I've worked in state government and private industries for many years, and I've seen people forced out in both. If used correctly, a PIP is helpful to both the employee and the employer. But the employer must be able to clearly identify the areas needing improvement. There can be no wishy-washiness and it must be measurable. —*Janet*

It's all about how you look at the situation. If you continue to think that you're going to eventually be fired, then your actions will follow suit and the fear of being fired is more realistic. It sounds like they're trying to give you the opportunity to shine. Make the effort to go with the plan and take at least one extra step higher than what they are asking you to do/change and you should be good! You don't necessarily have to leave the black mark behind and forgotten. Instead, use it as motivation and a reminder to put forth the extra effort.

If you need examples, consider Michael Jordan, who was dropped from his high school basketball team. Or Bill Gates, whose first company flopped. Or Thomas Edison, who found a thousand ways a light bulb doesn't work before finding the right way. We all have mistakes or dark spots in our life. It's all in how you recover from it. —*Terron*

➡ Daily reminders that you are a value to yourself, to help you get through each day, can help keep the down attitude at bay. —*Van*

➡ The comeback is totally up to you. I know the action is very demoralizing and possibly even humiliating, but you are/can be the assistant you want to be. Don't lose your own self-worth and value by the actions of others. Show them your true potential and value. One way to gain some of that back is to join an admin group, such as IAAP, and start learning and sharing with other admins. —*Tari*

➡ Your manager wants you to succeed. That's why they're spending the extra effort to help you by creating a performance improvement plan. My advice would be to embrace the changes they recommend and exceed their expectations. This is your opportunity to prove the naysayers wrong. —*Margie*

Q Are there some mistakes it's just too hard to rebound from?

"Last week at my new job I made an oversight when putting together a package of materials for my boss, but it was the worst possible mistake to make and led to a ruined presentation, and in the end lost us some good business. I felt so miserable I could barely get out of bed the next day. I think it will take me months to win back any kind of trust (my boss is not the most forgiving person), and I would like to know if anyone thinks it's ever better to just start over somewhere else rather than try to slowly erase a track record that's gone wrong so soon." —*Cass*

➡ What I've found is that time passes fast, and even the worst mistake seems like a distant memory before you know it. In six months, you'll probably shrug about it. And remember that everyone else in the office forgets about what other people did in the blink of an eye, because they've all got too much to worry about themselves without keeping score! —*Gil*

➡ You need to schedule a one-on-one meeting with your boss. Apologize again for the mistake and explain that, while you know everyone makes mistakes, this has been weighing heavily on your mind. You should explain that you are committed to excellence, then show how you plan to keep yourself from ever making that mistake again in the future. —*Lisa B.*

If you quit your job entirely, this will be all that folks remember when they're called for a reference. This is not how you want to be remembered. Besides, skipping from one job to the next too frequently also sends up red flags. —*Kate*

Please take heart not to let this mistake weigh you down … To ensure you have a clear understanding of what your boss wants in the future, you may wish to take notes. When starting as a temp at my current company, there was so much to learn that I always carried a notepad and pen with me at all times when discussing issues with my supervisor. My boss actually really liked that, and it truly helped me to remember instructions and gave me the opportunity to ask questions and follow up with my boss when I was unsure …

In an effort to recover from a similar misstep, I found out my boss's favorite food—banana nut muffins—and whenever he was angry with me (he had a well-known and feared temper with staff) I left one on his desk with another little apology note and a promise to do better! Here's the happy ending: When I did leave that position, he was nearly beside himself and told everyone that they'd never ever be able to find anyone to do my job as well as I did. —*Colleen*

Q If you could create your own job title, what would it be?

"After two years on the job, I've been given permission to come up with my own job title—my boss doesn't put much stock in them. Right now I'm basically your average administrative assistant, but I wonder if sprucing up my title will look good on a résumé or LinkedIn should I need to look for work somewhere else. Who knows, maybe I could gain more credibility here in the office, too. Should I call myself something a little fancier, or is there a downside to it?" —*Melanie*

Titles can be important and can even be a steppingstone to higher salaries. So if you are given the go-ahead to pick a title, think about it carefully. It should reflect your actual duties. I would avoid overhyping. But go with something that sounds professional and puts you in the running to move up the ladder. Titles like office manager, administrative coordinator, administrative manager, executive assistant and executive administrative assistant all sound professional without being pretentious. They each connote different duties and responsibilities, so do some research. Google the titles that you are most interested in to make sure they are an accurate indicator, and then go for it. —*Karen*

➡ It's not the title that will get you noticed, but the way your résumé reads. I wouldn't put too much time into coming up with a new title that no one would know about, but rather spend time polishing up the way your résumé is written, which will gain you the credibility you seem to be seeking. So my thoughts are: No, don't call yourself something a little fancier … just be what you are, and make sure you are the best at it! —*Peggy*

➡ I would spruce it up. Some people look at titles, others don't, and you never know what your next boss might be paying attention to. I would use something like executive assistant or executive support specialist. I like administrative services manager also. —*Pam*

➡ I'm coincidentally working through the same thing and can totally relate. Because I work diligently to set up validated processes and literally keep the lights on, my boss and I have proposed to the C-level decision makers that my new title be operations coordinator. I still do a little of everything: supply management, facility management, event planning and communications, but I'll be allowed some empowerment to "make things happen" on behalf of the department instead of running everything by someone else and/or waiting for someone to read my request. —*Karyn*

Q If they don't ask for a real résumé, do they really want applicants?

"I've been applying for quite a few admin jobs recently. I've become wary of any job posting that leads to a long online template where I fill in forms and submit all my information through them, as opposed to places that simply ask for an emailed résumé. It seems to me that companies serious about finding the right person for a specific position only use the latter method instead of being so impersonal. Am I wrong? Have other admins found that a long online application process usually leads to silence?" —*Victoria*

➡ I think the template method allows them to look for certain characteristics a little more easily using hiring software, and it also makes it easier for a hiring manager to quickly go through many résumés when everything's in the same format. But I agree then that they're collecting too many résumés, and it does take more to get noticed. I wish they would focus more on being precise with who they're looking for and what they want. Every time I've had to go through a process like that, I got the sense that this must not be a very important job if they don't want to take the time to go through a carefully prepared, personal résumé. You can tell a lot about a person by how it's formatted, printed and presented. *—Earl*

Having been a recruiter in the past, there are two ways the employers are looking at having you complete a lengthy application: (1) Is this person really interested in this position and our company, or just any job? (2) Does this person follow through and give their all no matter how cumbersome the task may be? *—Laurie*

I work in higher education, and our university also uses online template applications. It allows the applicant to attach their résumé to the application, but the only way to apply for a job at the university is to complete an online application on our jobs website. We are the largest employer in our city, and our university is very serious about all of our applicants. Having used the system myself, it does make it easier to search applicants, rather than sifting through mounds of paper résumés. *—Celestine*

Q How should an admin team bring a serious issue to supervisors?

"A situation has arisen in our office involving a lack of raises for admins going back three years, while other departments get steady increases. We believe that only the whole admin team presenting our grievance at once will work to get a change made, because individual complaints just haven't had any impact. I'm looking for guidance on the best way to present a 'unified front' when an issue needs to be addressed this way. Should our concerns be in writing? Should one of us act as the leader who presents them?" *—Daphne*

While I believe a united front can be good in some instances, there is a fine line between that and making someone feel ambushed. Have you checked in with your HR department on this subject? I would suggest your team get together and brainstorm all the great things you have accomplished in the last few years. Be specific. Then, set up a meeting with your

HR person (and just a key representative or two of your team) and express what your group is wanting to accomplish, and provide the list. Ask for assistance in how best to move forward. Your HR person should be able to guide you on next steps and possibly help facilitate a meeting for all of you. Be careful not to start your conversation with, “Other departments got a raise; why haven’t we?” There could be a very good reason that you are not aware of. Keep it positive. Show them how valuable you all are to the success of the organization. I would also ask what you should be doing to be able to receive the raise. Did other departments not get a raise too? Or was it just yours? There might be a goal that is misunderstood or not communicated. Good luck! —*Lisa*

I must agree with the idea of a united front and a spokesperson; also research your area for the salary ranges for administrative professionals. I would also include a common job description, along with a detailed description of exactly what each person does. Compare the two descriptions. Do an analysis on the difference. Let the audience you assemble see in writing what it is that makes everyone deserve at least a cost of living raise. I had not had an increase in pay in five years, while all other areas of my company did. I used this approach and am slowly being increased for my value and worth. Soft skills are in high demand. That is your Trojan Horse. Use it. —*Reasa*

What I personally would do is send a polite, yet firm, email to the person who you would meet with, and spell out the concerns. It should end with a request for an in-person meeting with the recipient and as many admins as can make it to the meeting. It should be “signed” by all the admins who agree this needs to be addressed, so it is understood that many people feel this way, not just one. My reasoning for sending the email first, as opposed to just walking in on the person, is that it gives them time to do a little research on the issue instead of being blindsided by it. Plus, an email establishes a paper trail (be sure to save it) in case, in a worst-case scenario, legal action eventually comes into play. —*Mark*

Q Is it possible to give notice of your resignation too soon?

“I am planning to move out of state this summer. When would be the appropriate time to let my current employer know of my plans? I would like to give them enough notice so they can find a replacement, but I’m concerned that if I let them know sooner rather than later, they might replace me. I would like to work as much as I can." —*Nancy*

➡ I worked at a place that was known for escorting people to the door once they knew you were going to leave, but I thought I should give two weeks' notice and preferred to give a longer one since I was leaving the state. I waited until I had nearly everything packed and could actually leave anytime, then gave three weeks' notice knowing that if they did not accept that, I could go ahead and move. My manager was shocked that I was moving, and thankful that I gave such long notice since no one else knew all of my job. I did work those three weeks and ended it with a wonderful surprise party! —*Claudia*

➡ Depending on your relationship with who you report to, and how long the hiring process takes for your company, the earlier the better, at least verbally. Our home sold much more quickly than expected, and I ended up needing to leave about a month earlier than I had anticipated. Because I had a decent relationship with my boss, she was not unaware. Once I had a go date, I communicated it in writing. (At this job, they couldn't post for my position until they had received a resignation in writing.)

If you don't already have a procedures manual in place, or something like it, start one. Communicate that you are working on it and make it as detailed as possible—you can possibly eke out a little extra time to pad your resignation, if necessary. Happy trails! —*Pam*

➡ I think it really depends on the culture of your organization and your boss. There are some organizations, such as ours, where we greatly appreciate as much notice as possible, and we will keep the person until the date they've spelled out in it. We are incredibly grateful for the opportunity to have as much time as possible to find a suitable replacement and get them trained.

We've had one employee give a year's notice the day he was hired (he was joining the Marines the following year), we've had at least three or four people give six months' notice, and we've had some give less. We think it is phenomenal when employees can do that. On the other hand, I know there are employers who will let you go as soon as they get a replacement hired, and others that will let you go as soon as you give notice. It all goes back to your employer's corporate culture/policies. —*Mark*

Q Have you ever suspected your skill level is equal to the boss's?

"I go to work every day suspecting I could actually do the job of the supervisor I'm assisting—and maybe even do it a little bit better. I'm trying to be as patient as I can, but I'm finding it harder and harder to stay motivated when I feel this way. How do other admins manage it when they have these thoughts?" *—Ivana*

I don't think it's very uncommon to feel this way. People get placed in jobs above other people for all sorts of reasons. All you can do is remind yourself that in the end, the best people do get ahead, so you'll leapfrog your boss someday if you're really as good as you believe, or wind up somewhere where your skills boost you up the ladder. It just takes time and patience. What you want to avoid is becoming negative and bitter, because this will hurt your career without you even realizing it. *—Susan*

I definitely think this sometimes, but then I remind myself that every job seems much easier when we're not in the middle of it eight hours a day. I bet sometimes my boss thinks I have it easy; at the same time, I think *he* has it easy. But if you're really starting to think this seriously, it's probably a good sign for your career and means you think big! *—Gil*

The quickest way to improve any situation is to change your thinking about it. Your ability to do your supervisor's job, perhaps even better, makes you a valuable asset to the company. Does your company offer tuition reimbursement? While you are working in a secure situation, consider improving your skills or furthering your education. Perhaps there are opportunities within the company for advancement, or maybe there are things you can learn from your supervisor. If not, this may be a sign to move on. Maybe you can develop a new system, or improve an existing one. When I lose my motivation, the first thing I do is change my opinion of the situation; next come the ideas, and then back comes the motivation. *—Debra*

Q How do you know when to fold 'em at a dead-end job?

"I have worked as an administrative assistant for seven years with the same boss. I have constantly asked for more responsibilities, as I feel I could do more—I'll be graduating with my master's degree in December. My boss seems to just brush my request off. At what point should I start seeking opportunities elsewhere?" —*Natarsha*

➡ I was in a dead-end job for 15 years! I finally had the guts to move on. It's not easy, especially after so many years in one organization. I grew up with the place! But if they wouldn't recognize my skills and how much I've grown professionally, why bother? It was like having a bad relationship; you hope for the best and change because you love your significant other, but you know deep down there will be nothing. It's just time to move on. Trust me, it's not that bad out there. Experience holds just as much weight as a degree. —*Margarita*

➡ Start now! You can press your boss further by explaining that, based on your experience and your degree, you are serious about pursuing additional responsibilities and an increase in salary, and that if there are no in-house opportunities, you will be moving on. Say it and mean it! If stating your intent to leave will be an issue, then that's one more reason to go. Get professional references from those who support you and launch your search off company time. Use all your networking opportunities and be confident! —*Nancy*

➡ It was great that you were able to study while working, but if your boss doesn't see your potential, especially with your almost-acquired degree, then someone else will be thanking their lucky stars that you decided to come to them. Seven years is a long time with someone, and you have grown throughout that time. Do not regret that you spent seven years there and that you probably won't be spending more time there. It's time to look forward to an upcoming challenge. Good luck! —*Diane*

➡ I think you have done what you could, which is being direct and asking your boss for more responsibilities. Too many take the indirect route and hint around that they want to do more, or mention it to those who are not in a position to do anything about it. If you have asked for more responsibilities (as opposed to hinting) and your requests have repeatedly been ignored, I think leaving is one of only two options. The other is to explore the opportunity to transfer elsewhere within your organization. Many companies are too small for that, or seldom have turnover to allow for that, so it might not be a possibility. But I would definitely wait until you have the master's degree. Saying, "I am *about* to get my master's" doesn't carry nearly the same weight as saying, "I *have* a master's." —*Mark*

Q What are the do's and don'ts of thanking them for the interview?

"I'm a little uncertain about job interview etiquette—more specifically, what comes afterward. How long do I wait to send a thank-you email, and is that a good time to elaborate at length on how I feel about the job, or even try to correct some impression I may have accidentally given? How should I close such an email, and is it even necessary to send one if I'm no longer interested in being hired?" —*Kenny*

Speaking as a long-time administrative person, currently working in human resources with more recruitment responsibilities, I would say that you would want to send your thank-you as soon as you can after completing the interview. This keeps your name and face fresh in the mind of the interviewer. You can certainly let the interviewer know if you have any questions or want to express any clarifications that you feel may be necessary, but you want to keep it brief. And yes, I would say that if you have decided that you are no longer interested in the position, the thank-you step is a perfect time to let them know that. They will appreciate your being forthcoming and may even want to contact you to find out if they could change your mind. —*Vicki*

Always follow up with a thank-you—and don't wait more than a day. This shows the interviewer that you appreciate his/her time; that you follow-up in a timely manner; it reminds him/her about your particular qualifications for the position, which helps them remember you; and that you are interested and want to move to the next step in the interview process—even if you aren't. You never know when your path may cross again with any interviewer. Who knows—another position may open up in the future, and they may remember you and ask you to come back! Just Google "sample interview thank-you letters" and you'll see some great examples to use as a basis for your own. You'll see the key elements needed for a good follow-up letter. Be sure to include them and don't make it too long or wordy. In today's world, an email seems to be more common than a letter sent via snail mail, but regardless, it is still a key step in the interview process and should not be overlooked or underestimated. I have been on interview teams, and I have not hired candidates as a result of no follow-up/thank-you letter. —*Cheri*

I would send a thank-you card via snail mail instead; too much gets "lost" in email. Ask for a business card when you leave. When you get to your car, write it up immediately. You don't have to go into great detail; simply thanking them for their time is good and saying you look forward to hearing back. Drop it off at the post office on your way home. They will get it the next day. I don't care what anyone says in this digital age—manners matter, and an actual card goes a long way (especially if it comes down to you and another candidate). Good luck! *—Kate*

Q How do you really make yourself more assertive?

"I've heard many times from colleagues and people close to me that I'm just not assertive enough to really get ahead and achieve the things I want. But this is the way I've been all my life and I'm not sure I can change. Does anyone know some good first steps to try?" *—Mercedes*

First, take a hard look at who's telling you you're not assertive enough. If you still consider their opinion valid, make a list of what you want. Then pare that list down to one or two priorities. Think about if what you "need" is actually a "want." Your "need" should be something that will definitely enhance your job position within your organization and favor the bottom line. Your need could equally be something that will secure your future with the company for years to come. Research all possible areas of concern and be ready with hard facts to questions asked. Put yourself in a position of making an offer they can't refuse. Be prepared to still get refused … but keep trying by bringing new ideas or outcomes to the table when received; further your claim at every turn. Your only failure would be if you stopped trying. *—Teresa*

Usually when someone says "I've always been this way and I can't change," it means they don't want to change. Is it truly important to you to make this change, or is it that others are saying something? Are you content doing what you do? Are you happy in your own skin? Then don't worry about other peoples' opinions. If you really do want to change, then start with something small: Speak up when it's scary, or try something you've never done before but have wanted to. Watch someone who does "assertive" well and emulate them. *—Paula*

I believe my first question would be: What do you really want? I too struggle with assertiveness, but not with the things that are most important to me. Are you really not assertive enough (based on their standards) or are you content with life? I think sometimes we accept what others say even though deep down we really want what we already have. There is nothing wrong with that; it's a place many people never achieve. That said, if you really want something that you don't have, then you need courage, not assertiveness. Courage to ask, courage to accept no, courage to possibly need to find another position, courage to speak in a diplomatic way about what you really think. Courage isn't pushy, rude or disrespectful. Courage is a quiet confidence in what is true and actions upon that truth. *—Tari*

Q How do you train yourself to say 'no'?

"I think I'm in need of some sort of training that will teach me to turn down tasks and projects that gobble up too much time, or that I just don't want to get involved in. I fear that as an admin for 15 years, I've been conditioned to say 'Yes' to whatever comes my way. Has anyone out there made a conscious effort to break from the agree-then-regret trap? How did you go about it?" *—Monica*

I trained myself to fall back on "Let me get back to you." This always buys me time to really mull things over before I commit, and it's a great way to really evaluate your desire to do something. Not just at work either; it works wonders with party invites and the like! *—Gail*

Due to time constraints or other commitments, sometimes it's just not possible to assist. In the past, I've even thrown out my supervisor's name (e.g., "I'm sorry but X has me working on this right now …") so that the person asking for help understands that the supervisor's request has priority over theirs. *—KF*

In my long career so far, not once did I turn down a request, but a week ago when asked if I could do a task I just said "No, I can't as I have numerous deadlines." I felt uncomfortable saying it, but once it was said, I did feel better because there was no additional pressure on me. In the future, it won't be that difficult now. *—Barbi*

I trained myself to start sentences with "I'll have to see if …" The rest of that sentence can be anything from "my schedule is going to allow it" or something specific like "I don't get tied up on Tuesday with meetings." The important thing was to lock that phrase in my mind so it became second nature to speak it. *—Mel*

It just takes some practice. For example, anticipate a situation where you'll want to say "no." Let's say you can reasonably predict that Joe will be back to ask you for one more favor. Write down what you want to say: "No, not this time, Joe." Then rehearse your response. When Joe drops by, your turn-down line will flow right out. *—CB*

Q What are some tips for catering multiple meetings?

"I'm surprised at how much of my new job is about ordering food for meetings—I'm responsible for four or five a day sometimes, anything from a basket of muffins for a team huddle to a 40-seat luncheon. Has anyone learned any catering 'cheats' that will save money, move lines along faster or just make me look like I really know what I'm doing?" *—Becky*

I stock up on items that store easily, and also have started buying baked goods and freezing them. This way, when there is a last-minute need for breakfast or snack items, I just pull them out of the freezer. Most baked goods will defrost very quickly. *—Jeannie*

First thing I did was to learn about my "clients'" preferences. Then, I took some time and went online searching for common restaurants that I like to eat at, or that have been recommended, to find out if they offer catering. Made a list of them all, and opened an account with them ...

Second, as I started ordering or would go to a restaurant, I'd request a copy of the menu (or print it from the website), and would offer it to the requestor, for him/her to choose whatever he/she would want to order for their guests or team. Also, since each requestor has a different credit card, I made a list and saved it in my file, to salvage my time.

Another thing that I did that has helped me a lot was to sign up for Cater Nation. They're great and have a variety of restaurants that you can choose from. Most of them offer breakfast, lunch and happy hour options ... One of the benefits from CN is that you get points for each order, and are rewarded with gift cards of your choice. The price is the same if you order directly from the restaurant. *—Ruth*

Knowing what people prefer is always helpful, but get to know the managers at local places you frequent because when they see that you order from them a LOT for various company events, they will start applying discounts as a "thank you" and even offer suggestions. *—Treva*

Take over a storage area near you. Stock plates, cups, table service, napkins, etc. Get a few nice baskets. Keep a basket of chocolate-type candies, another basket of mints (never mix with chocolate—will give all chocolate mint taste). Also get some small clear glass or clear plastic bowls—fill with candy for tables. I also do the same with cracker packages, trail mix packages, granola bars, individual chip bags, etc. These can be brought out in a couple of minutes, allowing you to present a nice meeting without much work. *—Connie*

Q How best to share documents at work?

"As executive assistant to our not-for-profit board, we have the discussion constantly about the best/easiest way to share materials. We have a SharePoint platform forum; however, members say there are too many clicks to get what they need. Additionally, firewalls become an obstacle, plus the size of files, the time it takes to download large ones, etc. Any suggestions on sharing documents would be greatly appreciated." *—Theresa*

We use Dropbox. We're a small organization and don't have a server. Dropbox fits our needs. Even though we upgraded with a yearly cost, it's worth it for the extra storage to share photographs. *—Fran*

We use mostly Google Drive for sharing and collaborating. There are now Team Drives, where an organization can own the drive and add the various participants to the drive. One thing that I like about Google Docs and Sheets is the ability to chat right inside the document as you are collaborating on it. We've even held Hangouts meetings while working on a document. Google Drive storage is free for educational organizations. I wonder if they would also have a free version for nonprofits. …

Some of my colleagues utilize Dropbox for ease in editing/accessing/collaborating on Publisher, PowerPoint and Access files where Google's comparable product does not meet their needs. Dropbox is not free, but it has proven to be affordable. When our ISD went full Google, I kept my Dropbox account and just pay for it myself because it works better for certain things. *—Jennifer*

Our agency has mainframe folders for each division that you must be assigned access to. Within these division folders are folders with subfolders that have information pertaining to the title. It is several clicks, but we have access to a wealth of information. *—Renee*

We use Laserfiche to store all documents for the Purchasing Dept. for the City of Kingsport, TN. All others have to do in our office is click on Laserfiche and pull up the file. It doesn't matter how large the documents are. You can also email from this program. We also use Laserfiche Workflow to send documents for electronic signature. *—Michelle*

Meta, the creators of Facebook, have an online collaborative software tool called Workplace. It offers functionality for instant messaging, file sharing and video and audio conferencing. We have tested many of its features and absolutely love it. *—Maria*

Q Bring out your to-do lists! What's yours look like?

"Everyone seems to have a different way of creating their to-do lists. I've always been interested in how they go about it, and what their lists actually look like. Am I the only one who just scrawls things in a big notebook and messily crosses them out? How many people use Excel, Outlook, sticky notes, legal pads, posters, whiteboards or even emails to themselves? Is there some method that seems to work wonders for admins?" *—Joe*

I tried my hardest to use a bullet journal method but found that to be so over the top with the listing, moving and rewriting things that I finally resorted to an old-fashioned graph-type pad of paper and writing down my to-do for the next day in the last half hour of the day. Anything not completed that day is re-evaluated for deadlines and relevancy, then added to or deleted from the next day's to-do list. I was tossing those out at first, but then decided I needed to keep then in a folder as a means of tracking and validating what I accomplish each day. *—DeeDee*

I use the Task feature in Outlook, a week at a time. I can easily add items, and when they are done, I can cross them off. If I need to print them, I can. Things that are left at the end of the week can easily be copied over to the next to-do list. Also, I have a record of what I have done. *—Sheila*

I use GQueues—since I use Google apps both personally and for work, it is awesome. Make tasks directly from emails and websites; enter manually, attach emails, documents, etc., to the task; use multiple lists and multiple tags; assign tasks to others; create reminders. It integrates with Google Calendar and is accessible from any internet-connected device. *—Heather*

In the past, I used a college-ruled tablet with all my projects scrawled on it; tried an Excel spreadsheet; reminded myself in emails, etc. When I attended a seminar on managing multiple projects and deadlines, one of the things I took away from it was using Outlook's Calendar. I didn't like Outlook's Task feature but I found the calendar to be the easiest and most reliable way to keep track of everything I have to do. It's pretty easy to set up reminders for things you do daily, weekly and monthly. I don't know how I managed before I started using it! *—Cathy*

I have multiple ways of trying to remember everything.

1. A monthly calendar binder to jot down events, due dates, pay periods, notes, etc., forecasted for a year. I carry this with me everywhere and keep it for a couple years.
2. Weekly emails are flagged and marked complete when done. Keeping open items in my email inbox helps remind me to follow up on ongoing items; no deadline stuff, etc.
3. Daily lists: personal life and work life. We use so much paper here that we try to use both sides so when we are done with one side we flip it over and cut them down to half sheets for making lists. Every day I make a list of the most important things to do the next day, and cross them off when I complete them. I am going to start keeping this and do an end-of-year analysis for the next year's projections. I make lists for my personal life and clip it to the monthly binder. *—Trace*

Q Do you feel pressured to work ahead before a vacation?

"I actually stress out a little when my vacation rolls around, because I feel I should work far ahead as a courtesy to the team so they don't have to do anything for me that I could conceivably do in advance. Without them ever asking me to make that effort, sometimes I wind up working frantically because I don't want to burden anyone during those two weeks. Am I doing the courteous thing, or am I unnecessarily taking on too much?" —Shayley

Shayley, you are taking on too much; every position should have a Standard Operating Procedures manual, and it should be created by the person who is doing the job. Mine is a step-by-step guide to what needs to be done, how it is done, and where to order/collect items.

Holidays are meant to be enjoyed and to reduce stress, not cause more. *—Jackqueline*

Where I work, it's common for everyone to do that. I agree that it is a courtesy. Everyone is already going to be busy doing their own job; we try to do all we can to lessen how much of our job someone needs to cover in our absence. *—Mark*

I had to take a family leave for five weeks, with only two weeks to prepare. By meeting with individuals, asking them what I needed to do for them, that helped a lot. I reviewed my regular list of responsibilities and made sure they would be taken care of. I also leaned on two admins as points of contact. I created a detailed out-of-office for emails so that others would know who to contact in my absence, including voice mail. It was all about planning and deep breathing. *—Barbara*

Because my work is cyclical and cannot be done in advance, I am not able to work ahead. There should be cross-training completed so that you shouldn't have to work harder just to take a needed and planned vacation. Putting that extra stress on you defeats the point of taking breaks. If you have planned your vacation far enough in advance, add extra to-do tasks to your weekly and daily planner that might help you to work ahead, but in a more controlled and sane way. *—DeeDee*

Q How do you learn office tech in a hurry?

"It looks like my new job is going to require a little more office tech knowledge than I was prepared for. Just today I was asked to do something in Excel I wasn't sure how to. What do other admins usually do when they get stuck like this and the clock is ticking? What's their 'escape route' for finding a fast solution under deadline pressure?" *—Mary*

My two main methods are emailing our admin group at work and Google. Especially with Excel! LinkedIn Learning and Star12 are also great resources for taking self-paced webinars/e-learnings for when you have more time. *—Tara*

I created an administrative support group for the employees of our county. Anytime someone from a different department/building has a question, they can send an email to the group. Normally someone within the group has an answer within minutes of the email. *—Dawn*

It helps being a part of IAAP so that there is a ready community of admins to tap into. —*Val*

You can Google practically anything, especially in Microsoft programs. There are tons of YouTube videos, or you can try LinkedIn Learning and networking with other admins. —*Bridget*

PART II: TIPS AND TOOLS

4 Managing Projects and Time

An Admin's Guide to Curing Procrastination

You can take several steps to overcome procrastination. The pragmatic solution boils down to willpower, or at least to the recognition that "I have a problem and I intend to start solving it now," not tomorrow. What you do to solve it will depend on your own personality—and just how big a hurdle procrastination is for you. Here are several approaches to consider:

Tackle an overwhelming project in small steps

Large blocks of time, commensurate with the size of a complex project, are hard to come by. That's why most jobs are done in bits and pieces, even important and imposing ones. Yet many people are reluctant to tackle such jobs when the available time is short.

> **Thwart a headache before punching the clock**
>
> Faced with an unpleasant task at work tomorrow? Try this: Start your workday just early enough to knock it out before everyone else has started, when all is quiet and pressure is at its lowest. Getting past an onerous duty by the time you're even officially responsible for starting your shift is a fine feeling and makes the entire day seem like a breeze.
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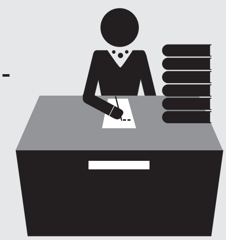
> 

Given the size of the task, allocating your 15 free minutes before lunch and 10 minutes before the 2 p.m. meeting doesn't seem worthwhile. Procrastinators never even consider it. Instead, they pick some easy, insignificant task that can be completed in a short time, even if it's only addressing a couple of envelopes. They go to lunch or to their meeting feeling as if they have accomplished something and are in charge of their time, when, of course, they're not.

Even five minutes can be used to start or continue a major project. No project is so large that it can't be broken down into manageable pieces. One approach, therefore, is to use your free 15 minutes to make a project to do list and then decide on priorities. In effect, you're only nibbling at the edges, but at least you are nibbling—that is, beginning the task.

The problem with working sequentially

It seems like a perfectly natural way to work: When a task comes in, it's placed in the queue behind the others in front of it, and you finish one thing completely before you start on the next. But this method can wind up painting you in a poor light, as work that would take you only a few minutes to complete gets delayed to the point of frustrating co-workers. Learn to become nimble enough to interrupt even the most important projects for the sake of expediting smaller ones—and never put off reading emails that you suspect might carry an assignment just because you're busy with another one.



Another way to start is to "read in." Start a new file. If you are working on a report, clip relevant material from news sources and press releases. It's a mindless task and one likely to quell the butterflies in your stomach—probably the most important thing you can do to overcome procrastination.

Once you've charted your course, use your free 10 minutes to make that first phone call. Once it's out of the way, the others almost make themselves. Don't give up if the person you're trying to reach is not available. You rarely have only one call to make. Draw up a list and go down it until you hit paydirt. You'll be surprised how often you can make six calls in 10 minutes and get some useful information.

Of course, you cannot complete a two-week job or even a 12-hour job in five- or 10-minute bites. But getting started on a big project is a lot like starting an exercise program. Try 25 push-ups on your first day, and you'll likely collapse after 10 and never try again. But do five at a time for a week, and you'll soon be doing 10 and will hit the 25 mark much sooner than you'd thought possible.

Observation: What staggers most procrastinators is the magnitude of the task. As a result, they despair of ever finishing. Start with little steps, however, and the larger ones will come by themselves. You'll train yourself into post-procrastination shape.

Put your daily interactions under the microscope

Today at work, you may have dozens of interactions with people. How many of them, though, are actually worthy? Try this experiment on a busy day: On a sheet of paper, track with a simple mark how many individual times you discuss work with people—a mark for each meeting, office visit or casual chat. If, at the end of it, a discussion actually pushed work forward, or generated ideas or solutions, circle the mark.

When the day comes to a close, note how many of the interactions ultimately came to nothing. These are the minutes you need to reclaim by identifying unproductive mindsets and the people who are trapped in them.

Force yourself to tackle unpleasant tasks

Unpleasant tasks don't ever really go away; they just get worse. Not many of them lend themselves to the piecemeal approach outlined above.

A meeting where you must announce bad news can be postponed just so long, and each postponement makes actual delivery that much harder. The phone call you dread making will not become less threatening by postponing it yet one more time. Yes, you should rehearse what you want to say; that will make it easier. But it won't be easier if you rehearse your speech three times every morning for 10 days without ever delivering it. When you finally do give it, you will be so over-rehearsed that you'll likely blow your cues.

You have to walk a fine line in these cases. A little procrastination can be a good thing; a lot is deadly.

Observation: Forcing yourself to do something unpleasant can become habit forming if you do it regularly. For example, you can talk yourself out of lame excuses—such as the one about working so well under deadline pressure. Tell yourself that pressure-cooker tactics are a myth. They leave you tired and unable to think clearly. That can keep you from stalling, and it works to counter any excuse, no matter how logical. There is an added benefit to twisting your own arm: Once you get going, you'll find the task was never as bad as you imagined.

Don't be the "remind me" person

When you agree to complete a project of any size, never drop the old "Remind me if I forget" bomb on the person who requested it. When you do, you create an obligation for *them* to have to deal with, and you set up a situation where they have to play the thankless role of the pest at some point. Agreeing to a task carries with it the responsibility of finishing it without having to be needled about it.

Don't reward yourself for procrastination

The relief of postponing a decision is often augmented by the pleasant activity you substitute for it—having a cup of coffee, say, or idly discussing last night's ballgame. Instead, face the consequences of your inaction. Lock yourself in your office without coffee or conversation. It's a bit like self-flagellation, but it's a lot more effective.

Do reward yourself every time you conquer it

You've earned it. Don't skimp on the self-praise. It's warranted—especially if you licked a two-week project you'd put off for six months and then did it in eight days.

Use positive self-talk

Procrastinators often talk the language of victims. Things happen to them; they don't make things happen. They don't choose to act but are forced to do so. You can talk your way out of the procrastination trap by using language that will make you stop feeling victimized and start taking charge of your life. Here are a few examples of how to go about it:

Don't be a 10-minute deceiver

What's the most common lie we accidentally tell each other every day? That we'll be home in 10 minutes, or a phone call will just make us five minutes late or it'll only be a half hour before a project is done. When we speak to others, we chronically underestimate the amount of time things will take because we seek to avoid conflict and put their minds at ease, but the opposite can happen if we're not honest enough. Think of your credibility when making such wobbly guarantees.

- *Say "I want to do X" rather than "I should do X."* The difference? Decision versus compulsion. You're in charge, not adrift.
- *Dump the "should" concept; accept "is."* "Should" has an oppressive connotation; it's a striving for the ideal, for the way the world is not, but should be. "Is" accepts reality.
- *Think start, not finish.* The end is forever and you haven't even begun yet. Don't focus on ending a project—that puts pressure on you to finish and makes the distance to the end even longer. Change your attitude from "I've got to finish this" to "I can't wait to start"—even when that's the last thing you're thinking. The point of talking to yourself is to persuade yourself to change. Use the language of positive reinforcement long enough and it will become part of your interior vocabulary.
- *Cut the project down to size psychologically.* It is, after all, only a project, not an avalanche hurtling down to bury you. However you feel, you are not going to be crushed by the project; you are being asked only to solve a problem. As a manager, you have problem-solving skills, but you must be willing to apply them.

Observation: Chronic procrastination is often a symptom of a psychological problem; it is not the problem itself. It may co-exist with low self-esteem, perfectionism, fear of failure and of success, indecisiveness, inability to balance work and play, and poor goal-setting abilities. Some chronic procrastinators whose problems are rooted in childhood trauma or other neuroses need professional therapy.

Quiz

Are You Organized?

Answer the following questions "yes" or "no" to get a quick assessment of just how organized you are.

1. Do you keep a daily to-do list and cross off items as you complete them?
2. Do you schedule weekly meetings with your boss(es) to review the status of the workload, update each other, discuss objectives, set priorities, give and get feedback and express your concerns?
3. If you have more than one boss, do you have structures for prioritizing their work?
4. Have you established a procedure for covering the bases when you're unavailable?
5. Do you make effective use of support systems—messengers, temps, junior administrative professionals and interns—to handle emergencies and other overloads?
6. Is your file organization system meeting your current needs? Can you locate what you need immediately?
7. Are you making effective use of calendars, either electronic or paper, for noting and tracking appointments and meetings and staying on schedule?
8. Do you and your boss set realistic deadlines? Do you schedule checkpoints where both of you can assess how projects are going?
9. Do you have a practical method for managing interruptions, such as asking some callers to call back later, asking them to email you or instructing the receptionist to hold calls during crunch periods?
10. Do you group tasks that can easily overlap, e.g., dropping off a report on the way to lunch or reading while waiting for a meeting to begin?
11. Do you know your limits and heed signals that it's time to take a break, change tasks or enlist assistance?
12. Do you break problems into manageable pieces to handle in small steps?

Unless you could honestly answer "yes" to every question, you have room to improve your organizational skills. The following pages will lay the groundwork for organizing your work and controlling the chaos.

To you, your workload is a mountain; to everyone else …

… it tends to look like a molehill. That's just the inescapable way we perceive things at work. Confine all complaints about how much is on your plate to the people who can appreciate and actually do something about it: those above you. Co-workers on the same level or beneath you will never truly respect you if you harp on problems they cannot solve. They simply think, "Thanks for the whine, but I care about this *why*…?"

A Project Management Primer

You've called your team members into your office and asked them to coordinate a special project. It's a new sort of task for them, unlike your team's typical work, and they're unsure where to begin …

1. Determine the goal. Make sure everyone understands what they're trying to accomplish. With your help, they should state and define the goal in specific terms. Ask how things will be different for your team or enterprise once the project is completed. Your project should be tightly structured, carefully budgeted and scrupulously planned before your work begins. Build in time for unexpected snags along the way. Beware the tendency of the work to expand over time, otherwise known as "scope creep."

2. Define success. How will a positive outcome manifest itself? What metrics will change for the better? Will productivity go up? Will employee turnover go down? Will spending be cut by 5%? Error rates by 10%? Identify the best ways to measure and verify that you've achieved your goal.

3. Be realistic and manage expectations. Guard against setting expectations that are unrealistically high. Don't start a project by promising an unrealistic rate of return before you've researched all the possible outcomes.

4. Strategize. Now it's time for your team members to retreat and develop a plan of attack. Ask them to plot the steps they'll take to make the outcome a reality, keeping in mind any limits (such as time and budget restrictions) you've set for the project. Assess each function you are working on. Define each stakeholder group's role in your existing process. Understand what you have and how it works so you can get to where you want to be.

5. Develop a project calendar. Have your team establish a deadline for each step they've included in their action plan. If you don't think they've allowed enough time to complete a task, say so. A calendar will help them assess the viability of their action plan and stay on track during its execution.

6. Set up a monitoring system. How are your team members going to keep track, on an ongoing basis, of where they stand on the

Project Management Checklist

- [ ] Everyone understands exactly what we're trying to do.
- [ ] We've discussed and agreed on what we're *not* trying to do.
- [ ] We've defined what success will look like, and have hard metrics in place.
- [ ] We've set a deadline for finishing the project and discussed the ramifications if we miss it.
- [ ] Everyone knows their individual role in the project, is OK with the time constraints, and is working toward the same goal.
- [ ] A calendar has been set up and distributed, with no "fuzzy" dates.
- [ ] Everyone that this project might affect has been notified that it's a go.
- [ ] We've set a date when we will all get together after the project is done to talk about what went right or wrong.
- [ ] If the project begins an ongoing effort, we've set a date in the future when we'll meet to discuss whether we can call it a success or failure—and agree to either end the effort and move on or keep it going, depending on how we defined success and failure in the beginning.

project? And how are they going to keep you informed? Help them establish both a schedule and a method for checking in with you and each other.

7. Communicate! Now's the time for you and your designated leaders to brief the rest of the work group on the project. Aim to dispel fears, answer questions and generate as much enthusiasm about the project as possible, along with a sense of pride among the employees who'll carry out the plan.

'What would you do if I weren't here?'

When colleagues come to you with problems to solve, resist offering them a solution. Instead, ask, "How would you handle this if I wasn't available?" Often you'll hear that the person could solve the problem after all. And at the very least, their answers will give you a glimpse into their creative thinking process—or lack thereof!

8. Delegate! You've already delegated to the leaders you've chosen; now help them delegate to the rest of the team. Provide support as they give team members their individual assignments, but don't make those assignments yourself.

9. Have a kickoff. A special staff meeting, written project bulletin or social occasion helps build morale for the effort. Nothing fancy is required, but even small projects attain a sense of importance when you give them an official kickoff.

10. Monitor. Make sure you follow the monitoring system you devised—which means being available when your leaders need to check in with you. Stand ready to assist your leaders in coaching and counseling employees who are having difficulty meeting their expectations.

Reduce stress by beating the clock

Make punctuality your friend and you'll soon notice how much of our stress comes from simply taking too long to get ready to go somewhere and leaving late, creating a lifetime of frustrating beat-the-clock episodes that can easily be avoided. Make a goal to be early and watch your tension level drop.

Let's Get It Done!
A Worksheet for Getting a Big Task Off the Ground

PROJECT:	
GOAL:	
DUE DATE:	
STAFF INVOLVED:	
KICKOFF MEETING DATE:	
POST-PROJECT REVIEW MEETING DATE:	

TASK	START	FINISH	ASSIGNED TO	COMPLETED	HOURS

A Project Management Pre-Game Checklist for the Not-So-Super-Confident

The question	Your answer	My worry level about this on a scale of 1 to 5
1. Is there anyone who's not taking the project as seriously as I am, and is that going to possibly be a problem?		
2. What are the consequences if the project fails?		
3. Who is someone who I know I can turn to with any stupid question I might have as I work on this project?		
4. Do I trust everyone who's involved in this project with me?		
5. Will I be prepared if I unexpectedly lose a bunch of time working on this because of other duties, or even illness?		
6. Will I be prepared when, inevitably, someone is late on their step of the project?		
7. Have I made a comprehensive list of everything I'm going to need to finish the project?		
8. How confident am I that the timeline will be met?		
9. Who will I be making excuses to if something goes awry? Am I comfortable with that person?		
10. Which parts of the project am I unable to complete all by myself?		
11. Which part of this project is the most intimidating to me?		
12. What would it take to make me feel good about that part before we go forward?		

If your worry level totals ***30*** or more, go back through the list, attack the toughest questions, find answers, and re-evaluate before you begin the project.

Creating a Standard Operating Procedures Manual

Before you even begin

Start an activity log. Trying to magically remember everything you do isn't a productive way to go about documenting a procedure. You need a little science! An activity log will reveal the things you'll forget.

Every time you perform a task, jot down the steps, along with:

- The time you spent on it—and how long it *should* take
- Exactly who you needed to work with, and their role
- Any unusual variables you encountered that changed the procedure.

After a few weeks, you'll have a firm idea of what needs to be fully documented, what you can afford to simply pass on verbally and a logical order for your manual.

Find out if a due date is just wishful thinking

The next time someone asks you "When can you have this done?," resist the understandable temptation to blurt out the earliest, and possibly unrealistic date, just to please someone and show your efficiency. Instead, ask, "Is time a factor for you?" The answer will give you much more of a sense of the *real* schedule involved—if there even is one.

Documenting a procedure

Lead off with a list containing this information:

- The reasons why following the procedure is important—including what can go wrong if it's *not* followed
- Its priority level compared to other tasks
- Everything the procedure affects
- Everyone who might need to be contacted to complete it
- Every tool that's necessary to have in place before the task begins.

Then, use everything in your toolbox:

Checklists

These will be the most helpful part of a procedures manual. Make sure each one:

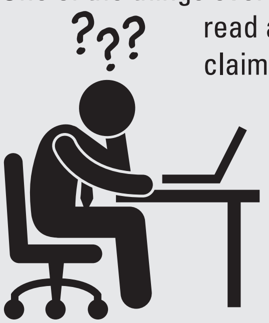
- Is written in plain English as if the person using it knows only the very basics of a job (think of one of your intelligent friends outside the company—would they be able to follow the procedure?)
- Is made up of specific action steps that can be checked off as completed—not simply commentary or helpful hints, which should appear different (italicized, in another color, etc.)
- Does not assume the same staff will always be involved; it's preferable to mention job titles, not the names of those who hold them
- Has all the steps of a task in the proper order
- Offers contacts for when a problem arises.

The game of email pingpong has no winners

This one's as true as it was years ago: If any correspondence requires more than four emails, pick up the phone or take a walk down the hallway to talk in person.

Something's not quite getting communicated correctly or clearly. Plus, don't you find yourself getting irrationally irritated with someone when you keep seeing messages pinging your inbox in rapid fire with that same darn subject line, over and over and over … ?

'I didn't see that email' = 'I'm somewhat clueless'



One of the things every co-worker has a right to expect of us is that we'll read and react to all our emails from them. When we claim we didn't see one, or forgot about it, it's reasonable for them to question our work methods. After all, those messages just hang out in our inbox, not exactly dodging and weaving and being elusive. We even have helpful flagging systems for them. Think of email as a trust delivery system. So, can your colleagues trust you?

Visuals

Many of us are visual learners, and even those of us who are not use visuals as powerful memory devices. Your handbook should include:

- Diagrams
- Flowcharts
- Photographs
- Screenshots.

Wrapping up

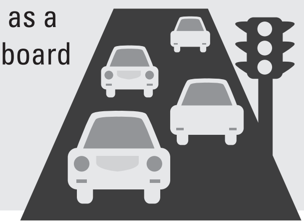
- Create signs that can be altered, printed and used again and again.
- Make templates (such as the one on the next page) that a procedures follower can use to mark their progress.
- Save everything electronically. Additional paper copies never hurt.
- Create a file in which each procedure has its own tab, with the most important procedures up front.
- Insert a table of contents up front.
- Finish with a section called “Troubleshooting,” to include two or three common problem scenarios for each procedure that you’ve described (and how to either solve them or find someone who can).

Predict your own mistakes to minimize their toll

On January 1 of each new year, give yourself a three-blunder allowance for the year in advance. When you know three noticeable blunders are inevitable, they’ll roll more easily off your back when they do happen.

Trim some time off a classic productivity killer

Tired of enduring the same old stories from co-workers about what a nightmare traffic is on their commute? Tell them you *like* the delays—it gives you time to think, listen to favorite tunes or a book or catch up on the news on the radio. Thus, end your days as a sounding board for that particular gripe!



Your S.O.P. Worksheet

Standard Operating Procedure For ______________________________

Created by	
Task assigned to	
Date	
When is this task performed?	
How time sensitive is this task?	
Necessary supplies and equipment	
Contacts	
Terms to know	

Step by step
1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.

This procedure revised by ______________________________ Date ____________________

This procedure revised by ______________________________ Date ____________________

This procedure revised by ______________________________ Date ____________________

Quiz

Self-Audit: How Well Are You Keeping Burnout at Bay?

Most of us have had periods at work where it seems all we're doing is putting out fires and dealing with interruptions. But when those occasional periods turn into everyday experience, it can lead quickly to burnout.

Take this quiz and see how well you cope. For each item, rate yourself from 1 ("always false") to 5 ("always true"):

____ I try to take crises and interruptions in stride—they're not unwelcome distractions but part of my job.

____ I focus on one task or project at a time and avoid interrupting myself.

____ When people ask me to do things I can't handle, I have no problem saying no.

____ When a conversation is going nowhere, I take steps to wrap it up and move on.

____ I see crises and interruptions as opportunities to solve important problems and show what I can do.

____ When I can't avoid being interrupted, I'm good at handling the interruption quickly.

____ When something blows up, I focus on finding solutions and only later deal with finding out who or what is to blame.

____ I stay focused on deadlines and avoid procrastinating.

____ I keep lines of communication open with my team so that I know about problems before they become crises.

____ If I don't have time to talk, I'll make room on my schedule for following up.

____ I also make room on my schedule for tasks that require concentration.

____ I ask my staff to let me know about issues by email before we meet in person, so we have time to prepare solutions.

What do your answers mean?

High scores are better, of course. ***If your ratings total up to 45 points or more,*** you've probably got a reputation for being well-organized and disciplined. In fact, you may need to consider being a little more flexible or spontaneous. Don't be so focused on efficiency and good time management that you miss the benefits of serendipity, or the learning that can come from open-ended discussions without an agenda.

For most of us, though, being "too organized" is a problem that we wish we had. ***If you scored between 24 and 44 points,*** look closely at your responses and see which areas are your weak points. Some of us, for example, do a good job handling our own time—using our schedule, setting priorities, avoiding procrastination—but are less successful at dealing with interruptions caused by other people.

Target dates beat 'ASAP'

Avoid using the term ASAP; it means different things to different people. Employees faced with an "ASAP assignment" may not know whether that means they should instantly drop whatever they're doing to complete the project or whether they should squeeze it into their already busy schedule and just do their best.

If you scored fewer than 24 points, you'll probably find that investing in time-management training and coaching would be a useful strategy and make you a better manager. There are, of course, an abundance of programs, books, tools and systems that promise to help you get a handle on your time, and most of them offer valuable advice. But a good place to start is with a mentor—someone who knows you and your particular work situation. Working with a trusted mentor can help you quickly figure out what strategies work best for you.

Quiz

Are You a Micromanager?

As an admin, you must remain involved in your colleagues' activities. But where does involvement stop and micromanaging begin? Sticking your nose too deeply into a fellow admin's work process can be counter-productive and waste time. Learn to control the process, not the people.

Let's say you overheard someone refer to you as a micromanager, or that you just want too much say in how other people go about their tasks. To find out if it's true, answer the following questions using this scale:

4 = Very often 3 = Often 2 = Sometimes 1 = Seldom 0 = Never

HOW OFTEN DO YOU ...

___ Give specific directions about how you want a task completed?

___ Wonder what colleagues are doing and whether their time could be spent better?

___ Reject someone's suggestion because it isn't how you would perform the task?

___ Get annoyed when a normally capable admin makes a simple error?

___ Worry about whether a key task will be done right or on time?

___ Sneak a peek when someone isn't around to check a project's progress?

___ Delegate work in increments rather than explain the entire project at once?

___ Resent or refuse to answer questions about "why" a task needs to be done?

___ Find people coming to you with questions they should know the answers to?

___ Talk most of the time during meetings?

SCORING

30 to 40:

They're right: You're a micromanager. You may be focusing too much on how people perform work, not the outcome. Instead of always explaining how something should be done, explain what you're trying to achieve. After all, a colleague may know a faster, better way.

20 to 29:

Shift your focus to results. You're not a "dyed-in-the-wool" micromanager, but you need to loosen the reins a bit. Give others more space to make their own decisions.

10 to 19:

It's not your fault. If you've answered the questions honestly, you're not quite micromanaging, but you still have a problem. People view your critiques negatively, so you need to work on communicating your expectations and feedback more effectively.

0 to 9:

She must have been talking about someone else! The complaint is probably an isolated remark.

When training, context is key

When training someone on a new task, remember to take a step back and explain exactly *why* it needs to be performed, everything it accomplishes and everything it affects. This will go a long way in helping memory retention and embedding the importance of the skill in the trainee's consciousness.

5 Writing and Speaking

Spice Up Your Writing

Business writing doesn't necessarily mean boring. Before hitting "send" on your correspondence, review it and put some oomph in it. Use these editing tricks:

- **Search and destroy.** Replace lazy verbs, such as "have" and "get" with stronger, punchier verbs. *Example:* Instead of "We have 20 new employees," write "We welcomed 20 new employees this year."
- **Go noun hunting.** Next, look for verbs that you've turned into nouns. *Examples:* Instead of "develop a full understanding of …," write "understand fully." Instead of "provide an explanation," write "explain."
- **Wipe out "to be."** Eliminate forms of "to be" that dilute your verbs. *Example:* Instead of "The team was debating the proposals," write "The team debated proposals."
- **Stay active.** Avoiding the passive voice also slices weak constructions from your sentences. Instead of "The agenda was approved by the board," write "The board approved the agenda."
- **Get to the point.** Putting the most important information first is key, says Linda B. Gretton, retired assistant professor of strategic communication at High Point University. If you're writing a one-page memo,

put your conclusion first and add supporting data later, she says.

- **Summarize.** For longer reports, write an executive summary at the beginning, Gretton says. An executive summary can stand on its own, and people can get the main points quickly if they don't have time to read the full report right away.
- **Break up the text.** Use bullet points, numbered lists or bold or italic fonts to highlight what's important, Gretton says. This can help your boss save time by making it easy to pick out key information.

Add a sucker punch to your text

One good way to really wake up your reader, no matter how dry the topic of your document, is to very occasionally drop a paragraph consisting of a single sentence between two larger bodies of text.

Like this!

It can provide a dramatic jolt and create a quick, laser-like focus on the topic of that sentence.

- **Be brief.** Practice writing on sticky notes, recommends John Znidarsic of Adcom. "Every email, PowerPoint slide or comment in the meeting should have only one clear message. If you can't fit it on a 2-inch-by-2-inch space, it probably won't fit into someone's short attention span."
- **Remember your audience.** A report for an entire department will be written differently than a quick memo to your boss. Not thinking about your reader's knowledge or interest can make your writing less effective, says Susan Rooks of Grammar Goddess Communication. Keeping the audience in mind will help you target your message.
- **Cut the jargon.** People often use big words or business jargon in an effort to look more intelligent, Rooks says. Instead, it ends up distracting from your core message. Cut back on buzzwords and focus on clear phrases that say what you mean.
- **Seek help.** Workshops and classes can be helpful for perfecting your professional writing, says Steven Kendus, a corporate communications expert. In addition, enlist a second set of eyes to help you find errors or unclear phrases that you didn't notice.

Business Letter Etiquette: The Art of the Personal Note

Who hasn't started writing a thank-you or condolence note, only to encounter "the big um" after the first sentence? "The big um is when you get your first couple of words out and wonder, 'What's next?'" says author Angela Ensminger. "That blank paper is very intimidating."

Ensminger told attendees at an International Association of Administrative Professionals convention that great personal notes come from taking these five steps:

1. State why you're writing in a straightforward manner.

   Example: "Thank you for taking the time to visit our offices."

2. Elaborate on step 1.

   Example: "It was so valuable for our entire executive team to meet with you face to face. And your meeting sparked several creative ideas that we're excited to pursue."

3. Build the relationship. "This is the most important step," says Ensminger. "What you're saying here is: 'Your relationship matters, and I'm proving it by taking the time to write this note.'

   "In business relationships, time taken is worth everything. If there's a bell curve of emotion to a personal note, this is the top of it."

   That key step is often missing in personal notes, adds Ensminger, so doing it well will set you apart from the crowd. As you write, take into consideration how close your boss is to the recipient and what's coming up next in the relationship.

   Example: "We feel fortunate to have spent so much time with you. We look forward to seeing you again at the XYC convention next year."

4. Restate why you're writing.

   Example: "Again, thanks for your visit."

5. Offer your regards. For business notes, "Sincerely" is the standard.

Bottom line: It takes practice, but the payoff is huge. Ensminger says, "People still get a jolt when they look in their mailbox, and there's something other than a form letter in there."

Standard Business Letter Template

Up top: Your letterhead containing the company logo and contact information.

Below that: The date line, written out in full (June 25, 2024).

Below that: The addressee's full name, job title and address.

Below that: The salutation. Try to always use a person's name if you can—it is far more attention-getting. Phrases like "Dear sir" and "Very truly yours" are sounding more and more archaic as people come across them more and more rarely, but they can still help a business letter to stand out. Keep aware of the level of formality you wish to go for, and make an effort not to sound distant and cold.

Below that: Your main message. Be as succinct as possible. If you must state obvious facts that have been covered before, at least do so with new language, or add illuminating details.

If a letter is too short, it may come off as somewhat curt and unfriendly, and if it is too long, the reader's attention may fade and cause them to miss an important detail.

Gender-neutral terms are becoming more and more the standard for business writing, so comb your correspondence for any that might be mistakenly alienating one sex or the other.

Below that: Your closing. Consider your relationship with the person you're addressing before you add it. The closing tends to be read with only scant attention, and there is no need to make it stand out with humor or false sincerity.

Below that: Your signature block. It goes directly beneath the first line of your closing, and it is followed by your full name and job title. You may wish to add "on behalf of" if you are sending a letter for your boss and you wish to make this clear, but often you will simply use his or her name in place of your own.

Doctors Guild East
701 Caduceus Street
Baltimore, MD 21202

January 10, 2024

Dr. Melinda Braun
414 Walnut Drive
Annapolis, MD 21403

Dear Dr. Braun,

I organize an annual professional conference for orthopedists such as yourself. I would like to invite you to speak in Baltimore in the fall on one of your topics of expertise. The conference would greatly benefit from your participation; we here at Doctors Guild East have long followed your work and feel your knowledge is invaluable to what we do.

Please take a moment to check out the conference website, www.DoctorsGuildAnnual.com, and reply with your answer as soon as you are able so that we may speak about the details. I'm excited to offer you this opportunity!

Thank you for your attention,

Frederick Yates
Executive Director of Events
Doctors Guild East
240-475-6130

Enter the Grammar Zone: 26 Key Usage Rules

Affect / effect. The verb "affect" describes something that produces a change in another thing: Being tardy *affects* your performance review. An "effect" is a change that has occurred in something: Being tardy was an *effect* of her procrastination.

A lot. It's always two words.

Alright / all right. The proper spelling is "all right."

Alternately / alternatively. The former means that turns are being taken; the latter means that more than one option is available.

Between / among. "Between" refers to two (or sometimes more) things that are clearly separated, and the word "among" refers to things that are part of a group or mass of objects that is more difficult to count.

Between you and me / between you and I. "Between you and I" sounds formal and proper, but "between you and me" is correct because it's the object of the preposition "between."

Compliment / complement. Something that "complements" something else completes it, enhances it or makes it perfect. A "compliment" is an expression of praise.

Continual / continuous. Continual things are chronic and may come and go, start and stop: Their *continual* meetings really slow things down. Continuous things never stop, are never-ending: The flow of information to the website will be *continuous.*

Elicit / illicit. "Elicit" means to draw a response, while "illicit" means forbidden.

Everyday / every day. "Everyday" is an adjective that describes something common or ordinary: Internet connectivity issues are an *everyday* occurrence with this ISP. "Every day" means each day: We post promotional material on social media *every day*.

Farther / further. "Farther" is used more to refer to physical distances, while "further" is used more to refer to time, frequency and figurative distances, as in: We'll discuss this *further,* or, *Further* efforts seem necessary.

i.e. / e.g. These Latin abbreviations are often misused: "i.e." stands for "id est" (that is), "e.g." stands for "exempli gratia" (for example).

Into / In to. "Into" indicates movement (Darren moved *into* his new cubicle today; I put my burrito *into* the microwave) and usually answers the question, "Where?"

It's / its. "It's" is a contraction for "it is." "Its" is possessive.

Less / fewer. Use "fewer" for things that are quantifiable, like "fewer trips to the cafeteria" or "fewer problems." Use "less" for things that aren't quantifiable, like "less hassle" and "less worrying."

Lie / lay. They're not interchangeable. I "lie down" right now and "lay down" last night. However, if there's an object involved, it's "lay" and "laid." *Example:* He *laid* the copies before his boss.

Loose / lose. "Loose" is the opposite of "tight." When you "lose" something, it's missing.

More / most importantly. The "ly" is almost always incorrect and unnecessary. You can just say "more important" or "most important."

None. It is always singular, never plural. *Example:* None of the admins is as efficient as Joy.

Refute / rebut. To refute is to disprove something, while to rebut is to simply disagree.

That / who. "That" refers to a thing. "Who" refers to a person.

Then / than. "Then" describes a sequence of events: I went to work, *then* I went to the game. "Than" is a matter of comparison: I'd rather eat chocolate *than* eat Twizzlers.

Their / there / they're. "Their" is used to show possession. "There" is a place. "They're" is the contraction of "they are."

Uninterested / disinterested. The former means someone is actively tuning out; the latter means someone couldn't really care either way.

Who's / whose. "Who's" is a contraction of "who is." Reread your sentence, and if "who is" doesn't make sense, you need to use "whose."

You're / your. "You're" is a contraction for "you are." "Your" is possessive.

7 Cruel Proofreading Traps That Are Lying in Wait for You

Proofreading is a little like building a 50-foot cement wall to keep out an invading army: Thousands of soldiers are repelled, and then a tiny ant crawls under the wall, bites you on the ankle and you're out of commission.

In every document are annoyingly small traps looking to take an admin down if you're not careful. Knowing grammar and punctuation inside and out, and putting a spell-checker through its paces, can only take you so far. Remember these tips when reading something one last time before giving it the thumbs-up:

1. **Look for the elephant in the room.** The big bold text in headlines has a way of slipping right past our consciousness—after all, how could anyone make an error in such a prominent space? Ask the people who misspelled "college" on a huge banner spread across a baseball team's dugout during a nationally televised game.

2. **Hyphens can be harsh.** A word split in two by a hyphen and continued on the next line is a devious thing; when text breaks, your mind does an invisible double-take and is susceptible to a swindle. Make sure nothing was left behind or added accidentally when that dash jumped into the fray.

3. **Stamp out identity theft.** Does Jack stay Jack throughout your document, or did he suddenly become Matt? Sometimes a search-and-replace doesn't quite update everything, and name consistency is not typically something you focus on during the first or even second read.

4. **Do the math.** Simple addition and subtraction is almost never checked with a calculator when someone writes a piece. Come on, who would bother when seven times five is, and always has been, 42? Oops. Look at every number carefully—dates too. Are you just assuming the 14th of March is a Sunday because someone wrote it down that way? Inaccurate dates can be a stealthy assassin to a proofreader.

An exercise to get serious about editing

Try this if you want to sharpen your editing skills, think outside the box and maybe have a little fun: Take a news story off the Internet and go through it with a red pen until you've deleted every single word that isn't absolutely necessary to express that information. Being as unforgiving as possible with the text is a good way to teach yourself how to slim down your own writing.

5. **Count your bullets.** This article is called "7 cruel proofreading traps that are lying in wait for you." Now, count how many we actually describe. Yes, the numbers match up. (They do, don't they? Please say yes.) No one deleted or added one at the last minute—*this* time, but it could easily happen, making you look arithmetically challenged.

6. **A picture is worth a thousand headaches.** So, those photos that have been placed so artistically inside the document … they *do* actually match up with the text, right? You never know when someone's left an old picture where it shouldn't be, or they've simply grabbed the wrong one. For example, the image to the right. And then there's the one-in-a-thousand chance that a picture's position on the page syncs up with text you don't want it to, creating unfortunate (and sometimes bizarre) connections in the reader's mind.

7. **Beware the Mistake of Mistakes.** Just as Count Dracula is always keeping an eye out for wooden stakes in the area, so must you always be on guard for the world's most sinister typo—of course we're talking about the "public/pubic" misadventure, infamous in urban legend. If you misspell the word "misspell" or let a calendar go out showing Christmas on June 25, fine, but whatever happens, *don't let this one through.* The Internet is ready to preserve it forever … and ever … and ever.

Now Make a Bold Final Charge Against Pesky Typos

When you're 99.9 percent sure your document is gold, try the following to recalibrate your mind and detect what may *still* be cleverly hiding:

1. **Adjust the font to be twice the normal size** and be amazed at what you spot when sentences get huge.
2. **Read the document while standing up,** or lying down, or in some other slightly unusual position. Just come at it from a slightly different physical angle.
3. **Find everything totally fascinating.** Pore over the material as if you're not looking for errors at all; you're just a fan of the subject matter and immersing yourself like a reader would. You'll make different connections and new logical inferences.

Deep breath. Did we miss any typos in this article? If we did, you know where to find us.

Fractions in words

When expressing fractions in words, such as three-and-a-half dozen, don't forget the hyphens. The hyphens link the words as a compound modifier. It reduces ambiguity for the reader. The trick is to know when the modifier ends. You would write three-and-a-quarter million, but three-and-a-quarter-million people.

We'll Give You 60 Seconds to Spot These 9 Writing Errors

Speaker and admin trainer Dr. Fred Kniggendorf was watching the local news and saw a reporter ask a scientist if he had a way to "predict avalanches before they happen." The scientist replied, "Well, I guess there's not much use in predicting them afterwards."

A harmless verbal faux pas on the reporter's part, surely. After all, no one's keeping score. But how often are you letting seemingly innocent communication glitches like the one he made into print, where they're much more noticeable and likely to reflect poorly on you as an admin?

Read these nine sentences that Kniggendorf has put together for admins to see if you can pin down what's wrong with them.

1. If you have any further questions, feel free to call Tina or myself.
2. I see no reason to stop now, please continue as planned.
3. The meeting was held just for rosemary and I.
4. The party is over, yet, who knows?
5. I am going to read a book, write some checks, and will be calling home.
6. It lasted 6 hours.
7. Each of the managers are gone today.
8. It will be a tough road to hoe.
9. Nether the list or the books is available.

The answers:

1. The word "myself" should be replaced by "me." As for the word "further," isn't it just taking up space?
2. When two phrases each work as their own independent sentence, feel free to reach for a semicolon to join them.
3. The lowercase "r" in "rosemary" isn't the only noticeable flaw. It should be "Rosemary and me."
4. Here's an instance where a pause that probably sounds natural when spoken comes off as awkward in print. That second comma disrupts the flow of the sentence.
5. This is an example of nonparallel structure. No one's going to arrest you for delicately changing tenses at the end of this sentence, but simply "and call home" is a better way to finish it.
6. Spell out numbers one through nine; when you hit double digits, it's time to go numeric.
7. What is the subject of this sentence? It's the word "each," not the word "managers." Replace "are" with "is" to bring everything into sync.
8. You don't hoe roads; you hoe rows. (Say that three times fast.)
9. Follow the either/or and neither/nor rule to set this sentence on the straight and narrow, but only after fixing the spelling of that first word.

Song Titles Gone Bad

We just can't let them off the English language hook. You know, those poets and song lyricists who either just don't get it or don't really care. Or perhaps proper grammar destroys the beat and coolness of the titles. Anyway, here are some songs through time that sport some cringe-worthy grammatical errors in their titles:

"Me and Bobby McGee" – Kris Kristofferson	Should be: **"Bobby McGee and I"**
"Lay Down Sally" – Eric Clapton	Should be: **"Lie Down Sally"**
"It Don't Come Easy" – Ringo Starr	Should be: **"It Doesn't Come Easily"**
"I Got a Name" – Jim Croce	Should be: **"I Have a Name"**
"You Ain't Seen Nothing Yet" – Bachman Turner Overdrive	Should be: **"You Haven't Seen Anything Yet"**
"Since You Been Gone" – Rainbow	Should be: **"Since You've Been Gone"**
"Baby I'm a Want You" – Bread	Should be: **"Baby, I Want You"**
"(I Can't Get No) Satisfaction" – Rolling Stones	Should be: **"(I Can't Get Any) Satisfaction"**
"She Don't Have to Know" – John Legend	Should be: **"She Doesn't Have to Know"**
"Don't Ask Me No Questions" – Lynyrd Skynyrd	Should be: **"Don't Ask Me Any Questions"**
Lay Lady Lay – Bob Dylan	Should be: **"Lie Lady Lie"**
"Where It's At" – Beck	Should be: **"Where It Is"**

Beware the lure of exclamation points!

Hold it right there!! Don't stop reading this, because every line is important! Why?! Because each ends with an exclamation point! Sometimes two!! If you find yourself adding these marks of clichéd emphasis to show excitement, playfulness or urgency, then you've failed! Because if every sentence stands out, then none do! See how that works!?

Redundant Redundancies

We all know what Raid does. It kills bugs.

But wait. Raid says it goes further than that. It not only kills bugs, it "Kills Bugs Dead!"

What does that mean? Perhaps the user of the spray can be not only assured that the bug is killed—it's dead and even its ghost won't torment you. They ain't coming back.

Really, the slogan is a redundancy but it works for Raid. If it claimed it "Kills Bugs," that wouldn't be good enough for us. We want them killed dead. I'll take two cans.

Here are some common redundancies that you should exterminate completely (redundancy intended) from your writing and speech:

- **Basic fundamentals**—Fundamentals are basic. You can even just say "the basics."
- **9 a.m. Monday morning**—Just 9 a.m. Monday does it.
- **ATM machine**—Know your abbreviations and acronyms.
- **Closed fist**—When it's open, it's no longer a fist. Expect a slap.
- **Completely eliminate**—Eliminate the word "completely."
- **Set a new record**—If you just set a record, it's new.
- **Over-exaggerate**—Once you crossed the line, that's it. You exaggerated.
- **Past experience**—Where else does experience come from?
- **$200 dollars—**The $ (dollar sign) takes care of the word "dollar."
- **Civil lawsuit**—They're all civil. Lawsuit itself is just fine.

If Your Email Fails This Test, Don't Bother Sending It

Somewhere out there lurks a group called the Plain English Campaign, an organization so peeved by bad business communication that it hands out annual Golden Bull awards for the worst of the worst. Here's a recent "winner," a snippet from an email sent by a business to a prospective client:

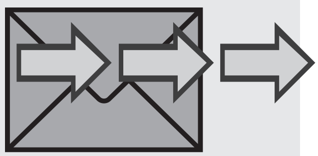
> *(Company X) is engaged with the largest knowledge driven companies helping them transform the way their employees collaborate, breaking down silos and creating a flatter more dynamic organization that better leverages the thousands of staff that they have.*

That's 37 words with almost no information.

Heather Baker, speaker and creator of the BakerWrite Speedwriting system, points out that words themselves make up only 7% of the full message that's internalized when we speak or write. The rest comes from factors like intonation, style, body language—even timing and the restrictions of the medium in which we choose to communicate.

Email remains the primary place where that other 93% regularly goes haywire. How many do you receive each day that grate on you with

Delete behind-the-scenes chatter from email forwards



When we forward emails, we tend not to notice if we're actually including an entire chain of them, beginning with someone's original message. Including this history can cause two problems: First, your reader may get bogged down by chatter and information he or she has no need for. Secondly, those email messages, when written, were intended only for the original recipients, and since we write in different "voices" for different people, someone reading a message they weren't originally included on may be surprised and even put off by the tone or phrasings they see, especially if they're mentioned somewhere in there. That was private communication and is usually better kept as such.

their sloppiness, incompleteness or unintentionally brusque tone? "The *meaning* of your communication is the *response* you get back, regardless of your intention," Baker says. So if you're taken aback by the *Re:* reply to what you put out there, go over your original message again. Chances are it failed this critical 7-point test that Heather offers:

1. **Is your email going First Class?** Whenever you compose one, imagine yourself writing it on paper by hand, putting it into an envelope, stamping it and walking it all the way down to the mailbox. The preparation of electronic mail should be treated no less seriously than this, because it's certainly taken that way.
2. **Are you maxing out the information in the subject line?** Heather recalled an infamous chain of emails that began with the subject line "Merry Christmas!" She and her co-worker *Re:'d* each other with that line intact for months as the calendar and their ever-changing topics made it seem more and more absurd. Save your recipients' time and patience by giving them something to spot, sort and understand easily.
3. **Are you making it clear why they should give a hoot?** You should always be hyperaware of what's important to your reader's workday. If you know a person well, you can probably gauge their level of interest in what you have to say pretty accurately, and you may have to massage the message to make it hit their world a little harder. If they don't usually care about the goings-on in your department, why will this email make them pay attention? What's in it for them?

The dubious wisdom of email signatures

A premade email signature would seem to add a nice personal touch to the end of your emails, but often they create the opposite effect, ending your communications with an impersonal "form letter" feel. Internal emails especially could do without the odd formality of contact and job title information that people see again and again. *Ask yourself:* Am I trying to keep some sort of professional distance between myself and the recipient, or do I want to establish a true back-and-forth? If the latter, drop the signature.

4. **Do you sound like they do?** Know your audience and speak at their level, using terms they themselves have used before. This creates an affinity between you. Imagine how your email would go down if it were delivered verbally; is it something you'd be likely to actually say to that particular person, or would they find it jarring because it's simply not the way they would ever speak?
5. **Are you coming off as a pipsqueak?** See if you can identify all the weak-kneed words in this offering: *"I'm sorry to bother you. Could I just ask a couple of questions? I'm not an expert but I think it's important. Sorry again."* Don't demean or lessen yourself by filling your email with apologies for intruding or presuming. You're not "just" anything—put yourself on equal terms with your reader from the outset or you'll find yourself getting blown off.
6. **Are you turning bad news into good news?** It doesn't take a whole lot of skill to stress or depress someone with a negative tidbit. Keep in mind that it's tough not to blame the messenger just a little in these cases, so look for a way to put a positive spin on a message you don't particularly want to send. You may be cutting the office coffee budget by 50%, but why not highlight the fact that glorious warm weather is just around the corner and iced drinks will be in vogue?
7. **Are you offering solutions, or just more problems?** Your message should be a tool for fixing things, not pointing out that the toolbox is empty and life is hard. Email is a tiny thief of time, so if you're going

Make electronic thank-you's memorable

Sending an electronic thank-you note is never quite as classy as a paper note or card, but there's one way to make your gratitude stand out: Create a memorable subject line that will pop up impressively in their inbox. Instead of just "Thank you for your gift" or "We appreciate you going the extra mile," which sound computer-generated, try something like "Wow, did we dream that project or did you actually make it happen?" or "Help, we can't stop telling our friends about what was in that box!"

to take more of it away from the reader, make those words valuable … and if you can't make them valuable, at least don't raise troublesome issues that can't be worked through on a screen. Bringing problems to people requires a different delivery method: picking up a phone or walking down the hallway for a pop-in. Remember what that was like …?

The Guaranteed Great Speech Template

It's 48 hours before you have to give a speech that makes a difference. You've sat through a hundred of these before—and you remember maybe two of them. Here's a sample sequence to keep yours on course so it doesn't wind up with those lost 98.

BEGIN WITH: The non-intro intro

No one really needs to be thanked for being here today, appreciated for having you or reminded that the weather is nice. Just as a movie is more intriguing if it opens right on the action instead of the credits, get to the point as swiftly as you possibly can.

ADD: A story and a mystery

Jump into a brief, tight narrative right away, one whose setting and events don't quite seem to match with your subject matter. Get the audience to wonder, "What's this anecdote really about?"

ADD: The reveal

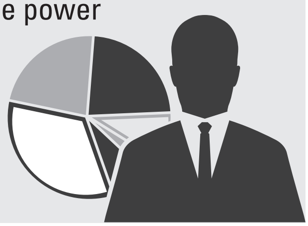
Conclude your compelling story by relating its true meaning to the theme of your talk. The audience should think, "Ahhhhh, I see now."

ADD: A fact that opens their eyes

Now throw out a number, a statistic, a quick truth about your topic that will truly surprise them.

Who's doing the presenting—you or the slides?

Everyone expects you to lean heavily on PowerPoint for that next presentation. But before you give in to the allure of slides, just play a little game in your mind by asking yourself: *How could I pull this show off if I had no visuals? How would I make this topic intriguing?* Imagine yourself commanding the room with only your voice, because that's always where a talk's true power should come from.



ADD: Your own surprised reaction

Become a part of the audience for just a moment by making your own jaw drop at the factoid you just put out there—and describe how you felt when you first became aware of it. This is a good chance to introduce a little humor as you describe the feeling of being suddenly whacked over the head by an eye-opening realization.

ADD: A second story

You've got one narrative under your belt; now give them another one. No mystery about how it relates this time—now that you're all on the same page, stay on it.

ADD: An audience callout

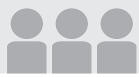
Show you're engaged with them by working in a member of the audience at the end of your second tale. "I can see, sir, that you think that's insane," you might say, or "Just a quick show of hands of how many people have experienced the same thing."

ADD: Why you're there

Time to make your central point, the one you want to leave them with. What is this speech really about? It should put a small spin on what they thought it would be—build an unexpectedly nice roof upon your solid foundation.

'Expertise' = confidence + platform

Before you sell yourself short when it's time to speak, remember that when it comes to many topics, people don't research or even note credentials; what they respond to is a strong person who speaks confidently and seems to be followed by others. Think of it in terms of this equation: "Expertise" = confidence + platform. It's often simply the loudest and boldest who are believed over the better-educated.



ADD: A plea

Tell your audience what you want them to do when they leave their seats. Issue a call to action and a personal request. Don't just give them information; give them a cause.

CONCLUDE WITH: A swift exit

Once you've hit all the points you need to, don't leave any time for an anti-climax. Don't reproduce your introduction or start in with the thanks. Go out on a high note and walk away.

6 Office Technology

Time management is one of the biggest challenges facing administrative professionals. One way to alleviate this problem is to capitalize on technology and learn how to streamline your office responsibilities.

The information provided in this section—ranging from time-saving keyboard shortcuts, software tips, IT troubleshooting and various other technology-driven suggestions—will not only give your software knowledge a boost and make your workday more efficient, but also increase your marketability and advance your career.

Excel Tips

Is there a way to bookmark spreadsheets, or make them easier and faster to access?

Pin specific Excel workbooks for convenience. If the Excel icon appears in the Windows taskbar, right-click it. Recently opened files appear in the pop-up list.

Hover over it and you'll see a thumbtack icon. Click that to have it always appear at the top. Just right-click the Excel icon and select the pinned file to open it.

From Excel, you can do the same, from the File tab.

From Recent files, hover over the one you want, and you'll see that thumbtack icon again. Click it to have it appear in Pinned files, also viewable from this screen.

Copying and pasting in Excel can take a lot of clicking and dragging… is there a better way?

To select data in a column, click on the first cell, then Ctrl+Shift +Space before you copy. This will stop before the next blank cell.

If you've typed a formula into the first row and want it on each following row in your list, place your cursor over the Autofill handle (tiny black box, lower right of a cell) and double-click.

Copy it down only one row, with Ctrl+D in the blank cell below.

How can I utilize formulas more?

Studying books and help text is one way to learn formulas. Another: Ask the formula! While typing in a function, like IF, you'll see helper links for each argument. When you click on them, they highlight that portion of the formula.

Click on the helper link for the function itself and get the help text while remaining in the cell. Also, check out the Trace Precedents button on the Formulas tab in the Formula Auditing group. This will "map" the formula with arrows pointing to which cells are used.

Can a whole worksheet change color if I change just one cell?

Yes! First, select all the data in your list, columns, and rows.

Then, from the Conditional Formatting button on the Home tab in the Styles group, select New rule.

From that dialog, choose Use a formula to determine which cells to format. You can then specify the formula to be something like $B2="Pending." Be sure the $ sign is ONLY on the column letter.

Next, click the format button and choose the Font card at the top and choose your font color.

Click OK and OK to close the dialog boxes. If anything is amiss, click the Conditional Formatting button again and Manage Rules, select your rule and edit it.

My settings in Excel always give me $ signs for currency, but I often have to work in £ and €. Is there an easy way to change the currency symbols?

This is one case where a simple macro can solve the problem. Repeat these steps for each currency format you need.

Type a value with two digits after the decimal point and press enter. This will help you know that your macro is working. For example, type in 4.52.

Single-click on that same cell to select it. Don't double-click!

On the View tab, on the far right, choose Macros, then Record Macro.

Name the macro, for example "Change_to_Euro," and change the Store macro in: field to Personal Macro Workbook. This ensures it will always be available to you, no matter what workbook you're in.

Then, click OK. From this point on, everything you click on will be recorded, so proceed carefully.

Press Ctrl+1 to reveal the Format Cells dialog box. Choose either Currency or Accounting.

Then in the Symbol: field, select the appropriate currency. Click OK.

On the View tab, find the Macros again and choose Stop Recording.

Add a button to the Quick Access toolbar to run this macro by following these steps:

- Click File, Options, Quick Access Toolbar.
- Change the Choose Commands from: field to Macros.
- Locate your macro and click Add to get it to the right side of the screen.
- Change the name and button by selecting it on the right and clicking the Modify button on the bottom.

I'm having trouble breaking up combined data. Is there a way to make this easier?

While Excel offers many ways to fix combined data like "Chicago, IL, 60660," many are fragile and not suited to connected data sources in a workbook. But if you've connected your data using Get & Transform Data tools, you can use the Add column tool in Power Query to accomplish this.

Select the column that needs a break-up, click the Columns From Examples button and type the first parsed entry, such as Chicago, and press Enter. If Power Query can detect the data element, it will repeat it down the column. This will be applied each time the data source is refreshed.

What is “power query” and what does it do?

Power query may sound intimidating, but it’s easy to use, especially to correct ugly data. It works best if data is converted to Table-Style formatting.

To do this, click into the middle of your data and click the Format as a Table button on the Home tab in the Styles group.

Then, on the Data tab in the Get & Transform group, click From Table/Range. This will launch Power Query.

Use the tools in Transform and/or Add Column to do things like Split Columns, which works like the Text to Columns tool. You can also do this on the Add Column tab with Column From Examples.

Why do I keep getting #NAME? in my formulas?

There could be several problems (e.g., missing punctuation, text strings not in double quote marks, improperly spelled named ranges). If Excel can’t tell what you mean by a text string, it shows this error message.

One common reason is a function like SUM or AVERAGE was entered and not followed by an open parenthesis. So, it’s trying to interpret SUMA1+B1. It can figure out B1, but not SUMA1.

Another reason for this is you’ve typed in a value if true that is a text string but forgot to enclose it in double quotes. So, that might look like IF(A2=January,1,””).

This formula checks to see if the value in a cell, in this case A1, contains a single text string, January. The problem is text strings without double quotes around them are interpreted by Excel as a function. Since there’s no function called JANUARY, it returns the #NAME? error.

A third reason this message might pop up is you’ve used a named range and Excel can’t find it. A named range is a range of cells, like A1:B3, that were selected and named something besides A1:B3. This is done in the Name box to the left of the formula bar.

So, let’s say you’ve named this range MONTHS, but in your formula, you misspelled it MONTSH. That would net you a #NAME? error, too. This can also happen if the range you are referring to was deleted.

Click the Formula tab and then the Name Manager button to see available named ranges.

Can you collect information in a single worksheet, and collect all sheets to summarize and analyze without creating two files?

To preserve the original data, one way to do this is to create the individual worksheets first, then use Get & Transform, Get Data, From File and choose the individual worksheets as you create them.

Then, from the Query list, choose to edit one of the queries and use Append Query in Power Query. Be sure to create it as a new query.

Select multiple queries and choose all the individual sheets you added with Get & Transform. As long as the worksheets are structured identically, you can then analyze them as if they were a single worksheet.

Can I create a chart in Excel and transfer it to PowerPoint?

There is no one right way to paste Excel charts into PowerPoint. It depends upon who has access and what they may need to do.

If you want someone to have access to the spreadsheet from which you created the chart, and they also have access to the location of the file, then the default, Paste Link, will suffice.

If you want to permit editing without giving them access to your spreadsheet, choose the Embed selection. To avoid anyone being able to edit anything, choose Paste as a Picture.

Why do pivot tables confuse count with sum?

One frustrating problem with pivot tables comes when you add a field to the Values layout area expecting a sum, and it gives you a count instead.

Right-click the values in the pivot table or left-click the value in the Values layout area, and choose Value Field Settings to change it to Sum. It's happening because Excel detects some non-numeric data in the column you're using. It isn't always solvable, but when you can, keep your value fields clean of blanks and other nonnumeric characters.

What are the options for adding dates to a pivot table?

In recent versions of Excel, when you add a valid date field to a Pivot Table, it groups the date elements rather than just giving you the date. While sometimes this might be useful, when your data covers multiple years, looking at it by month isn't really providing you an accurate picture.

When you need the actual dates, right-click on the + sign next to the grouped date values in your report area and choose Ungroup.

To add groupings back as a second "layer" of row data, simply click and drag your date field back into the row fields.

Is there a way to make absolutely sure two spreadsheets are identical?

Use the Inquire add-in in Excel. Click on File, Options, Add-ins, then COM Add-ins from the bottom dropdown menu. Once installed, you'll see this tab appear on your ribbon.

Open both files you want to compare, then click on the Compare Files button. Select both files and let Inquire do its thing. You'll be presented with a report of the changes. The report can seem a little busy, but the bottom panel has the change log.

What if you have a list of people in Excel and there is no one field in the row of data that can be guaranteed to be unique? For example, multiple John Smiths, but not all at the same address or with the same phone number.

String these fields together and you get a unique identifier. So, if the first name, last name, address, and phone number were in columns A through D, respectively, your formula in column E on row 2 would show: A2&B2&C2&D2.

Now you can run Highlight Duplicates (Conditional Formatting menu) or Remove Duplicates comparing records on your new unique identifier column.

How do you print all columns across the page and keep things readable?

The secret is the number of pages you allow for. If you've accidentally chosen Fit Sheet on One Page rather than Fit All Columns on One Page, you'll likely get something resembling a bar code. By choosing the correct option, Excel will be able to spread the data out across multiple pages.

In the Page Setup dialog box on the Sheet card, click into Rows to repeat at top and then anywhere in the header row (usually row 1). This will cause the column headers to be printed on all pages. If it's still too small to be readable, you simply have more data than will fit on the page. Hide any columns you don't absolutely need.

Why should I use table-style formatting?

Table-style formatting in Excel makes your tabular data portable from application to application and accessible to SQL Query language. Just in Excel, though, converting your data to table-style formatting turns on useful tools.

Click in the middle of a well-built list (no completely blank rows or columns; one row=one record) and press Ctrl+T. At the top you'll notice filter dropdown arrows for each column and a Table Tools Design tab from which you can add a dynamic totals row and additional appearance options to improve readability.

Can I import a list of holidays to Excel?

If you use NETWORKDAYS or the WORKDAY function, it's useful to import a list of holidays from TimeandDate.com.

Choose the country calendar that you would like to use and capture its URL. For the United States, it's **www.timeanddate.com/holidays/us**.

In Excel on a blank worksheet, click on Data tab.

And in the Get and Transform (or Get External Data) group, choose From Web.

Paste the URL and choose the option for Table on the left. If you want to filter the list, choose Transform. For example, you can filter for only federal holidays. Click Close & Load (upper left). There's your list!

Word Tips

One person has made a copy and edited that instead of working on the document I shared with everyone. How do I merge their changes?

Our recommendation is to preserve a copy of your original document. If you need to go back into the version history to do this, just save the old version under a new name.

In Word, on the Review tab, choose the Compare button and compare the revised one to the new one. Now, save that one under its own unique name, like Davids Changes Only.docx.

When you have reviewed everyone else's changes, then run a final compare with Davids Changes Only.docx and reconcile any changes that David suggested with the final from the team co-authored document.

What are bookmarks in Word?

Microsoft Word can create bookmarks (essentially metatags) with any selection of text or objects. This comes in handy when you have a citation in mind, but not the citation data yet. For example, if you want to quote Stephen Covey and know the quote, but not the reference, you can create a bookmark and navigate to it later.

Once your text is selected, click the Bookmark button (Insert tab, Links group). Give it a name and click Add.

Now, from the Go To dialog (Ctrl+G), you will be able to conveniently locate any bookmarked text that you created.

How can I easily build diagrams?

In Word, Excel, PowerPoint and Outlook, on the Insert tab, you'll find a button in the Illustrations group called SmartArt. Click this for the Choose a SmartArt Graphic dialog.

For an org chart, click the Hierarchy category and choose a diagram. Initially, you will see a flyout menu labeled Type your text here. Type the information, outline style.

Add a same-level shape with Enter, and a subordinate shape using the Tab key.

Explore the SmartArtDesign contextual tab for color and object appearance options.

Pages are breaking after a topic title, leaving its text on the next page. How can I stop this?

You should be using Paragraph Options and Styles. Avoid hard page breaks to ensure your document survives modifications that might otherwise disturb how content flows.

To remove hard page breaks, find them by going to the Home tab in the Paragraph group and clicking the Show/Hide button (looks like a paragraph symbol). This reveals all your word, paragraph, and page break symbols. You can either remove these manually or use Find and Replace. You can use Ctrl+H (PC) or Ctrl+H (MAC) to launch the Find and Replace dialog.

Click More>> to get more options, then the Special button at the bottom.

From this list select Manual Page Break. Don't fill in the Replace with field. Choose Replace all.

Once all your content and diagrams are added, notice where topics have separated from their following text.

One solution is to format your topics as a heading style, for example Heading 1. These automatically use the paragraph option, keep with next, and won't separate.

Next, where explanations come before diagrams, select the explanation, right-click and choose Paragraph.

Click the Line and Page Breaks card and choose Keep with next. Now, no matter what text is added before or after, these will stay connected.

Inevitably, I end up with pages with too much white space at the bottom or diagrams separated from their text. Is there an easy way to get things to fit on pages without using hard page breaks?

Hard page breaks often offer a temporary solution but can cause more problems than they solve when adding and deleting content. The solution to most problems is lying behind the scenes in the Paragraph dialog.

You can get to it by right-clicking in the text and clicking Paragraph, or by clicking the dialog box launcher arrow in the bottom right of the Paragraph group on the Home tab. Click on the Line and Page Breaks tab in that dialog.

For too much white space, make sure that Keep with next or Keep lines together isn't causing the problem. If the document has these features automatically set in the Normal style, you can right-click on the Normal tile in the Styles gallery and choose Update Normal to match selection.

If that throws your document into disarray, you can use Undo to return it and make the Paragraph format changes to specific paragraphs.

If diagrams are getting separated from their relevant text, use the Keep with next or Keep lines together feature on the Paragraph dialog to keep them from separating.

If you've exhausted these options to make everything fit, you can try a couple more heavy-handed techniques.

On the Layout tab, choose Margins to adjust the top, bottom, left or right margins to make things behave. Or adjust the size of any graphics or the font size of tables to nudge them where you want them.

How do I fix graphics that separated from their text?

From the line or paragraph describing your graphic or table, if it comes before it, right-click and choose Paragraph.

Then, from that dialog box, choose the Line and Page Breaks card.

Click the checkbox next to Keep with next. If you don't want the text in a whole paragraph to break across pages, choose Keep lines together.

You can also try adjusting the Wrap Text options, by clicking on the little "horseshoe" button that appears when you select a graphic object.

To keep tables from breaking across pages, in the Table Properties dialog, on the Row card, uncheck Allow row to break across pages. If it's large enough to need several pages, with your cursor in the header row of your table, be sure to click Repeat as header row at the top of the page.

Are there any advantages to using Google Docs over Microsoft Word?

If you've been turning away from Google Docs because, well, it's just Microsoft Word, one of the reasons is maybe that you work with complex documents requiring multiple sections, page headers and footers. This is available in Docs!

Click on the Insert drop-down menu and select the Break flyout menu. Here you will find Section break (next page) and Section break (continuous).

When you double-click the page header, you can choose Link to previous, or not! It works the same for the footer.

There are three levels of file-sharing you can grant in Google Docs (and Sheets and Slides, for that matter): Viewer, Commentator and Editor. The Editor level allows you full access to change anything in the document. But don't worry if you need to undo some of it. Google automatically creates versions.

Click on File, then select Version History to restore a previous version. The other two levels don't allow direct changes, but Commentator allows reviewers to add comments and suggest changes.

How do I get multiple people to collaborate on a document without risking losing anyone's contributions?

The best way to accomplish this is by beginning with your document in the Microsoft or Google Cloud, so, for example, either OneDrive, SharePoint or Drive. Cloud storage apps like these automatically save versions as changes are made.

In Word, you can access the version history with File, Info, Version History. In Google Docs, you'll get to it as File, Version History.

Once you have access to the version history, you can restore a previous version or simply call it up and make a copy of it to compare to the most current one. Whether or not you use the cloud, another great practice when co-authoring is to turn on Track Changes from the Review tab in work. In Google Docs you'll use the Editing mode button and change it to Suggesting mode.

Can Word translate documents?

Yes! If you receive a document in another language, on the Review tab in the Language group, look for the Translate button. You can either choose Translate Document or Translate Selection.

The Translator task pane will appear on the right and allows you to choose a From language and a To language. It will also translate in real time while you type if you keep the pane open.

Use the Translator only for better understanding. To produce a translation that supports a legal agreement, always use a professional translator.

How do I fix a messed-up table of contents?

First, if you are using Heading 2, 3 and beyond to structure your document with long text strings such as complete sentences, eliminate them from the TOC.

Select your original TOC and from the References tab, TOC group, click the Insert Table of Contents button again.

Choose Custom Table of Contents and reduce the number of levels shown.

Problems may also be caused by an inadvertent continuation of a heading style. So, the first sentence in the paragraph, which should be Normal style, is picking up the style of the heading. You can use the TOC to navigate to the item and click on the Clear Formats button on the Home tab.

PowerPoint Tips

I'm always nervous when I have to give a presentation. How can I make sure my slides are in order?

When delivering a PowerPoint presentation it's a good idea to have a list of your slides by the sequence number in the presentation. That way, you can always just type a slide number from wherever you are in the presentation, and it will go right there. Then type the slide number that you were on.

Can't remember which one you were on? No worries. Right-click in the middle of the slide displayed and choose Last Viewed.

No slide numbers? Right-click in the slide showing and choose See All Slides. Then just choose the one you need.

A feature of PowerPoint called Zoom slides also provides this type of functionality, and gives a visual "zoom" animation as you navigate back and forth.

On the Insert tab, click the Zoom button in the Links group. If you don't see it, you may need to upgrade your version of PowerPoint. This places a thumbnail of the slides you select on the "menu" slide. When the presentation is viewed, the viewer clicks the picture of the slide to which they want to navigate and then the back arrow key to return to the main menu.

What does the "photo album" feature do?

To produce a photo loop that runs in the background at a special event, use the Photo Album feature in PowerPoint.

Assemble your photos in a folder on your computer or cloud folder accessible from File Explorer. From PowerPoint, click the Insert tab and select Photo Album from the Images group.

Select the folder and photos you wish to use on the dialog and let PowerPoint do the rest. You may adjust photos or add text and transitions. From the Slide Show tab, set up your slide show to run automatically and loop until press Escape.

Can I use YouTube videos in my PPT presentations?

Like many things in life, just because you can, doesn't mean you should! If you've found a clip on YouTube that you want to include, click the Share icon below the video and capture the link. (It will look like this: https://youtu.be/S0m3L3tt3R5.)

On the Insert tab, at the far right, you'll find the Media button. Click it and choose Online Video. Then, paste the link.

Before any of that, you will need to ruminate on a couple of things. Does the video have an advertisement playing on the front end? What might it be on the day of your presentation? Are you comfortable with it? You can't trim these off. The other thing to consider is whether you have the right to use it.

Is it easy to record my presentations?

Try using PowerPoint Screen Recorder tool.

On the Insert tab in the Media group, select Screen Recording. It will automatically switch to the last screen you had active. If this isn't the one you want to record, you can navigate there.

First, use the toolbar at the top to select the area you want to record, decide whether you want to record the audio or not, then press record.

When you've captured what you want, click the stop button or use Win+Shift+Q.

How can I get rid of the screen recording toolbar from videos I record in PowerPoint?

When you use the Insert, Media, Screen Recording button, that toolbar that appears at the top can be tricky.

After selecting the screen area to record (Select Area) and choosing the Audio and Record Pointer options, click Record. Here will be the difference between having to trim the front part of the video or not.

Hang on the Record button after clicking it for a second. As the "countdown" begins, move your cursor. The toolbar disappears.

All that said, if you have captured the toolbar in your screen recording, use the Playback tab, visible when you select your video on the slide, and Trim Video. Slice off the seconds at the beginning where the toolbar is visible.

How do I recycle elements of older presentations?

If you use older presentations to create new ones, involuntary image resizing may result when you change the slide size from 4×3 to 16×9. Make a copy of the presentation you are about to convert and re-open the old one as well.

Choose Slide Size from the Design tab. Most of your graphics will survive but slide master graphics may not.

On the View tab, choose Slide Master. Do the same in your copy.

Layout by layout, copy the graphics from the old one to the new one. They will hold their original size, allowing you to adjust them while keeping the aspect ratio.

How do I make my charts look more readable on a screen?

Putting a complicated chart up on a screen is a sure way to lose an audience. Clear things up by animating series or category objects and build the chart one logical, explainable element at a time.

First, choose a simple animation like Fly in, Fade in or Float in.

Then click the Effect Options button and scroll to the bottom. Choose the option that best suits how you explain how your chart came together. You can add emphasis elements, like other shapes, and customize the animation on the animation pane.

When should I consider using animation?

Presenting online (without a webcam) can be daunting if you've only ever presented in person or in print. You won't have the power of your facial expressions or gestures to emphasize your message. What can take their place is carefully used animation.

Use entrance animation to keep the focus on the topic you are discussing. Don't be afraid to experiment with animation and transitions.

You don't want kitsch, but you do want to keep your audience engaged.

Practice and make sure you're giving the audience something to look at or some movement every 15 to 30 seconds.

How can viewers of my PowerPoint presentation get to different places in the presentation and back to a main screen?

There are two primary ways to accomplish what you wish. One method, available for years, uses shapes or text, and hyperlinks. A newer feature called Zoom slides, not related to the Zoom teleconferencing platform, can also be used.

Shapes & hyperlinks: Create your main slide (menu) with shapes containing the text for each place to which you want them to navigate (target slides). You could just use text here; the hyperlinks that will be added will cause the text color to change and be underlined.

Select your first shape and press Ctrl+K or click the link button in the Links group on the Insert tab.

In the next dialog box, choose Place in this Document on the left.

Now, choose the target slide.

Next, you will need to give them a way to navigate back. You can place another shape on the target slide, perhaps a left-pointing arrow with the text "back" or "main menu."

Repeat the link process, choosing the menu slide after Place in this Document.

Zoom slides: Zoom slides give a visual "zoom" animation as you navigate back and forth.

On the Insert tab, click the Zoom button in the Links group. If you don't see it, you may need to upgrade your version of PowerPoint. This places a thumbnail of the slides you select on the "menu" slide. When the presentation is viewed, the viewer clicks the picture of the slide to which they want to navigate and then the back arrow key to return to the main menu.

I really love SmartArt. Is it possible for me to animate it in PowerPoint?

Yes! As just one example, let's take something simple like an organizational chart.

First, select the graphic that you created with SmartArt. On the Animation tab, choose the type of animation that you would like to apply.

Initially, the entire graphic will show this behavior. But don't worry, the next couple of steps will get you where you want to go.

Next to the Animation gallery, you will see the Effect Options drop-down button. Click it and choose the Sequence: for example, Level at Once. In this case, it will bring in each level of the organizational chart as just one object.

The trigger will be "On Click" by default. To change the sequence or the trigger, click the Animation Pane button, and adjust the order of the animation script on the right.

In order to use more complex animation, you may need to first convert the diagram to shapes. To do this first, click the diagram, then the SmartArt Tools Design tab. On the far right, you will see Convert.

Choose Convert to Shapes. To make sure that you can apply different animation to each element, click on the Drawing Tools Format tab and then choose Ungroup. You might need to do this a couple of times before all shapes are separated. Now, you can apply animation to each element.

Outlook Tips

How can Outlook help me organize my email?

You've finally decided to get your email organized. But where do you begin? Here are some steps to take.

Conversation view: In the Outlook desktop version, you can show your email messages in order by conversation. This includes your sent messages, too. Then, you can apply the Clean-up tool to reduce these conversations to the minimum items required to maintain the entire conversation.

1. To begin, be sure the inbox is sorted by date. You can do this by simply clicking on the Received column heading, or from the View tab, in the Arrangement group, click on the Date selection in the Sort Order gallery.
2. Check the box in the Messages group that says Show as Conversations.
3. On the Home tab, in the Delete group, click on the Clean-up button and choose one of the options that appear in the dropdown menu. To clean up the whole Inbox including subfolders, click that selection, or just choose to clean up a single conversation.

Rules: If you recognize a pattern in the email, you can simply folder or delete without even opening it. Set up a filtering rule to do this for you. Let's say you get automatic notification messages every day from a system that you check each day anyway. Let's further decide that you have no way of ceasing this message flow.

1. Right-click on the email message and choose Rules, then Create Rule.
2. Select either the from address, if it is unique to this type of message, or some consistently repeating text from the subject line.
3. In the Action section, choose the Deleted Items folder to send them to.

This process can also help you set up a series of "sweep" folders that can hold email you'd like a chance to peruse but will ultimately end up deleting. This can be social media messages, out-of-office messages or Meeting Accept/Decline/Tentative items. This one would need to be done as an advanced rule using the "Uses the form name form" option in the first step. Choose Application forms and then one or more of the meeting response types.

Categories: The great thing about categories is that you can apply multiple categories to a single item. For example, you can categorize an email message by project, and then also categorize it as urgent. Categories are also a great way to organize email messages without subfolders. To view your messages by category, click on the Categories column in the view. Or, on the View tab, in the Arrangement group, click Categories from the Sort by gallery. Messages with multiple categories will appear multiple times. However, there is really only one message. If you delete it in one place, it will be deleted from all. Right-click and click the category you wish to remove. It will still appear in the others.

Clean out deleted items: It may sound obvious, but many people use the Deleted Items as a permanent folder. You should be deleting your deleted items regularly. If there are some you keep just in case or want to review again before confirming that you want to delete it, create another folder and use a Quick Step to put something there with a single click. That way, everything that goes into Deleted Items is something you mean to delete. Alternatively, you can begin using Shift+Delete to permanently delete things you absolutely don't need. But still, sweep Deleted Items once in a while, too. Who wants to file in a trash can?

How do I send follow-up reminders in Outlook?

It doesn't take long to start swimming in email. The trick is not losing the important calls to action in the sea of other messages. One tool to use when you reply is to set a reminder for both you and the recipient.

When you reply, click the drop-down arrow in the ribbon for follow-up (red flag), choose Add Reminder and notice that you can set one for you and one for your recipient. Whoever is the one charged with the task, set that due date a day before the due date.

There's got to be a way to set up Outlook to give myself a chance to unsend emails, right?

We've all sent the "oops" reply. Here's how to avoid it:

Set up a Rule so all email messages won't go out until two minutes after you click "Send." Then you'll have two minutes to recognize any errors … and save yourself the embarrassment.

Here's how to create a Rule in Outlook:

1. On the Home tab, in the Move group, click the "Rules" button.
2. Click "Manage Rules and Alerts."
3. Under "Start from a blank rule" select "Apply rules on messages I send…"
4. Click "Next" to have it apply to all messages you send. Click "Next."
5. In Step 1, select "Defer delivery by a number of minutes." Set the number of minutes in the lower panel (Step 2). Click "Next," twice.
6. Turn on the Rule. Click "Finish." If you send an email by mistake, go to Outbox and delete the message before your "oops" goes public.

What does "Outlook Tasks" do?

There are thousands of different ways to record and progress toward your goals. If you don't feel like messing around with a new app, use Outlook Tasks.

If you plan to track several goals, consider setting up a folder under your Tasks folder for each one.

Then, using the "Click here to add new Task" field at the top of the view, start brainstorming all the things you'll need to do to accomplish your goal. You can even set recurring tasks to remind you of daily self-care goals.

Can I create contacts directly from email?

When someone calls you up and says, “Hi! How are you?” are you thinking “Hi! Who are you?” There are some people in your network with whom you may only be in touch occasionally.

When you receive your first Outlook email contact from someone, drag it to People to create a contact with that email. The contents of the message will be stored in comments. Pop open the contact to see how you know them. Bonus: If they have contact data in their signature, you can drag it to fields in the contact form.

How can I keep my executive’s email messages pinned to the top of my list?

Set up a search folder (right-click on Search Folders at the bottom of the navigation pane for your account) for all mail coming from your executive. Then add that search folder to your Favorites by right-clicking the search folder and choosing Add to Favorites.

How do I make an Outlook template?

Ever accidentally left names or other information in an email message you copied in order to create a new one to someone else? Avoid this with an Outlook template.

Compose your email, subject line, attachments, content, and any consistent cc: entries.

Remove your automatic signature. Click File> Save As and save as type Outlook Template.

To use it, choose New Items >More Items>Choose Form, and select yours from User Templates in File System. You can also create rules that will send messages based on this template.

In Outlook Online:

To create a new email message, which can be done from any view showing your mail in Outlook Online, type an **N**. This works whether you are viewing a list or individual email.

To quickly categorize an email message in Outlook Online, just select it from the list or open it and press **C**. Tip: Categories created in the desktop version will show up in the online version.

If you keep track of work received in email by using read and unread markers, use **Q** to mark it read and **U** to mark it unread. This can be done from a list view of your mail.

Windows Tips

Got a few dozen windows open? To maximize one to work on, activate it with a click and then use the Windows key and up arrow **(Win+Up)** to maximize it.

To resize that window you just maximized down to its previous size, use the Windows key and down arrow **(Win+Dn)**. Whatever size it was the last time it was restored down is the size it will return to.

Need to walk away from your computer for a moment? Use the Windows key plus the L key to lock it **(Win+L)**. When you return, you'll need to enter your Windows password.

Open File Explorer with **Win+E** to instantly see a list of all files and folders recognized by your operating system, including synched cloud accounts.

Whether it's just getting too hard to look at or you have sensitive information that needs to be scuttled quickly, **Win+M** does the job. You can tap **Alt+Tab** to open the last one you had active.

Another way to get things going again after using **Win+M** is to use **Win+Tab**, which shows you thumbnails of all your open windows, allowing you to activate whichever one you want.

Cycle through your open applications by holding down Alt while you repeatedly press Tab. Open the control menu in the upper-left corner of the current application window by pressing **Alt-Space.** Close the current application by pressing **Alt-F4.**

Launch Windows Explorer by hitting **Windows-E**. Then, just press **Backspace** to move to your current folder's parent folder. Type **F2** to rename the selected folder or file, and **F3** to search for a file.

Minimize all open windows and return to your desktop by hitting **Windows-M** or **Windows-D**. **Shift-Windows-M** reopens all the windows. (**Windows-D** will restore them, too, if that's the key combination you used to minimize them.)

Trim some task time with these shortcuts, which work in many Microsoft applications:

- Ctrl-S saves your current work.
- Ctrl-O opens a new document.
- Ctrl-Z and Alt-Backspace undo the last thing you did.
- Ctrl-Y undoes the last undo (or redoes).

- Ctrl-A selects everything in the open window, whether it's all the files in a folder or the entire document.
- Ctrl-X deletes the selection.
- Ctrl-C copies the selection.
- Ctrl-V pastes the clipboard contents.
- Ctrl-F launches the program's search or find tool.
- Ctrl-Home moves the cursor to the beginning of the open file or document.
- Ctrl-End moves the cursor to the end of the open file or document

Tips on Other Apps

SharePoint

Where is the best place to put files shared by people in Office 365: OneDrive, SharePoint or Teams?

Well, first a little secret. It's all SharePoint. OneDrive is a SharePoint library that you use for your own files and with which you can control how files and folders are shared. When you use Teams, the team has its own Files tab by default. That is a SharePoint library accessible to everyone on the Team. Finally, with the proper permissions, you can create a library in SharePoint and store files there, managing the permissions at the library level to share with different people or groups. My vote for your particular situation would be a library accessible on the File tab in Teams.

How do I alert my staff when a new document is added to a SharePoint library?

In SharePoint, you can set alerts on a library. It works similarly to your social media group emails. You can set notifications for each addition to a library or group them into a weekly update notification. These will be received by email and can be set for multiple people. Look up in the ribbon and find the Library tab. Click Alert Me in the Share & Track group. Set up alerts on the next dialog for yourself and others.

Can I use Teams to route a document for approvals?

Well, not with Teams alone. The library you'll use will be one that appears on the Files tab in your team. Since it is a SharePoint library, you can either use a SharePoint workflow or Microsoft Power Automate (previously Microsoft Flow) to set up your approval route.

You should already find a template for this called "Start approval for new documents and notify via Teams." When you click Continue, you will need the URL of the SharePoint library. Click into the Site Address field. You should see a list of your teams and/or groups. Once you select the right team, click into the Documents field. It will list all of the document libraries associated with that team. If you want to reference a specific folder, you can choose that below the library name.

In the Post Message area, select the team again. Select the channel to refer to in Teams below that. If you haven't created channels, choose General. You can customize the message, but be sure not to remove the fields, especially the one with the link to the document. Next you'll complete your approval fields. You'll notice the ability to set next steps based on the results of the review. You can make a relatively complex scheme using conditions and approval statuses. It may require a bit of experimentation to get it right, so enlist the help of a couple of team members to receive notifications and set statuses to determine if you have the routing you like.

How do I customize my Teams library?

If it would be helpful to have an additional piece of metadata on your files in Teams, it is a really easy customization to make. On the Files tab in Teams, click on the three dots at the top right of the menu and select Open in SharePoint. While looking at your library in SharePoint you'll notice, in the column headings, a selection labeled +Add column. Click this and add the type of column you need. For example, if the document needs to be reviewed annually, you could add a date field called Review Date.

How do I make a to-do list in Teams?

Would it be handy to have a list of to-do items for your team? You can easily create one that is accessible from Teams. First click the + sign at the top right of your Teams screen to add a new tab. Search for "Lists" and add it. When the tab opens, you can click Create a list and select the type of list you wish to add, or create your own from scratch. There are quite a few templates available to start from, such as Issue Tracker, Travel Requests, Event Itinerary and more.

How can I separate access within my own group in Teams when IT won't let me create another team?

If you're the team owner, you can create channels. Each channel has its own chat, file library and wiki. You can also add other apps by adding a new tab. Keep it simple and open. Specify the channel's privacy option as "Accessible only to a specific group of people within the team" when you need to secure information from unauthorized access. Set up channels for sub-teams without locking them down to keep like resources with like operations. Name channels clearly so everyone knows what goes where. The simpler the structure, the less "crosspollination" of content and communication there will be.

Can I set up an out-of-office message from Teams?

Yes! Microsoft offers the ability to set your out-of-office message right in Teams.

Click on your profile picture, Set status message, Schedule out of office. You can also do this from Settings in General. Choose Out of Office and select Schedule. You can personalize your message similarly to the way you do it in Outlook, including scheduling how long the message should be active. If you work from Teams as your home base, this is one more task you don't have to leave the app to do!

How do I control who is and is not on camera in a meeting?

Perhaps not everyone needs to be on camera in your Teams meeting. Before the meeting, in Meeting options, turn off Allow camera for attendees? Save your choice. During a meeting, organizers and presenters can selectively disable all or individual attendees' cameras by clicking More options… next to Participants and then Disable camera for attendees. This can make limited internet capacity less of a burden during meetings.

OneDrive

I have files in Google Drive and OneDrive. I'd like to use only one. What's the best way to move things over?

You can use a tool like MultCloud or ODrive to manage documents in multiple clouds. However, if you truly wish to shift all of your cloud storage to a single one, activate the desktop sync options for both accounts and use File Explorer to move files and folders. For Google Drive, you'll need to activate an add-on called "File Stream." You can do this from the Settings gear button and choosing Get Drive File Stream for Windows. Once installed, this will create a G: drive that appears like a network drive in your file system.

Resist just moving everything and take the opportunity to cull your file collection. Unless you are giving up one subscription or the other, leave the old files on the other platform and treat it like an archive. Be brave about deleting files you no longer need or for which more recent copies are available elsewhere. Another very important finishing step is to remove all sharing permissions from the old system. Any links that are out there in your network shouldn't work anymore.

When sharing Google Drive files with a link, how can I stop people who don't already have access to the shared drive from seeing them?

When you share a file, it will usually say Share Restricted, meaning it can only be shared with people who have access to the folder it is in. If it does not, you can change the selection from Anyone with the link to Restricted. With a Google Workspace paid account, you can also provide access to people in your organization. In either case, you will see a gear icon in the upper right corner of the Share with people dialog, where you can further refine what people with view access can do.

All my documents are stored on Microsoft OneDrive. How do I get back to an older version of a document?

From the File tab, choose Info. On the backstage view you'll see a large square button called Version History. When you click that, you'll notice a list in the task pane on the right with all of the versions that have been automatically saved by Word. Click Open version for the one you want. It will open as Read Only. At the top of the document, you may select to Compare or Restore it. When trying to recover good content that was lost in a later version, we usually select Compare first. Selecting Compare will bring up a screen that may seem a little busy. However, if you just look on the left-hand pane, you'll see a list of all the changes between the most current version and the one you selected to compare it to.

How about accomplishing the same thing on Google Drive?

With your most current version of the document open, click the File drop-down menu and choose Version history. From here you have two choices: Name current version or See version history. With naming version, you're able to more readily identify where you were in the process, such as 1st draft, 2nd draft and so on. Clicking Version history will bring up a list of all versions on the right. Here, you can delete all but named versions, decreasing the number of versions you might have to review to confirm the changes you'd like to keep.

Google Sheets

Does Google Sheets have macros like Excel?

While macros don't translate cleanly from Excel to Sheets, they can be recreated. On the Tools dropdown menu, choose Macros, then Record macro. It's a good idea to rehearse the steps you want to record to make sure you're doing it optimally and with consideration for how that data might appear in another file on which you'd like to run the macro. You can choose to record with relative cell references or absolute references. For most utility macros that can be run on many different files, use the relative option.

How can I get rid of duplicates in Google Sheets?

There are a few native features within Google Sheets for removing duplicates. The first method uses the Unique function. Type "=UNIQUE" and select or type the range of the data source you'd like to remove from and hit enter. Another way to do this is by selecting the entire entry of data, navigating to the Data tab, hovering over Data cleanup and clicking Remove duplicates.

How do I make a table in Sheets the way I can in Excel?

There are a few add-ons you can try to get the look of table-style formatting. While you don't get all the functionality of an Excel table, you do get the formatted rows and columns. AbleBits Table Styles has the ability to apply canned styles and colors, as well as create customized ones. Once installed, you must select the whole dataset for which you'd like to apply the formatting, then click on Addons and Table Styles to open up a panel on the right. Expand the options to change how the formatting is applied. For example, you may not always want a total row. To extend formatting to new rows and columns, you will need to use the Format Painter button (Paint Roller Icon).

Google Docs

How do I layer images in Google Docs?

When you initially insert an image, you will see a toolbar pop up at the bottom left of what you inserted. The five buttons allow you to choose in-line (default), wrap text, break text (most easily navigated by most online browsers), behind text and in front of text. Depending upon your selection, you'll be able to assign image behaviors: Move with text, Fix position on Page or choose Position options for even more flexibility.

OneNote

How do I send an email message to OneNote for Windows 10?

If once upon a time you used the Send to OneNote feature with OneNote 2016, and are now using OneNote for Windows 10 and beyond, you may have assumed that feature was forever lost. But it's not gone. There is an options setting in Outlook you'll need to adjust if you want to send things to OneNote for Windows 10. Click on File, Options, Advanced in Outlook. Scroll to the bottom under Other and check the box that says Use Send to OneNote with OneNote for Windows 10, if available. You will need to shut down Outlook and OneNote for the change to take effect. When you have an email open you will see the Send to OneNote button on the far right in the ribbon. Sign in if you're prompted, and you're all set!

Can I use OneNote for calls to action?

You should see a OneNote icon in Outlook, on the Home tab, in the Move group in the ribbon. Click it to select the notebook, section and page on which you want it to appear. This does not get rid of the email from your inbox, but you can delete it and manage the related work on the call to action from OneNote. Keep in mind that the content will be visible to anyone with whom you've shared the notebook.

How do I use OneNote tags?

Most OneNote users have discovered the checkbox tag that creates a To Do item, but creating custom tags allows you to tag meeting follow-up items by person, outstanding issues and more. To create custom tags, click on the Tags gallery and choose Customize Tags (OneNote 2016) or +Create Tag in the dropdown to the right of the To Do tag (OneNote

Windows 10). Then, using Find Tags (OneNote 2016) or Search Tags (OneNote Windows 10), you can summarize a meeting before you ever leave it! Links for a OneNote TOC. If you use OneNote as a procedure repository, create interactive links between a table of contents (TOC) item and the page with the procedure. Right-click the procedure page in the notebook navigation panel and select Copy Link to Page. Then select the text of the list item in your TOCs and press Ctrl+K (or click the Link button on the Insert tab) and paste the link. Then right-click the list item and choose Copy Link to Paragraph. At the top of the procedure page, type Return to List and paste the link there.

General Tips

3 tech tips for the new savvy admin

As we enter a new world of work where technology plays such a critical role, and many of our coworkers log in remotely on a regular basis, the skills we need to thrive have changed. There are three tech tips for right now:

1. **Get to know the IT specialists.** Most of us get used to a work model in which tech people are considered part of a vastly separate division. And like dealing with car mechanics, we think that we shouldn't meddle in what they do too much or ask questions that are beyond us. But when problems arise, we need to engage IT in conversation about their causes and effects—don't just have them fix our problems and walk away. We'll sound unusually smart and forward-thinking while so many others are just shrugging and saying, "That's an IT thing; I don't get it."
2. **Master the art of the network search.** How many times have we heard this: "Does anyone know where this file is?" "Wasn't there a folder with that document in it?" Figure out where everything on the network is stored, what folders mean, how they relate to one another and what we have access to. Mastering search skills within our company's network also saves everyone time.
3. **Master the art of permissions.** It's frustrating when someone suddenly can't open a file or save it correctly. Teams often set up folders and documents without correctly considering who should be able to edit them, and how and when. Dig deep into how permissions work

and talk to IT about how they're structured on the network. This will also clarify the need for security (or the lack of it) for all documents.

Where to find useful how-to learning online

As fast as technology changes, you may find yourself searching for instructional videos on how to use new applications and new features on old applications. In fact, you may spend just as much time searching and sampling information as you do using your tools. Here are some time-savers.

How to search

If you go to your favorite search engine and type in Excel Formulas, you'll get a ton of results. So, the first tip is: Be specific! If you want to know how an IF statement works in Excel, type "How does an IF statement work in Excel?" You will likely find the answer to your query on the first screen.

Searching new features might yield results from older versions that may not be helpful. So, include the version you're using, too.

Also, click the Tools link under the search criteria field and then the Anytime drop-down link. Choose results within the last year or even the last month if there has been a recent update.

Now your results are more likely to yield an answer. Know that the provider (e.g., Microsoft) will have the most comprehensive information. But other sites might explain things better.

Where to search

Searching Google is like searching the ocean for a particular drop of water. You might prefer to search YouTube instead; it's the second most used search engine in the world for a reason. After entering your search criteria and launching your search, look at the top left for the Filter button. Click this to narrow results by upload date or other criteria. YouTube can be a bit like the wild west. You may have to start and stop several videos to decide whether they answer your question and whether you can understand the presenter. As well, there are many people creating YouTube videos who have a relatively limited understanding of what they're presenting. If you find a solution to your query, check it out on another video or two to make sure it's accurate.

Building a library

Once you find sites or presenters you like, save those links, and subscribe to their channels or newsletters. Don't be afraid to ask questions in the comments sections of website blogs or videos. Those of us who post tips out there love talking about this stuff!

Conducting successful remote meetings

"Zoom fatigue" has been a reality since 2020, when so many employees began working remotely from different locations. A remote meeting using online meeting platforms is a great solution. Yet, although the objectives of an in-person meeting may be the same, the way to accomplish these in an online meeting requires special attention to different factors.

Use a reliable platform such as Zoom, Skype, GoToMeeting (gotomeeting.com). You may already have access to these platforms at no additional charge or be able to take advantage of a free trial. Whatever you choose, be sure to have a "tech test" with a representative sample of attendees using the various technology platforms from which they will be accessing the meeting. Be sure to include any mobile devices like smartphones and both PC and Mac computers. Also double-check the recommended browser if you'll be using a web-based platform like GoToMeeting.

Can I use other videoconference tools in Teams? While many people really like the robust features of Teams, they are more comfortable with other tools for videoconferencing. The good thing about Microsoft Teams is they're always adding new apps. Recently, they've added Cisco Webex to the apps you can add to your channels.

If you're using Zoom or GoToMeeting, while you cannot add them as apps, you can add the website to a tab. Those with sign-in access will be able to sign into their accounts and work in the app. Or click the Join link inside those apps and enter the meeting number to join a meeting. Another way to handle this is to post meeting invitation links from other portals directly into chat or into a team's calendar created in SharePoint and added to the tabs in Teams. The object is to create a single hub where team members can come to interact with all the content and apps they need to use to be productive.

Visuals are key! Good visual aids are imperative. Encourage co-presenters to have slides or other graphics that not only inform and clarify but engage and courage interaction from meeting participants.

Provide opportunities for everyone to interact. Whether checking in using the chat box, voting in polls or sharing audio, be sure everyone in attendance has the opportunity to participate in the online meeting experience. It's too easy for people to start "multitasking", muting their audio and checking out of the proceedings.

Set the start time of the meeting at least 15 minutes prior to the meeting's actual start to facilitate the resolution of any technical issues that are encountered. Have a "buddy." If you are the meetings leader, have someone who will co-host with you and address any individual issues through chat, so the meeting doesn't get delayed.

7 Minute-Taking

With everything that's at stake in today's challenging times, it's no wonder that employers prize accurate minute-taking skills more than ever before. Minutes serve as a permanent record of what was *decided*, what *actions* must be taken, *who* must take them and *when*.

Every day, key meetings are probably taking place in your office. And the decisions made as a result of those meetings can involve millions of dollars, and even change people's careers. That's why the role of the minute-taker is so important. It's also a way to boost your value within your organization and become a key player on your team.

Pre-meeting Preparation: 8 Key Steps

When just the thought of creating official meeting minutes makes your writing hand freeze, take note: Preparation starts well before the meeting.

In fact, 60% to 70% of a minute-taker's most effective time will likely be spent in the pre-meeting stage, as one meeting expert pointed out. The work you do during this phase lays a foundation that helps ensure your success upon entering the meeting room.

Follow these eight pre-meeting steps:

1. **Choose your technology**
What tool will you use to capture information? While some minute-takers still use shorthand, more often nowadays people are using a laptop, which can be a real time-saver. You need to determine which method is going to work best for you.
Either way, you can use audio or video recordings as a back-up. Just be sure you get permission first to do that. Find out what the rules are, based on where you work and the meeting itself.

2. **Review previous minutes**
Before you start, it's a good idea to review the minutes from prior meetings. Notice the organization of the minutes—the amount of detail, phraseology and other characteristics.

3. **Obtain the meeting agenda, other pertinent materials**
The agenda for an **informal** meeting lists only the items the attendees will discuss during the meeting. But the agenda for a **more formal** meeting could list the times, the events, speakers, rooms and activities. Make sure you get a copy of the agenda beforehand, especially if you're not the one who helped prepare it.
Why are agendas important? They show the time frames for each segment of the meeting. They also make you aware of what you can expect from the discussion.
Other materials you might want to request: minutes of past meetings, handouts and glossaries of relevant subjects.
Ask the meeting chair or facilitator to copy you on all materials sent prior to the meeting and to send you an advance copy of any handouts that will be distributed.

4. **Speak with the chairperson in advance**
Go through the agenda together to establish the main topics and the group's goals. Then determine with the chairperson whether the meeting is going to be formal or informal. Oftentimes, that will dictate the type of notes you will have to take, as well as the format to use when writing up the minutes.
Also, decide on a signal to use during the meeting in case you will need clarification from the chairperson.

5. **Arrive early to check equipment, materials**
Of course, you'll want to check your audio or video equipment in advance, and make sure you have enough batteries and extension

cords. If you will be using a laptop, make sure to bring every accessory you'll need.

Check your recording device prior to the meeting. Set your volume level by walking around the room and experimenting with audio. (During the meeting you may have to adjust the volume if one of the speakers is soft-spoken.)

Some additional materials to bring: sticky notes, highlighters, a red pen, a note-taking pad, extra pens, note pads for visitors, any necessary file folders and meeting handouts.

Make sure you have a copy of the agenda—and bring extra copies, in the event the meeting chair forgets to bring them.

6. **Create a seating chart**
   This is a good idea, especially if you don't know the attendees or have a large group—eight to 10 people—in the meeting. Before everyone arrives, draw a diagram of the table in your notes. Then, as each person takes a seat, write his or her name in the right position.
7. **Determine your position at the table**
   Ideally, you should sit next to the meeting leader or chairperson. That way, you can more easily signal the chair if you need clarification. The chairperson is likely to appreciate the strategic positioning as well. It's easier for him or her to say quietly something like, "Oh, did you capture that? What Elijah just said was really important."
8. **Introduce yourself**
   If you don't know some of the attendees, plan to introduce yourself and your role at the meeting. Remember to smile and be confident. It's good for people to get to know you.

During the Meeting: 10 Minute-Taking Tips

Even after years of practice, taking minutes wasn't getting any easier for Terri Michaels. "I had become wordy, and the minutes were sometimes eight pages," she says. "Each new director or company wanted them done differently."

Finally, she enrolled in a workshop, where she learned that to take better minutes, "I had to adjust my *listening* skills and thinking patterns, and home in on what was really being discussed."

Now Michaels uses these minute-taking best practices from Rhonda Scharf (www.MinuteTakingMadeEasy.com):

1. **Ask yourself, as you're taking notes,** "Will it matter in two days, two weeks, two months, two years?" If yes, include it. "I still find myself putting things in my draft that do not matter and later removing them," Michaels says.
2. **Summarize.** Don't record conversations word for word.
3. **Do record motions word for word,** and indent them for easy scanning.

   Example: **Mr. Hurst made a motion to approve the 2024 ranking list. Seconded by Mr. Goodhart.**

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4. **Use keywords vs. sentences.** *Tip:* Record minutes in a steno pad. On the left side, write keywords; on the right side, make short notations on the keywords. Want the notes to stick in your memory? Write on a color pad.
5. **Keep emotions out of the minutes**—yours and those of attendees. *Example:* "Mr. Smith~~, exasperated by the discussion,~~ left the room."
6. **Be an active listener.** "If someone makes a motion and you didn't hear it clearly, interrupt the meeting and ask," Michaels says. "If you don't understand something being discussed, but you can't interrupt the meeting, make a note on your pad to ask the chairperson about it later."
7. **Reflect accurately the order of the discussion,** even if it doesn't follow the agenda. "These are legal, historical documents, and you are the one who took those notes," she says. "You never know when you will be asked about a meeting."
8. **Switch to using your laptop for minute-taking.** "Listening to the meeting while recording it and then listening to it again to complete the minutes was double duty," she says. "Now I save time by typing keywords, short sentences and notations into the agenda."
9. **Create bulleted lists when recording** a list of comments, suggestions or concerns.
10. **Streamline your sign-in sheet.** Michaels uses a three-column template: The first column lists all staff and attendees. Attendees

initial the second column and mark their arrival times in the third column.

"Two days before the meeting, I ask staff if any guests are coming, and I add them to the sheet. The morning of the meeting, I put it by the door with a pen and a 'Please sign in' sign. At the start of the meeting, I ask the chairperson to announce for all attendees, including board members, to sign the sheet."

When Confused at a Meeting, Speak Up!

You're sitting in a meeting taking the minutes when you suddenly realize you don't understand what's being discussed. Speaking up to ask for clarification can be intimidating. Despite that feeling of discomfort, though, it's best to summon the courage, especially since you're the one charged with taking formal minutes.

Having a few useful phrases on hand can give you the confidence you need, says Jodi Glickman Brown, founder of communication consulting firm Great on the Job. She offers a few examples in a *Harvard Business Review* blog post:

- "Forgive me for falling behind, but I'm a little confused about …"
- "Max, I believe this is what you said … Is that correct?"
- "I'm not entirely sure I'm following you. Could you please recap what you just mentioned regarding …"
- "I'm sure I'm supposed to know this already, but …"
- "I apologize if this is totally obvious to everyone here, but what does XYZ stand for?"

Joan Burge, founder and CEO of Office Dynamics, says if you're taking formal minutes or notes on behalf of the group, "Feel confident about the role you play because it will impact what is happening after the meeting. It just takes courage to speak up in that meeting. It's your tone of voice and your volume that convey confidence."

Make it clear that you need clarification for the notes. "If you can't get a word in edgewise," Burge says, "then write down what you thought you heard, and then afterward go to that person and ask about it."

Conversation Veers Off Track—Now What?

You're taking minutes in a meeting when the conversation suddenly goes off topic. Or, two attendees begin to argue. To what extent should you capture the conversation?

"The problem with side conversations: Sometimes people just chitchat and say nothing of value, but other times they say something important," Burge says.

She offers these tips for turning meeting conversations into a valuable road map—even when the conversation is difficult to track.

Situation: The conversation goes off topic.

What to do: Listen for an action, a clarification or a requirement.

"For example, this comes up when I'm working with a new client," says Burge. "I'm on the phone with them, and they are rattling off tons of information to me. So I'm always listening for *keywords* and phrases that have to do with an action or viewpoint."

Situation: Two attendees begin to argue.

What to do: What you'll need to capture isn't "David was really upset about the new project," explains Burge. "Rather, you should be capturing David's comment about the project: that he feels it's going to be too big of an investment, or that the company won't get a return on its money."

Situation: A subgroup is having a side conversation.

What to do: Say something like, "Excuse me, but is this really good information that I should be capturing?" or "Do you have something you would like to share with me that I need to write down?"

Otherwise, you won't know whether they're saying something important.

Situation: Attendees are using an acronym you don't understand.

What to do: Ask the person who is using the term if they could please repeat it or spell it for you. If it's an acronym, ask, "What does that acronym stand for? I need to put that in the meeting minutes."

Use a Meeting Minutes Template to Save Time

At her company meetings, senior administrative assistant Amy Finelli uses a meeting minutes template. That way, she can quickly send out notes after the meeting "because I don't have to figure out how to organize the topics. And it looks the same each time I send it out," she says.

Another "power tool" Finelli uses: She keeps a Word template for creating nameplates, which she provides to all meeting attendees. If it's a large meeting or if anyone is new, she says, "it's helpful to have nameplates for all employees so everyone knows whom they're talking to."

Finelli isn't the only one using time-saving tactics like minute-taking templates. Some people spend eight hours a day in meetings, so any tip that helps speed up front-end or back-end work can be a lifesaver.

Tip: Want to stop reinventing the wheel every time you take minutes? At the end of this chapter, you'll find two minute-taking templates provided by Patricia Robb, an executive assistant and renowned expert on minute-taking.

Turn Meeting Minutes Into Action Plans

After a meeting is over, everyone will scurry back to check email messages and resume work. They may quickly forget about the action items they just took on.

Your mission? To produce minutes that remind everyone what needs to happen next, and assure them that their meeting time was well spent.

At Marilyn Halsall's workplace, "action minutes" are the solution.

Streamlined and informal, action minutes record little, if any, discussion. They record only decisions and who will do what by when. That makes it easier for people to note what they actually accomplished in the meeting.

"People don't take time to read the full minutes," says Halsall, an HR administrator at a Canadian college. "They want to quickly see 'What do I have to do before the next meeting?' or 'What decisions did we make?' That's why so many people find action minutes useful."

Since Halsall introduced the new format, it has received rave reviews from meeting attendees.

These five suggestions will help you prepare to write minutes that yield results:

1. **Use a consistent format.** People refer to minutes to remember what the group decided and who's in charge of doing what next. Help that information pop out with a consistent format that people will see each time.
2. **Include discussion recaps,** and key them to the agenda topic they match. No need to give a word-for-word account (see exception in No. 3), nor should you editorialize.

   Example: "David feels we need to look into industry averages, as well as our company's numbers for the past few years, before finalizing our sales goals."
3. **Be specific when it counts.** If the group makes a major decision, include synopses of the discussion's debates and conclusions. A vague account will make your minutes less valuable.
4. **List complete names and titles** under an "Attendees" headline at the start of your minutes. Should someone refer to your minutes two years later, they might not know who "David" was.
5. **Present action steps and deadlines** clearly by using bullets, underlining or bolding keywords. Make sure attendees can see at a glance what's expected of them.

Post-meeting: Closing the Minute-Taking Loop

When it's time to produce your meeting minutes, follow these steps:

1. **Gather your materials**

   Pull together the agenda, your notes, any reports or documents that were distributed at the meeting, and verbatim copies of motions and resolutions.
2. **Create a draft within 24 hours, while the information is fresh in your mind**

   If you used your laptop to take notes, it won't take a lot of time to type your draft.
3. **Double-space your minutes**

   That way, handwritten corrections can be easily and clearly inserted.

4. **Make sure to include any attachments**
5. **Send a draft to the meeting leader**
   Ask the leader to review the minutes before you send them out to attendees. This gives him or her the chance to clarify anything, or to add an important point.
6. ***Prepare to make corrections***
   After you've spruced up your notes and formatted the document, you'll need to make sure all corrections are made to the final version before filing it as a formal record.

   At the group's next meeting, you may hear corrections to the minutes, says Joan Burge. "Follow the legal requirements of your organization in correcting the minutes," she says.

   If no special requirements are indicated, Burge recommends following this procedure:

   - **Draw a red- or black-ink line through the incorrect wording.** Write the correction in ink above the line, and specify in the margin at which meeting the correction was made. Include the initials of the person making the correction, as well as the meeting date, in the margin.
   - **Use a separate page for large corrections.** If attaching a separate sheet, write that information in ink in the margin of the minutes. The corrections will need to be signed by the administrative assistant, chair or meeting leader.
   - **Store them somewhere accessible and reliable.** Keep minutes in chronological order, and store them in a place that others can access. Storing them in a shared location online and locking access behind a password is a safe option.
   - **Keep an index.** Maintain an index of everything in one place. When you are filing the minutes, make sure to include all handouts and the agenda.

For visual presentation, keep it simple. A straightforward style is more attractive than pages marked with repetitive asterisks and underscores. It's the information that people are interested in.

MINUTES OF THE AGRICULTURAL PRESERVE BOARD'S MEETING

February 23, 2024

Present: Mr. Gene Garber (Chair),
Mr. Jeffrey Frey (Vice Chair)
Mr. Daniel Zimmerman
Mr. Roger Rohrer
Mr. Richard Hurst

Ms. Terri Michael (Recording EA)

Absent: *Mr. Edward Goodhart, III*
Commissioner Dennis Stuckey
Mr. David Zimmerman
Mr. Matthew Young

Staff Members in attendance: Mr. Matt Knepper, Director
Ms. Nancy Ambler, Farmland Preservation Specialist
Mr. Kevin Baer, Farmland Preservation Specialist
Mr. Bill Jones, Farmland Preservation Specialist

Guests in attendance: Mr. Justin Evans, LCPC Senior Community Planner
Mr. Dean Severson, LCPC Agricultural and Rural Lands Specialist & Planning Analyst
Mr. Jeffrey Swinehart, Deputy Director, Lancaster Farmland Trust (LFT)

I. Call to Order and Recognition of Guest

Mr. Gene Garber called the meeting to order at 7:30 a.m. The meeting was held at the Lancaster Administrative Building, 150 N. Queen Street, Room 102, Lancaster, PA 17603.

II. Review of Mission Statement

"To forever preserve the beautiful farmland and productive soils of Lancaster County and its rich agricultural heritage; and to create a healthy environment for the long-term sustainability of the agricultural economy and farming as a way of life."

III. Minutes of the meeting from January 28, 2016

The following amendments were made to the January 28, 2016 minutes: VI. Old Business, Item A., third bullet, insert the road name, Hilltop Road; VI. Old Business, Item B., fourth bullet, modify the sentence to read "APB will continue current position, which is to instruct that the encroachment be removed;" Concerns/Comments from the Board, delete extra line between first and second bulleted item; VII. New Business, Item C., Questions from the Board, first bullet, rephrase the question to read "Since the program is for plain sect, does that mean they need to be the owner or operator to sign?"; VII. New Business, Item D., Concerns/Comments from the Board, first bullet, correct the spelling of "Goodhart;" second bullet, second line, remove the word "and" following the parenthesis.

Mr. Jeffrey Frey made a motion to approve the minutes of January 28, 2016 with the above noted changes/modifications. Seconded by Mr. Daniel Zimmerman.

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IV. Announcements

- The joint meeting with Lancaster County Planning Commission (LCPC) will be scheduled during the month of May, details to follow
- The founder of the Lancaster County Agricultural Preserve Board, Mr. Amos Funk, passed away on February 14, 2024. Commissioner Stuckey has requested the Boards input on an acknowledgement of his work. The standard acknowledgment letter from the County Commissioners could be presented. The Board would like to do something permanent to acknowledge him and his work;
  - — Proclaim a certain day to be Mr. Amos Funk day
  - — Preserve a farm in his name
  - — Place a plaque at the Farm and Home Center
  - — Name a challenge grant after him

Lancaster County Conservation District and Lancaster Farmland Trust will be contacted for possible input. Lancaster County Commissioners will acknowledge Mr. Amos Funk at a public meeting.

V. Executive Session

Mr. Gene Garber called the meeting into Executive Session. During this time, the Board discussed financial and real estate matters. After some discussion, Mr. Gene Garber ended the Executive Session and opened the meeting to the public.

VI. Old Business

Nothing new to report at this time pertaining to the two encroachment issues (Wentworth and Bowlan)

VII. New Business

A. Requests for Subdivision

1) APB has received a request from Mr. Harold M. Shellenberger, East Donegal Township, 84.47 acres. Mr. Harold Shellenberger has requested a preliminary approval for an agricultural lot subdivision/add-on of 26.0 preserved acres to an adjacent preserved farm of 96.2 acres. After completion of the subdivision/add-on, the resulting acreage for the parent tract would be 58.47 acres and the receiving tract would be 122.2 acres. The proposal meets the Board's subdivision guidelines, however, Lancaster County Planning Commission (LCPC) and East Donegal Township have yet to review and approve the proposal. The additional residential right has not been assigned on the proposal (required by the subdivision guidelines).

   Concerns/Comments from the Board:

   - Landowner could subdivide the 122.2 tract in the future
   - Possibly setting restrictions for potential future subdividing

   Staff recommendation is to grant preliminary, conditional approval; final approval after LCPC and East Donegal Township have reviewed/approved and the location of the additional residential right is assigned.

   Mr. Daniel Zimmerman made a motion to grant preliminary conditional approval. Final approval may be granted after review and approval by LCPC and East Donegal Township. Seconded by Mr. Richard Hurst.

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B. Requests for Rural Enterprise

None

C. 2016 Funding

- Overall State funding is $20 million, which is a decrease from the estimated $22 million
- Approximately 30 farms will be preserved in 2024
- Six farms offered 50%, 30% of the applicants offered some type of bargain sale
- Average $3,100/acre, 90% of easement value (decrease)

Lancaster Farmland Trust (LFT):

- Estimates 25-30 farms to be preserved this year
- Average $800/acre
- Preserves more farms in the eastern end of the county

Mr. Jeff Swinehart, Deputy Director, Lancaster Farmland Trust (LFT) reviewed the steps LFT takes to preserve a farm and a per acre amount:

1. The Board sets the policy as what they are willing to pay per acre
2. Board establishes criteria to evaluate the property (Similar criteria to APB)
3. The criteria doesn't prioritize the projects, and currently, farms are on a first come first served basis
4. Farm is visited by LFT staff and landowner is presented with a "Letter of Intent," which is their indication they desire the Board to take action

VIII. Open Discussion

The ID badges Board members have do not open the front doors to the Lancaster County Office Building as was indicated earlier. Staff will continue to provide access for the monthly board meetings.

IX. Business from Guests

Nothing at this time

X. Adjourn

Adjournment at 9:45 a.m.

Reference List: Professional Organizations

American Society of Administrative Professionals

Website: **http://www.asaporg.com/**
Email: info@asaporg.com
Phone: 1-888-960-ASAP

The American Society of Administrative Professionals was established in 2005 to provide year-round online professional development, training, and resources to address the changing roles and demanding responsibilities of administrative professionals and executive assistants. There are more than 60,000 ASAP members in North America and around the world.

Membership to ASAP is free and includes access to articles and columns focusing on business skills and career development, the popular monthly *FastTrack* newsletter, and "Learn It in a Minute" videos. Members also have access to hundreds of online training courses and live and on-demand webinars. Additionally, ASAP members have the opportunity to participate in a prestigious certification program, PACE, the Professional Administrative Certificate of Excellence.

Office Dynamics International

Website: **https://officedynamics.com/**
Contact: https://officedynamics.com/contact/
Phone: 800-STAR-139

Since 1990, **Office Dynamics International** has been the global industry leader in the development and presentation of sophisticated executive and administrative assistant training, coaching and resources. We offer a broad range of solutions that create behavior change and produce sustainable results.

Office Dynamics' experience and expertise in the administrative training industry are unparalleled. We have crafted and refined a unique line of premier educational products and training programs that boost success for progressive employers and enterprising administrative professionals, executive assistants and support staff.

Our programs teach administrative professionals how to create, renew and sustain their focus on excellence in the workplace, igniting heightened engagement in thousands of support staff worldwide.

International Association of Administrative Professionals

Website: **https://www.iaap-hq.org/**
Contact: geninfo@iaap-hq.org
Phone: 816-891-6600

IAAP (International Association of Administrative Professionals) is a 501 (c)(6) registered not-for-profit professional association for administrative professionals. IAAP strives to ensure individuals working in office and administrative professions have the opportunity to **connect**, **learn**, **lead** and **excel**.

IAAP is dedicated to helping office and administrative professionals advance their career in a demanding and ever-changing business environment.

We have always focused on preparing our members for what matters now and what's ahead. Our purpose is to enhance the value that office and administrative professionals bring to the table and advocate for the profession as it evolves to encompass the role of not just business partners but also leaders.

From specialized online and offline training programs, to valuable networking and industry leading events, we provide the knowledge, skills, and insights that build toward job advancement, success, and recognition.

Admin to Admin

Website: **http://admintoadmin.net/**
Email: support@admintoadmin.net

Admin to Admin offers one-day educational workshops, customized training programs and creative professional development retreats for administrative professionals. Our team of experienced trainers are unique because they currently work in the profession as successful executive assistants and have partnered with executives and managers in the public and private sector with a combined experience of 60+ years. As career-minded executive assistants, they have taken their administrative careers to new heights as accomplished authors and coaches, international presenters, bloggers, award-winning administrative professionals, and educators.

Legal Secretaries International Inc.

Website: **http://www.legalsecretaries.org/**
Email: info@legalsecretaries.org

Legal Secretaries International Inc. was formed to respond to the educational and networking needs of legal secretaries, as an affordable means of increasing their knowledge, skills, and networking opportunities.

We are an educational association for legal secretaries whose members value ethics, professionalism and continuing legal education.

Our mission is to increase the competence of legal secretaries so that they may better serve attorneys, courts, businesses and governments.

Our members include legal secretaries of all levels of experience who support their professional association with their time, talent, spirit and resources.

International Virtual Assistants Association

Website: **https://www.vanetworking.com/**
Contact: https://www.vanetworking.com/contact/

The International Virtual Assistants Association (IVAA) is dedicated to the professional education and development of members of the

Virtual Assistance profession, and to educating the public on the role and function of the Virtual Assistant.

IVAA's Mission is:

1. To provide access to the leading virtual assistant organization to professional virtual assistants worldwide.
2. To educate the general public and the business community on the role and function of virtual assistants.
3. To promote and require high professional standards through member commitment to the IVAA Code of Ethics.
4. To assist our members to operate their VA practices more efficiently and profitably by providing education and benefits to promote the entrepreneurial work ethic, strengthen their wealth-creating capacity and enhance general economic development.
5. To build strategic alliances, coalitions and affiliations to foster networking opportunities while promoting innovative and effective changes in the business culture to reflect the virtual assistance profession.
6. To serve as a resource for businesses seeking professional VAs by maintaining a free, easily accessible on-line database to simplify the task of locating the best qualified VA for their needs.

Association of Executive and Administrative Professionals

Website: **http://www.theaeap.com/**
Email: headquarters@theaeap.com
Phone: 703-237-8616

AEAP (Association of Executive and Administrative Professionals) is a membership association that helps you to have a rewarding and successful work life. You'll find that by having an association with us, you'll have access to a host of benefits to aid in your professional development, career development as well as your career advancement.

Visit our administrative job bank if you're looking to move on to something new. Find out what positions in this field are paying with our salary survey. Attend the annual conference that visits a different location each year. Participate in our admin forums to exchange information with your peers and us. Keep up-to-date on the ever-changing world of technology. Plus enjoy our newsletter—*The Executary*—which delivers the "latest and greatest" information right to your desk or desktop!

Professional Association for Secretaries & Administrative Assistants

Website: **http://www.pafsa.co.za**
Email: anamaria@pafsa.co.za
Phone: 27 11 616 7401

PAFSA (Professional Association for Secretaries and Administrative Assistants) is your profession's home. We are here to serve your career's best interests and to ensure that you are kept updated, motivated and informed.

- Your status as a professional will be enhanced the minute you are a member of an association such as PAFSA.
- We are in the 21st century! The world has changed drastically … your profession just as much.
- You need a professional home that communicates with you through various platforms.
- You need an association that respects you as a professional.
- You need to be a member of a professional representative body that understands your profession.

The Periodic Table of Admin Regrets

Co-workers	**Sh**ould've offered people more of my help	**Ca**n't believe I gossiped so much	**Sp**ent too much time listening to negativity
Career	**Di**dn't always have my résumé totally up to date	**He**ld back on telling my boss what my true goals were	**Go**t shy about getting involved in projects I didn't understand
Skills	**Wa**sn't aggressive enough in learning office tech	**Ne**ver did get around to writing a procedures manual	**Le**t other admins learn the "hard" stuff so I didn't have to
Money	**Ga**ve Starbucks way too much of my paycheck	**Me**ant to save money in case of unemployment but never did	**As**sumed raises would always be steady
Life	**Al**lowed job stress to creep into my nights and weekends	**Be**lieved too much that other people's careers were better than mine	**St**opped learning and dreaming too soon

10 Timeless Truths for Admins by Colette Carlson

Embrace change. The pace of change is only going to accelerate, so the quicker you adapt to new technologies, protocols and even office design, the saner you'll stay. Better to be an early adopter than a constant complainer who gets left behind.

Everything counts. Every thought you think, every decision you make and every email you send either moves you toward or away from becoming an exceptional employee. Do you choose to judge another's comments or assume positive intent? Engage or refrain from gossip? Quickly send or carefully proofread emails for clarity and understanding?

Your network is your net worth. Connect with individuals that can hire you or help you get ahead, gain a skill or introduce you to a person of influence. Don't just think locally, but regionally, nationally and globally. Add diversity to the mix in age, gender and talent.

Be a go-giver. Give of yourself, your talent and time. Share your expertise and skills with new admins, lead a meeting or provide unexpected backup to struggling departments. Givers give generously without conditions or expectations of anything in return.

Be interested vs. interesting. The greatest gift you can give another is to truly listen with your eyes, ears and heart. Listening fully tells another person they matter and you genuinely care.

Dare not to compare. Comparing what you're feeling inside to what another is feeling outside is an unfair comparison. The only person you should ever compare yourself to is the person you were yesterday.

Feedback is a gift. We can't change what we don't see or acknowledge. Rather than resist feedback, use it to adjust your behavior and go further faster.

The answer is always no if you don't ask. Do your homework, build a case and go ask for what you need to succeed. Even if the answer is no, you'll know more than before.

School is never out for the pro. Do you choose to be educated through biographies, business or self-help books? Or, do you choose fast and easy entertainment? To go to the next level, you have to grow to the next level. Read nonfiction books, take online classes and attend conferences.

Speak your truth. Your success demands you get comfortable with uncomfortable conversations. Say what needs to be said with respect and candor.