

ADMIN
AWARDS + Uber
for Business presents



The Power of Strategic Partnerships

Embracing big-picture thinking isn't a title — it's a mindset

- Kathleen Earley: Executive Assistant to the President and CFO Emeritus, Salesforce
- Jackie Ludwig: CEO, LUMINI Network
- Yulanie Türkekol: Chief of Staff and Executive Assistant to President and CEO, Chaos Free, Inc.
- Rob Wu: Executive Business Partner, Google Ventures

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1 | What's the major difference between serving as an Administrative Professional and one who also serves as a Strategic Partner?



BE A MIND READER. For Kathleen Earley, who recently retired as Executive Assistant to the President and CFO Emeritus at Salesforce and spent 50 years as an Admin, it's all about staying ahead. "There was one Executive who nicknamed me 'Radar' — before he knew what he needed, I knew what he needed," she says. "It's about being proactive and being in the moment. I think that's a key differentiation."



DON'T JUST CHECK THE BOXES — CREATE THE BOXES. Administrative Professionals are often task-focused and manage much of the inbound, says Rob Wu, Executive Business Partner at Google Ventures. But a Strategic Partner is someone who *creates* the boxes and the projects that need to be tackled. "Be exponential, not additive," he says.



THINK BIG PICTURE. As a Strategic Partner, it's vital to understand your Executive's goals and ask yourself what you can do to help them achieve those goals, says Jackie Ludwig, a career Executive Assistant who is now CEO of LUMINI Network. "You have to think two, three, four steps ahead — farther and wider," she says. And don't be afraid to ask for a seat at the table. "That way you understand what's going on in the business, and you're better able to provide your Executive with the info they need in order to be successful," Ludwig says.

BE AN ALLY. Sometimes you are the person behind the scenes and sometimes you're the person out front, advises Yulanie Türkeköl, Chief of Staff and Executive Assistant to the President and CEO at Chaos Free, Inc. But no matter what, you have to be there for your Executive and the company. "A Strategic Partner is someone who knows what needs to be done, where your Executive's mind is at, and what pieces of the company are moving together," she says.

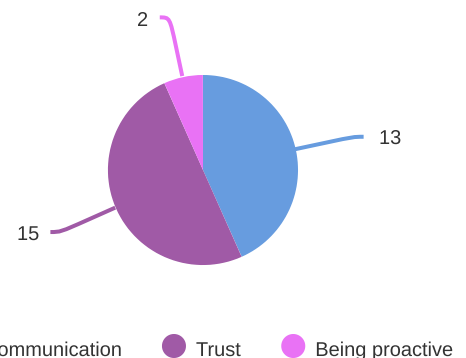


► QUESTIONS TO CONSIDER ...

WHAT IS THE DIFFERENCE BETWEEN A CHIEF OF STAFF AND A STRATEGIC PARTNER?

Chief of Staff is a title, while Strategic Partner is a mindset, according to Wu. "Strategic Partner is an extension of your title already," he says. "It's how you elevate yourself in the role that makes you a Strategic Partner." While many different roles carry the title of Chief of Staff, Ludwig says the position typically includes more project and higher-level thinking work, while a Strategic Partner might be an EA who serves as the right hand to their Executive. "You may still have to do travel and expense reports, but you should look at everything from a larger mindset, a wider scope," she says. "What can I do to make my Executive more successful?"

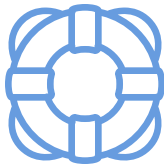
Participant Poll: What is Most Important for Maintaining an Effective Strategic Partnership?



2 | How do you prepare yourself to become a Strategic Partner?



MASTER THE DAY JOB. "Once you've created a repeatable, sustainable, and scalable workflow, it's only then that you can begin thinking beyond the job description," Wu says. Doing your day job well builds trust and confidence, which is key to any Strategic Partnership. It's also important to use contextual questions and critical thinking to better understand the bigger picture. "In the last couple of weeks, I noticed my Executive was talking to a bunch of executive recruiters and real estate folks. I found out he was building this cool new program," Wu says. "Through those conversations, he's now enlisted me to help with running the hiring process and vetting all these commercial real estate folks. So just by being aggressively curious, you'll uncover a lot of stuff. I Google everyone who comes into my inbox; I want to know who you are and why you're talking to us."



REACH OUT TO LIKE-MINDED PEOPLE. Talking with people who have the role you want is a great way to gain perspective. "They can give you feedback into what their day is like and the kinds of things that come onto their radar that maybe you hadn't thought of before," Türkekol says. "All of that, combined with your ambition, will help you understand if this is something you want to do in the long term." And, she adds, always ask questions. "If you don't know, ask as many questions as possible."



BE READY TO LEARN. Early on, Earley learned that you don't work *for* someone, you work *with* them. She's worked in various industries, from banking to real estate to venture capital, but the common thread has been finding a mentor who promotes professional growth. "I had the ambition, I had the drive, I had the curiosity," she says. "I was always very fortunate to meet various individuals who mentored me. Find that one individual you can partner with and who you can learn from — and who also can learn from you."

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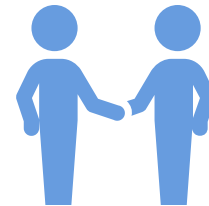
3 | What are the skills and attributes necessary to be successful as a Strategic Partner?



CONTINUOUS LEARNER. One of the key attributes, Türkekol says, is always being willing to learn something new. "If you have even 15 to 20 minutes to learn something new related to technology or your role, do so. It's going to separate you from the other Admins," she says. And, she advises, take as many notes and ask as many questions as you can — and when you feel stuck on a question or problem, ask for help. "There are times when you will need to seek other perspectives," she says. It's also important to know what you want out of your role and your career overall. "The more you love what you do, the better off you will be and the better you will be able to support your Executive," she says.



AGILITY AND FLEXIBILITY. That's especially true if you're in the startup world, where everything can change on a dime, Wu says. "With that, comes thick skin," he says. "We all deal with a variety of egos and attitudes and personalities, but you have to represent your boss and your company well." He also adds that it's vital to be aggressively curious, passionate, and always find joy in what you do. "Don't forget to ask yourself why you want to take on this kind of work," he advises. "Is it for the annual bonus? Is it because you want the experience or to make a lateral move into another skill or role? That's just as important."



CONFIDENCE AND HUMILITY. It's important to come across as confident in your role — but be careful to balance that with humbleness and humanity. "Don't take on the mantle of your Executive — you are representing your Executive, but you are **not** the Executive," advises Earley. "If you take on this mantle of importance, it can make other Admins very uncomfortable because then they feel like they're not working with a peer." And, she adds, it's crucial to be proactive. When her CFO Mark Hawkins recently retired, the CFOs from other tech companies who attended his retirement party were just as happy to see Earley as they were Hawkins. "It was a testament that I was able to help them and know what their priorities were in respect to working with Hawk," she says. "It's exciting to have that kind of relationship, to know these people, and to learn from them. It's the curiosity, it's the learning, it's the openness, it's the networking. It's a reward for all the hard work that you put into it."



SPEAK UP. Sometimes it's easy to forget that as Admins, you know more about your organization than many of your colleagues do because your work touches so many areas of the business. So be vocal about that knowledge base. "Don't be afraid to speak up," Ludwig says. "Your Executive will find that invaluable, because it's a perspective they don't get at the highest levels. But people trust you and will talk with you — and that adds value to what your Executive is doing."

4 | How do you help Executives understand how you can serve them as a Strategic Partner?



KNOW WHAT'S HAPPENING IN THE COMPANY. It's ideal to have some level of business acumen to be able to guide the conversations you have with your Executive, Türkekol says. Additionally, she says, it's a must to understand where your company is at and where it's going. "Each Executive is different and will have different ways of doing things," she says. "So as long as you have the understanding of what's really happening within your company and with your Executive, that makes it easier for you to communicate the value you are bringing."

SELL YOUR "NINJA SKILLS." "What are the things you can do beyond the job description that your boss doesn't know about? What are you passionate about?" asks Wu. He advises to make those talents known — as well as your interest in growing them by taking on special projects or assignments. In terms of how to tactically do that, Wu suggests having quarterly check-ins with your Executive. "What I want to know is what are your goals, what are the company's goals, and what should we be focused on," he says. Wu asks targeted questions, including 1) What are your personal annual goals 2) What are you enjoying about your job and what do you not like? 3) What do you wish you had more time for? and 4) What are the things you wish you could automate and get off your plate? "From there," he says, "I can take those things and figure out how I might be able to add value."



OPEN COMMUNICATION. Check in frequently with your leader, partner with them, and figure out what their priorities are. "Priorities are constantly shifting," Earley says, "so we have to understand quickly why things are changing — and be at the top of our game at the same time." And if you're interested in taking on a more strategic role, just ask, Ludwig advises. "Say, 'Hey, I see this is coming up, and I have an interest in that, I'd like to be involved.' Don't be afraid to ask. It might be less that your Executive doesn't think you're capable and more that he thinks you're not interested." Also draw upon your gifts for observation and listening. For example, when Ludwig noticed her Executive's one-on-one meetings with team members were taking twice as long as necessary, she suggested team members come to the check ins with an agenda — a move that saved her leader several hours each week. "Throw one idea out at a time," she says. "It solidifies that relationship that the two of you have and builds the trust between you. Have confidence in your knowledge and start by tossing out an idea as a question: 'What do you think about this?'"



▶ LEARN MORE ...

At Ludwig's company LUMINI, the focus is on creating a community for EAs and their Executives, and to show them how to work better together. "We have methodologies we share, we have an onboarding call with the assistant and the Executive, and we very specifically tell the Executive that they should have a minimum 30-minute call once a week with their assistant," says Ludwig. "You get peer-to-peer learning and this entire virtual community you can reach out and connect with."

LUMINI rolls out a different methodology each month that EAs can use with their Executives, including calendar and email management, meeting quality, and communication. "Oftentimes, within that communication, there are things you haven't talked about," Ludwig says. "For example, have specific conversations about when to use text and when to use email. You can begin to understand your Executive's ideal day. Do they only want meetings in the morning? How long should they be?"

To learn more about LUMINI, visit lumininetwork.com.

5 | If you could only give one best piece of advice for someone wanting to make this transition, what would it be?



BE CONFIDENT. "I can't say it enough times," Ludwig says. "Oftentimes, we don't chime in with a comment because we think our leaders are not going to want to know what we think. They are. When you have confidence, people around you see that, and they're going to come to you with things because you exude the air of a leader."

BE A DUCK. "On the surface, they look calm, but under the water their legs are moving frantically," Wu says. "It's OK to move frantically and show that in safe space, but always be the calm and reliable person on the top of the surface when you're dealing with everybody." And, he advises, document everything. "I keep my job description bookmarked in my browser, and I write down every single accomplishment on a weekly basis. So when it comes down to my annual review, I'm not trying to remember what I did over the past 12 months. Then I can say not only did I nail the job description, I did project X, project Y — you can use that documentation as metrics for your own raises, title changes, and performance bonuses."



REACH OUT TO A MENTOR. Find someone who has been there, done that, and is willing to support you, Türkelol recommends. "Try to continue to train yourself in as many things as possible related to your particular role or the role that you are aspiring to have," she says.

BE TRUE TO YOURSELF. "You have to know, 'OK, this is what I want, and this is how I'm going to go about it,'" Earley says. "You have to have a thirst for knowledge and be passionate about what you do, even if it's the housekeeping part. Make it fun. Fun is really important. Don't ever lose sight of it. If you're not enjoying the role, then it's not the path for you."



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