

[LOGO]
[COMPANY NAME]
Role Expectations Template

Employee Name: Jake Liu

Title: Executive Assistant to the CEO

Manager: Sarah John, CEO

Start Date: May 2023

Role Purpose: Ensuring that the CEO's daily operations run smoothly by owning email & meeting triage, efficiency, responsiveness, and preparation.

Areas of Responsibility:

- Scheduling: schedule and organize meetings/calls with clients & teams in various time zones, ensuring the CEO's calendar is up to date and correctly prioritized based on predetermined prioritization structure.
- Preparation: conduct, prepare, and communicate research on meeting attendees, meeting topics, and meeting purpose / ideal outcomes to ensure CEO is properly prepared for conversations. Schedule pre-meetings if needed.
- Meeting Ownership: Own meeting agendas, take notes, and send action items following calls when needed. When attending meetings, ensure CEO's action items are captured and completed.

Role Approach:

- Resourceful and entrepreneurial: able to find information independently and overcome roadblocks as needed.
- High attention to detail: notices and fixes errors quickly and professionally
- Able to triage strategically: understands the priorities of the business and is able to prioritize the CEO's time accordingly using 5 star priority system.
- Trustworthy: follows through on commitments, builds authentic relationships

Ongoing SLAs:

- Respond to all emails within 24 hours, at least confirming receipt and providing timeline of reconciliation
- Respond to urgent requests within 4 working hours

Goals/KPIs (30/60/90 for new hires, monthly or quarterly otherwise):

- Qualitative:
 - CEO feels prepared for meetings, clear on AIs/next steps following meetings
 - CEO feels he has more time for strategic work (can prove quantitatively by analyzing meetings)
- Quantitative:
 - Decrease CEO time spent in meetings by 5 hrs per week

- Ensure Q1 in-person meetings stay within budget

Needs & Dependencies for Success:

- Access to CEO calendar + email
- Access to up to date information about business priorities
- Communication about preferences from CEO
- Concrete prioritization strategy confirmed with CEO