

PROJECT QUICK SHEET - ADMINISTRATIVE/SUPPORT ASSISTANT

TERMS TO KNOW

Secretary = secretary is somewhat an outdated term. The modern titles most often used by employers include office manager, administrative assistant, and support assistant. Regardless of the title, these support professions can assist across many areas, including:

*Customer Service/Management -- Event Planning -- Purchasing -- Project Planning -- Reporting
Database & Records Management -- Postal Mailings/Emailings -- Corporate Communications
Invoicing -- Receptionist -- Software & OTJ Training -- Minor Bookkeeping & HR Tasks
Calendar Mngmt/Scheduling -- Meeting Setup -- Mail Sorting/Distribution -- Invoice Prep*

Virtual Administrative Assistants = the use and availability of virtual administrative assistants are on the rise. These workforce extensions are considered “dedicated to you” for a pre-set number of hours or available on occasion to support project or task-based needs.

Workflex = refers to a compressed and/or modified work schedule. COVID-19 has changed how companies view work schedules to accommodate employee requests.

Specialized Admin Assistants = in years past, administrative assistants were oftentimes generalists or focused on common industries, such as legal and medical.

However, we’re **seeing more specialized admin job titles**, such as Administrative Assistant - Software Implementation or IT Administrative Assistant. Specialized administrative assistants perform traditional clerical tasks with project- and department-specific tasks as well. For example, IT admin assistants can help with tech projects, such as learning management systems (LMS) administration, coordinating client support services, and conducting post-software implementation surveys.

INTAKE QUESTIONS

1. Tell me about the company you work for. What do they do? Are they a local, national, or global company?
2. Do you specialize in your support duties, such as infotech, customer service, software, marketing, etc?
4. Any personal assistant responsibilities for any executives or department managers?
5. What SaaS tools or apps do you use to support your job roles? Have you introduced any new processes or systems to streamline admin tasks and improve efficiency? If yes, what?
6. What key projects do you support? What’s your involvement with those?
7. Do you have financial responsibilities in this role, such as financial reporting, invoice processing, payment processing, expense reports, payroll, A/R or A/P?
8. Do you fulfill any HR-related tasks? Hiring, onboarding, training, or scheduling?
9. Do you manage purchasing to include researching and procuring large equipment purchases? Do you manage a budget and have involvement with contract negotiations?
10. What’s your involvement with customer service topics, from answering questions and vetting customer concerns to account management and sales?
11. Do you create presentations and reports used by executives and members of the Board?
12. Have you been involved with setting up meetings or overseeing the logistics of upcoming events?
13. Since joining the company, what have been your most notable successes to save the company time, money, or resources? Provide as much detail as possible.

14. Are there other notable tasks you perform in this role that I haven't already covered? If yes, what?

RELEVANT KEYWORDS

Accounts Payable
Accounts Receivable
Bookkeeping Support
Budgeting
Calendar Management
Call Handling
Content Editing
Content Refinement
Contract Negotiations
Corporate Communications
Correspondence Handling
Customer Service Inquiries
Customer Service/Management
Data Verification
Database & Records Management
Employee Onboarding
Event Planning
Executive Support
Expense Reporting
Expense Verification
Financial Reporting
Front-Office Administration
Graphic Design
Information Handling/Distribution
Invoicing
Letter Writing

Mail Distribution
Meeting Scheduling & Planning
Meeting Setup
New-Hire Paperwork
New-Hire Support
Office Management
On-The-Job (OTJ) Training
Payment Processing
Personal Assistance
Postal Mailings/Emailing
Presentation Development
Project Management
Project Planning
Purchasing/Procurement
Scheduling (*Appts, Tasks, Visitors, Conferences, Events, Training, Tech Support*)
Social Media Comments/Replies
Social Media Updates
Software Maintenance
Software Upgrades
Staff Training
Tech Support (*Minor*)
Travel Arrangements
Travel Bookings/Itineraries
Video Conferencing
Visitor Meet & Greets
Writing Assistance

EXAMPLE SENTENCES

MARKETING SUPPORT

- Assist and provide marketing department support, while taking on new ad-hoc projects as needed, such as conceptualizing ideas for marketing campaigns and useful storytelling to further broaden the client's brand.

CALENDAR MANAGEMENT

- Manage calendars for the President and VP of this \$23M privacy and data compliance company. Utilize Bookafy, a SaaS solution that enables the executive staff to optimize their calendars while traveling from the home office in Dayton, OH, and remote offices in China and India.

FINANCIALS

- Support the accounting department by auditing time cards and processing change of status forms for employees. Update employee records to track time, attendance, and pay rates.

- Verify documentation and receipts for the expense reports submitted by the department's 13 engineers and product managers. Monitor business expenses (and expense history) to verify compliance with established travel and expense policies. Request additional explanation and validation for claims as needed.

CALL/VISITOR MANAGEMENT

- Perform as a receptionist, which includes managing an estimated 50,000 calls and receiving an estimated 500 visitors annually. Enhance the visitor experience by giving tours of the office and production facility for a few select key business stakeholders and overseas visitors.

EVENT SUPPORT

- Select dates and negotiate contract terms with area venues offering meeting space and conference rooms for the company's annual customer appreciation week. Secure F&B caterers and additional staff to support each day's events and speakers.
- Work with support staff for VIPs, presenters, and speakers on audio/video requirements for the day of the event, along with any special travel, transportation, and hotel accommodations. Arrange receipt of marketing material shipped to the venue prior to the event.

NEW SYSTEM/PROCESSES

- Overhauled the department's payroll processing system by implementing an all-in-one payroll software solution and standardizing new-hire payroll processes. Updated an internal employee monitoring report (Excel spreadsheet) that eliminated errors from data collected by team leaders.