

ULTIMATE GUIDE TO

Working with an Executive Assistant

So, the time has *finally* come to set aside the excuses and push through your hesitations to find the additional administrative support you've been needing for a while.

Well, you've come to the right place for your best next hire.

You're ready to transform your workday and claim back your time – that's exactly what we're here to do. BELAY ensures the process of hiring an Executive Assistant is efficient, simple, and *worth it*. This guide is designed to set you up for ultimate success as you begin working with an EA. We'll answer all of your questions from pre-onboarding steps, to how the BELAY matching process works, successful onboarding tips, and everything you should delegate once we've matched you with your dream Executive Assistant and beyond. We've included worksheets, templates, and benchmark checkpoints to make the transition as smooth as possible.

Because busy leaders like you have (literally) no time to waste, let's jump right in so you can get back to what you do best.

Benefits

First, let's start with all you and your organization stand to gain from the decision you made.

(And sure, it's a dessert-first approach to learning how to maximize your time and productivity with an Executive Assistant from BELAY but we've been bucking the status quo since 2010, so let's kick this off with a glimpse into your future.)

How Leaders Benefit from Hiring a Premium EA from BELAY

If you Google '*reasons to hire an Executive Assistant*,' you'll be inundated with other professionals, industries, and businesses shouting their praises from the cyber rooftops. To weed out the noise, we've rounded up the most compelling benefits of *finally* hiring an Executive Assistant and never turning back!



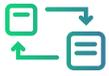
TIME.

The most valuable asset anyone has is – no, not money – time because once it's gone, it's *gone*. That's why it's mission-critical to hire people to whom you can delegate. Because solopreneurs that spend their days addressing low-level administrative tasks are destined to stall.



ADMINISTRATIVE TASKS.

From calendar management to emails, to answering phones, an Executive Assistant's scope of work can almost vary as much as the industries that hire them, like marketing, web design, bookkeeping, and other services.



SCALABILITY.

Executive Assistants will allow you to scale operations – and with less risk. Since growth requires capital – and Executive Assistants are a comparatively cost-effective alternative to IRL (In Real Life) employees – you can substantially reduce your costs and instead invest your money back into your business.



ONLINE PRESENCE.

As a small business owner, there's no escaping the reality that you should have an online presence by virtue of a website, social media, Google+, and more. However, managing digital marketing platforms is a time-suck most solopreneurs can't afford – but, your Executive Assistant can do it.



LEAD GENERATION.

Whether through inbound campaigns to your website, social media accounts, or website contact forms, lead generation is a very time-consuming – albeit invaluable – task. Your Executive Assistant can sort through your leads, determine their value, and add those potential customers to your database.



CONTENT.

You want to be seen as an authority in your industry and by researching and creating content around your product or service, you're adding value to the customer experience. Your Executive Assistant can handle content creation – from market research to publishing – to drive more traffic to your site.



BOOKKEEPING.

This one often comes as a surprise to many small business owners but it's true – yes, an Executive Assistant can do your bookkeeping. From bills, to invoicing, to payroll, your financial statements will be timely, in order, and *handled properly*.



CUSTOMER SERVICE.

To best serve your customers, your Executive Assistant can:

- Respond to customer questions
- Create email responses or Frequently Asked Questions
- Follow-up on customers
- Handle and respond to complaints or requests



IMPROVE PROCESSES, PRODUCTS & SERVICES.

An Executive Assistant can shore up your processes and streamline your operations. Further, they can monitor your markets, manage conversations on social media about your brand or industry, watch how competitors progress, and collate feedback from current clients.



PEACE OF MIND.

One word: *PRICELESS*. Having someone to whom you can faithfully delegate tasks is, ultimately, the cost of your sanity and peace of mind. As we've mentioned before, multitasking is often far less effective and efficient than monotasking, and an Executive Assistant can help you focus on the important things.

How Organizations Benefit from Hiring a Premium EA from BELAY

Now that we've gone through how you can personally benefit from hiring an Executive Assistant, we want to educate you on how businesses have benefited from hiring a premium EA from BELAY.

- **Improved efficiency:** A premium EA can help to improve the efficiency of your business by streamlining processes, identifying areas where time can be saved, and taking on repetitive tasks such as data entry, scheduling appointments, and managing email. This can all lead to increased productivity and profitability.
- **Increased productivity:** By freeing up their time, business owners can focus on the tasks that only they can do, such as developing new products or services, networking with potential clients or closing deals.
- **Reduced stress:** A BELAY EA can take on tasks that can be stressful for business owners, such as customer service or social media management.
- **Expanded reach:** A BELAY EA can help businesses to expand beyond their target audience by managing social media accounts, developing email marketing campaigns, and creating content for websites or blogs.
- **Lowered costs:** By outsourcing tasks to a premium EA, businesses can save money on salaries, benefits, and office space.
- **Increased Innovation:** A BELAY EA can help your business innovate by bringing new ideas and perspectives to the table. This will help your business stay ahead of the competition and have forward motion to grow in new ways.

All of these glowing benefits might have you wondering how you can effectively work with someone in a virtual setting, so let's talk about the advantages of hiring a virtual solution to your administrative needs.

Set Yourself Up For Executive Assistant

BUILD A FOUNDATION.

We know that for a client who's drowning in administrative detail, spending time on the setup can be a bit frustrating and confusing – especially when you just want to get things done as soon as possible.

And we *totally* get that.

However, after working with hundreds of clients and their EAs, we've learned that this up-front investment will yield a return of productive hours worth many times more than the prep time you put in.

OUTLINE A JOB DESCRIPTION FOR YOUR EA.

Taking time – while working with your BELAY Client Success Consultant – to identify the specific things you want your EA to help accomplish means they can dive right into those tasks with clear direction and no wasted efforts.

CREATE TRAINING RESOURCES.

Upload and share training documents on platforms like Google Drive and Dropbox as you create them, and use Loom to record narrated screencasts as you complete the assignments you want your EA to accomplish.

GET VIRTUAL TOOLS AND SYSTEMS ACCESS READY FOR YOUR EA.

We will walk you through all the virtual tools and systems you're going to need to share with your EA, so they can dive into the tasks and not waste any time waiting for access or approvals.

SET RULES FOR TECHNOLOGY.

The key to leveraging technology on a virtual team is to keep everyone on the same page with technology usage and the timeframe expected for replies. Everyone should always know what method of communication to use and when.

ESTABLISH COMMUNICATION GUIDELINES AND BOUNDARIES.

Both you and your EA need to establish and agree upon your response times to emails, texts, and voicemails to identify when you will and won't communicate. That way, when you send your EA a text at 10 p.m. – when you've agreed on a 9 a.m. to 6 p.m. window of business hours – they will know it's a really big deal and you need help.

Remember this is a marathon, not a sprint.

We want you and your EA to be working together for the long term, which means that just like a marathon, you'll need to invest time in training and preparation so you can see long-term success.

FILL OUT A TRAVEL PREFERENCES WORKSHEET.

We all have preferences when it comes to travel accommodations, from your preferred airline to hotels, car rentals, and airline rewards. Booking travel and organizing itineraries is a major time-saving task your Executive Assistant will need to manage. To ensure they have all the correct information to set you up for smooth travel days, fill out this [BELAY Travel Preferences Worksheet](#). When it's time to book your next business trip, they have everything they need in one consolidated place.

TRACK YOUR EA'S TIME.

Since Executive Assistants work flexible schedules, it's important that they keep track of their time.

You and your Executive Assistant can set your own parameters for how you want to communicate about time, but here are some common practices for how and why our Executive Assistants track it.

WEEKLY UPDATES.

Especially in the beginning, it's important to regularly communicate about hours. Both you and your Executive Assistant are figuring out the EA's responsibilities, how long it takes them to complete their work, and how best to prioritize tasks.

MID-WEEK ADJUSTMENTS.

Closely monitoring time allows you both to gauge throughout the week if they need more work to meet their hours or need further clarification from the client to prioritize tasks when they're running over on time.

KNOW WHERE YOUR TIME GOES.

Time tracking helps you know where you're spending most of your time so you can adjust as needed.

If, for example, an EA's main responsibility is to handle social media but secondary tasks often steal their focus, knowing how much time they spend on different tasks provides a better idea of what's distracting them from their top priority and how to prioritize better.

POPULAR TOOLS FOR TRACKING.

Toggl allows you to track hours by client, make notes about any particular project, and present information in a pie chart or bar graph – arguably the best feature. HoursTracker app is another popular option.

The next question you should be asking yourself is, 'How can an Executive Assistant help me manage my time?'

We have answers for that, too.

Manage Your Time

Many of our clients here at BELAY come to us because their businesses have outgrown their available time.

These leaders find themselves buried under all the details that go along with a successful venture, and are in danger of drowning in those details. Fortunately, that's exactly why BELAY exists!

- **Protect your calendar**
With a BELAY Executive Assistant, you no longer have to be the bad guy when it comes to saying 'no' to appointments you really don't have time for.
- **Manage your network**
Many of our Executive Assistants are tremendously skilled in the ways of social media and can help you take advantage of all the business development opportunities available through those platforms.
- **Push projects forward**
Rather than spending hours of your week following up on vendors, contractors, and unpaid invoices, have your Executive Assistant handle that for you.
- **Deal with the details**
Executive Assistants deal with thousands of details every day for our clients – seriously thousands. If you ever catch yourself wondering, 'Why am I doing this task?,' that's a task an Executive Assistant can do for you.

You likely already have a rhythm for when you like to get certain tasks done, what time of day you're most productive, and which days are reserved for meetings, brainstorming sessions, 1:1's, etc.

We encourage our clients to consider what your most *ideal* work week would be, that way you can best decide how you want your EA to help you manage (and protect) your time. Here's an example of what an **ideal schedule** might be for a business leader like you. Simply use this as a guide and customize it to best fit your ideal schedule if you don't already follow one. When the time comes, explain to your EA how you like to organize your workdays, and how they can best help you stick to it.

The BELAY Process

So, now you're fully ready to transform your workday with a BELAY Executive Assistant. Here's how it all works from our end.

How Does BELAY Match Clients With Executive Assistants?

One of the things we take really seriously here at BELAY is the way we match clients with one of our Executive Assistants.

As such, we're pretty selective when it comes to choosing the candidates we invite to join the BELAY EA team. We joke sometimes that becoming a BELAY Executive Assistant is kind of like our own version of Survivor. It's a long and sometimes challenging process, but we believe it is a big payout at the end for our clients who deserve the best.

In fact, fewer applicants make it to our talent bench than get accepted to Harvard. So take that for what it's worth!

Our talent acquisition recruiters screen hundreds of resumes each week, looking for candidates with the right mix of skills, experiences, and attitudes. Often, attitude is the deciding factor. We want candidates who are truly focused on serving their clients, who understand that often the most important position when it comes to getting things done is at the bottom of the ladder.

Our talent acquisition team then conducts video interviews with those candidates that have the winning combination of skills, experiences, and attitude, and completes in-depth reference checks and skills assessments before offering the candidate a contract.

Once they're on board, the process begins all over again as we match new clients with a potential Executive Assistant.

The Process: How It Works



STEP 1. SALES CALL

Meet with your Solutions Consultant to identify your exact needs and pain points to determine if we are fit. If so, we'll send you an agreement to sign and you'll be assigned a Client Success Consultant.



STEP 2. DISCOVERY CALL

Meet with your Client Success Consultant to deep dive into your tasks, tools, culture and personality requirements to ensure we match you with the right talent.



STEP 3. PLACEMENT PROCESS: OUR SECRET SAUCE

Your Client Success Consultant will meet with the Placement Team to discuss, vet and select 2-3 top candidates from our bench of nearly 1,500 U.S.-based talent. Then, your Client Success Consultant will interview and select the best candidate for you based on our discovery call.



STEP 4. KICKOFF CALL

You, your Client Success Consultant and your talent will have a kickoff call – the official start to your partnership – to meet your talent, set initial goals, discuss communication plans, and set yourselves up for success.



STEP 5. ONBOARDING

Your Client Success Consultant stays close in the first few weeks to provide high-touch relational service to guide you through our proven onboarding process.



STEP 6. NURTURING

You will have ongoing check-ins to support both you and your talent throughout your partnership with BELAY.

Delegate to Elevate

Is all this talk about freeing up your calendar and peace of mind getting you excited?

Good! That's our hope.

You might already be jumping ahead to all of the tasks you're ready to hand off to an Executive Assistant. Or, you may be feeling some tightness in your chest at the thought of training and delegating tasks you've been handling for quite some time. Both are normal, and both we can help

Let's dive into the process of how delegation looks once you've been matched with the perfect BELAY Executive Assistant for you.

Delegation is one of the most effective tools in a leader's toolkit. It empowers your team and helps you grow your business. Here are 25 tasks you can start delegating immediately with the help of a BELAY Executive Assistant.

What To Delegate at Work:



Gathering data/ research from your industry



Transcribing webinars, short videos, podcast episodes, etc.



Running reports (Google analytics, CRM's, Quickbooks, etc.)



Booking travel



Handling minor customer service concerns



Managing your inbox - scanning and flagging important emails for you



Uploading items to your online store or resource center



Uploading blog posts



Managing your meeting schedule



Communicating with vendors, customers, and your team on your behalf



Reading trade publications and summarizing relevant content



Monitoring productivity or profitability reports



Managing online registrations for an event



Uploading online surveys and monitoring activity



Online advertising reporting



Coordinating events



Organizing content



Finding customer and staff appreciation gifts



Creating and curating Youtube playlists



Moderating online forums



Building Facebook groups or Twitter lists



Responding to social media direct messages, Tweets, comments, etc.



Creating images in Canva



Scheduling social media posts



Researching and staying up to date with social media channel

Now, let's get personal.

EAs can also help you manage the personal tasks that you simply don't have time to get done in a day. Whether they're business or personal assignments, don't be afraid to delegate personal items on your growing to-do list.

What To Delegate at Home:

1. Schedule pick-up or delivery for your online grocery order.
2. Research airfare to make that well-deserved vacation a reality.
3. Locate your lost cell phone left in the third stall of a Denny's restroom in Albuquerque. (We've all been there.)
4. Unsubscribe from the emails you don't want anymore.
5. Make dinner reservations for your family or friends at that new restaurant you've been meaning to try.
6. Order books from your growing reading list. Your EA cannot read them for you, however.
7. Schedule a photographer for family photos – matching outfits not included.
8. Order your children's back-to-school shopping list.
9. Take your phone and/or computer to the Apple Store to buy the latest upgrade you need.
10. Schedule your doctor appointments.

It's been said countless times, but it's worth repeating. An Executive Assistant can save you the time and sanity you need to get out of the weeds of administrative *and* personal tasks from the never-ending lists of things you don't have the energy or time to focus on.

Need More Delegation Help?

If you're feeling overwhelmed at the possible tasks you need to hand over, our [Delegation Worksheet and Guide](#) is sure to help you think through what tasks you can delegate to your Executive Assistant.

Must. Could. Should.

Another resource we like to include when thinking through what you can delegate to an assistant, is our [Must Could Should Worksheet](#). This gets into the nitty gritty of how you can organize your workday.

It's an objective plan for what must get done each day – followed by what should get done, and then what could get done. You are not permitted to start on the “shoulds” and “coulds.” You must complete what is listed as #1 in the must category, then #2 then #3 – BEFORE you move on to the “should” category.

MUST: MISSION CRITICAL

SHOULD: IMPORTANT

COULD: NICE TO HAVE

By adhering to this numbered list you show what is important in terms of your work, and you and your Executive Assistant are on the same page. With consistent practice, before you know it you'll be tackling projects, tasks and initiatives like a champ – and your virtual culture will love it!

Stay On Track

As you begin the process of working with your new Executive Assistant, we want this to be a smooth transition.

Like we said, this is a process.

To help you stay on track and not overload your new assistant with everything they'll be managing up front, we've created a [high-level week-to-week guide](#) to organize when to start implementing their tasks and set goals.

We know there is a lot to cover and you're eager to offload tasks, but delegating and training can't happen in one day. This resource will help you ease into the transition and set everyone up for success in the long run. Trust us, you don't want to overwhelm them from the start.

Executive Assistant Ascent To Success

BELAY's partnership with you begins from the moment we take your first discovery call. Once we've matched you with the perfect EA fit, we don't go anywhere. This means we continually offer guidance throughout the onboarding process and beyond. Our main goal is to set you and your EA up for long-term success, so we're in this with you for the long haul.

That being said, we've created guides to support you through the first [30 Days](#) and [45-90 Days](#) with your Executive Assistant. As you start working together you will eventually find your rhythm, determine the processes that work best, and build a rapport that leads to you accomplishing more while growing a thriving empire.

Stay on track and create a strong working relationship by following these benchmark checkpoints we've set.

Remember, your Client Success Consultant is here to help you and your EA throughout your entire partnership with BELAY.

Lean into the support we offer – after all, this is what we're here for!

Frequently Asked Questions

We've covered a lot. If you still have questions about how this whole process works, no problem – we want to ease any hesitations or concerns you may have before jumping into the process of hiring an Executive Assistant.

1. **What does the typical EA do for a client?** EA can handle your calendar, appointments, manage your email accounts, post social media, proof/edit documents, book travel arrangements, coordinate between clients and/or team members, and coordinate almost anything you need!
2. **Do I get a team of assistants that rotate?** No, you will have one dedicated EA that we match you with based on your needs, industry, personality and working style
3. **How long does it take for me to be matched?** On average, our clients are matched within one week. Your Client Success Consultant will meet with your Placement Team to discuss, vet and select 2-3 top candidates from our bench of nearly 2,000 U.S.-based talent, and then interview and select the best match for you.

4. **What happens if the EA and I don't work well together?** Your Client Success Consultant will be there to help. You'll work together to find a new match and keep your downtime to a minimum. If there are any minor hiccups, we will address them and find a solution.
5. **How does my Executive Assistant account for the work done?** Manage time off or vacation? That will be between you and your new assistant. If there are times you know are slower, then let your EA know that would be a good time for time off. Commit to over-communicating with each other so work can be done ahead of time and productivity doesn't lapse.
6. **What security measures are in place to protect me?** All our contractors sign a Confidentiality Agreement to protect you and your business. If you would like any additional contracts, then we can discuss that. We highly recommend strong passwords and using a password manager to keep your accounts secure.
7. **Will I be able to interview the candidate you pick for me?** We get it. Handing over the decision on who will work with you is a tough one. But, what we also know after years of helping business leaders just like you, is that you don't have time to devote to screening and setting up interviews. We have a customized system to match you to someone equipped to handle everything you need accomplished.
8. **Can the EA answer my phone?** It depends on how many hours you are contracted for. You can have specific time periods where your phone can be forwarded to your assistant. If your Executive Assistant isn't able to answer at that moment, they can return calls and triage those messages. If you need a full-time receptionist, we recommend Ruby Receptionist – we use them and love them.
9. **Can the EA call people for me?** Yes, they are there to support your communication to your team and clients.
10. **Are they available on weekends if I need them?** No, our assistants are available Monday-Friday, 9 AM – 5 PM.
11. **Can an EA make sales calls for me?** You know your product best! They can relieve other admin and support tasks that will allow you added time for those calls.
12. **Can my specialist use AI?** Absolutely – in fact, we encourage it! Our clients and Executive Assistants that leverage AI maximize productivity and increase efficiency to help them accomplish more and juggle less.
13. **I am new to the virtual concept and have no idea how this will work for me. Is there help?**

14. **What if I don't use all of my hours?** The EA can “ebb and flow” your hours throughout the month. We just shoot to come in at the contracted amount at the end of the month. If they go over, we simply bill the extra hours, but they do not roll over to the next month. We track and report on those during onboarding to make sure you are at a good amount of hours for the work needed.
15. **What if you do such a great job of matching me, that I want to bring my Executive Assistant on full time?** You're right – it happens! We know it's a possibility that you'll get to the place in your business where you want to expand your W-2 team, and we love nothing more than knowing we helped you find your first (or second or fifth) hire. Talk to your Solutions Consultant about the details.

BELAY EA Success Stories

We understand there is a lot to consider here. Take a look at what a few of our clients have to say about their success working with a BELAY EA:

“I've known about BELAY actually for quite a while,” Steve says. “When we started the company, I was doing all kinds of things that were taking me away from what I do best, which is content creation, ideas and looking into the future. Enter BELAY Executive Assistant Alexandra Dellerson. **Freeing [myself] up and not feeling like I'm always buried under details has helped me be a better leader for the company.** I'm better able to use the skills I've developed over the years to move forward toward our goals of helping insurance agents with their technology.”



Steve Anderson | Co-founder and CEO at Catalyit, an IT services and consulting firm simplifying technology for insurance agents.

“We initially reached out [to BELAY] at the beginning of the year,” Amanda says. “We [had] growth goals and I needed to be able to focus more time on building out a sales team and sales itself instead of [spending] time on the operational side. We really needed somebody in a role that could help our marketing consultants take the load off of them and also somebody who is a problem-solver. And along came BELAY Executive Assistant Sally Robbins. If everything stayed as is, I would be beyond-the-moon happy,” Amanda says. **“I did not imagine it going this well. I’m looking forward to growing and scaling my team because [Sally] is handling something that I don’t have to handle anymore.”**



Amanda Sleger | Sales and Marketing Director at Lone Fir Creative, a digital marketing agency.

“I looked into a variety of Executive Assistant services. I decided on BELAY for a couple of reasons. And serendipitously, the name ‘BELAY’ is a rock climbing reference and our company’s name is also a rock climbing reference. Enter BELAY EA Lauren Bible. “I work remotely, and I travel a lot,” Max says. “We work flexible hours. It was great to be able to actually take advantage of those things and not just be desperately trying to barely keep up with email, calendar invites and all these sorts of things. **It was sort of a game-changer in that respect. Lauren jumped in and took over email and calendar management from the beginning and has taken on more wide-range responsibilities over time including client tracking spreadsheets, website updates and client gifts.** “We’ve grown the business quite a bit,” Max says. “When Lauren joined, we’d only been in business for [about] nine months. We’ve grown both in terms of headcount, we’ve grown a lot in terms of revenue.”



Max Walker | Co-founder of Piton Labs, a software engineering agency focused on startups and innovation projects within enterprise companies.

Sow Today. Reap Tomorrow.

We get it. Initially, the process of hiring an EA takes time. And we've heard – and offered – the same objection: 'I don't have time to delegate right now.' We hear you. Like we said – we've been there.

The first time you delegate, you think, 'It would just be quicker for me to do this task myself.' However, the long-term answer is that you will continue to own that task until you no longer have the margin to accomplish your big business goals. Growth will hit a standstill until you take action to transform how you're getting work done each day. You've most likely already hit that point or your business is about to, which is why you're here.

The good news – Executive Assistants are no longer a figure of productivity imagination. The future is here, and the time to hire the solution to your overwhelming administrative problems is **now**.

Throughout this guide, we did our best to try and answer all of the questions you may have about BELAY and our process. If you want to learn more about our services, explore our blog [here](#), listen to our [podcast](#), or schedule a FREE consultation with one of our Success Consultants [here](#).

Our team is here and waiting for you to make the first move.



Accomplish More. Juggle Less.

REMOTE STAFFING SOLUTIONS FOR BUSY LEADERS

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