

SUGGESTED PROPOSAL EXECUTIVE ASSISTANT TASKS

EMAIL & CORRESPONDANCE MANAGEMENT

- ☐ MANAGING AND PRIORITISING EMAILS
- ☐ DRAFTING AND RESPONDING TO BUSINESS CORRESPONDANCE

SCHEDULING & CALENDAR MANAGEMENT

- ☐ ORGANISING AND MAINTAINING CALENDAR
- ☐ SCHEDULING MEETINGS, APPOINTMENTS AND TEAMS/ZOOM CALLS
- ☐ COORDINATION WITH OTHER STAKEHOLDERS TO ARRANGE MEETINGS

DOCUMENT PREPARATION & MANAGEMENT

- ☐ PREPARING REPORTS, PRESENTATIONS, LETTERS AND DOCUMENTS
- ☐ MANAGING FILE STRUCTURES AND RECORDS, BOTH DIGITALLY AND PHYSICAL
- ☐ ENSURING ACCURACY AND CONFIDENTIALITY OF DOCUMENTS

COMMUNICATION & COORDINATION

- ☐ PHONE CALL MANAGEMENT
 - ☐ HANDLING INCOMING CALLS
 - ☐ SCREENING & DIRECTING CALLS TO THE APPROPRIATE PEOPLE
 - ☐ TAKING AND RELAYING MESSAGES
- ☐ ONSITE MEETING COORDINATION
 - ☐ ARRANGING MEETING VENUES, EQUIPMENT AND REFRESHMENTS
 - ☐ PREPARING AGENDAS, TAKING MINUTES & ACTION POINTS
 - ☐ FOLLOWING UP WITH ACTION ITEMS FROM MEETINGS
- ☐ ACTING AS A POINT OF CONTACT BETWEEN CLIENTS, SUPPLIERS AND EMPLOYEES
- ☐ MANAGING RELATIONSHIPS WITH KEY STAKEHOLDERS

SUGGESTED PROPOSAL EXECUTIVE ASSISTANT TASKS

TRAVEL ARRANGEMENTS

- ☐ COORDINATING TRAVEL
 - ☐ BOOKING HOTELS, FLIGHTS, TRANSPORTATION
 - ☐ PREPARING DETAILED TRAVEL ITINERARIES WITH ALL SUPPORTING CONFIRMATIONS/BOOKING CONFIRMATIONS ETC

EXPENSE MANAGEMENT

- ☐ TRACKING & COLLATING INDIVIDUAL BUSINESS EXPENSES
- ☐ PREPARING EXPENSE REPORTS AND ENSURING TIMELY REIMBURSEMENT

PROJECT & TASK MANAGEMENT

- ☐ PROJECT ASSISTANCE
 - ☐ ASSISTING WITH THE PLANNING AND EXECUTION OF BUSINESS PROJECTS
 - ☐ MONITORING PROJECT TIMELINES AND MILESTONES
 - ☐ COORDINATING WITH THE TEAM TO ENSURE PROJECT GOALS ARE MET
- ☐ TASK PRIORITISING
 - ☐ PRIORITISING & MANAGING DAILY TASKS AND RESPONSIBILITIES
 - ☐ ENSURING YOU ARE MEETING YOUR INDIVIDUAL DEADLINES & COMMITMENTS

OFFICE SUPPLIES

- ☐ OFFICE SUPPLIES & EQUIPMENT
 - ☐ ORDERING & MAINTAINING OFFICE SUPPLIES
 - ☐ MANAGING OFFICE EQUIPMENT, COORDINATING REPAIRS OR REPLACEMENTS

SUGGESTED PROPOSAL EXECUTIVE ASSISTANT TASKS

FINANCIAL SUPPORT

- ☐ BUDGET & FINANCIAL TRACKING
 - ☐ ASSISTING WITH BUDGET PREPARATION & FINANCIAL FORECASTING
 - ☐ MONITORING EXPENSES AND ENSURING DEPARTMENTS/STAFF MEMBERS ARE ADHERING TO BUDGETS
- ☐ INVOICE & PAYMENT PROCESSING
 - ☐ PREPARING & PROCESSING INVOICES
 - ☐ MANAGING PAYMENTS & FINANCIAL TRANSACTIONS

CONFIDENTIALITY & DISCRETION

- ☐ HANDLING SENSITIVE INFORMATION WITH THE UTMOST DISCRETION

RESEARCH & ANALYSIS

- ☐ CONDUCTING MARKET RESEARCH AND COMPETITOR ANALYSIS
- ☐ PROVIDING INSIGHTS & RECOMMENDATIONS BASED ON RESEARCH FINDINGS

EVENT PLANNING & COORDINATION

- ☐ ORGANISING BUSINESS EVENTS, CONFERENCES, FAMILY DAYS, CHRISTMAS PARTIES, TEAMBUILDING DAYS AND NETWORK FUNCTIONS
- ☐ COORDINATING LOGISTICS AND MANAGING EVENT FROM START TO FINISH