



# Your Next Move

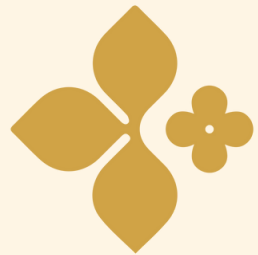
Lead louder. Show up smarter.  
Grow stronger.

**Inside the Chief of Staff Role: What Every Executive Administrator Needs to Know**

**Anne Marie Otanez**  
**Chief of Staff**







# Welcome

---

## Anne Marie Otanez

Chief of Staff



**YOUR NEXT MOVE**



# CONTENTS

## Our Story Timeline

01

Who am I?

02

Define the Chief of Staff

03

The North Star

04

Let's connect

YOUR NEXT MOVE



\*



ANNE MARIE OTANEZ

*Your Chief of Staff*

- **Author :**
- *The Chief of Staff: An Insiders Perspective to Becoming a Strategic Partner in the Executive-Suite*



YOUR NEXT MOVE







Tired of being the behind-the-scenes fixer with no path forward?

You're already doing half the work of a Chief of Staff, but without the title, recognition, or strategy seat you deserve.

**YOUR NEXT MOVE** 

# Define the **Chief of Staff** **Role**

## Clarify the Role

- Strategic operator and force multiplier for the executive.
- Focuses on cross-functional alignment, decision readiness, and enterprise-level priorities.

## Differentiate from Admins

- Admins manage flow *to* the executive (calendar, logistics, access).
- Chiefs of Staff manage flow *through* the executive (strategy, alignment, priorities).



**Engagement Moment:** *"How many of you have ever wondered, 'Why does my exec need both me and a Chief of Staff?'"*

# The Strategic Partner



Build Trust

Protect Principal's Time

Anticipate Needs

Provide Candid Feedback

**YOUR NEXT MOVE**



A man and a woman in business attire are seated at a white table in a modern office setting. The man is on the left, wearing a grey suit and a pink tie, with his hands clasped. The woman is on the right, wearing a grey suit, with her hands resting on a laptop. They are facing each other, suggesting a meeting or discussion. The background features large glass windows and a modern interior with a grey carpet and a blue ottoman in the foreground.

# Managing Executive Relationships

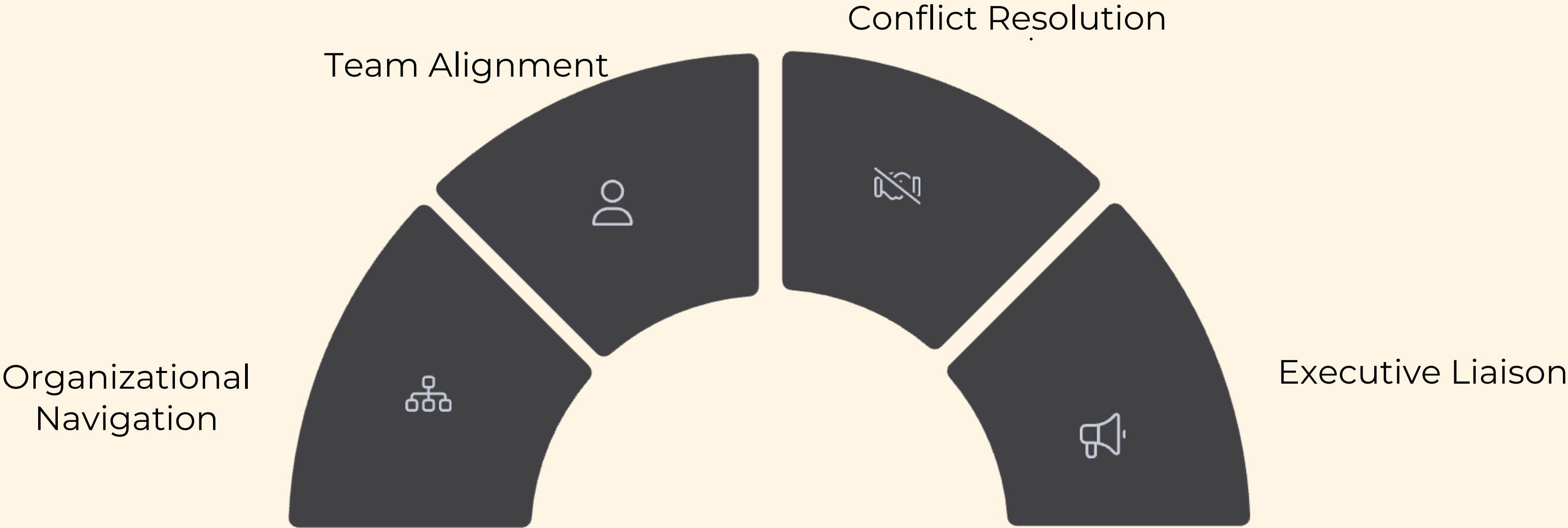
Understand Working Style

Establish Clear Communication

Develop Trust Through Consistency

Become Their Strategic Thought Partner

# Cross-Functional Leadership





# Strategic Initiative Management



**YOUR NEXT MOVE**



# Practical Strategies for Admins

0  
1  
**Proactively surface themes you see in the calendar**  
(You see patterns first.)

0  
2  
**Ask the CoS: "What's the top priority this month?"**  
(Align your exec's time to it.)

0  
3  
**Share intel both ways**  
(You hear hallway chatter, CoS hears strategy—when shared, exec makes better decisions.)



**Engagement Moment:** "Think of your executive right now; what's one area where their calendar doesn't match their priorities?"

YOUR NEXT MOVE



# The Power Pair

## Framework

**My Framework:** *"Power Pair = Alignment + Amplification."*

### Alignment

Admin ensures the exec's calendar reflects priorities; CoS ensures those priorities align with strategy.

### Amplification

Admin clears space; CoS ensures the space is used on the right things.

**Story Beat:** during a reorg at Microsoft, my partnership with our Admin was critical to balance competing demands.

**Takeaway:** Together, Admin + CoS create operational excellence.





# The North Star

## Takeaway

### North Star

*"The most valuable thing I want you to walk away with: The Chief of Staff role transforms executive support into enterprise-level impact and when you align with them, your influence multiplies."*

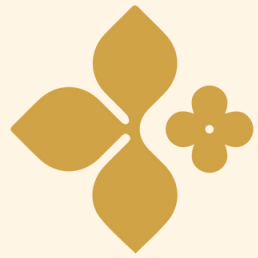
**YOUR NEXT MOVE**



## Frame Empowerment

You're not just scheduling, you're shaping organizational outcomes.





# Closing Thought

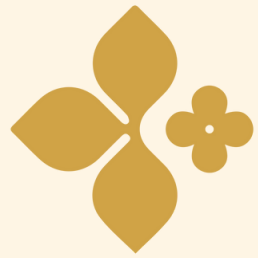
---

*"Together, Chiefs of Staff and Administrators don't just support leaders—they create the conditions where leaders can lead."*

## Call to Action

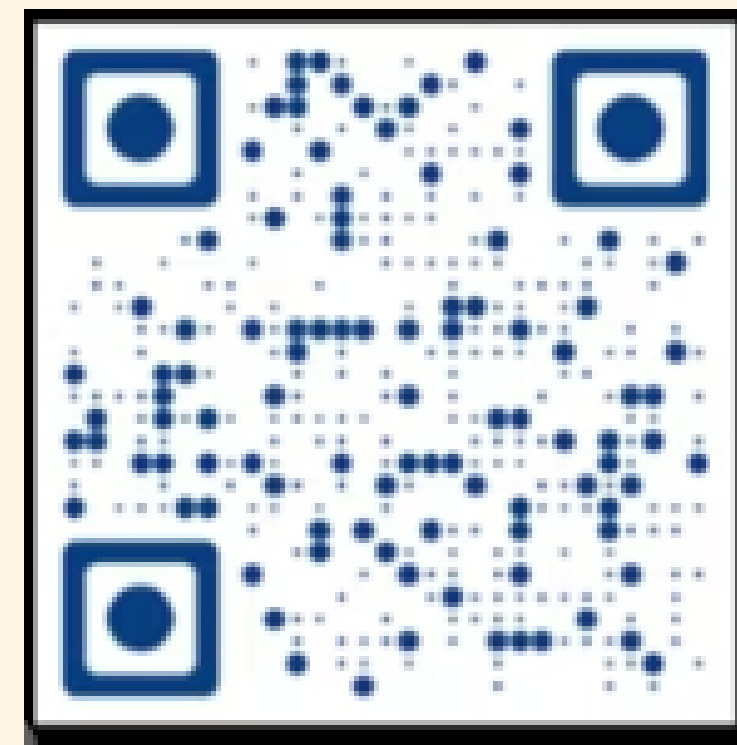
"I'd love to stay connected. If you want more resources on this partnership, follow me on LinkedIn or check out my book *The Chief of Staff: An Insider's Guide to Becoming a Strategic Partner in the Executive Suite*."

**YOUR NEXT MOVE** 



# Stay In Touch

---



**YOUR NEXT MOVE** 



# Your Next Move

Lead louder. Show up smarter.  
Grow stronger.

Cultivating a Mindset for Success

Annie Croner  
EA Coach & Trainer

# CONTENTS

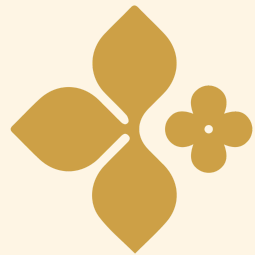
## What We'll Cover

---

- 01 How mindset affects everything
- 02 The 3 levels of self-awareness
- 03 A tried & true 3 step process to develop a more strategic mindset







# Annie Croner

---

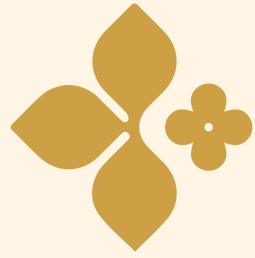
## About Me

20 YEAR CAREER AS AN ASSISTANT

In a variety of industries including:

- Consulting
- Accounting
- Nonprofit
- Finance
- Private wealth management
- VC





# Annie Croner

---

## About Me

I help assistants unlock their badassery & revolutionize their careers through...

### SPECIALIZED TRAINING

Southwest

3M

FORTIVE

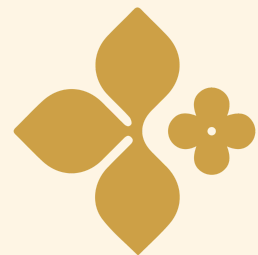
### INDUSTRY-LEADING COACHING



YOUR NEXT MOVE



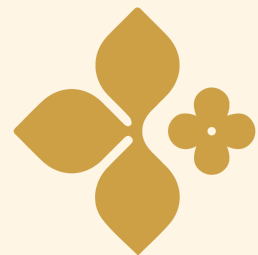




# Cultivating a Mindset for Success

What got you to where you are won't get you to where you want to be.



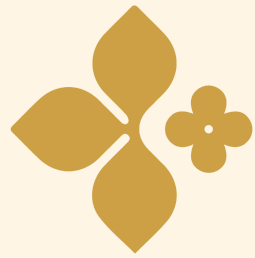


# Cultivating a Mindset for Success

To make a bigger impact you're going to have to embrace your badassery & level up your thought processes.





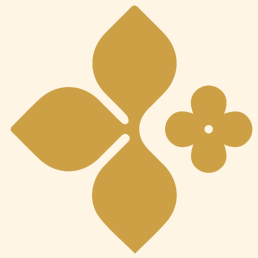


# You'll need to stop...

---

- Being everything to everyone
- Playing whack-a-mole
- Sitting on the sidelines & not speaking up
- Trying to control what your executive thinks of you
- Discounting your strengths & contribution

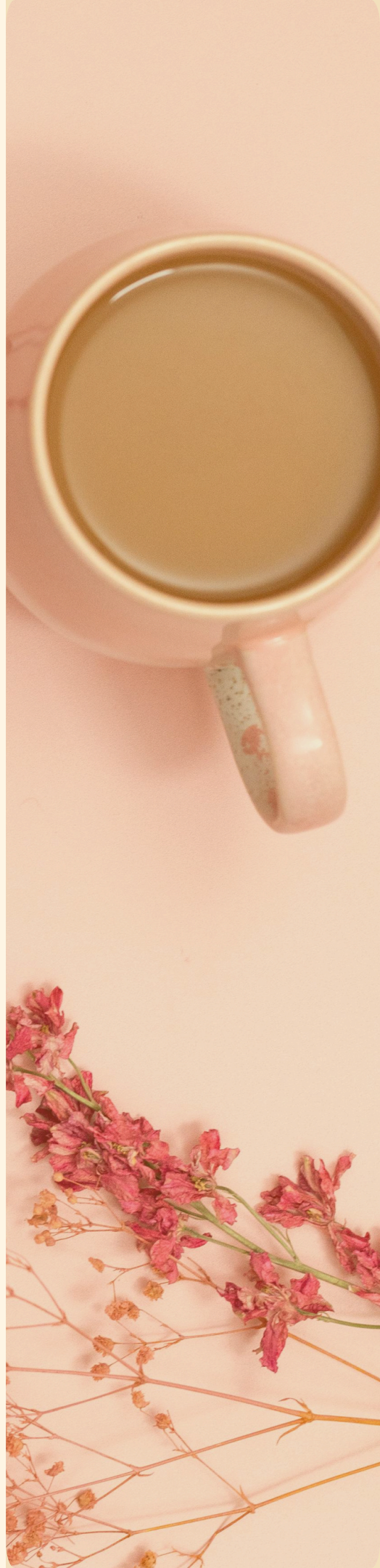


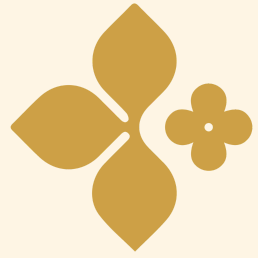


# You'll need to start...

---

- Setting strategic boundaries
- Using your voice & being the bridge
- Embracing your strengths & contribution
- Being the anchor
- Working clean





# Cultivating a Mindset for Success

ALL OF THIS WILL REQUIRE YOU TO  
MANAGE YOUR MIND.



# Cultivating a Mindset for Success

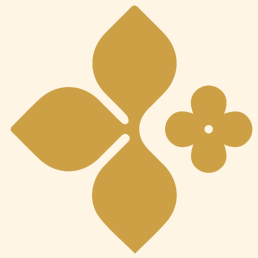
INTRODUCTION TO THOUGHT WORK





# Cultivating a Mindset for Success

WHAT IS THOUGHT WORK?



# Cultivating a Mindset for Success

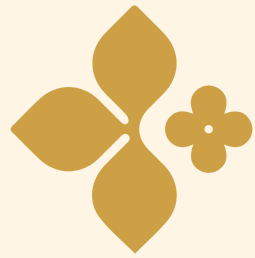
The practice of bringing **awareness** to your thoughts.

Considering how those thoughts inform your **emotions**, and play a part in creating **actions** & **outcomes**.



# Cultivating a Mindset for Success

STARTING POINT = **AWARENESS**

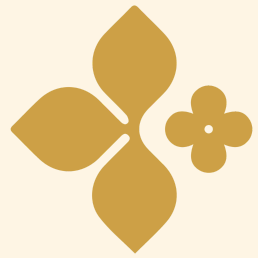


# 3 Levels of Self-Awareness

---

- 01 Introduction
- 02 Observation
- 03 Interruption





# Cultivating a Mindset for Success

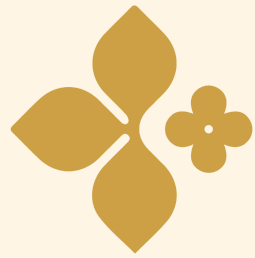
From a place of **awareness** you can consider how those thoughts inform your **emotions**, and play a part in creating **actions** & **outcomes**.



# Cultivating a Mindset for Success

Self-compassion & patience are key to success.





# The Model:

---

Circumstance = Facts

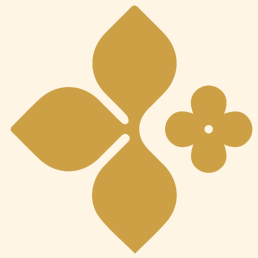
Thought = Your opinion about the facts

Feeling = A sensation in your body

Action = What you do from that feeling

Result = The outcome this process creates





# Example

---

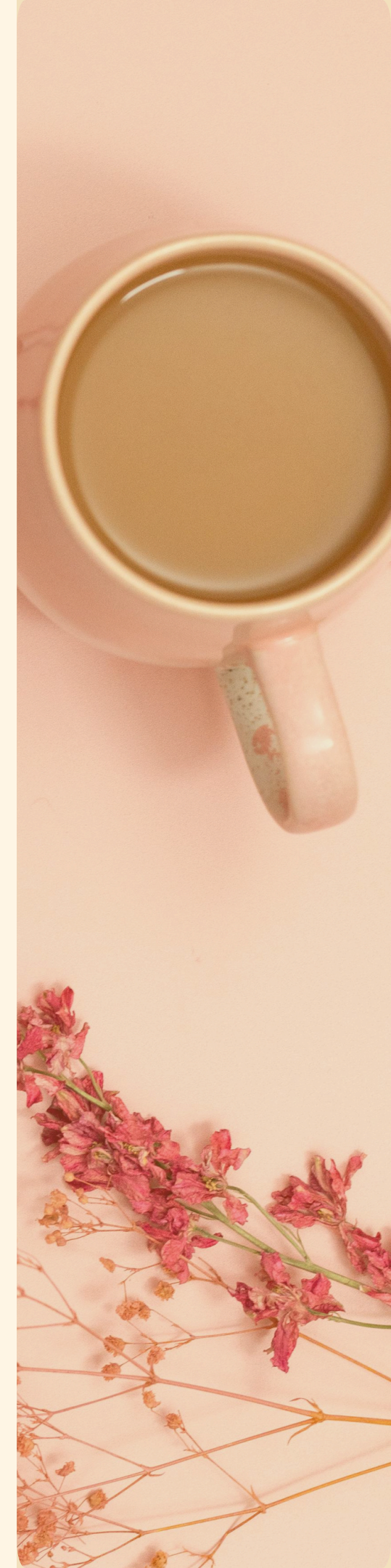
Circumstance = You attend an ELT meeting

Thought = Everyone's smarter than I am

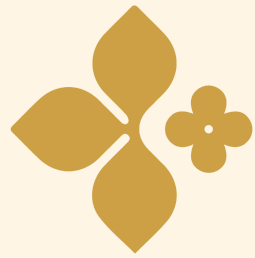
Feeling = Insecure

Action = You don't speak up and ask questions

Result = Everyone remains smarter than you







# Example

---

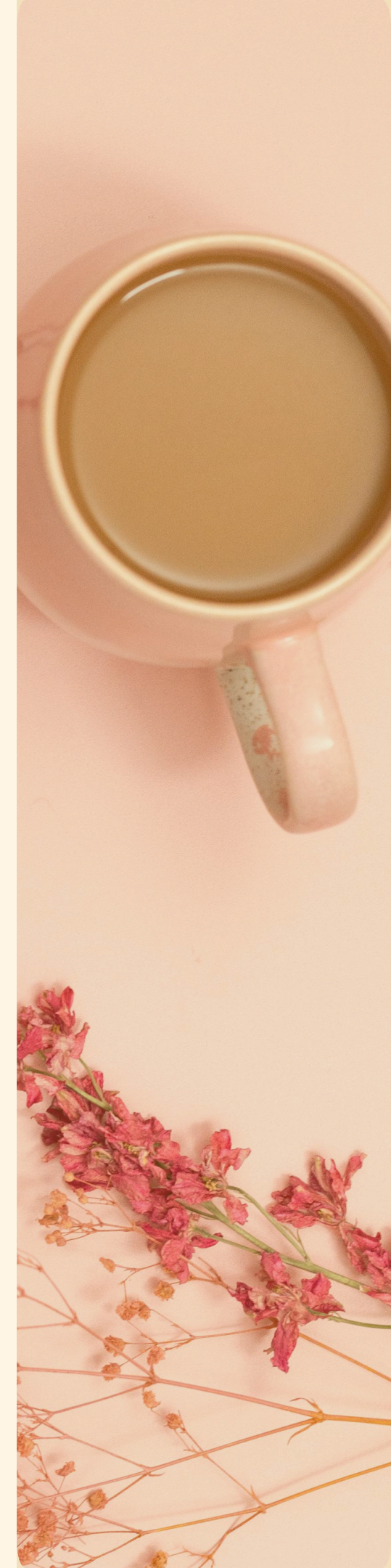
Circumstance = You attend an ELT meeting

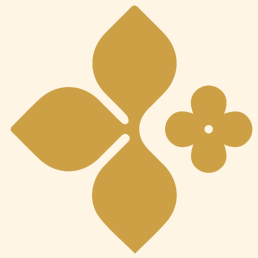
Thought = I'm here because I'm valued

Feeling = Empowered

Action = You speak up and contribute

Result = You showcase your value

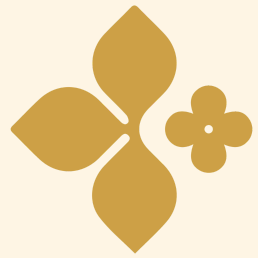




# Use Cases

## Cultivating a Mindset for Success

- Setting strategic boundaries
- Using your voice
- Embracing your strengths
- Being the anchor
- Working clean

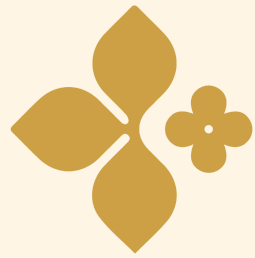


# Start here...

## Cultivating a Mindset for Success

- Pick one pain point, thought pattern, belief, or goal
- Get curious
- Practice redirecting your brain to an equally believable, more helpful thought





# Stay In Touch

---



/annie-croner/



wholeassistant.com



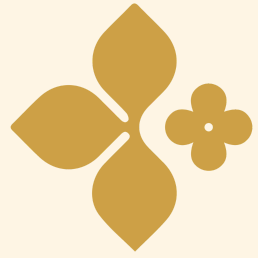
annie@wholeassistant.com





# Your Next Move

## Elevating Your Role Through Governance and Leadership



# Make It Obvious: Building Influence with Clarity

---

## Lisa Olsen, MS, CWCA

Career Senior EA / Administrative Manager

Board Coordinator

Professional Development Specialist

Keynote speaker / Workshop Facilitator

Coach / Consultant

Advocate for the EA Career



A dimly lit conference room with several microphones on a table in the foreground and rows of chairs in the background. The scene is dark and moody, with the text overlaid in the center.

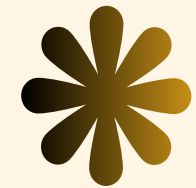
Being exposed to Board meeting protocols, procedures, and practices is a valuable opportunity for any assistant.

Step into it with confidence!

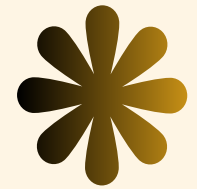


# Benefits

---



**Strategic Awareness**



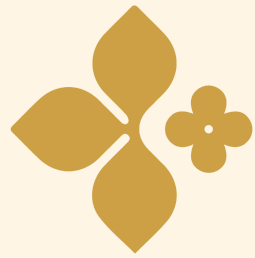
**Strengthened Partnership with  
Leadership**



**Professional Credibility and Visibility**







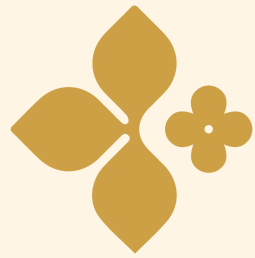
# What's Expected

---



- ***Professionalism***
- ***Decorum/Diplomacy***
- ***Situational awareness***
- ***Organizational Skills***
- ***Understanding of governance protocols***
- ***Expertise in minute-taking***
- ***Assertiveness***





# Best Practices

---

Organized  
files

Planning  
process/  
effective  
best  
practices

Board  
attendance

Meeting  
logistics

Maintain  
board portal

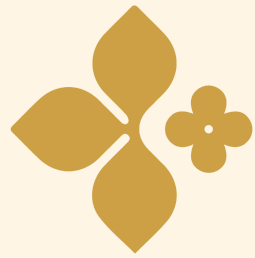
Minutes

Board  
retreats

New member  
orientation

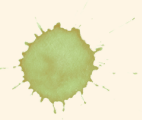
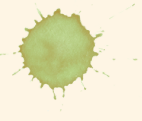
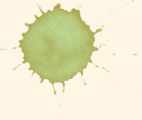
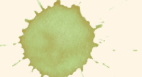




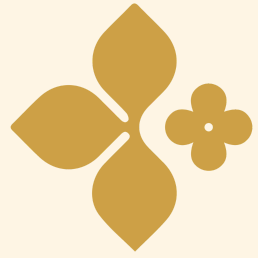


# Challenges

---

-  **Submission deadlines**
-  **Quorum**
-  **Technical issues / remote access**
-  **Last minute changes**





# Lessons Learned

---



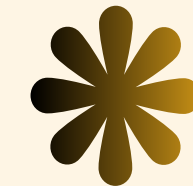
**Confirm catering**



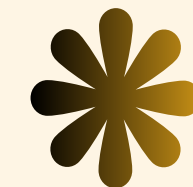
**Confirm quorum day of meeting**



**Arrange for on-site IT help and back up EA support**



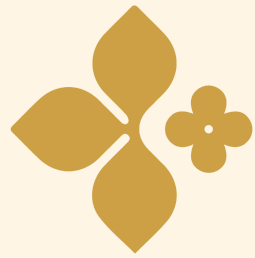
**Extra pens, pads, chargers, cables**



**“Emergency” bag: Tylenol, batteries, hand sanitizer, bandaids, mints**







# Master Planning

---



**Understand board protocols**



**Create a yearly planning document:**

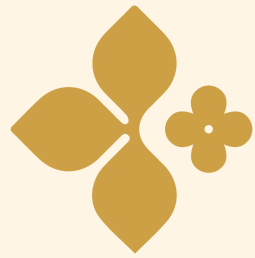
- *Yearly agenda*
- *Submission deadlines*
- *Meeting dates and locations*



**Create governance meeting “Experience Plan:”**

- Contains all meeting details
- Include flight information for board members
- Airport pick up details
- Contacts and cell phone information
- Catering information
- Parking instructions





# Stay In Touch



**Lisa Olsen, MS, CWCA**  
**[lisa@lisa-olsen.com](mailto:lisa@lisa-olsen.com)**  
**[www.lisa-olsen.com](http://www.lisa-olsen.com)**

**Keynotes**  
**Training Workshops**  
**Conference Presentations**  
**Coaching/Consulting**



# Your Next Move

## Make It Obvious: Building Influence with Clarity





# Make It Obvious: Building Influence with Clarity

---

## Jodie Mears

CareerEA, Speaker, Mentor, Coach and  
Podcast Host





# CONTENTS

## Make It Obvious: Building Influence with Clarity

---

→ Why This Session Matters

→ The Problem

→ The SEE Framework

→ Building Career Credibility

→ The Impact Portfolio

→ Reflection

# Why This Session Matters for EAs

## Make It Obvious

---

- 1 Because “doing a great job” isn’t enough.
- 2 Because opportunities don’t just appear you have to position yourself for them.
- 3 Because your visibility impacts your executive, your team, and your career.

*“Executives don’t see effort they see outcomes.  
Hard work alone isn’t a visibility strategy”*





# The Problem

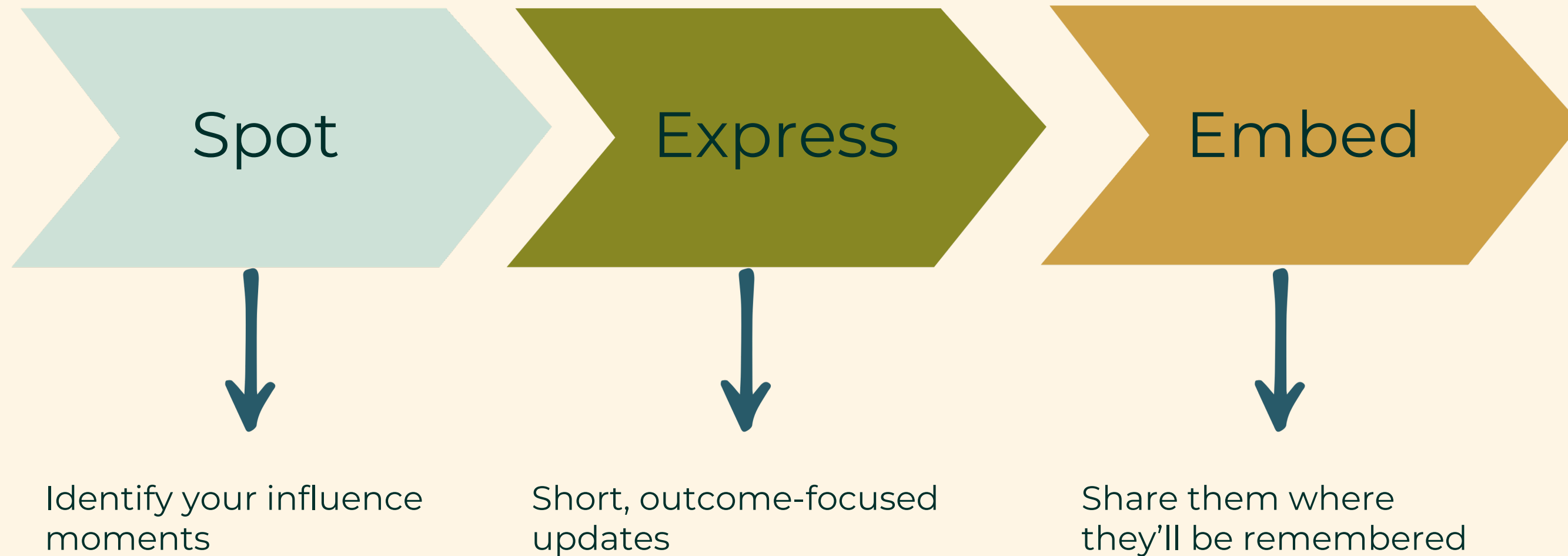
---

- Quiet consistency is often mistaken for invisibility
- Being visible doesn't mean being extroverted; it means being easy to understand, back, and talk about.
- If people can't name what you bring, they can't support your next move

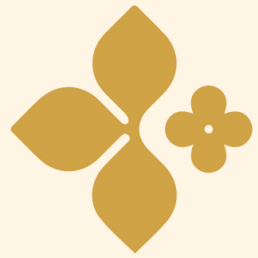


# The SEE Framework

---







# Look for these signals of impact

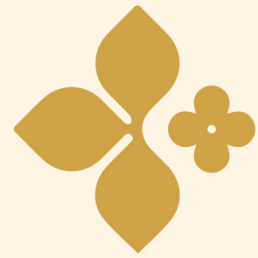
---

## Spot

- Something got easier
- A barrier was removed
- A decision was enabled
- A relationship was strengthened
- A result was accelerated

*“It doesn’t have to be big. It just  
has to be real”*





# One Line Impact Update

---

## Express

*“Last week, I [made a tactical contribution], which [resulted in a business outcome].”*

**Here are two examples you can adapt:**



“I arranged confidential interviews across three Directors in one week, allowing two top internal candidates to be appointed without the need for external search.”



“I coordinated livestream setups across 10 sites for our All Hands meeting to increase attendance and simplify delivery for our COO.”



# Where to Make It Stick

## Embed

**Make your value visible in places that matter**

- ➔ 1:1s and leadership updates
- ➔ Performance reviews and quarterly recaps
- ➔ LinkedIn profile and posts
- ➔ Internal newsletters or team wrap-ups
- ➔ ***Your Impact Portfolio***

*“Visibility isn’t luck, it’s placement”*



**“The key to successful leadership today is influence, not authority.”**

# Building Career

## Credibility

Track your impact weekly, small wins add up to big influence



Use 1:1s and team updates to make your value visible (not just your tasks)



Build a Credibility Portfolio- a private log of your results, growth & leadership







**“Your resume tells people where you’ve  
been...  
Your Impact Portfolio shows them what  
you bring”**



# The Impact Portfolio Career Credibility File

- A living document to track, frame, and share your influence  
Built from real coaching sessions
- turned application letters into impact manifestos  
Helps you reflect, grow and build a credible internal brand





*"Influence isn't a personality type.  
It's a visibility strategy."*

- ? Which part of my influence currently relies on assumption... not articulation
- ? What are others benefiting from, but not fully aware that I'm driving
- ? What evidence could I make more visible, not louder, just easier to champion
- ? What would shift if I were recognised not just for how I support, but for what I enable

## Reflection

---





# Stay In Touch

---



**Jodie Mears FInstAM**  
Empowering Leaders &  
EAs to Achieve More | Out...









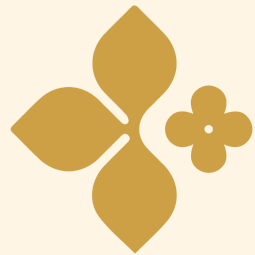
# Your Next Move

Lead louder. Show up smarter.  
Grow stronger

Your Power Behind the Role

Lindsay Robinson

Executive Assistant, LinkedIn



# Lindsay Robinson

Executive Assistant, LinkedIn





# Your Power Behind the Role!

YOUR NEXT MOVE





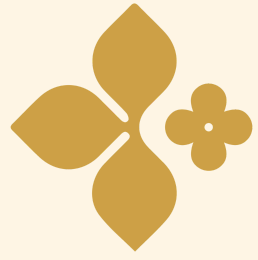
YOUR NEXT MOVE

# Career Currency

"If I do a job in 30 minutes,  
it's because I spent 10+ years  
learning how to do that job in 30  
minutes."

You owe me for the years, not the  
minutes."

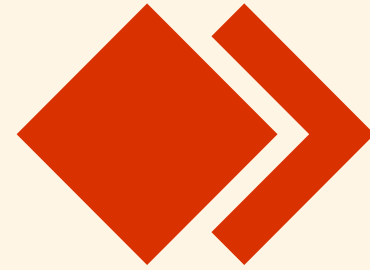




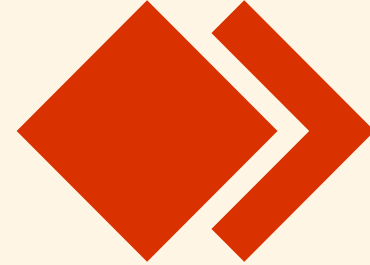
YOUR NEXT MOVE 

# Career Currency

---



**Focus on what you do well!**

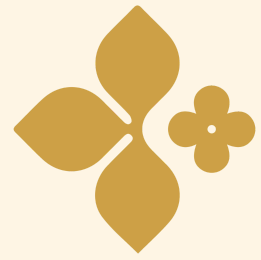


**Comparison is the Thief of Everything!**



**Be Curious, not Fearful!**





**YOUR NEXT MOVE**

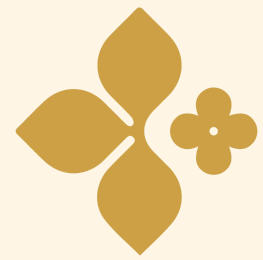
# Create/Refine Your Brand

---

**"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel".**



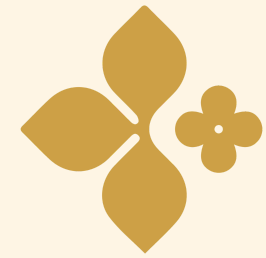




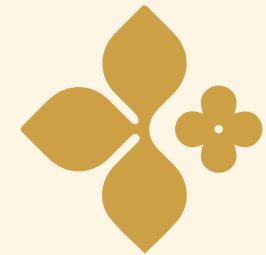
YOUR NEXT MOVE

# Create/Refine Your Brand

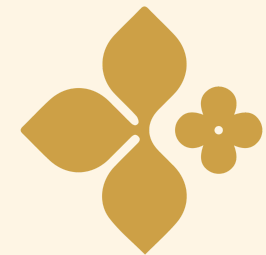
---



You are your best Ambassador!



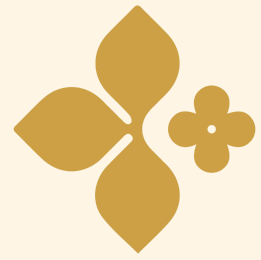
What impact do you want to make: team/  
organization, or industry?



Feedback is a GIFT!







YOUR NEXT MOVE

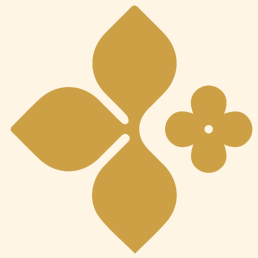
# Self Promotion is not Selfish!



## Self Promotion

---





YOUR NEXT MOVE

# Self Promotion

---



Your Profile is a WIP, it should be updated regularly!



Your Headline & Summary tells a story.

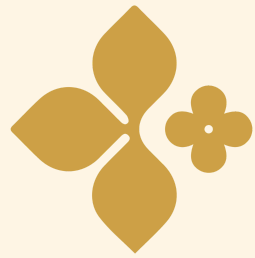


Our Work Experience is Our Brand.



You should Post, Comment, and Connect





# Stay In Touch

---





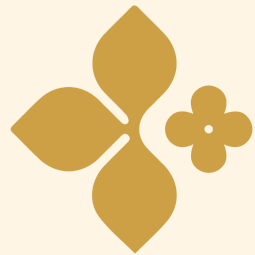


# Your Next Move

Lead louder. Show up smarter.  
Grow stronger.

Building the Case for a Salary Increase

Trinity James  
Career Coach



# Hello!

---

## Trinity James

Career Coach

Views Professional Development

[www.viewspd.com.au](http://www.viewspd.com.au)



 YOUR NEXT MOVE 

# CONTENTS

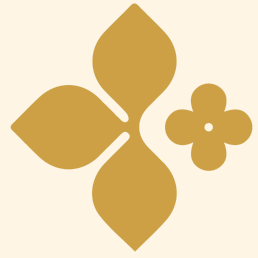


# Salary Increase

01	Mindset
02	Evidence
03	Timing
04	Alignment
05	Ask
06	Pushback
07	Reframe







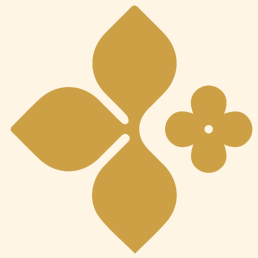
# Why this conversation feels hard

---



Confidence doesn't come ***before***  
this conversation.

It comes ***after you've done it  
once and survived.***



# The Mindset Shift

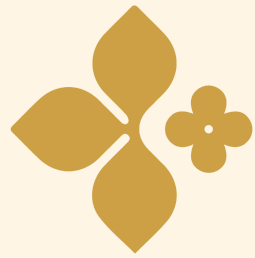
---

You're not asking.

You're ***presenting evidence.***







# Step 1: Gather the Evidence

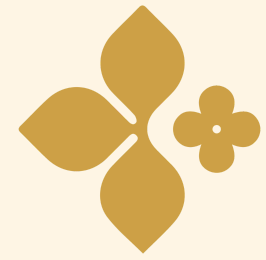
---

You need numbers ***and*** narratives.

QUANTITATIVE + QUALITATIVE  
= IRREFUTABLE

QUANTITATIVE	QUALITATIVE
<ul style="list-style-type: none"><li>• measurable outcomes</li><li>• time saved</li><li>• cost reduced</li><li>• efficiency gained</li><li>• revenue influenced</li></ul>	<ul style="list-style-type: none"><li>• leadership feedback</li><li>• stakeholder impact</li><li>• trust</li><li>• culture</li><li>• initiative</li></ul>

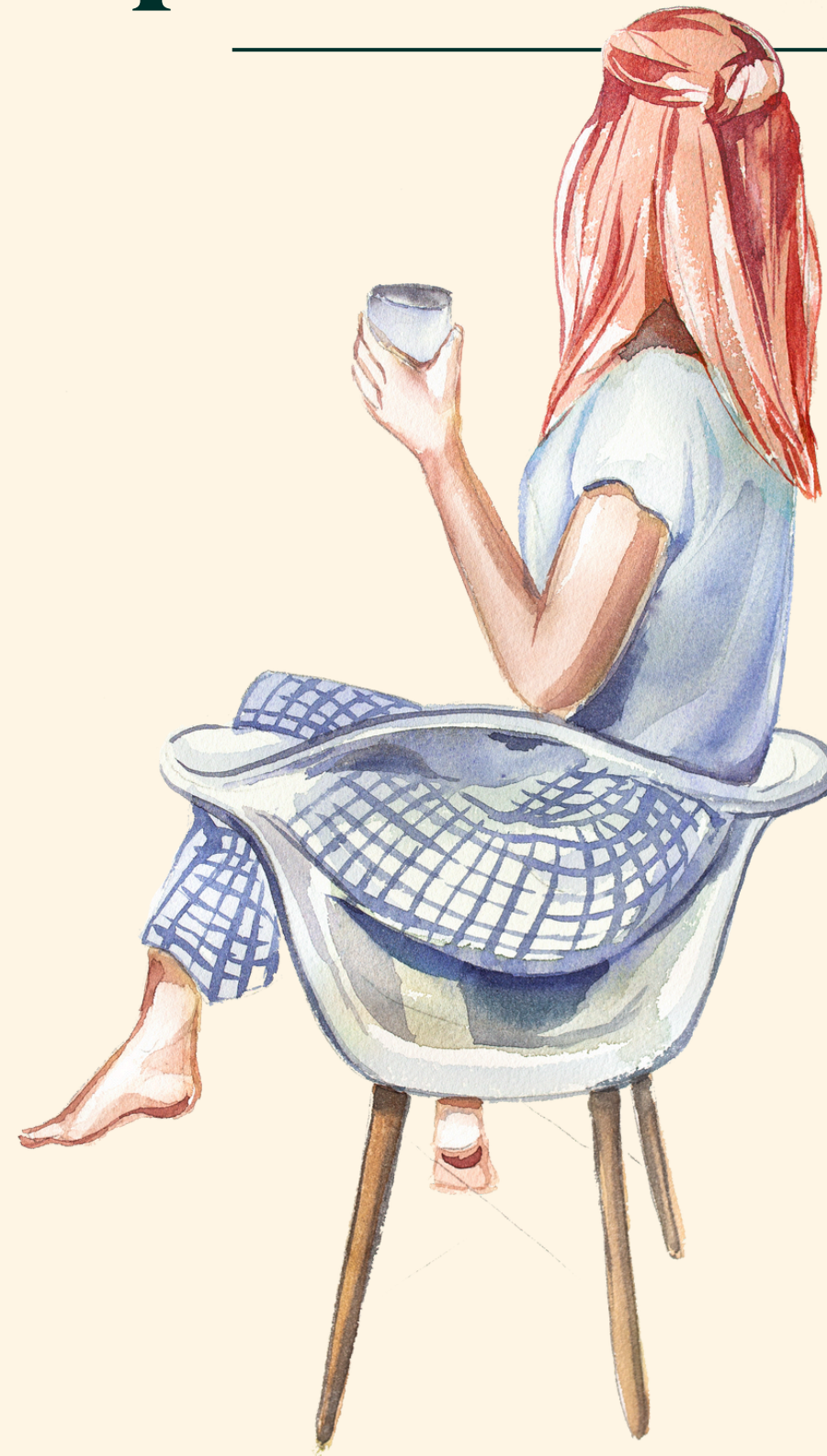


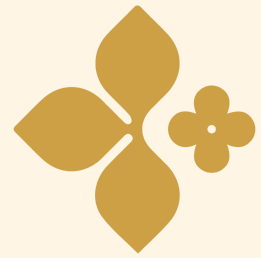


# Step 2: Frame the Timing

---

Choose your moment  
***strategically.***





# Step 3: Align with Org Priorities

---

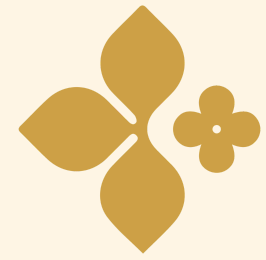
Anchor ***your value*** to what matters most



YOUR NEXT MOVE







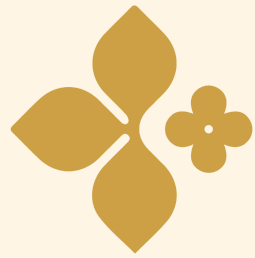
# Step 4: Articulate the Ask

---

Make it ***specific, confident, and future-focused***



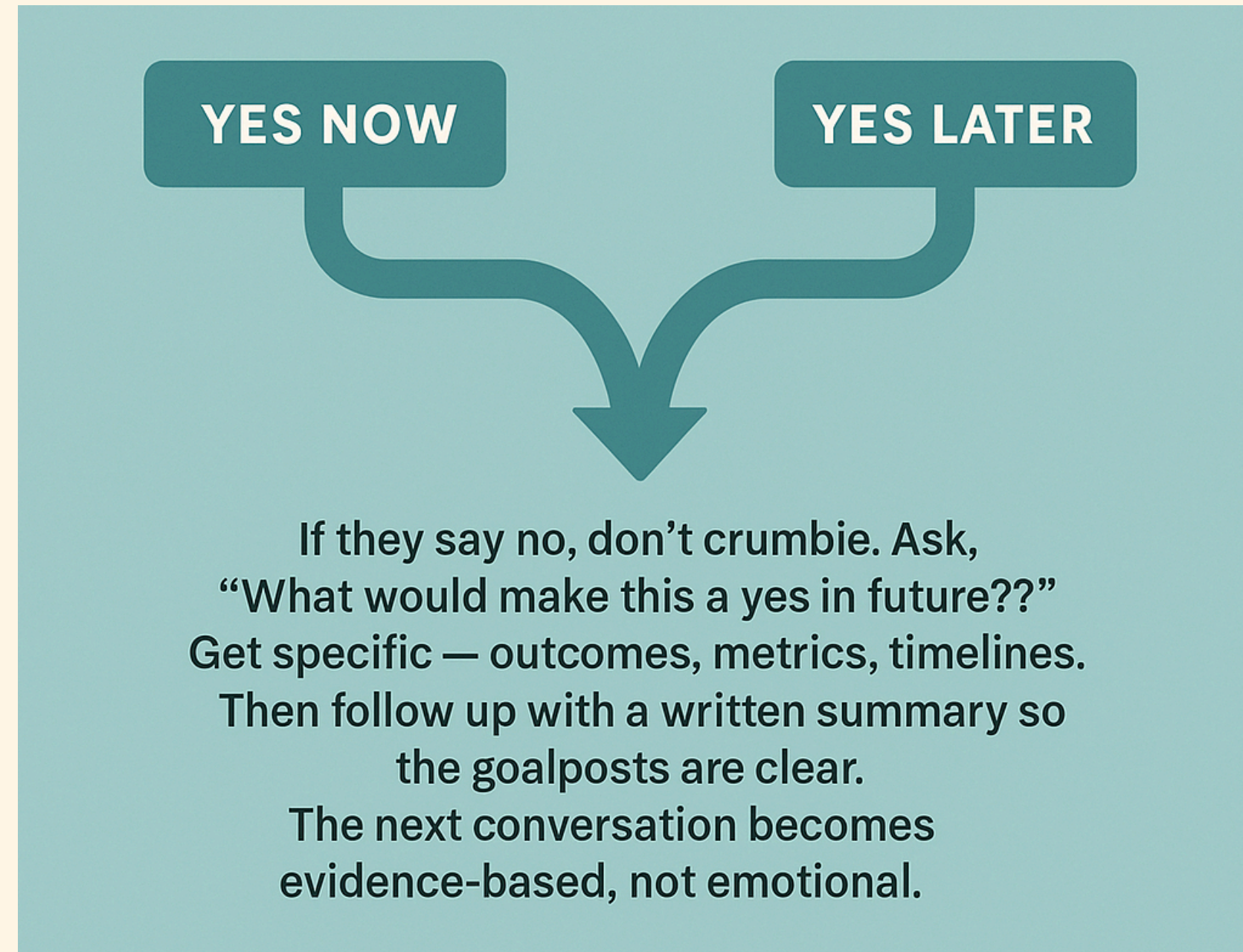


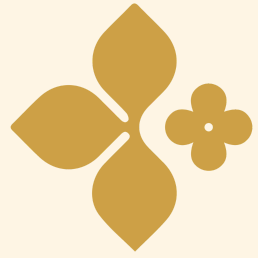


# Step 5: Prepare for Pushback

---

‘No’ is ***not the end*** of the conversation





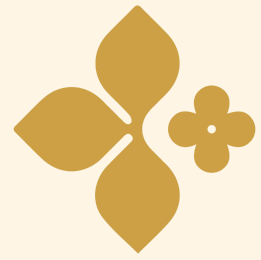
# The Salary Report

---

The 2025 ***Salary Report*** is a reference, not a demand letter.







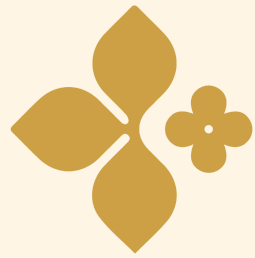
# Step 6: Track & Quantify Progress

---

Make your impact **visible** all year round







# Leverage AI

---

Train for the Conversation Without the Panic

**1/ Upload personality reports**

**2/ Prompt:**

‘Pretend you’re [Boss], a [profile]. I’m [My Type]. Let’s role-play a salary conversation; respond realistically.’

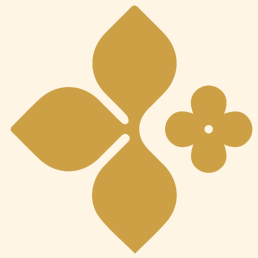
**3/ Use voice mode** to practise tone and timing until you sound calm, not defensive.

**4/ Refine your script:** paste your ask and say ‘Make this concise, confident, exec-friendly.’

**5/ Quantify wins:** ‘Turn these notes into three measurable results for a salary case.’

**6/ Post-meeting debrief:** ‘Summarise what worked, what to follow up on.’





# Step 7: Reframe the Outcome

---

Every conversation ***builds capital.***

Financial  
Reputational  
Relational



 YOUR NEXT MOVE 



# You are the ROI

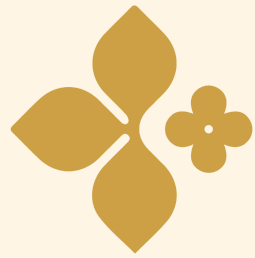
---

You're not just supporting the business. You are the business infrastructure.

When you advocate for yourself, you're modelling exactly what high-value professionals do: ***demonstrating leadership.***





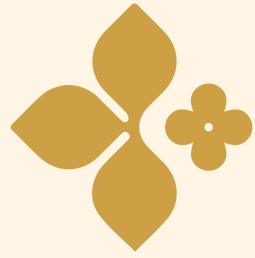


# Your Turn

---

- Document your wins for the past 6 months
- Research your market range
- Draft your business case using the framework we covered
- Schedule the conversation within the next 30 days
- Prepare using the cheatsheet provided (including AI prompts to help you practise)





# Stay In Touch

---



[www.linkedin.com/in/trinity-james/](https://www.linkedin.com/in/trinity-james/)