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My Favorite Templates

My EA Experience

Take these templates and make them your own! Use them as inspiration to curate the automation & efficiency to fit your needs.

Meeting Scheduling

Every day we **schedule** and **re-schedule** meetings for our **executives**, **team members**, and **ourselves**. Sometimes we have the information we need to send out the meetings/ request emails, and other times we are frantically reaching back out for clarification.

In most cases we are not in control of the information we receive, but this template/ questionnaire has helped me make sure I **have everything I need** to schedule or coordinate a time for a meeting.

If someone requests a meeting from me:
- Some of the executives I work for like the template because then they know I won't have to ask any follow-up questions.
- Others, I fill it out for them and send it back to double-check that I have all the information correct for the meeting they are requesting.

When sending an email request:
Sometimes it is challenging to add all the details of a meeting nicely in an email request. I have this table saved in my email templates with something similar to this:

Hello,

Subject:	
Duration:	
Location (In-person or Virtual):	
Attendees:	
Optional Attendees:	
Purposed Date(s) & Times:	
Goal/ Objective:	
Agenda:	

I hope you are well! I am working with [**executive**] on scheduling a [**duration**] meeting regarding [**subject**]. [**Executive**] is hoping would like to have this meeting within [**time period of proposed dates**]. Please send your executives availability based on the information detailed below.

[**paste table**]

Meeting Notes

Note taking can be a big part of our jobs. Although AI has "entered the chat," many of us cannot use these tools in their entire capacity. I still keep notes even when AI is being used, so when the summary is created, I can compare my notes, and put the "key take aways" into my various templates for dispersal and reference.

Below is my main template for meetings and making sure that my executive hits on all their key points in the meeting.

YYYY.MM.DD | Subject

Attendees:

FirstName LastName	email@email.com	notes
FirstName LastName	email@email.com	notes

Agenda: [If this is a recurring meeting, I add review last meetings action items and decisions made]

Notes: [I break out the agenda and try to note who said or mentioned what]

Topic	Notes	Name
Agenda Item 1	Discussion on Agenda Item 1	Who discussed

Action Items:

Action	Person	Deadline
Action 1	FirstName LastName	Date

Last Meeting's Action Items:

Action	Person	Deadline
Action 1	FirstName LastName	Date

Decisions Made:

Decision	Made by	Notes
Decision 1	FirstName LastName	Date + Notes

Last Meeting's Decisions Made:

Decision	Made by	Notes
Decision 1	FirstName LastName	Date + Notes

Goal Tracking

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Every year we are asked to create goals for ourselves. I use this template to figure out what goals I should be making for myself and track my progress throughout the year. I enjoy how easy it is to share it with my Executive during evaluations and when I am inquiring about a promotion. I will expand this table of goals as I participate in different projects or want to note somewhere a milestone to bring up during Year-End Review.

Tie your goals into your company and department's goals and strategic initiatives. You should be able to tell a story of how your goals will benefit the company you work for.

The easiest way to create that story is to make them SMART, and it makes the transfer to this chart easy as well.

Goal Type	SMART Goal	Q1	Q2	Q3	Q4
Learning					
Relationship					
Project/ Process					
Project/ Process					
Project/ Process					
Stretch					

GOAL — SMART

S	Specifc	Plan effectively with specific targets in mind.
M	Measurable	Set realistic goals that are challenging but achievable.
A	Attainable	Track your progress and reevaluate along the way.
R	Relevant	Ensure the goal serves a relevant purpose.
T	Timely	Specify a deadline, monitor progress and reevaluate.

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Each EA role is very different. One of my responsibilities is to host outside vendors for various events and workshops. These are a few templates for these events. If any of this information needs to be consistently shared with individuals, think about creating an email template!

Workshop Prep Questionnaire:

1. Dates of Workshop:
2. Attendees:
   a. What vendor(s) are coming:
      i. Who will be the point person for the coordination:
   b. Who from our company will be attending event:
   c. How many in total will be attending:
3. Food
   a. Date & Time of meals/ snacks:
   b. Food Allergies/ Dietary Restrictions:
4. Who will own the calendar invite?
   a. Will there be a Zoom/Teams/Google
5. Do you have a preference in conference rooms?
6. Is there an agenda?

FirstName LastName	Email	On-Site or Remote	Vendor/ Company	Food Allergies

Workshop Planning Outline:

I create a table of the participants of the various meetings to make it easier to copy and paste into a email, or invites.

Core Team = individuals who will be in EVERY meeting/ event

Name	Email	In-Person or Virtual

Event A= if I have events that have multiple meetings with different participants in each, I will separate those individuals from the "Core Team"

Name	Email	In-Person or Virtual

Agenda + Adjoining Documents

Workshop Timeline

Date	Subject	Duration	Time (00:00-00:00)	Attendees	Agenda	Additional Notes (Conf. Rm & Food)

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Each EA role is very different. One of my responsibilities is to host outside vendors for various events and workshops. These are a few of my templates for these events.

Each company has its own resources and support systems in place for events & meetings. Please cater this list to your department, executive, and company.

Admin Prep:

In addition to keep track of itineraries, and attendees there are certain things you can think of to prepare for meetings before and day-of the event.

Before the Meeting	
	Send calendar holds to attendees & reserve any conference rooms or coordinate space for the meeting.
	See if any Hotel or Travel arrangements need to occur. Does anyone need a ride to or from the Airport?
	When you get the agenda, and finalize the attendees, order food.
Closer to Event	
	Email IT, Facilities, Reception, etc • Might need assistantce with AV, Video Conf. • Facilities may have resources for conference rooms, parking • Reception may need to know about guests, meal coordination
Room Set Up	
	Snack Order: • Fruit = bananas & clementines • Protein = pistachio (if no nut alergy) • Candy = dark chocolate, kit kat, milk chocolate, dove • Chips = Cheez-Its, Pirates Booty, Kettle Chip
	For AM Meeting: • Coffee • Water • Frui
	Grab the Event Basket: • IT: computer & phone chargers, Guest Wifi Cards • Admin: tissues & hand sanitizer, Whiteboard Markers & Erasers, Scissors for Snacks, Fidget Toys, Pads of Paper & Pens
	Small plates, bowls, napkins Serving utensils