Executive Assistant: Your First Two Weeks

September 8 to 17, 2026. Insight Planning.

This is your plan for the first two weeks. On Tuesday afternoon, enter it in your own calendar. After that, your calendar is the schedule and this document is the reference.

The plan follows the First Principles Stack (1.6): only what is needed this week, in the simplest form, with one owner for each item.

What you own from day one

- The Open Items register (9.15): everything Shea is waiting on from anyone. You enter it, you keep it current, and you bring due items to the Sync.
- The daily Sync (6.7.2). You run it.
- Shea's calendar, from Monday, September 21. The CSS walks you through it on Wednesday and keeps it until then; you shadow her on it.
- Your first task: Shea's flights for the industry conference in October. Due Thursday at 4:00.

A normal day, from Thursday

Time	With	What
8:30	You	Open Shea's calendar and your list. Check the next 48 hours for anything that needs his approval or needs to move.
10:00	Shea	Daily Sync, 30 minutes at your desk. You run it. Five items in order: Emails, Tasks, Calendar, Client work on Shea, Questions. If there is nothing under an item, skip it. Afterward, post the decisions in #sync-shea-ea, one line each.
After	You	The work.
4:15	You	Update the Open Items register. Day ends at 4:30.

How to learn the role

- The reading order is in 1.7 How to Use This Playbook. It takes about two hours across the week. It is the only reading list this week. Next week's list comes from Shea on Friday.
- If a page raises a question, ask Insight Sam from that page first. It is the AI icon at the bottom right of any Notion page. It answers from the Playbook and names the section.
- If Sam cannot answer, add the question to your list and bring the list to the 10:00 Sync. Bring questions the same day; do not hold them.
- If something in the Playbook looks wrong, out of date, unclear, or missing, post it in #playbook-hygiene. That is what the channel is for. Do not change the page yourself.
- Shea communicates directly and expects the same from you. Section 6.5 has each person's DiSC profile and how they prefer to work. Your own DiSC debrief is in week three.

This week

Tuesday, September 8

Time	With	What
8:30	BDA	Systems set-up and orientation, until 11:00. Every login is confirmed working.
11:00	Shea	Shea's office, 60 minutes. Your systems in the order you use them each day, a normal day, how to learn the role, and this week day by day. Your first task is posted at the end.
12:00	You	Lunch.
12:30	OM	Payroll and paperwork.
1:00	You	Anything outstanding from the BDA's set-up, then reading, day one: 1.1, 1.4, 1.5, 1.6, 1.7, then 3.1 and 3.2.5.
2:30	You	Enter these two weeks in your calendar. Finish the day-one reading.
4:15	You	First entries in the Open Items register: what Shea said he is waiting on. Day ends.

Wednesday, September 9

Time	With	What
8:30	You	Calendar pass, next 48 hours. Prepare your Sync list. Reading, day two: chapter 2 and chapter 4.
10:00	You	Shea is on a call. Reading.
11:00	Shea	First Sync. Items 2, 3 and 5 this week; items 1 and 4 start after the CSS's sessions next week. Post the decisions afterward.
11:30	Shea, CSS	Weekly cash audit. You sit in.
12:00	CSS	Shea's calendar, walked through on your laptop (9.2). Greeting cards handoff (8.1.3).
1:00	You	Lunch.
1:30	You	conference flights. Greeting cards. Reading.
4:15	You	Update the register.

Thursday, September 10

Time	With	What
8:30	You	Calendar pass, shadowing the CSS. Prepare your Sync list. Reading, day three: 6.4, 6.5, 6.6.
10:00	Shea	Sync.

Time	With	What
After	You	Book the conference flights. Post proof in the task thread: one line and the ✅ reaction.
1:30	You	Reading. Register. Greeting cards.
4:00		conference flights due.

Friday, September 11

Time	With	What
8:30	You	Calendar pass. Reading, day four: 5.1 to 5.3 and chapter 7. Set up To-Do with two recurring items: daily calendar pass, daily register check.
10:00	Shea	Sync, 30 minutes. Five items, then next week: The receipts pile and where it goes in Box, the Outlook block build, the lunch service, calls while he is away, the CSS's days, and your reading list. He will ask three questions: what is clear, what is not, what do you need.
10:30		Shea and the BDA.
11:30	BDA	15 minutes. Tech support next week and how to reach him.
1:00		Shea and the OM.
After	You	Post the decisions. Enter next week in your calendar. Update the register.

Next week

Shea, the BDA and the OM are away Monday to Thursday. The CSS is in the office Tuesday and Thursday. Each day, do the 8:30 calendar pass and prepare your Sync list. Shea will call when his schedule allows. Run the five items on the call and post the decisions afterward. If there is no call that day, carry the list to the next one. Do not send questions to Shea in the channel. The CSS is your first contact for anything about clients or systems.

Time	With	What
Mon 14	Alone	Enter Shea's Week in Outlook as recurring blocks, working day only, with the sync meeting series (9.2). Sort the receipts by entity and month.
Tue 15	CSS	The CSS reviews the Outlook build with you. Introduction to Shea's inbox (9.1). Receipts. Lunch service research.
Wed 16	Alone	Receipts scanned and filed. Write the lunch service 1:3:1 (6.4).
Thu 17	CSS	Wealthbox overview. Close the receipts with proof in the thread. Post the lunch service 1:3:1 in its thread. Have your question list ready for Monday's Sync.

Reading for next week: provided by Shea on Friday.