The Executive Assistant Role

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This is what the role is, in priority order, and what it takes to do it well. Everything in it follows the First Principles Stack (1.6): only what is necessary, only what is essential, in the simplest form, with one owner.

The three most important functions

In this order. Everything else in the role is secondary to these three.

	Function	Why it ranks here
1	The daily Sync	It is where everything owed, decided or blocked gets resolved. If the Sync works, the week works.
2	The calendar system	It decides where the Founder's time goes. Protected time is the product of this role.
3	The email system	Two inboxes, high volume, client-facing. Nothing can sit and nothing can be missed.

1. The daily Sync

Monday to Thursday, 10:00 AM, 30 minutes, in person. You run it. Shea answers. The weight of making it effective sits with you.

Five items, same order, every day (6.7.2). You run each one, Shea answers. If you have nothing under an item, skip it.

	Item	What you bring
1	Emails	Only the ones needing his decision. Not a walk through the inbox.
2	Tasks	Everything captured since the last Sync, from the channel and from what he said out loud. Read each one back with your proposed done and date. He confirms or corrects.
3	Calendar	The next 48 hours. Only what needs his approval or a move.
4	Client work on Shea	His open and overdue Wealthbox tasks, including Insight 360 workflow steps. Already sorted by deadline and priority. You put them on screen and he decides each one: done, today, moved, or reassigned. You update the status and the date on the spot. You do not do the client work itself, you do not create tasks, and you do not touch notes, records or workflow steps.
5	Open and questions	New tasks from Shea. Anything blocked or needing a decision, as a 1:3:1 (6.4). Every item on the register hitting its date today is read here.

You run it off the large monitor. The register, the emails needing direction, the calendar and his Wealthbox task list are all on screen, in the order the agenda calls for them.

Why item 4 stops where it does: on Shea's instruction you update the status and the date of his tasks, and nothing else. The client work itself, notes, records and workflow steps are never yours.

Right after, post the decisions in #sync-shea-ea, one line each. That is the record.

Between Syncs, anything Shea posts in that channel is Sync work. Capture it and bring it to the next Sync. If it is urgent or has to happen today, he will say so in the post. The channel runs one direction: it is where work comes to you, not where questions go back to him. Questions are raised at the Sync.

To run it well you have to know four systems

These four are what make the Sync work. Knowing how to open them is not the standard. Knowing them inside and out is.

- Wealthbox. Where client tasks live, how they are sorted, and how to pull what is open on Shea.
- The Open Items register (9.15).
- The calendar system (9.2) and Calendly (9.9).
- The email system (9.1 and 9.3).

2. The calendar system

The calendar is yours. You book it, move it and decline into it, end to end.

- The blocks are the availability. Meetings go into open time; blocks do not move to make room for a meeting unless Shea says so.
- Advisory is the only bookable block. Client Hours in Calendly mirrors it: Tuesday to Thursday, 10:30 to 11:30 and 1:30 to 4:30 Pacific.
- The calendar sets Calendly, never the reverse. If the wrong slot is bookable, the calendar is wrong. Fix the calendar first, then raise the Calendly side with Shea.
- Every invite carries the link or the address, with the right people on it.
- Time away is blocked in Outlook as an all-day event set to Out of Office, whole days including travel. Then confirm it worked by opening a booking link in a private window.
- Standing meetings are not cancelled. A conflict moves later the same day as a last resort.
- You do not move or cancel a client meeting on your own. List them and bring them to Shea.

Proficiency here means the whole system: meeting types and what each is for, the Calendly links and which is public and which is invitation only, booking, moving, recurring series, and working across more than one calendar.

3. The email system

Shea’s inboxes are yours.

- Every email ends up in one of four outcomes: you handle it, you action it and file it for his awareness, you route it, or it goes to Shea for a decision.
- The test before you act: have I handled exactly this situation for exactly this person before, with no surprises last time? If no, or anything feels off, it goes to Shea.
- Client email is acknowledged the same day. An acknowledgement is not an answer.
- Anything material to a client goes onto the client record in Wealthbox. Documents go to Box.
- Only what needs his decision comes to the Sync. Everything else you deal with.

Three passes a day, every day: 9:00, 12:00 and 3:45. Both of Shea’s inboxes on every pass.

Those times are fixed. How you make sure you never miss one is yours to set up. 9.11 is where recurring tasks live.

Proficiency here means volume without loss: folders, rules, search, flags, and a system you can run quickly three times a day.

4. The Open Items register

The register is everything owed to Shea. That is the whole test: did he ask for it, or is he waiting on it?

- If Shea asked you for something, he is owed it. It goes on the register.
- If anyone else owes Shea something, it goes on the register, and you follow up with them until it closes.
- If it is your own work that Shea did not ask for, it does not belong there. Run that in your own system.

The register is not a personal to-do list. It is the list of what Shea is waiting on, from anyone, including you. If it is complete and current, nothing is dropped and nobody has to remember anything. If it is not, things fall through.

Every item carries a real due date. A date that has passed gets a decision at the Sync, not a new date quietly typed in. And nothing confidential goes in a register field: logins and passwords live in 1Password (9.6), never in Notion.

Your day

Time	What
8:30	Shea's calendar first. Then Wealthbox: his open client tasks, flagging anything high priority, urgent, overdue or due today. Then the register: overdue, due today, due soon, and remind anyone who owes Shea something.
9:00	First email pass. Both of Shea's inboxes and your own.
	Prepare the Sync from all of it.
10:00	The Sync. You run it off the monitor.
After	Post the decisions. Then the work of the day.
12:00	Second email pass.
12:30	Lunch.
3:45	Third email pass.
4:15	Register current before you leave. Day ends at 4:30.

Purchases

Nothing is purchased without Shea's prior approval. No size threshold and no exceptions. That covers travel, subscriptions, office items, and anything on the company card.

What it takes to be good at this

The systems are learnable. These are the things that decide whether the role works.

Judgment about what reaches Shea

Knowing the difference between what you solve, what you bring to the Sync, and what genuinely interrupts him now. This single skill decides whether the role returns time or costs it.

Problem solving and resourcefulness

Bring solutions, not problems. When something needs a decision, bring it as a 1:3:1 (6.4): one problem, three options, one recommendation. Exhaust the Playbook, Claude and your own resourcefulness first.

Anticipation

Seeing what is coming before it arrives. The meeting that needs prep, the trip that needs blocking, the item that is about to be late. Working ahead of the calendar instead of behind it.

Follow-through on other people

Getting what Shea is owed out of team members and outside parties, assertively and without being asked, until it closes. Precision on the small things is part of this: The right people on the invite, the right link, the correct date, the file named properly.

Timing and tact

When, where and how you raise something. If you think Shea has something wrong, say so directly and privately. That is welcome and it is part of the job. Doing it in front of the team is not. Ask before you start rather than correcting after.

Resources

Getting proficient is yours to drive. Use all of these.

- The Playbook in Notion. First stop for anything about how we do things here. Go there before you ask anyone, including Shea.
- Claude. The fastest way to solve a problem, learn a system, or draft something. Use it before you are stuck, not after. Give it the full picture.
- Insight Sam. Ask it from the Playbook page you are on; it answers from the Playbook and names the section.
- The CSS. Client and system judgment, and the history behind how things are done.
- Vendor training. Microsoft's own Outlook and Teams training, the Wealthbox help centre, Calendly help. This is where real proficiency in the tools comes from.
- YouTube. Search what you are actually trying to get better at: managing an executive's inbox, calendar management for assistants, how to be an exceptional EA.
- Buy Back Your Time, Dan Martell. Chapter 6 is the Sync.
- Block time for this in your own calendar. If it is not blocked it will not happen.

If something in the Playbook is wrong, out of date, unclear, or missing, post it in #playbook-hygiene. That is what the channel is for. Finding a gap is a contribution, not a complaint.

What the role is measured on

Four things, assessed at the 90-day review.

1. Loops close without follow-up.
2. Questions come before starting, not corrections after.
3. Confidentiality holds.
4. Shea’s capacity is measurably lighter than before this role existed.

How you do anything is how you do everything. The small things are the job.