

## EXECUTIVE LEADERSHIP SUPPORT FORUM: SAN DIEGO

NOVEMBER 7 & 8 | HILTON GARDEN INN SAN DIEGO BAYSIDE

The Executive Leadership Support Forum Series strives to improve the profile and professional lives of executive assistants worldwide by welcoming those with a thirst for knowledge, desire to make new connections, and a passion for career advancement.

### ABOUT THE FORUM

The Executive Leadership Support Forum Series is a two-day professional development course that covers a wide range of challenges faced by executive assistants supporting North America's most prominent executives. With forums held in major cities across the continent, executive assistants are provided with a uniquely elevated educational and networking opportunity led by expert instructors and regional peers. Inspired by university programs, the robust curriculum takes an MBA approach. Each session is formatted to hone leadership development and project management skills with an ultimate goal of increasing the productivity and profile of the executive leadership support role.

### EDUCATORS & EXECUTIVE ASSISTANT CONTRIBUTORS

Bonnie Low-Kramen  
Founder  
**ULTIMATE ASSISTANT TRAINING & CONSULTING INC.**

Alysha Coleman  
Senior Executive Assistant to Corp. VP  
– Chief Development Officer  
**JACK IN THE BOX**

Cecilia Persson-Ramos  
Executive Assistant to CEO  
**CUBIC CORPORATION**

Rick Zerkle  
Principal  
**BOOZ ALLEN HAMILTON**

Vickie Sokol Evans  
CEO & Founder  
**THE RED CAPE COMPANY**

Holly Guile  
Executive Assistant to CEO  
**WD-40**

Nikki Machado  
Executive Assistant to Chief Strategy Officer & Global Strategy Team  
**RESMED**

Vanessa Fox  
VP, Chief Development Officer  
**JACK IN THE BOX**

Rhonda Scharf, CSP, HoF  
Trainer, Consultant & Author  
**ON THE RIGHT TRACK TRAINING & CONSULTING INC.**

Marissa Parks  
Senior Executive Assistant to the Office of the CEO  
**ESET NORTH AMERICA**

Heather McGann, CAP  
Executive Assistant to Principal  
**BOOZ ALLEN HAMILTON**

Dr. Debra Dupree  
President & Workforce Management Consultant  
**RELATIONSHIPS AT WORK, INC.**

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## OPENING KEYNOTE:

### REPORT FROM THE WORLD: GLOBAL TRENDS FOR EXECUTIVE ASSISTANTS

Thought leader and Forum speaker Bonnie Low-Kramen says, "There has never been a better time to be an EA than right now. There has also never been a more complicated time to work as an EA than right now. We navigate these complications at the ELS Forum." Since 2008 and the financial crisis, the world has changed and EAs have had to change with it. In our volatile and evolving environment, we will pull the curtain back on the important global trends that affect the 1 billion assistants in the world. These include, EAs being viewed as strategic business partners who now have a seat at the table and an important voice to add as a contributor. EAs have always been vital eyes and ears and now are actively exerting their leadership skills to the benefit of their executives and companies.

Bonnie Low-Kramen, Founder, **ULTIMATE ASSISTANT TRAINING & CONSULTING INC.**

*\*Sessions 1-6 will be delivered and facilitated by professional instructors and educators:*

## SESSION 1:

### UNLEASHING THE POWER OF INFLUENCE: LEADERSHIP DEVELOPMENT FOR EXECUTIVE ASSISTANTS

Author and management expert Ken Blanchard said, "The key to successful leadership today is influence, not authority." As a strategic business partner, EAs are expected to make authoritative decisions and act as an influential leader both on behalf of their executive and the organization. By developing skills to professionally engage with executives throughout a business, EAs can increase their influence and be a voice to be heard and respected. This session is designed to improve the leadership capabilities and performance of high potential executive assistants.

Rhonda Scharf, CSP, HoF, Trainer, Consultant & Author, **ON THE RIGHT TRACK TRAINING & CONSULTING INC.**

## SESSION 2:

### DEVELOPING THE MINDSET OF AN EXECUTIVE: SHARPENING CRITICAL THINKING SKILLS

Successful leaders are critical thinkers possessing the ability to step outside their biases in order to see problems or situations from a new or different angle. Today's executive assistants are called to lead, think, and act strategically and by educating themselves about the business, EAs can become key stakeholders within an organization. In this high-level session, participants will uncover critical thinking strategies to create a personalized problem-solving method for whatever task is at hand.

## SESSION 3:

### ENSURING MUTUAL SUCCESS BY MANAGING UP

In a Harvard Business Review article, Melba Duncan, CEO at the Duncan Group, states that executive assistants "can drastically improve the productivity of an executive and of the organization as a whole." Learning how to manage one's manager is key to anticipating needs and establishing open lines of communication. When executive assistants assert themselves as reliable business partners, leaders have an opportunity to delegate additional responsibilities and drive the business forward at a faster pace.

Dr. Debra Dupree, President & Workforce Management Consultant, **RELATIONSHIPS AT WORK, INC.**

## SESSION 4:

### KNOWING YOUR WORTH & GETTING REWARDED FOR EXCELLENCE

Executive assistants can find themselves frustrated with metric-driven performance evaluations, outdated job descriptions and salary caps. Often, the exhaustive work completed behind the scenes by EAs cannot be measured by the traditional metric-driven evaluation, and EAs are underpaid as a result. Evaluating your worth and confidently communicating your value to management are vital skills for EAs in today's fast-paced business environment.

Bonnie Low-Kramen, Founder, **ULTIMATE ASSISTANT TRAINING & CONSULTING INC.**

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## SESSION 5:

### **TECHNOLOGY MASTER CLASS: TIME SAVING TIPS FOR ULTIMATE PRODUCTIVITY**

The most influential business leaders expect their executive assistants to be highly productive and fast functioning. In order to achieve this, EAs must be exceptionally proficient in using Microsoft, Apple and Google platforms. This engaging 2-hour master class will provide participants with quick and easy tips and tricks in Word, Outlook, Excel, PowerPoint, SharePoint and data analysis. Participants of the 2017 workshop saw a return on investment of 5.68 hours saved per week and over \$4000 saved per year.

Vickie Sokol Evans, CEO & Founder, **THE RED CAPE COMPANY**

## SESSION 6:

### **SEAMLESS EXECUTION OF PROJECT MANAGEMENT FOR EXECUTIVE ASSISTANTS**

Executive assistants are no stranger to juggling multiple projects, and more EAs are pursuing advanced education through Project Management and Six Sigma Certifications to further expand their skillset and contributions. Focused on quality improvement initiatives, Project Management Professional Certifications, or PMP Certifications, offer benefits for the whole organization such as meeting both project deadlines and company goals. A project management expert will provide strategic approaches to successfully managing a project from the early stages of planning to completion.

Rhonda Scharf, CSP, HoF, Trainer, Consultant & Author, **ON THE RIGHT TRACK TRAINING & CONSULTING INC.**

*\*Sessions 7-10 are collaborative conversations and workshops facilitated by executive assistant contributors:*

## SESSION 7:

### **STOP PUSHING & START PULLING: LEADING & MOTIVATING A TEAM**

Executive assistants are an extension of their leaders and are often managing teams of their own. Yet in many cases, there is no formal manager training for executive assistants. In this session, EAs will develop both day-to-day management skills as well as the classic leadership skills needed to establish and maintain a corporate culture of excellence. Participants will examine the organizational impact of effective and collaborative teams as well as share tools to proactively lead and motivate a team, whether you are leading with influence or leading with formal authority.

#### **CONTRIBUTORS:**

Holly Guile, Executive Assistant to CEO, **WD-40**

## SESSION 8:

### **EXECUTIVE & EA ROUNDTABLE: BECOMING AN INVALUABLE ASSET & PARTNER**

When an executive and the assistant establish a strong strategic and supportive business partnership, possibilities for both careers are endless as the success can often be felt throughout an organization. Having the executive's respect and trust is empowering for the assistant and will positively affect every aspect of his or her work. Conversely, knowing that the assistant is autonomous, capable of safeguarding time and handling other priorities, will allow the executive to focus on significant matters. Establishing this partnership and continuing the relationship requires on-going collaboration and communication. Through discussion and professional moderation, executives and EAs will share insight into their professional partnership.

#### **CONTRIBUTORS FROM JACK IN THE BOX:**

Alysha Coleman, Senior Executive Assistant to Corp. VP – Chief Development Officer

Vanessa Fox, VP, Chief Development Officer

#### **CONTRIBUTORS FROM BOOZ ALLEN HAMILTON:**

Heather McGann, CAP, Executive Assistant to Principal

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## SESSION 9:

### **PASSION X PURPOSE: HOW TO BUILD A STANDOUT CAREER AS AN EXECUTIVE ASSISTANT**

We live in a fast paced global marketplace where the goal to accelerate your career is everywhere. All of this can affect our ability to think, plan and execute career goals or to create positive changes as executive assistants and beyond. How can we successfully channel our energy and focus, while making use of the resources around us? This thought-provoking discussion will share perspectives on fueling passion and driving purpose in the executive leadership support role.

#### **CONTRIBUTORS:**

Marissa Parks, Senior Executive Assistant to the Office of the CEO, **ESET NORTH AMERICA**

Cecilia Persson-Ramos, Executive Assistant to CEO, **CUBIC CORPORATION**

## SESSION 10:

### **WORKSHOP: PERFORMING COLLABORATIVELY & EFFECTIVELY ACROSS GENERATIONS**

Today's workforce spans across five generations resulting in diversified work styles and behaviors. As executive assistants are exposed to numerous facets of the business, they will need to collaborate with multigenerational teams. By identifying generational stereotypes, we are better equipped to shift the focus and maximize the strengths of each group to achieve organizational growth and success. Through an interactive workshop, participants will share strategies on working and communicating effectively across generations.

#### **CONTRIBUTORS:**

Alysha Coleman, Senior Executive Assistant to Corp. VP – Chief Development Officer, **JACK IN THE BOX**

Nikki Machado, Executive Assistant to Chief Strategy Officer & Global Strategy Team, **RESMED**

## SESSION 11:

### **2018 EDITION:**

#### **SAVVY: THE EXECUTIVE ASSISTANT CHALLENGE**

EAs are business game changers, always making the impossible possible for their executive on numerous levels. Back by popular demand, this interactive and exhilarating session will put participants to the test. In a board game challenge, participants will demonstrate their EA skills while picking up some new best practices along the way as they compete in teams to become the ultimate executive assistant! Categories of discussion include:

- Calendar & Time Management
- Difficult Conversations & Ethical Dilemmas
- Apps & Technology
- Travel & Event Planning

Phoebe Yates, Senior Producer, **EXECUTIVE LEADERSHIP SUPPORT FORUM**



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## 2018 SERIES SCHEDULE

<b>CHICAGO</b> January 24-25	<b>SILICON VALLEY</b> July 11-12
<b>INDIANAPOLIS</b> February 7-8	<b>VANCOUVER</b> July 18-19
<b>CHICAGO NORTHSHORE</b> Feb 28-March 1	<b>NEW YORK CITY</b> September 12-13
<b>TORONTO</b> March 7-8	<b>SEATTLE</b> September 26-27
<b>ATLANTA</b> March 21-22	<b>MINNEAPOLIS</b> October 3-4
<b>MISSISSAUGA</b> April 11-12	<b>DALLAS</b> October 22-23
<b>DETROIT</b> April 18-19	<b>HOUSTON</b> October 25-26
<b>BOSTON</b> May 2-3	<b>PHOENIX</b> October 31-Nov 1
<b>SAN FRANCISCO</b> May 16-17	<b>SAN DIEGO</b> November 7-8
<b>WASHINGTON, DC</b> June 6-7	<b>ORLANDO</b> November 12-13
<b>NEW YORK CITY</b> June 27-28	<b>DENVER</b> November 14-15

## ATTENDEE TESTIMONIALS

“This was truly a great experience. The speakers and attendees were spot on. I was able to connect with colleagues that understood my frustrations and it was great to not feel alone; I got some great ideas. I loved the team building exercises and look forward to repeating them with my team.”  
*Executive Assistant, CLEAR CHANNEL OUTDOOR*

“The Forum was great, and I’ve already used some of the resources. It was exactly what I needed to be exposed to in this stage of my EA career.”  
*Executive Assistant, ORIGINS BEHAVIORAL HEALTHCARE*

“This was indeed one of the best experiences I’ve had as a presenter as well as a seminar participant.”  
*Executive Assistant, FEDEX EXPRESS*

“Thank you so much for a fantastic conference! I learned, enjoyed and can’t wait for the next one.”  
*Executive Assistant, ANTHEM BLUE CROSS & BLUE SHIELD*

“The forum was remarkably well put together and very inspiring. All the information, networking, and learning I took away from it was more than I anticipated. It was an honor to be there and among all the speakers, panelists, EAs, and your team that worked hard to put it all together. I will be looking forward to next year’s!”  
*Executive Assistant, ROCKLAND FEDERAL CREDIT UNION*

“It was a fabulous event and I was thrilled to be part of it. The atmosphere of support and collaboration was so dynamic and inspiring.”  
*Executive Assistant, GIRL SCOUTS OF EASTERN MASSACHUSETTS*

“We want to recommend this event to our colleagues and can hardly wait for next year!”  
*Executive Assistant, AKAMAI TECHNOLOGIES*

