

TOOL 04

The Boss Profile

The questions for your first meeting with your boss, and a profile you fill in and keep up to date.

Inside

How to ask for the meeting · 35 questions in 8 groups

Your fill-in Boss Profile · Travel and small preferences

The "Here's what I understood" email

Your boss is your most important client

Before you change anything, learn how your boss likes to work. One good conversation in week one saves months of guessing.

HOW TO ASK FOR THE MEETING

Could I have 20 minutes with you today or tomorrow? I'd like to understand how you like to work, so I can support you the right way from the start.

How to run the meeting

- ☐ Choose **8 to 10 questions** from the next pages. You can ask the rest over the following weeks.
- ☐ Bring your notebook. Write the answers **in their words**, not yours.
- ☐ Listen far more than you speak. Do not promise to change anything yet.
- ☐ End on time, and thank them.
- ☐ Send the **"Here's what I understood"** email the same day (last page of this tool).

WHY IT WORKS

Career experts such as Tracy Brower (Forbes, 2024) and Booher Research recommend asking a new boss early about how they like to receive information, how often they want updates, and how they make decisions. Matching their style early prevents most first-month friction.

FROM 26 YEARS AT THE DESK

I always asked one question that surprised my bosses: *"What did your last assistant do that you really liked?"* It told me more in one minute than a week of guessing, and it showed I wanted to get it right.

Choose your 8 to 10

Tick the ones you will ask. Keep the others for later weeks.

Expectations and success

- ☐ What does success look like for me after 30 days? After 90 days?
- ☐ What is the one thing I must never miss or get wrong?
- ☐ What did your last assistant do that you really liked?
- ☐ Is there anything you would like done differently from before?
- ☐ Are there any informal rules or habits here I should know about?

How you work

- ☐ Do you prefer the bottom line first, or the details first?
- ☐ Are you a morning or an afternoon person for important work?
- ☐ Do you prefer short meetings, or fewer longer ones?
- ☐ Can I interrupt you with questions, or should I save them for a set time?
- ☐ How do you like to start your day?

How you give instructions

- ☐ How will you usually give me tasks: email, in person or chat?
- ☐ Would you like me to confirm tasks in writing?
- ☐ What can I decide on my own, and what needs your approval?
- ☐ How do you want to hear that something is done?

Communication

- ☐ What is the best way to reach you for something urgent? For something that can wait?
- ☐ How quickly do you expect a reply?
- ☐ Can I contact you after hours, and how?
- ☐ Would a short daily brief be useful? At what time?
- ☐ Would you like a Friday update each week?

More to ask over time

Calendar

- ☐ What is the earliest and latest you like to meet?
- ☐ Do you want buffer time between meetings?
- ☐ Which times should I protect for focused work?
- ☐ Who always gets a meeting with you quickly?
- ☐ Which meetings can I accept for you, and which do you want to see first?

People

- ☐ Who should I always put through, even when you are busy?
- ☐ Who should I screen, or pass to someone else?
- ☐ Who are the five people I should get to know first?
- ☐ Is there anyone I should be especially careful with?

Travel and small preferences

- ☐ How do you like to travel: seat, airline, hotel, timing?
- ☐ Coffee or tea, and how do you take it?
- ☐ Any dietary needs for catered meetings?
- ☐ Anything that makes your day easier, or harder?

Confidentiality

- ☐ What is confidential in your work?
- ☐ Where should I keep confidential documents?
- ☐ Is there anything I should never discuss with others?

Fill it in, keep it private, update it monthly

Name and title _____

Bottom line first, or details first? _____

Morning or afternoon person? _____

Urgent things: how to reach them _____

Things that can wait: how to reach them _____

Reply time they expect _____

Confirm tasks in writing? _____

Daily brief: format and time _____

Friday update: yes or no, format _____

I CAN DECIDE ON MY OWN

NEEDS THEIR APPROVAL FIRST

ALWAYS PUT THROUGH

SCREEN OR REDIRECT

Travel, preferences and what matters most

Seat	Coffee or tea
Airlines	Dietary needs
Hotels	Lunch habits
Travel timing	Pet peeves

WHAT SUCCESS LOOKS LIKE, IN THEIR WORDS

THE ONE THING I MUST NEVER MISS

WHAT MAKES THEIR DAY EASIER

CONFIDENTIAL AREAS

PLEASE NOTE

Keep this profile private and professional. Write only what helps you do your job. Never record anything you would not be comfortable with your boss reading.

The "Here's what I understood" email

Send it the same day. It shows you listened, and it gives your boss a chance to correct anything early.

TEMPLATE

Subject: Thank you, and how I'll support you

Dear [Boss's name],

Thank you for your time today. Here is what I understood, so you can correct anything I have wrong:

- You prefer [the bottom line first / details first], by [email / chat / in person].
- For urgent matters I should [call / message you]; everything else can go by email.
- I can [decide X on my own]; [Y] needs your approval first.
- I'll send you a short daily brief at [time] and a summary each Friday.
- Your priority for my first month is [priority].

If I've missed anything, please let me know. I'm looking forward to working with you.

Kind regards,
[Name]

FROM 26 YEARS AT THE DESK

Update the profile on the last Friday of every month. Bosses change their habits with the season, the workload and the year. Your profile should change with them.