

TOOL 07

Calendar & Daily Brief Kit

Read your boss's calendar, agree the rules, and keep your boss informed every day and every Friday.

Inside

The 3-Month Calendar Review · Your boss's calendar rules

The scheduling checklist · The daily brief

The Friday update · The Friday calendar check

The 3-Month Calendar Review

Open the last three months of your boss's calendar. Do not change anything. Just notice.

WHY IT WORKS

Experienced assistant trainers call this one of the most valuable things a new assistant can do in the first weeks: the calendar shows who matters, what repeats, and what your boss protects (ExecViva).

RECURRING MEETINGS

MEETING	HOW OFTEN	DAY AND TIME	WHO ATTENDS

PEOPLE THEY MEET MOST

TIME THEY PROTECT

WHAT GETS MOVED OFTEN

BUSIEST DAYS AND TIMES

TRAVEL AND TIME OFF PATTERNS

MY QUESTIONS FOR MY BOSS

My boss's calendar rules

Suggest rules, then let your boss correct them. Once agreed, you can manage most of the calendar without asking.

RULE	WHAT WE AGREED
Earliest meeting	
Latest meeting	
Buffer between meetings	
Protected focus time	
Lunch	
No-meeting day(s)	
Maximum meetings per day	
Always gets a slot within 48 hours	
Needs approval before I accept	
I can accept on my own	
Double bookings: what to do	
Personal appointments: how to label	
Time zones to watch	

SAY THIS

Could I suggest a few calendar rules, and you tell me what to change? For example, 10 minutes between meetings and nothing before 9.

The scheduling checklist

Run through this before you send any meeting invitation. It takes one minute and prevents most calendar mistakes.

BEFORE YOU SEND

- ☐ Purpose of the meeting is clear
- ☐ Right people invited; optional attendees marked
- ☐ **Time zone** checked for every attendee
- ☐ Room booked, or video link added
- ☐ Duration includes a buffer
- ☐ Agenda attached, or a line about the purpose
- ☐ Papers attached, or a date when they will be sent
- ☐ Dietary or accessibility needs asked, if relevant

AFTER YOU SEND

- ☐ Acceptances checked the day before
- ☐ Room and equipment checked
- ☐ Papers printed, if needed
- ☐ Your boss's prep notes in the daily brief
- ☐ Reminder set for any follow-up

FROM 26 YEARS AT THE DESK

The most common calendar mistake I saw new assistants make was the time zone. If anyone joins from another city, write both times in the invite: "10:00 New York / 15:00 London." Nobody has ever complained about too much clarity.

The daily brief

A short note your boss reads in two minutes. Most important line first.

EXAMPLE

Subject: Daily brief: Tuesday, March 3

Good morning,

Most important today: the budget decision for [project] is due by 5 p.m.

Meetings

- 9:30 Weekly team meeting (Room 4). Agenda attached.
- 11:00 Call with [client name], 30 min. Last call notes attached.
- 2:00 Interview, [candidate]. CV attached.

Deadlines

- Expense report due Thursday.

Needs your decision

- Can [Name] move Friday's meeting to Monday?

FYI

- [Name] is out sick today.

[Your name]

YOUR DAILY BRIEF TEMPLATE

Most important today _____

MEETINGS, WITH PREP NOTES

DEADLINES

NEEDS YOUR DECISION

FYI

The Friday update

Ten minutes, every Friday. It answers the question every boss has about a new assistant: what is she actually doing?

EXAMPLE

Subject: Friday update: week 2

Hi [Boss's name],

A short summary of my week:

Done

- Calendar rules agreed and applied to next week.
- Started the daily brief.
- Set up the follow-up tracker (6 items).

In progress

- Booking for the March board meeting.

Need your input

- Should I accept the invitation from [Name] for the 18th?

Next week

- Meetings week: agendas and minutes for the team meeting.

Have a good weekend,
[Your name]

YOUR FRIDAY CALENDAR CHECK

- ☐ Look at next week, day by day: clashes, missing rooms, links or agendas
- ☐ Check travel and time zones
- ☐ Add prep notes for big meetings
- ☐ Flag anything that needs your boss's decision in the Friday update

CALM MOMENT

Finishing the week with a clear next week is one of the best ways to enjoy your weekend. Close the calendar, close the laptop, go home.