



Best Practices for Working with Your PA

Here are some tips that will help you gain maximum leverage from your Prialto service

Invest Time at the Start

- Spending time with your PA and support team early will pay dividends over time.
- During the onboarding call, your team will verify and document your preferences for the first processes we take on.
- It is important for you to be clear about your preferences for these tasks.
- It is also important to be clear about your priorities and objectives. This will help your PA team add value based on the outcomes you want rather than focus solely on task completion.

Hold a Regular Check-in Call with your PA

- It is also helpful to hold regular check-in calls, at least once a week for 15 minutes, with your PA during the first few weeks of service.
- Be honest about tasks that are and are not meeting your expectations, and any other feedback.
- It is your choice whether to get to know your PA outside or their responsibilities. Usually, this results in a better experience for you and your PA.

Leverage your Prialto Daily Review (PDR) & Share Feedback

- Every day, you'll receive a PDR from your PA outlining what they've done, what they're working on and any other updates, and plans for the next day.
- This is a great way to provide feedback after you dial back check-in calls.
- PDR comments allow us to quickly address any quality control issues.
- Your feedback is invaluable to the Prialto team in terms of coaching and development, but also helps us to best determine how to continue to support you.

Lean into your Engagement Manager (EM)

- EMs work with hundreds of executive teams and are experts in business process optimization.
- Your EM is your thought partner in increasing your productivity – let them optimize your service and partner with you to identify, document and delegate workflows.

Communicate Context

- Context is critical – taking time to explain the backstory of a process and its importance ultimately drives results.
- Teach your language. Every company has its own jargon. Explain & interpret – your PA will be more equipped to help.

Clearly Define Expectations and Timelines

- Set realistic deadlines for tasks to enable your PA to organize their workload (and yours).
- When offloading a new process, have examples ready to share on your training call. Giving your PA an opportunity to see what the desired end result is priceless.