**SAMPLE Win/Win Agreement for Talent Champion and Assistant**

***Mutual Expectations: Desired Outcomes (mutual)***

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| --- |
| Proactively work together to ensure Talent Champion can successfully lead TLD and meet her executive commitments.  |
| Help each other be the best performers we can be. |
| Support each other so we can both enjoy work life balance – which involves a reasonable work load for both.  |
| Help Talent Champion be a role model for being a professional, calm, and strategic, on time leader.  |
| Follow through on commitments or action items that we make to each other or communicate status or renegotiate timeframes.  |
| Share and leverage best practices from people to achieve our desired expectations most effectively |

***Guidelines:***

(What do we need in place to achieve our mutual expectations? - Communication –What, How and When?)

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| We have clear expectations from each other – and are aligned on priorities.  |
| Meet at least once a week to review next two week’s calendar in depth – ensure meeting timeframe is realistic for content that needs to be covered. *It’s critical to have this time on the calendar weekly and if a conflict arises move instead of deleting the appointment.*  |
| When workload becomes too heavy we proactively speak up and we brainstorm solutions and prioritize work.  |
| We proactively review what is coming up to ensure smoother work flow and less stress.  |

***We agree that Talent Champion’s Assistant is successful if she performs these deliverables:***

**Talent Champion’s Top Priorities in Order**

**First Priority - Calendar**: Scheduling Talent Champion’s time so she can be most effect: It is critical that it is accuracy and she has all of the support inform as well as time between appointments. Calendar needs to be in alignment with agreed upon guidelines – unless we have had a conversation and Talent Champion agrees with something different- ex. daily exceptions.

|  |  |  |  |
| --- | --- | --- | --- |
|  | 1-Excellent | 2-Good | 3-Needsimprovement |
| Need minimum of 6 hours of admin time a week – this is critical since Talent Champion gets 500-800 emails a week – if spending 1 min per email that would be 8-13 hours of admin time needed – also as she is attending meetings and going through emails to dos come up that require time to complete.  |  |  |  |
| No appointments before 8am. |  |  |  |
| No more than 2 buildings a day |  |  |  |
| 45 minute appointments unless directed otherwise – though when people ask for time see if 30 minutes would work.  |  |  |  |
| 30 minutes between appointments |  |  |  |
| Build in 2 hours of strategic think time a week and schedule outside of Talent Champion’s office.  |  |  |  |
| Hold 430-5pm for Talent Champion to return calls if needed. |  |  |  |
| Pre reads and agendas are in her day folder that she receives day before. Double check all of calendar entries to ensure preread/agendas are included.  |  |  |  |
| Call in information is accurate on calendar and visible on the printed calendar copy. |  |  |  |
| Some time for lunch unless an appointment includes lunch. |  |  |  |
| Ask before putting new people on her calendar unless you already know she needs and want to meet with them – be careful to take someone’s word. |  |  |  |
| Timely response to people that want to get on her calendar – the response could be we need to talk to determine best time to put them on calendar when the week is already full. Ensure our team members know they are a top priority for Talent Champion. |  |  |  |
| Time with Admin support person each week to ensure we do a review of the above for prior week and preview of week to come as well as go day by day for month ahead.  |  |  |  |
| Proactively look at the calendar a minimum of 1 month in advance – Assistant understands enough of Talent Champion’s calendar to help bring to her attention conflicts, so we can resolve and to give Talent Champion enough advance notice on things she need to prep for. This will help Talent Champion be a role model for being a professional, calm, and strategic, on time leader.  |  |  |  |
| Creating a balance of getting people on Talent Champion’s calendar either for a 1:1 or in a group setting, though allowing Talent Champion enough Strategic Admin think time.  |  |  |  |

**2nd Priority – Travel (First preference is to use southwest)**

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| --- | --- | --- | --- |
|  | 1-Excellent | 2-Good | 3-Needs improvement |
| Book All travel – flights and limo |  |  |  |
| Put travel into calendar – double check to ensure accurate |  |  |  |
| Print one pager with all key info on it.  |  |  |  |

**3rd Priority –**

**Expense Reports – continued timely submission with the right amount of detail**

**4th Priority –**

**Extra email admin support – on days Talent Champion is in meetings for longer period of times need to be actively checking Talent Champion’s email for critical to dos or requests**

**5th Priority – Help keep my office organized**

|  |  |  |  |
| --- | --- | --- | --- |
|  | 1-Excellent | 2-Good | 3-Needsimprovement |
| Set up folders A-Z |  |  |  |
| Set up system for adding to existing files or new ones |  |  |  |
|  |  |  |  |

***Accountabilities*** *(how will we know if we are on track?)*

|  |  |  |  |
| --- | --- | --- | --- |
|   | 1-Excellent | 2-Good | 3-Needsimprovement |
| 1. Review this evolving Win/Win Agreement – each week during 1:1 to ensure we are on track or to make adjustments
 |  |  |  |
| 1. Minimizes misses and mistakes
 |  |  |  |
| 1. Being flexible to each other’s communication’s style
 |  |  |  |
| 1. Consistent communication on follow up items.
2. Instituted email response to confirm I have action item
3. Instituted follow up on pending items
4. Instituted communication on completed items through email or 1:1
 |  |  |  |

 ***Resources*** *(available to help us accomplish our win win agreement)*

* (Name specific resources here)
* Other TLD leaders and team members
* Outside resources

 **Consequences** (when we successfully implement this agreement)

* We are stronger more effective performers due to our working relationship - role models for others and our team.
* Achieve our team and personal goals.
* Better work life balance.
* Manageable workload.
* Less stress more satisfied with our performance.
* We love our jobs even more.
* Minimize mistakes/things missed
* Eliminates negative stress