

ABC Company – Admin Assistant Accountabilities

Accountability	Priority	Percent Time	Success Factors
Phone Calls & Customer Service <ul style="list-style-type: none"> • Answer phones • Customer service – billing problems, copy invoices • Initial collection calls • Screen management calls 	1	40%	<ul style="list-style-type: none"> • No unanswered calls • Demonstrated professional phone interactions • Collection calls made and documented as scheduled • Minimal management complaints (appropriate screenings)
Bookkeeping <ul style="list-style-type: none"> • Input A/R and A/P entries • Reconcile A/R and A/P transactions • Process customer statements – print, stuff, mail • Reconcile credit card statements • Resolve purchase order issues (ACL) • Process invoices 	2	30%	<ul style="list-style-type: none"> • Date entered accurately within 2 days • Customer statements sent 1st day of month • Credit card statements reconciled within 2 days of receipt
Process paperwork and support office <ul style="list-style-type: none"> • Process inbound and outbound mail • Filing • Inventory and order office supplies • Purchasing – place orders 	3	10%	<ul style="list-style-type: none"> • Mail processed by end of day • Filing complete within 1 day • Office supplies in stock • Purchases gathered and made on Mondays
Projects <ul style="list-style-type: none"> • Newsletters • Create forms • Assist Shipping & Receiving • Backup Office Manager – checks, Fridays • Special research • Travel arrangements • Distribute sales materials • Maintain office equipment • Time study entries • Management requests • Trade show coordination 	4	20%	<ul style="list-style-type: none"> • Positive team and management feedback



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Accomplishments

Very Important Personal Skills

Results Orientation - The ability to identify actions necessary to achieve task completion and to obtain results: the ability to meet schedules, deadlines, quotas, and performance goals.

Goal Achievement - The ability to: set, pursue and attain achievable goals, regardless of obstacles or circumstances; identify actions necessary to achieve task completion; set achievable goals; maintain direction in spite of obstacles; stay on course in times of difficulty.

Personal Accountability - The ability to be responsible for the consequences of one's own actions and decisions: taking responsibility for these decisions and not shifting focus or blame or poor performance somewhere else or on others.

People Awareness - The ability to be open to people and willingness to hear what other people are saying; "read between the lines" in understanding body language and emotions; not allow unfair implications of prejudged information to enter into and effect an interpersonal relationship.

Self Starting - The ability to initiate and sustain momentum without external stimulation.

Self Management - The ability to prioritize and complete tasks in order to deliver desired outcomes within allotted time frames.

Consensus - The ability to surrender control of a given situation; the ability to coordinate personal insights and knowledge to others into effective actions; how motivated a person is by feeling like part of a group; the ability to be sensitive and aware of the feeling of others.

Date:

Phone Calls & Customer Service

Bookkeeping

Process paperwork and support office

Projects

Preferred DISC Approach

D Low Dominance	Value To The Team: <ul style="list-style-type: none"> Team oriented Promotes Consensus Identifies Resources Identifies Obstacles 	Tendency Under Stress: <ul style="list-style-type: none"> Hesitant Timid Anxious Hibernation 	I Low Influence	Value To The Team: <ul style="list-style-type: none"> Good listener Not reliant on others to perform Assimilates various input Sits through static; identifies nuggets Not easily deceived 	Tendency Under Stress: <ul style="list-style-type: none"> Dismissive Explosive Malcontent Withdrawn
DESCRIPTORS: <ul style="list-style-type: none"> Cooperative Conservative Agreeable Supportive Consensual Modest Risk-Averse Reserved Cautious Considerate 	Ideal Environment: <ul style="list-style-type: none"> Opportunity to work with a team A deliberate, cautious approach to business Low risk work Opportunity to share responsibility and recognition Work with pleasant non-reactionary people 	Possible Limitations <ul style="list-style-type: none"> Slow to react to urgencies Indirect communication Too diplomatic Resistant to change 	DESCRIPTORS: <ul style="list-style-type: none"> Observant Skeptical Hesitant Independent Focused Reluctant Undemonstrative Dispassionate Reflective Calculating 	Ideal Environment: <ul style="list-style-type: none"> Freedom from many people contacts Focus on control and detail Freedom to work independently Sufficient time to process ideas and plans before engaging Freedom to work with minimal supervision 	Possible Limitations <ul style="list-style-type: none"> Discomfort with brainstorming Impatient with effusive teammates Initially distrusting Skeptical of oral communication
		Emotion Of The Low D: Ambivalence			Emotion Of The Low I: Realism

Preferred Workplace Motivators

Utilitarian Motivator	Goal: To discover utility and what is useful or practical.
Focus On: <ul style="list-style-type: none"> Return on an investment of time, energy or money 	Value To Team: <ul style="list-style-type: none"> Practicality in all areas of life Utilizing resources to accomplish results Gaining a measurable return on all investments Creative application of resources Producing goods, materials, services and marketing them for economic gain Capitalism
Basic Attitude: <p>Investments made will have a greater return in time and resources.</p>	Tendency Under Stress: <ul style="list-style-type: none"> Workaholic Self-preservation; little or no concern for others Wasted resources, time materials and/or services Investments with inadequate or no return

S High Steadiness	Value To The Team: <ul style="list-style-type: none"> Dependable team player Work for a leader and a cause Patient and empathetic Logical step-wise thinker Service-oriented 	Tendency Under Stress: <ul style="list-style-type: none"> Non-demonstrative Unconcerned Hesitant Inflexible 	C High Compliance	Value To The Team: <ul style="list-style-type: none"> Maintains high standards Conscientious and steady Defines, clarifies, gets information and tests Objective - "the anchor of reality" Comprehensive problem solver 	Tendency Under Stress: <ul style="list-style-type: none"> Pessimistic Picky Fussy Overly critical
DESCRIPTORS: <ul style="list-style-type: none"> Amiable Friendly Good Listener Patient Relaxed Sincere Stable Steady Team Player Understanding 	Ideal Environment: <ul style="list-style-type: none"> Stable and predictable environment Environment that allows time to change Long-term work relationships Little conflict between people Freedom from restrictive rules 	Possible Limitations <ul style="list-style-type: none"> Yield to avoid controversy Difficulty in establishing priorities Dislike of unwarranted change Difficulty dealing with diverse situations 	DESCRIPTORS: <ul style="list-style-type: none"> Accurate Analytical Conscientious Courteous Diplomatic Fact-finder High Standards Mature Patient Precise 	Ideal Environment: <ul style="list-style-type: none"> Where critical thinking is needed Technical work or specialized areas Close relationship with small group Familiar work environment Private office or work area 	Possible Limitations <ul style="list-style-type: none"> Be defensive when criticized Get bogged down in details Be overly intense for the situation Appear somewhat aloof and cool
		Emotion Of The High S: Non-emotion			Emotion Of The High C: Fear

Social Motivator	Goal: To eliminate hate & conflict; make society a better place
Focus On: <ul style="list-style-type: none"> How ideas will benefit others 	Value To Team: <ul style="list-style-type: none"> Investing self in others Selflessness Generosity of time, talents and resources Seeing and developing potential in others Champion of worthy causes
Basic Attitude: <p>Invest self, time and resources in helping others to achieve their potential.</p>	Tendency Under Stress: <ul style="list-style-type: none"> Primary focus is on others in injurious to self Over-zealousness for a cause may lead to harmful behavior to self and others Individualism Decisions or actions which are insensitive to people