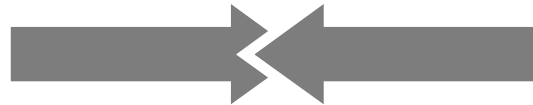# Manager Toolkit

STAR PROGRAM & PEP

Forming a High-Impact Partnership

- Creating a high-impact partnership allows management to maximize its effectiveness and the efficiency of staff through enhanced communications and better time management.

- This program applies a balanced, team-oriented approach that identifies your OMA as integral part of your department.

Successful Communication

- Clarify your OMA's current job responsibilities
- Determine how you can empower your OMA and discuss future goals and objectives
- Your OMA will act as a vital communication liaison by building mutual understand and connections among your team and everyone within your network.
  - Communicate your business, work habits and preferences
  - Listen! She may have a good sense of what's affecting the internal workings of your department.
  - Seek every opportunity to fine tune your OMA's interpersonal skills. Enhanced interpersonal skills will better equip your OMA to effectively handle sensitive situations in her role as the face of your department.

Successful Communication cont.

- Encourage your OMA to attend SNL-sponsored training opportunities when appropriate.
  - Crucial Conversations
  - Social Styles
  - 7 Habits of Highly Effective People
- Ask your OMA to subscribe to resources that will aid her development.
  - Office Pro
  - International Association of Administrative Professionals
  - American Society of Administrative Professionals
- Empower your OMA by creating trust.
  - Discuss confidentiality and discretion
  - Give praise and recognition. Catch your OMA in the act of doing things right.
  - Enhanced communication will foster an environment of respect and understanding between you and your OMA so that both of you will be more successful.
  - Challenge your assistant. Delegate assignments that force your assistant to dig deep.
- Take the time to get to know each other
  - Share interests, career goals, background and skills
  - Don't force it; few partnerships enjoy instant rapport

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Collaboration

- Respect, value and involve your OMA as an integral member of your team.

- Include your OMA in department meetings, along with other direct reports, which will communicate the importance of the OMA's role. Your OMA will have a better understanding of key issues facing your team and details of upcoming activities.

- Make yourself available for questions and clarifications. If you are frequently unavailable, look for a solution that works for both of you (establish a procedure for how your OMA can reach you).

- View your OMA as a key resource who is able to provide you with valuable insights, advice and opinions. Your OMA may often know about issues, initiatives and challenges before you do.

- Copy your OMA on important emails to ensure information sharing about your work. This eliminates the need to discuss every issue because the OMA is already in the loop. By being better informed, your assistant can take initiative, anticipate issues, and help mitigate problems.

Empowerment and Delegation

- Empowerment implies that you and your OMA have developed a level of mutual trust, respect and high expectations for each other. Typically, this results in a highly-motivated work environment where your assistant feels that his/her efforts are an integral part of the work being accomplished.
- Delegate for results. Let your OMA know what you need done and allow her to find the best way to get the job done.
    - Communicate to your colleagues and direct reports that your OMA speaks and acts on your behalf.
    - Clearly articulate and define your expectations related to your OMA's role as gatekeeper and how your time can be effectively protected.
    - Give your OMA the necessary information to manage your calendar.
    - Provide your assistant with access to your email in-box to:
        - Screen your email to eliminate non-important messages, then mark saved emails as unread to avoid confusion for you
        - Flag your emails for follow-up
        - Color code your emails from your most important business contacts so you can identify and respond to these emails promptly
        - Delete/unsubscribe to junk email you receive
        - Respond, as appropriate, on your behalf
    - By asking your OMA to screen your calls and recap your voicemails, you can more effectively manage your time by minimizing interruptions and returning calls at your convenience.

Empowerment and Delegation cont.

- Work with your OMA to streamline and organize your workload. Below are some examples of projects your assistant can lead:
    - Travel arrangements – your OMA can provide you with a travel folder that contains your itinerary outlining your business trip and all supporting travel documentation. Also included should be all meeting materials for your upcoming business trip, as well as directions/maps and a copy of your calendar.
    - Budget review/prep – OMA's can utilize reports and tracking systems to assist you in managing your budget and preparing your budget for the coming year
    - Expense reports – your OMA can process your expense report and review your direct reports' expense reports
    - Performance management – OMA's can manage the communication, tracking, calendaring and timing of the performance management process for your direct reports.
    - Long-range planning – ask your OMA to regularly schedule time to review your calendar for long-range planning. Your OMA could print the next three to six months of your Outlook calendar in the monthly format and highlight the blocks of time you are traveling, on vacation, etc.
        - By looking at the big picture of your calendar and reviewing key dates and commitments in advance, you and your OMA can better schedule any p-re-work and planning for upcoming meetings and travel. For example, your OMA can begin collecting data for upcoming PP presentations and budget review, arrange travel and begin making preliminary plans for a teambuilding session, etc.
        - Ask your OMA to schedule weekly one-on-one meetings to discuss project updates, accomplish short and long-range planning and to answer questions requiring follow-up. This time can also be used to follow up on the status of deliverables. Request that your assistant prepare an agenda to make your time together productive and to keep it on target.
- By helping you with these administrative tasks, your OMA can create time for you, which allows you to focus your time on strategy and managing business and operations issues.

Enhancement of Business Knowledge

- Work with your OMA to identify and create opportunities for her to gain more in-depth knowledge of your business and a greater understanding of the industry, in general, to best represent you at SNL.

- Encourage your OMA to network with the other OMA's in the division to share best practices and serve as a means to support each other.

- Advise your OMA on the benefits of having a mentor.

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Supporting Two or More Managers

- Have a meeting up front and discuss priorities. Make sure that your OMA understands how each department works, how each manager works, and how to prioritize the workload. Make sure both managers understand the other's expectations.

- **Be sensitive to the fact that your OMA is doing double-duty.** Check in with her often to see how her workload is. It's highly likely that the OMA will <u>not</u> speak up on her own behalf if her workload is too heavy, for fear of being judged incompetent and unable to handle the workload.

- Be mindful of the fact that one manager always uses up more of the OMA's time than the other. Don't hold this against the OMA. She's only doing her job. It's the responsibility of the managers to communicate with each other and find a suitable solution.

- Make sure your OMA has back-up.

Summary

Creating a high-impact partnership with your OMA is a continuing process. It will build slowly over time. The result is that your partnership will continue to grow and so will the success of both you and your OMA.

Model the behaviors you expect. If you want to build trust, then you have to trust your OMA; if you want your assistant to respect your position, then respect theirs.

ATTACHMENTS

Typical OMA Job Responsibilities

Remember! Some OMA's support two or more groups!

A typical job description reads as follows:

Job Details
Typical duties of this position include, but are not limited to: - making travel arrangements, occasionally including foreign travel; - assisting in the preparation of SAND reports; - preparing correspondence; - preparing presentation materials - collecting and distributing mail on a daily basis; - maintaining multiple managers' calendars; - arranging meetings, including arrangements for visitors from other organizations; - initiating videoconferences; - assisting with the management of office functions; - ordering office supplies and equipment; - assuring timely submission of timecards; - maintaining office filing system; - maintaining the area security plan; - serving as department property coordinator; - maintaining department training records in TEDS; - tracking the status of department ES&H self assessments and findings; - support of visiting SMU managers, Senior Managers and Directors; - maintaining visitor's office and videoconference room; - filling in for the Senior Office Management Assistants and other OMAs, as required.

Required
The successful candidate must - have a current Q clearance or the ability to obtain one; - be proficient in using Sandia's standard computer software suite for word processing, spreadsheets, and presentation materials (Office 2007); - have working knowledge of Sandia's administrative policies and procedures; - have demonstrated professionalism in both written and oral communication skills (good interpersonal and communications skills); - be able to team effectively with the managers, staff, and other OMAs in the immediate office area, within 8100, as well as in other organizations; - have the ability to protect sensitive and private information appropriately; - maintain a positive approach and demeanor; - have demonstrated an ability to manage and prioritize multiple tasks and work independently; - must take the initiative to ensure that the office functions efficiently.

Desired
It is desired that the candidate be familiar with Sandia's business practices; and be willing and able to learn new administrative software applications and procedures. A willingness to learn new software such as SharePoint to support the various organizations is also desired.

OMA Duties

Different centers and different groups have different needs. Below are some ideas on how you can support your manager and your team

Daily	Weekly	Monthly	Annually	As Needed		
Calendar Management	Travel arrangements for manager and staff (Foreign and Domestic)	Purchasing (office supplies, books, equipment)	Preparation for interns	Building Space Issues	Coordinate meetings (schedule and logistics)	Set up for new employees (computer, space and etc)
Maintain conference rooms (including scheduling)	Monitor timecards	Property coordination	Property Inventory	Team Celebrations (anniversaries & retirements)	Interview Candidates	Exit paperwork and follow up
Answer phone	Monitor required training for department	Equipment reapplication	Tracking year-end spending	CCHD requests	Visitors – (schedule, logistic, badging, seminars)	Requisitions
Give status updates	Reportville report	Expense Vouchers	Keep track of subscriptions and memberships	Assist with project budgets	Submitting FNRs	Office moves
Prioritize email		Maintain office equipment	Building-wide clean up day	Serve as BETL	Outgoing classified visits	Publications Lists
Maintain a filing system		Keep up department org chart	Coordinate an annual off site conference	Review and Approvals	No Fee Agreements	Coordinate PMF meetings with manager and staff
				Webcars Requests	Telecom requests	Facilities requests
						Procard purchasing

OMA/SMA Typical Duties

Office Administration	Handles questions relating to office administration and established policies and procedures. Provides information on organizational rules, policies and procedures and formally communicates the information. May require the resolution of immediate problems and/or the development of solutions related to organizational policies and procedures.
Calendar Management	Maintains an electronic/paper calendar for assigned management personnel. Uses judgment in scheduling high-level internal and external appointments and commitments without prior approval. Keeps all parties apprised of schedules. Ensures management personnel can be reached at all times.
Handling Action Items	Sends action items to appropriate person using personal judgment; files items in suspense, tracks and handles follow-ups.
Travel	Contacts the contracted travel organization to arrange trips per management request. Ensure established policies are followed. (i.e., ticket fare basis, travel times, rates, etc.). Completes registration/access forms. May include foreign travel and/or creation of personalized itinerary.
Meetings and Conferences	Coordinates scheduling and arranges facilities; prepares agendas; corresponds with attendees; arranges for presentations; serves as liaison with attendees/visitors. May include making arrangements for foreign visitors.
Mail Communication	Collects, opens, prioritizes/logs, and distributes electronic and paper mail. Determines who should receive/handle items, responding personally when in accordance with general practice and precedent.
Telephone Communication	Handles phone calls. Conducts research when needed to determine correct response. Responds to calls personally or delegates to other center personnel as appropriate.
Records Management	Maintains record filing systems that facilitate effective workflow and information retrieval. Creates and maintains confidential records and controls access to files based on need and access policies.

OMA/SMA Typical Duties cont.

Correspondence	Composes and answers internal and external correspondence and memoranda on own initiative, guided by unit objectives. Acts as the point-of-contact for subsequent correspondence.
Research & Information Management	Prepares reports for management, performing the required research. Completes required forms. Maintain databases as assigned. Processes unit personnel actions as assigned.
Webpage Administration	May maintain sections of the units web pages, creating and revising copy as needed. Ensures information is current, accurate and complete.
Process Ownership/Protocol	Oversees established processes controlling workflow or information management and monitors their effectiveness, suggesting revisions as needed. Ensures protocols and Sandia business rules are followed.
Office Supplies and Equipment	Orders office supplies via Just-in-Time and orders equipment via Purchase Requisitions. Oversees contracts with suppliers and coordinates equipment maintenance when assigned.
Classified Custodian (when required)	Generate, route, mail, file and maintain classified records. Must pass all audits of station. Educate staff and management on proper procedures for handling classified documents.
Coordinator (as assigned)	Property; Training; ERA, ECP, Bond Drive; ES&H; Space; Sandia Community Services

OMA Competency Chart

Core Competency	Critical Skills
Work Approach & Professional Etiquette	• Approachable and customer-oriented • Mentoring, sharing best practices, and supporting peers • Dependable • Flexible and adaptable • Interpersonal conflict resolution, style adaptability, and teamwork • Maintain confidentiality • Listening and phone etiquette • Professional oral and written communication
Office Management	• Logistics for incoming and outgoing staff and visitors • Travel coordination • Proactive approach to meeting and anticipating business needs • Marketing planning and coordination • Prioritization, multi-tasking, and time management • Sandia protocol for internal and external interactions
Computer Skills	• Intermediate knowledge of MS Excel and Internet Explorer • Sandia reporting systems • Advanced knowledge of MS Word, PowerPoint, Outlook and Excel
Corporate Knowledge & Value	• Sandia culture and values • Lifelong learning and continuous improvement • General knowledge of SNL business strategies and objectives

OMA Excellence

OMA Excellence Performance Criteria

Office Management	VoC= OC (outstanding Contribution)	VoC = FC (full contribution)	VoC = NFC (not fully contributing)
• Proactive approach to meeting and anticipating business needs. • Prioritization, multi-tasking, and time management.	• Consistently provides insight to the manager. • Serves as a "thermometer" for the organization by keeping the manager informed of key staff and customer issues. • Exercises independence in setting up and following through on tasks, including documentation • Is proactive in anticipating department needs.	• Plans, responds, prioritizes, and handles multiple tasks.	• Requires excessive guidance to accomplish individual tasks. • Does not have basic skills or understanding to complete routine, well-documented tasks.
• Logistics for incoming and outgoing staff and visitors. • Travel coordination. • Meeting planning and coordination. • Sandia protocol for internal and external interactions.	• Exhibits exemplary office management skills. • Understands the content and context for the department. • "Runs" the department in the manager's absence	• Completes projects accurately. • Performs and takes security responsibility appropriately in each situation.	• Does not perform appropriate security responsibilities
Corporate Knowledge and Values			
• Sandia culture and values. • Lifelong learning and continuous improvement. • General knowledge of SNL business strategies and objectives.	• Perspective is larger than one's department. • Actively seeks out and engages in service contributions at the site level. • Considered a key partner in accomplishing organization goals and objectives. • Embraces learning and growth.	• Has sufficient knowledge of how to get tasks done. • Identifies appropriate contacts and knows where to find information and materials. • Is a resource for Sandia systems such as timecards,	• Does not initiate the appropriate self study to understand administrative issues.

OMA Excellence

Computer Skills	VoC= OC (outstanding Contribution)	VoC = FC (full contribution)	VoC = NFC (not fully contributing)
• Intermediate knowledge of MS Excel and Internet Explorer. • Knowledge of Sandia reporting systems. • Advanced knowledge of MS Word, PowerPoint, and Outlook.	• Extremely competent in many computer programs. • Sought out for expertise in various computer programs.	• Possesses computer competency in "core" programs (MS Word, PowerPoint, Excel, Outlook) • Creates documents and knows how to use tables, basic animation, style elements, graphs, and equations.	
Work Approach and Professional Etiquette			
• Approachable and Customer Oriented	• Consistently exceeds customer expectations. • Through own initiative, is able to identify and solve problems using independent judgment. • Actions have a positive outcome and impact on the organization.	• Is approachable and is sought out for help. • Stays on top of issues; doesn't drop the ball. • Meets customer expectations and has good relationships with all levels of management and external customers and contacts. • Recognizes when initiative needs to be taken and can anticipate beyond the immediate issue.	• Does not perform essential job function of being available for work. (attendance and being present in work area)
• Acts as a mentor, shares best practices, and supports peers.	• Is considered a key resource for all administrative processes. • Considered a mentor or natural leader of OMAs. • Ability and willingness to substitute for the Center SMA. • Takes risks, initiates improvements, and offers creative ideas.	• Works independently, with minimal supervision. • Takes some risks; is a self starter.	
• Dependable, flexible & Adaptable	• Services are sought out beyond the work group. • Extremely reliable, communicates projects status		

Training Opportunities

- Any and all software training courses (Word, Excel, PowerPoint, Outlook, Sharepoint, charting, etc.)

- Interpersonal training courses (Social Styles, 7 Habits of Highly Effective People, etc.)

Networking Opportunities

- Administrative Professionals Council

- Toastmasters

- Diversity groups

- Programs offered through HBE

Opportunities at the Site Level

Take Our Daughters & Sons to Work Day	Holiday Spirit Campaign	Food Drive
STAR Training Team	Site Celebrations	Mentoring new OMAs
Sharing Best Practices	BETL	SHARE Campaign
APC	Back up other OMAs	Cover the SMAs desk

What if things aren't working out?

- Ombuds
- Team building
- Coaching/Consulting
- Sr. Manager