

A PRACTICAL WORKBOOK FOR LEADERS

How to Hire an Executive Assistant.

A working guide to hiring the strategic partner who gives you your time back. Begin your EA search with the clarity most leaders don't find until six months into a placement that isn't working for them.

01 Need

02 Define

03 Evaluate

04 Onboard

How to use this playbook

The EA relationship is the most personal hire you'll make. Treat it like one.

Most executives approach hiring an EA the way they approach any hire: write a job description, screen résumés, interview candidates, make an offer. But the EA relationship is different. It's one of the most personal professional partnerships you'll have, and getting it right requires more than a good job posting.

This playbook helps you think clearly before you hire; not just about the role, but about yourself as a leader. What you need. How you work. What a strong partnership actually requires from both sides.

It's a working document. Work through it honestly, and you'll go into the process with a level of clarity most executives don't have until six months into a placement that isn't working.

HOW TO USE THIS

This document is most useful when you write in it. The exercises produce real outputs, including a delegation map, a communication profile, a readiness assessment, that you can use on day one with your EA.

WHAT THIS IS

A structured, fill-in-as-you-go workbook that turns the messy question of "do I need help, and what kind" into concrete, usable outputs.

WHAT YOU'LL LEAVE WITH

A delegation map, a written communication profile, an honest readiness assessment, and a one-page pre-hire checklist.

01

ASSESS

Do you actually need an EA?

Most executives wait too long to hire an EA, so by the time they hire support, they've spent months paying executive-level time for administrative work. Read the signals honestly.

Six signals it's time to hire.

Mark the ones that sound like you recently.

01 You are the bottleneck

Decisions stall because they route through you. Your team is waiting and your emails sit for days.

☐**02 Strategic work slips**

You have priorities that matter, but the week fills up before you reach them.

☐**03 Preventable mistakes**

Missed follow-ups, double-booked calls, and meetings you walked into unprepared.

☐**04 Admin is on your plate**

Booking travel, chasing invoices, formatting decks. None require your judgment.

☐**05 Your calendar is reactive**

Back-to-back meetings with no buffers, no prep time, and no space to think.

☐**06 Work spills into off-hours**

Evenings and weekends are where the day's overflow lands.

☐

If you checked three or more, you've outgrown doing this alone. It's time to get an EA. The next page turns that instinct into a number.

A EXERCISE

The Readiness Diagnostic

Check every box that is true right now
- not how you want things to be. Tally
each part, then total out of 12.

PART 1 — TIME & BANDWIDTH

- ☐ Administrative tasks take up more than 20% of my working week.
- ☐ I start the week with clear priorities and end it having completed fewer than half.
- ☐ My calendar is shaped by availability rather than priorities. I'm reactive.
- ☐ There are recurring tasks I do simply because no one else is doing them.
- ☐ I work evenings or weekends to catch up on things that should've been handled in the day.

PART 2 — OPERATIONAL PERFORMANCE

- ☐ In the last 90 days, I've made a preventable mistake due to bandwidth.
- ☐ My team has experienced delays because requests route through me.
- ☐ I've dropped or delayed something strategically important because I couldn't get to it.
- ☐ I'm regularly doing work that does not require my judgment.

PART 3 — LEADERSHIP & CLARITY

- ☐ I've been meaning to find support for longer than three months and haven't acted.
- ☐ I tell myself I'll delegate more once things slow down — but they haven't.
- ☐ I know exactly what I'd hand off immediately if someone capable were here right now.

YOUR TOTAL

 / 12

Tally every box you checked across all three parts. Read what your number means below.

WHAT YOUR SCORE MEANS

0-3**Not yet**

Load is manageable. Revisit in 90 days.

4-6**Worth exploring**

Approaching the threshold. Waiting is a risk.

7-9**Time to act**

Past the tipping point. The cost compounds.

10-12**Overdue**

Executive time is your most expensive resource. Now.



The question is never whether you *can* keep handling it yourself. You can. The question is whether you *should*, and what it's costing your business, your team, and your own best work when you do.

REFLECTION

What is one thing I've been holding onto that I know I shouldn't be doing?

What is the most meaningful thing I have not gotten to this month?

Why most executives wait too long.

The most common reasons executives delay:

- Assuming it'll take too much time to train someone.
- Worrying delegation will slow things down or create mistakes.
- Treating an EA as overhead rather than a strategic hire.
- Believing they're the only one who can manage their calendar or inbox.

WORTH NOTING

Executive time is one of the most expensive resources in a business. Stretched-thin executives make worse decisions, miss opportunities, and model the wrong priorities for their teams. A strong EA is a short-term investment that creates long-term capacity.

The reframe: an EA is not a cost you absorb when you can afford it. It's the hire that makes everything else you do worth more.

★ SELF-ASSESSMENT

Delegation Readiness Assessment

Deciding you need help is one thing; being ready to let go is another. Gauge how consistently you delegate today, before you define the role. 1 = not at all · 5 = consistently.

DIMENSION 1 — PROACTIVE DELEGATION

STATEMENT	1	2	3	4	5
I identify tasks to delegate rather than waiting to be asked.	☐	☐	☐	☐	☐
When I get something I could delegate, I hand it off the same day.	☐	☐	☐	☐	☐
I delegate consistently regardless of pace or workload.	☐	☐	☐	☐	☐

SCORE / 15

DIMENSION 2 — CLARITY OF HANDOFF

STATEMENT	1	2	3	4	5
I give clear context — the outcome, not just the task.	☐	☐	☐	☐	☐
I set deadlines and define "done" before handing off.	☐	☐	☐	☐	☐
I do not need to redo work after it's been handled.	☐	☐	☐	☐	☐

SCORE / 15

DIMENSION 3 — REAL OWNERSHIP

STATEMENT	1	2	3	4	5
Comfortable with decisions made within agreed boundaries.	☐	☐	☐	☐	☐
I hold back from jumping in once I've handed something off.	☐	☐	☐	☐	☐
I tolerate a different approach if the outcome is good.	☐	☐	☐	☐	☐

SCORE / 15

DIMENSION 4 — DOCUMENTATION & PROCESS

STATEMENT	1	2	3	4	5
I've documented (or will) how I like things done.	☐	☐	☐	☐	☐
I state preferences explicitly rather than expecting inference.	☐	☐	☐	☐	☐
I invest time onboarding rather than expecting fast figuring-out.	☐	☐	☐	☐	☐

SCORE / 15

TOTAL / 60

Experienced

48–60

Suited to an EA who operates independently.

Developing

36–47

Match with an EA who structures the rhythm.

Hold-On

24–35

A structured onboarding + weekly cadence helps.

Emerging

< 24

An EA who builds systems with you, not just executes.

WHERE TO FOCUS FIRST

My lowest-scoring dimension:

- ☐ Proactive Delegation
- ☐ Clarity of Handoff
- ☐ Real Ownership
- ☐ Documentation & Process

What I'll do about it before my EA starts:

02

DEFINE

Define the role before you post it.

The most common hiring mistake is writing a job description without first getting clear on what the role actually needs to do. A vague posting attracts the wrong candidates.

★ SUPPORT LEVEL ASSESSMENT · HOW MUCH SUPPORT DO YOU REALLY NEED?

Many executives know they need help but struggle to size it. Instead of estimating hours, assess the complexity of your workload. *Check every statement that is true today.*

CALENDAR & SCHEDULING

- ☐ My calendar changes multiple times per week.
- ☐ I regularly coordinate meetings involving multiple stakeholders.
- ☐ I frequently face scheduling conflicts, competing priorities, or last-minute changes.
- ☐ I struggle to create enough time for focused work.

OPERATIONS & EXECUTION

- ☐ I am managing multiple projects or priorities simultaneously.
- ☐ I regularly coordinate work across teams, vendors, clients, investors, or board members.
- ☐ There are recurring admin tasks I keep doing because no one else owns them.
- ☐ I often feel like the bottleneck in a process.

COMMUNICATION & FOLLOW-THROUGH

- ☐ My inbox regularly feels behind.
- ☐ Important follow-ups occasionally slip through the cracks.
- ☐ People are often waiting on me for decisions, approvals, or responses.
- ☐ I spend significant time coordinating communication between people.

CAPACITY & GROWTH

- ☐ I regularly work evenings or weekends to catch up.
- ☐ Strategic priorities slip because I'm focused on day-to-day execution.
- ☐ My workload is likely to increase over the next 6–12 months.
- ☐ I frequently think, "I probably shouldn't be the person doing this."

YOUR RESULT

TOTAL BOXES CHECKED _____ / 16

CHECKED	SUPPORT LEVEL	WHAT IT SUGGESTS
0–4	5–10 hrs / month	Occasional support for scheduling, coordination, inbox cleanup, and overflow.
5–8	10–20 hrs / month	Consistent support managing recurring responsibilities and protecting your time.
9–12	20–30 hrs / month	Ongoing support across calendar, communication, coordination, and follow-through.
13–16	Full-time dedicated	A dedicated partner who operates as an extension of you and creates leverage.

Reflection · if someone could take ownership of one area of your work tomorrow, what would create the biggest immediate impact?

01 YOUR DELEGATION INVENTORY · 20-MIN EXERCISE

Now translate that into specifics. Open your last two weeks of calendar and tasks. For each item ask: *does this require my judgment specifically, or could a capable person handle it with the right context?* Sort everything into three buckets.

Bucket 1 Delegate now

TASK OR RESPONSIBILITY	HOW OFTEN	NOTES FOR HANDOFF

Bucket 2 Delegate with support

TASK OR RESPONSIBILITY	WHAT MAKES IT HARDER TO HAND OFF	DOCUMENT FIRST

Bucket 3 Keep for now

TASK OR RESPONSIBILITY	WHY IT REQUIRES YOU SPECIFICALLY	6 MO?
		Y / N
		Y / N
		Y / N

A note on "keep for now": if Bucket 3 is longer than Buckets 1 and 2 combined, take a second pass. Usually it's not that the tasks actually require you; it's that you've never thought through what handing them off would look like.

★ SCOPE BUILDER · WHAT YOUR EA OWNS IN THE FIRST 90 DAYS

1	2
3	4
5	

The one area I most want off my plate immediately:

In 6 months, I expect the scope to expand into:

02 HIRE FOR THE ROLE, NOT JUST THE MOMENT

By the time your EA starts (typically four to eight weeks from search to start), your workload has shifted. Hiring purely for today's overflow means support that no longer fits in a few months.

What I needed help with 6–12 months ago but handled alone:

What I anticipate needing help with 6–12 months from now:

Am I hiring for where I am, or where I'm going? ☐ Where I am ☐ Where I'm going

03 GENERALIST OR SPECIALIST?

EA TYPE	BEST FOR
Generalist EA	Calendar, inbox, travel, light project coordination.
Operations-focused EA	Generalist scope + systems, process documentation, and vendor management.
Communications-focused EA	Generalist scope + drafting, research, board preparation materials, and stakeholder management.

My hire will be primarily:

☐ Generalist ☐ Ops-focused
☐ Comms-focused

An EA who thrives inside established infrastructure differs from one who builds it themselves. Match the skill set to your current environment.

04 SET CLEAR SCOPE

Will they handle personal scheduling?

☐ Yes ☐ No ☐ Some

Manage vendor relationships, or just facilitate?

☐ Manage ☐ Facilitate

Primary contact for your team, or external only?

☐ Internal + External ☐ External only

What financial access / decision-making do they have?

05 CHOOSE A FORMAT

FORMAT	WHEN IT MAKES SENSE
Full-time 40 hrs/wk	Consistent admin and ops load needing dedicated daily presence.
Part-time 20 hrs/wk	Lighter or predictable workloads. Can scale up as needs grow.
Fractional contract	Senior EA without full-time overhead. Ramps fast, flexes with needs.

Preferred: ☐ Full-time ☐ Part-time
☐ Fractional

✓ BEFORE YOU POST — FIVE QUESTIONS TO ANSWER IN WRITING

01 What are the top 5 things this person owns?

02 What tools and systems do they need to know?

03 What does great look like in 90 days?

04 Who will this person interact with most?

05 Reporting structure and check-in cadence?

03

EVALUATE

What to look for in a candidate.

Experience and tools are learnable. Communication fit is much harder to retrofit — so evaluation begins with how a candidate communicates versus how you work.

The output is a document you'll share with your EA on day one.

★ YOUR COMMUNICATION PROFILE · COMPLETE BEFORE INTERVIEWS

PART 1 — HOW I PREFER TO RECEIVE INFORMATION

Format

☐ Summary only ☐ + key detail ☐ Full context

Channel

☐ Email ☐ Messaging ☐ Verbal

Timing

☐ Real-time ☐ Batched ☐ On action

Urgency

☐ All, now ☐ Flag + handle ☐ Resolve first

PART 3 — FEEDBACK & CORRECTION

I give feedback

☐ In the moment ☐ At check-ins ☐ In writing

On a miss

☐ Immediately ☐ With context ☐ Self-correct

Under pressure

☐ Direct, brief ☐ Step back ☐ It depends

PART 2 — HOW I COMMUNICATE MY OWN NEEDS

☐ I proactively tell people what I need and when.

☐ I communicate needs reactively — when something goes wrong, or when asked.

What gets in the way of me communicating clearly:

PART 4 — AUTONOMY & OVERSIGHT (1 disagree · 5 agree)

STATEMENT	1	2	3	4	5
Comfortable with judgment calls made without checking in first.	☐	☐	☐	☐	☐
I want to approve comms sent in my name before they go out.	☐	☐	☐	☐	☐
I prefer frequent check-ins over independent operation.	☐	☐	☐	☐	☐
I trust people quickly once they demonstrate competence.	☐	☐	☐	☐	☐

THE RESULT · MY COMMUNICATION PROFILE

There's no score here — the point of Parts 1–4 is this summary. Use your answers above to complete each line below; it becomes the one-page guide your EA works from.

The best way to communicate with me is...

I communicate at my best when...

The most important thing to know about how I work is...

SHARE WITH YOUR EA ON DAY ONE

When something's urgent, the right move is...

I can be difficult to work with when...

● CORE QUALITIES TO SCREEN FOR

A great EA isn't just organized. They're proactive, discreet, adaptable, and wired to solve problems before you notice them. Test for these in the interview, the references, and the sample project.

Anticipatory thinking

Surfaces issues before they become problems. Preps you before you ask.

Communication skills

Writes clearly in your voice. Knows when to escalate vs. handle alone.

Prioritization

Triages competing demands without asking which to do first.

Discretion & judgment

Handles confidential information without prompting. Knows what to escalate.

Systems & process thinking

Builds repeatable workflows instead of one-off fixes.

Working style fit

Matches your pace. Takes direction but doesn't need constant supervision.

● GREEN FLAGS VS. RED FLAGS IN INTERVIEWS

POSITIVE SIGNAL	WARNING SIGN
Specific examples of anticipating executive needs	Only describes task execution, never initiative
Articulates how they handled confidential situations	Shares inappropriate details about past employers
Comfortable with ambiguity and shifting priorities	Needs a lot of structure to function well
Has built systems or improved processes before	Has only ever followed existing systems
Asks thoughtful questions about your work style	Doesn't ask about your preferences or needs
References when to escalate vs. handle independently	Escalates everything without trying to resolve first
Curious about your business, not just the tasks	Asks only about compensation, hours, logistics
Describes a mistake, owns it, explains what changed	Gets defensive or vague about past errors

Watch the pattern, not the single answer. Anyone can have one rehearsed example. Listen for whether initiative, discretion, and ownership show up *across* their answers — unprompted.

● INTERVIEW QUESTIONS WORTH ASKING

Note what you heard · rate 1–5

ANTICIPATION	"Tell me about a time you handled something before your executive knew it needed doing. What tipped you off?"	_____
DISCRETION	"How do you manage confidential information, and how do you decide what to share with the team?"	_____
JUDGMENT	"Describe a time you had two urgent priorities and your executive was unavailable."	_____
COMMUNICATION	"How do you prefer to receive direction and feedback? What does a good communication rhythm look like?"	_____
SYSTEMS	"What's a process or system you built from scratch, and what problem did it solve?"	_____
LONG-TERM FIT	"Where do you see yourself in three to five years? What makes this a meaningful step?"	_____
ACCOUNTABILITY	"Walk me through a mistake you made — what happened, how you handled it, and what changed afterward."	_____

● SAMPLE PROJECT · QUESTIONS TELL YOU WHAT THEY KNOW, A PROJECT SHOWS HOW THEY THINK

A 30–60 minute skills exercise gives you a real data point. Pick one that mirrors the actual work.

☐ Email response☐ Calendar build☐ SOP creation☐ Research brief☐ Retrospective — how they'd diagnose a process that broke down

SPECIFIC PROMPT I'LL GIVE THE CANDIDATE

04

ONBOARD

Setting your EA up to succeed.

Onboarding is where most placements succeed or fail. A strong start requires intentional investment — even when you're stretched. The return on those first weeks compounds quickly.

i THE FIRST 90 DAYS AT A GLANCE

MILESTONE	YOU DO	YOUR EA DOES
Week 1 Orientation	Share preferences guide, contacts, tools access, recurring tasks. Block 2–3 hrs to work through it.	Asks detailed questions. Starts a working reference doc.
Week 2 First handoffs	Hand off 2–3 defined tasks with clear instructions. Stay available.	Takes ownership. Flags anything unclear rather than guessing.
Weeks 3–4 Expanded ownership	Step back. Let them run. Give real-time feedback on misses.	Owns core scope: calendar, inbox, travel, coordination. Audits systems.
Day 60 Full ramp	Review performance against the 90-day benchmark set at hire.	Operating independently. Bringing solutions, not just questions.
Day 90 Calibration	Revisit scope together. Identify what to expand and adjust.	Comes with a point of view on where they can add more value.

ii WHAT TO PREPARE BEFORE DAY ONE

- | | |
|---|---|
| ☐ Preferences guide ready to share
Comms style, scheduling rules, access, updates. | ☐ Tools & systems access configured
Calendar, email, PM, travel accounts. |
| ☐ Org chart & key contacts prepared
Who gets access, VIPs, who to route from. | ☐ Recurring tasks list with instructions
Turns tribal knowledge into something transferable. |
| ☐ 90-day benchmark defined
So you measure against one standard from day one. | ☐ Weekly check-in cadence scheduled
So problems surface early, not at day 60. |

MY PREFERENCES GUIDE — DRAFT IT HERE

Even a rough draft is more useful than nothing. Start with these five.

How I prefer to receive status updates —

My scheduling rules (buffers, protected hours, preferred meeting times) —

Who gets direct access to me (and who gets routed through my EA) —

How I like to handle conflicts on my calendar —

One thing most people don't know about how I work —

iv COMMON ONBOARDING MISTAKES TO AVOID

- ☐ **Expecting full autonomy in week one** — before they understand your systems and context.
- ☐ **Skipping the preferences guide** — assuming they'll figure it out from observation.
- ☐ **Not giving real ownership early** — keeping everything on your plate defeats the purpose.
- ☐ **Waiting until day 90 to give feedback** — instead of correcting in real time.
- ☐ **Measuring against invisible standards** — instead of the benchmark you set together.

II

A strong EA hire starts with a clear executive. The more clarity you bring into this process, the faster and better the match.

PRE-HIRE CHECKLIST

Everything you need before you post the role.

Four areas. One page. Work through it before you write a job description.

A Define the role

- ☐ Completed the Delegation Inventory
- ☐ Reflected on needs 6–12 months back and forward
- ☐ Decided: generalist, ops-focused, or comms-focused
- ☐ Defined personal vs. professional scope
- ☐ Set format: full-time, part-time, or fractional
- ☐ Answered all five 'Before You Post' questions

B Know yourself as an employer

- ☐ Completed the Communication Profile exercise
- ☐ Completed the Delegation Readiness Assessment
- ☐ Considered what career trajectory you can support
- ☐ Drafted your preferences guide

C Build a strong interview process

- ☐ Prepared behavioral questions across competencies
- ☐ Selected a sample project that reflects real work
- ☐ Planned to ask about long-term trajectory
- ☐ Prepared accountability / mistake question
- ☐ Identified non-negotiables vs. nice-to-haves

D Set up for a strong start

- ☐ Preferences guide ready to share day one
- ☐ Tools and systems access configured before they start
- ☐ Key contacts list and org chart prepared
- ☐ First handoffs identified with clear instructions
- ☐ 90-day benchmark defined
- ☐ Weekly check-in cadence scheduled for first 90 days

Great EA hires aren't found. They're defined.

Every box above is a question you've now answered before a single candidate walks in. That clarity is what makes the match faster and better.

ABOUT BASE

The right EA is matched on more than a résumé.

Base works with executives to identify, vet, and place high-caliber executive assistants who are built for the way you work. We don't just match on paper — we match on communication style, working preferences, scope, and growth trajectory, because that's what actually makes these partnerships last.

TWO WAYS TO GET EA SUPPORT

Subscription or Select+

Both draw from the same elite, U.S.-based talent network. The difference is the commitment — and the outcome.

MONTH-TO-MONTH SUPPORT

Subscription EA

Match with a top-tier, fractional EA who provides dedicated support (40-160 hours/month)

BEST IF

You need leverage now and want flexible, ongoing support without the work of hiring.

- Dedicated U.S.-based assistant, ready to dive in on day one
- Personalized matches within days
- Month-to-month contract; scale hours up or down anytime
- EA receives continuous access to professional development and support to stay ahead of the game.

From \$2,800/month starting at 40 hours/month

TRIAL-TO-HIRE

Base Select+

Trial top-tier, full-time EA candidates risk-free, before you commit to hiring them internally.

BEST IF

You're ready to bring on a full-time EA and want certainty on fit before you hire.

- Curated intake process to capture all of the details of the role responsibilities, your preferences, and top priorities.
- Interview EA candidates with unlimited full-time EAs on a trial basis
- Trial unlimited candidates on a weekly trial basis.
- Hire with confidence, with coaching through the transition

From \$15,000 upfront + \$45/hour during trial period

AT A GLANCE

	SUBSCRIPTION EA	BASE SELECT+
Commitment	Month-to-month	Trial first, then hire
The arrangement	A dedicated, ongoing EA	A full-time EA on trial
Hours	Flexible, from 40 hrs / month	Full-time during the trial
You end up with	Immediate, flexible support you can scale over time	A confident in-house hire
Risk	Cancel or adjust your monthly anytime	Risk-free until you commit; \$5,000 replacement fee

Not sure which fits? Base will help you decide.

Schedule a call

basehq.com