

Your quick guide to:

Diary management for PAs and EAs

While the role of a PA or EA is constantly evolving, diary management continues to be a fundamental task. PAs spend at least a third of their time managing diaries, so it's essential that you've mastered this aspect of your job. This guide provides tips to help you on your way.

Own the calendar

Problems often arise when both you and your boss adjust and maintain your boss' calendar. For obvious reasons, this is a recipe for disaster.

Make it clear that all meeting requests should be directed to you, and keep your manager constantly updated, rather than allowing them to edit things themselves.

Clarify your boss' preferences early on

You'll encounter a wide range of personalities in your career as PA, and it's vital that you understand how they vary – every boss will be different.

In terms of diary management, make sure that in your first few days you ask your boss how they like their diary to be managed. Bringing habits across from your last job won't necessarily work in your favour.

Work out when they're at their best

Some of your bosses will get in early, ready and raring to go; others will take a little longer to be at their peak.

So, monitor your boss' habits early on, and build up a sense of when they're at their best. Then shape their key commitments and recurring meetings accordingly.

When managing diaries, you're also managing your boss' working habits and styles – making sure that their productivity is as high as possible at all times.

Always consider what's booked in before and after a meeting

When a request comes in for a meeting, it's vital that you not only look at whether your boss is free, but also at what else they have booked in before and after.

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If the meeting follows a deadline for an important report, will your boss be in the right frame of mind? Or if the meeting is before another important meeting that necessitates some preparation, will this one get in the way?

Diary management is a balancing act – so be cautious when adding in anything new.

Be firm and realistic

Your boss may often try to cram too much into one day. They may become unrealistic in terms of what they can achieve. It's your job to be the voice of reason.

Always factor in travel and allow time for delays. Also make sure that your boss allows time for breaks – without them, they'll just be less productive as the day goes on.

And be firm when organising their diary in a realistic manner – sometimes, you know better, and they just have to listen.

Create a system and stick to it

They'll be a lot to manage in your boss' diary so you'll need a system.

Maybe you want to use a physical diary as well as one in Outlook. Some people use colour coding and categories in Outlook to separate tasks, appointments, meetings and deadlines.

There's no right or wrong system – just create one that works for you, and stick to it.

Use your diary for tasks and deadlines

Research suggests that we're all far more likely to complete something if it's in our calendar.

So, make sure that your boss' calendar includes deadlines for key projects and duties, as well as meetings.

These are just a few key tips to support you, but if you register with Tate you'll get detailed, personalised advice for every job you apply for. Get in touch today

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