

How to Work Effectively with a Personal Assistant

With Tiago Forte and Tim Francis



Building a Second Brain

Our Agenda

01

Tim

1. 3 best strategies
2. Tim's story + philosophy
3. 360 Delegation
4. Hiring the right person
5. The evolution of delegation

02

Tiago + Betheny

1. Top misconceptions
2. Finding the right person
3. Personal vs. Team knowledge management
4. How to create SOPs

03

Billy + Marian

1. How a great assistant can give you more clarity on your business
2. The benefits of having an assistant in a client-facing position
3. 3 keys to keeping your assistant long-term

04

Q&A

Top misconceptions about personal assistants

01

Misconception #1

You should find the cheapest person you can find

02

Misconception #2

You'll start saving time immediately

03

Misconception #3

You don't have to have calls/meetings

04

Misconception #4

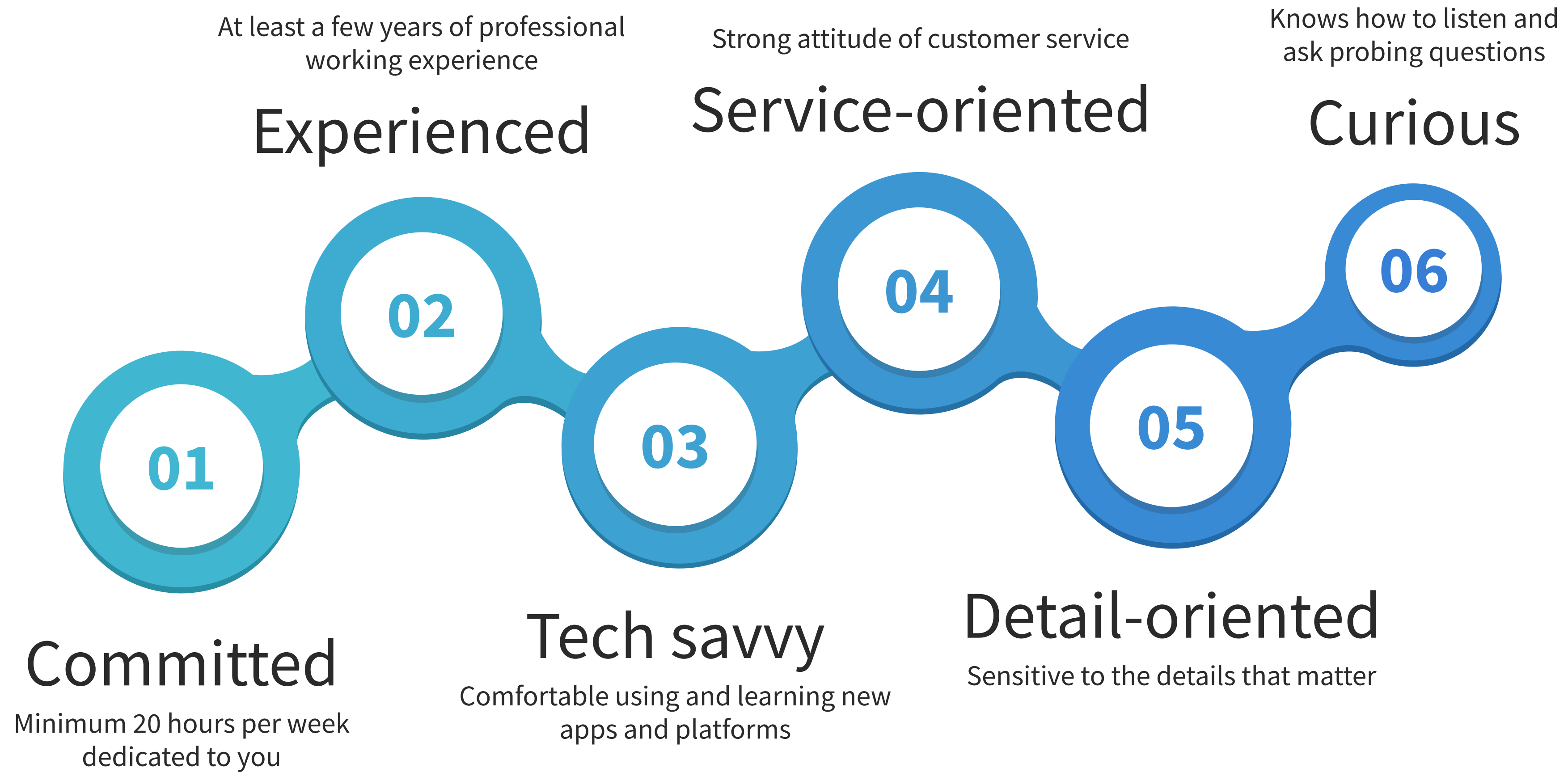
You can completely standardize your assistant's work

05

Misconception #5

You can only delegate routine, standardized work

Finding the right person



Personal knowledge management

Bear (Mac only)



Simplenote

Evernote



OneNote

Google Keep



Informal, quick and dirty



Open-ended and fluid

Low expectations for quality/polish



Optimized for quick capture

Team knowledge management

Notion



Default shared workspace



Structured and modular

Higher expectations for quality/polish



Optimized for consistency

The Digital Productivity Pyramid

