# Professional Identity and Anticipating Change The EA Role: How do we build readiness for the emerging future role?

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# Abbreviations

AI	Artificial Intelligence
AA	Administrative Assistant
AAPNZ	Association of Administrative Professionals New Zealand
CPR	Cardio Pulmonary Resuscitation
C-suite	Corporate suite (aka Executive suite)
CEO	Chief Executive Officer
EA	Executive Assistant
EQ	Emotional Quotient
GFC	Global Financial Crash
HR	Human Resources
IT	Information Technology
IAAP	International Association of Administrative Professionals
ITP	Institutes of Technology and Polytechnics
KPI	Key Performance Indicator
MHSc	Master of Health Sciences
MA	Military Assistant
MProfPrac	Master of Professional Practice
OP	Otago Polytechnic
PA	Personal Assistant
PTE	Private Training Establishment
UK	United Kingdom
VA	Virtual Assistant
WBL	Work-based learning

# **Executive Summary**

#### Background:

This study started as the result of a casual conversation. One where I noted that in the three industries, I had been part of over my working life, I had witnessed changes, "significant changes". In nursing, I had witnessed a transformation from rudimentary skills-based practice to highly skilled professional practice. Similarly, in my career in paramedicine. In my current career as an Executive Assistant (EA), I have experienced a transformation from rudimentary basic administration/office duties to highly skilled strategic and tactical professional practice. This phenomenon that I am experiencing is being seen globally and documented through professional bodies like World Association of Administrative Professionals (IAAP) and the Association of Administrative Professionals (IAAP). A key outcome of this study is to show that the industry has metamorphosed into a highly skilled professional practice.

I am witnessing Executive Administration (EA) roles being adopted in response to the increased demand for higher-level skills and leadership required by employers and industry. Whilst there appears to be an expectation of more advanced practice from EA's, I am also noticing a lack of understanding and, perhaps, acceptability of the advanced skills EA's brings to an organisation and the under-utilization of those individuals.

Many influences contribute to how EA's are perceived, not only by themselves but by others, and professional identity is therefore impacted by those perceptions. This study aims to narrate the experiences of EA's, past and present, Chief Executives and recruitment industry representatives to capture those changes and validate my theory that change has indeed occurred and is still changing.

Globally the recognition of EA's as highly skilled professional practitioners and business partners is well underway. Evidence from this study suggests New Zealand is only just beginning this transformation and there remains a tension between those in practice and those in positions of influence to change the levels of understanding around professional identity.

Being a participant researcher, I have been constantly challenged by what I think and feel and to articulate this against measured and proven peer-reviewed data.

**Methods:** The research phase consisted of in-depth interviews with eight participants: These consisted of four EA's, two recruitment industry representatives, and two Chief Executives. Each participant was asked eight questions (refer to Chapter 4) and from the answers, I was able to capture clear themes that were analysed. **Conclusion:** The overall outcome of this study was there has been a change, and perhaps EA's are only at the very beginning of significant change.

As I started this write-up the world was hit by a pandemic, COVID-19, the consequence of which has seen a major shift in the way EA's work. EA's worked from home, on digital platforms in a never seen before way and it worked!

For EAs, their role has been challenged. But it has also been developed, grown, changed but most importantly, I believe, enhanced, and empowered.

# **Chapter 1: Introduction**

"When people ask me what I do – taxi drivers, dental hygienists – I tell them I work in an office. In almost nine years no one has ever asked what kind of office, or what sort of job I do there. I can't decide whether that's because I fit perfectly with their idea of what an office worker looks like, or whether people hear the phrase work in an office and automatically fill in the blanks themselves – lady doing photocopying, typing". Honeyman, G (2005, p.5).

When trying to describe the role and identity of the EA from my point of view, there is an element of having a preconceived notion of what the role is alongside a large dose of filling in the blanks of what it might be like. What has been missing for me, is a sense of a professional identity.

Professional identity can be characterised at an individual, relational, or societal/group level (Currie et al., 2010). At an individual level, we are biologically unique with a set of environmental behaviours that are influenced by relationships with parents, grandparents, teachers (relational). As we grow and age, our influential relationships are broadened by being members of groups (social identity).

As individuals, we bring to a role a set of personal values and beliefs. A role and the organisations also have a set of values, beliefs, and goals. In time, the personal values of an individual are incorporated into the values of the role/organisation, and professional identity is created (Tseng, 2011). The American philosopher Mortimer J. Adler defined a professional as "a man or woman who does skilled work to achieve a useful social goal". In other words, the essential characteristic of a profession is the dedication of the members to the service they perform (Lane, 2018).

This study explores not only the changes to the role and the perceptions of the role but also looks at professional identity at the individual level using the narrative of others to consider a wider societal/group impact on the EA role and the broader industry at large.

### 1.1 Background

Over the space of my working life, some 40 years, I have had three careers. nursing, ambulance, and EA. In these careers, I have witnessed first-hand significant transformations in terms of their transformation into highly skilled professional practices with substantial areas of responsibility.

The aim is to illustrate how societal and technological changes have impacted on professional identity in the EA role. However, the main purpose is aimed at sharing the stories of my community of practice, business leaders, and human resource influencers to demonstrate how the EA role has changed.

#### 1.2 Framework of Practice

My own interest is drawn primarily from my career experiences. The combination of all these roles it enables me to respond to changing environments and meet the needs of an organisation, often whilst dealing with multiple tasks/incidents and often under pressure. Variety in career experiences and job assignments is an important mechanism through which we develop the "complicated understanding of the business environment by seeking out and learning from many diverse experiences" (Zhu et.al, 2012, p. 459).

During my Bachelor of Applied Management, I articulated my framework of practice as an architecturally designed garden; a centrally positioned water feature symbolised the need for fluidity in my practice, with each corner of the garden represented a season, symbolic of change, with pathways alluding to pathways of learning and the hedge my boundary (refer to Appendix F). It could be said that I categorised my professional identity as neat and structural. What has evolved f is my ability to consider differences in the EA role, even though they are all performed in a similar vein. The differences are not necessarily in the tasks within a role but the relationships and deeper understanding of the processes that shape the roles.

A neat and structured garden describes my style of learning. Previous learning in nursing and paramedicine had been prescribed, being taught what we needed to know, then embedded into practice, with very structured and legislative and professional boundaries. These boundaries were set by the professional bodies responsible for monitoring each of those professions.

I now see my hedge has a gateway leading to a meadow of new opportunities where learning and practice have changed landscape and structure. A meadow whilst still within a boundary has lots of seed heads that are spread by wind and create a more colourful palette.

My learning and practice are by in large developed by applied action rather than theorising. With that said, a framework of practice can only be enhanced as Kemmis (2009, p.6) states by "not only changing professional practitioners 'practice knowledge' but also the mediating preconditions that compose the 'practice architectures' within which practices are practiced."

I am driven, as both an EA and researcher, by the value of work-based learning and the development of others to reach their potentials. During this study I was becoming more aware of the gaps in the business to meet future demands and the part artificial intelligence will play.

#### 1.3 Narrative Enquiry

Clandinin and Connelly (2000) identify three dimensions for focusing narrative inquiry. Each of these was applied and shaped this study. The first of these

is 'continuity' (past, present, and future); evolution embraces the lessons of the past, failures teach us not to embark on the same journeys, success teaches us to look at continuous improvement and current practice and careful planning allow us to scope wisely for the future. Organisations, technology, and society are constantly evolving, so then must our practice. "Each point has a past experiential base and leads to an experiential future" (Clandinin & Connelly, 2000, p.2).

The second narrative, as described by Clandinin and Connelly (2000) is the 'personal and social'. Our interactions shape us, from our early learnings with parents and teachers through to our experiences through life – education, employment, major life events: marriage, divorce, children, no children, death of those close to us. The society I grew up in, even that of my children, no longer exists. Technology, global citizenships subsequent generations have changed things for instance the days of wearing your hat and gloves to town or standing for the national anthem before the pictures started at the cinema are gone. Clandinin and Connelly (2000) describe the third dimension as 'place' (situation). Like chameleons, we can adapt to situations in many ways. The concept of the undetermined situation both familiar and unfamiliar allow us to reflect and act to gain knowledge. My situation will be a little bit different from that of a colleague, however, the situation will have common elements that we share (Dewey, 1938, p.70).

As part of the narrative enquiry, I have chosen an EA with several years in the practice who has witnessed technological and societal changes in terms of the ability of an EA to have a voice at the table. I am was also confident that the interviewing of Chief Executive will highlight different viewpoints of where they, as individuals, see the role of an EA now and in the future. More importantly, I am hoping that as a collective they see how engaging/leading change can have benefits (fiscal, staff engagement/productivity, business leadership opportunities) to the business. These are all chapters of our book and make us who we are. Narrative enquiry is adding richness to those chapters with the stories of others.

My core value is caring and by the very nature of that value, I care deeply that those closest to my industry and those on the edge of the industry are given every opportunity to tell their stories, grow and develop, and be recognised. Lack of role clarity may lead to difficulties in advancing the practice. Without clarity, there is also a lack of community/societal acceptance of the capacity and breath that the EA offers.

Chapter 2: Aims of the Research Study (redacted)

## **Chapter 3: Literature Review**

"No real social change has ever been brought about without a revolution.... Revolution is but thought carried into action" - Emma Goldman

#### 3.1 Developing the Executive Assistant role identity

Solid data-based information on the change and evolution of the EA role, until recently has been limited. There is an emergence, however, over the past 2-3 years of rich data appearing, through blogs, articles, and opinion pieces that I foresee will form the basis of future academic research for peer review. What also became apparent during the researched was my observations were not only about the emergent role of an EA but also about the professional identity of those within the role.

Professional identity is a value and belief system constructed to shape and legitimize the behaviour of individuals within professional groups (Wilson et al., 2013). It can lead to the internalization of professional behaviours and ethics, and the development of self-regulation (Hamilton, 2008).

The role has evolved, particularly since the global financial crash of 2008 but it is only in the past 5 years that the growth of professional bodies with an interest in developing credentials to validate practice have emerged (Millaney and Hilbert, 2018).

The term secretary has been around since the late 14<sup>th</sup> century (Merriam-Webster, 2014). It comes from the Medieval Latin 'secretarius' meaning 'confidant' or 'keeper of secrets' (Oxford, 2019). It was a role title given to various confidential officers in courts of religious or noble hierarchy. Historical records clearly show the role of a secretary or secretariat support was the domain of men.

The shift from men to women, came about during the industrial revolution as the need for paper-based records increased (Horrell and Humphries, 1995). The invention of the typewriter by Pitman in the late 1880s had a huge impact on gender contribution as it became evident very quickly that the keys of a typewriter were more suited to smaller female fingers than those of a man. Two wars and a change of societal acceptances for women working saw the role became popular in the 1950s when 1.7 million women were 'stenographers, typists or secretaries.' (Fraser, 1967)

It was not just in the world of administration that these changes were occurring. The industrial revolution, a couple of world wars, famine, and a dissident women's

movement all contributed to major changes in the way women were viewed and operated in the world. Women were given the right to vote, to drive, to fly planes, to work in factories, and to lead. Whilst it may have been too premature to say there were equity and equality, a slow shift had begun (Breines, 2004). Whilst this is a useful nod to the beginning of change, there is a 70-year gap between 1950 and 2020! I needed to find something that was more current and allowed me to review and look at the changes I was witnessing.

Through my professional network, AAPNZ, I was introduced to the publisher of Executive Secretary Magazine. From the UK and a speaker on the administrative conference circuit, Lucy Brazier opened channels of emerging data, narrative, and documented experiences of EAs/Administrative Professionals from every corner of the globe who spoke of their roles changing; from telephone answerers and notes takers into key leadership roles and having a voice at the table.

Brazier (2017) says "Welcome to the Revolution". She looked at the effects the financial market crash of 2008 had on the space in which EA's operated and notes because of the crash, companies had to let their middle management tiers go to save money. The work did not disappear though, only the people that were fulfilling those roles. Step up – the EA. "Assistants found themselves taking on tasks such as HR, finance, reports, event planning, and marketing: most had no training and did not receive an increase in pay." (Brazier, 2017 p. 23). As a result of this EAs began to play an increased role in decision making and policy-setting. They now possess the authority to make crucial decisions affecting the direction of the organisation. From time to time they may act as a proxy for the executives, representing them in meetings or communications and study managing the production of reports or other deliverables in the absence of the executive.

However, there is a recent trend emerging (Levin-Epstein, 2016) that these types of roles are different in they are now expected to possess a higher degree of business acumen, be able to manage studies, as well as influence others on behalf of the executive. In the past, EA's were required to have a Level 4 or Level 5 qualification, or equivalent experience but increasingly jobs are requiring a bachelor's degree, (*Rampell, 2014*). "The college degree has become the new high school degree". The Washington Post. Retrieved July 6, 2016.)

Furthermore, Brown and Duguid (1991, p.42) wrote that "managers whose career path included an EA role almost exclusively (82%) show adaptability at a high level".

Suggesting the EA has professionally developed through vicariously experiential learning, participating in their executive's decision making, benefiting from coaching and/or total immersion into the executive role.

In the U.S. Department of Defence, the title of MA or EA is typically held by Army, Air Force, and Marines. They are, in the main, people of senior rank such as colonels, lieutenant colonels, and senior majors and navy captains, commanders, and senior lieutenant commanders. They are in direct support of the Secretary of Defence, Deputy Secretary of Defence, and other civilian defence officials down to the level of a Deputy Assistant Secretary of Defence, as well as general officers or flag officers. By tagging the role with a rank, would indicate the importance, understanding, and recognition given by the military to these roles. Likewise, their civilian counterparts, EAs, are also a resource in decision-making, policy setting, and will have leadership oversight of the entire military and civilian staff supporting the civilian official, general officer, or flag officer. EAs are often interchangeable with other senior military officers of equivalent rank holding the title of Chief of Staff in other service organizations headed by a Flag Officer or General Officer. (Military Assistant/Executive Officer Handbook, US Defence Forces. Retrieved on 11 June 2013).

In stark comparison, EA's in the civilian world are not high-ranking or necessarily highly qualified individuals. Overall, companies do not require post-graduate level qualifications or previous Board membership level participation. Length of service at executive level (known sometimes as the C-suite level) is a pre-requisite rather than C-suite contribution or leadership. A simplistic way of understanding the differences between the two sectors is that the requirements of the civilian world require the EA to be tactical where the military requires a more strategic skill set of their EA's. Regardless of which sector the EA is working in, the role is an integral support leadership role of any organisation. It is the structure, values, and identity of the military that provide the hierarchical identity and profile of the EA role compared to that of civilian (Warner, 2000, p.2).

Research in Australia in the late 1980s looked at the role of the secretary from a sociological perspective and the term "work wife" (Golding, 1986, p. 97; Pringle, 1988) was used to describe the types of tasks and the gendered nature of the role. The duties requested of a secretary/PA/EA, of providing support to the manager, were equated with those of a wife supporting her husband. This similarity led to the blurring of tasks that were asked of the administrative professional. I went into my first EA role believing that the performing of personal tasks was considered part of the role.

However, my transition from medicine to administration proved that skills, no matter what, are transferable. I also learned that a primary lack of understanding about the variety and variances in the EA role, reflected how I viewed myself in the EA role initially. Having learned there is more to the role than just diary management and travel bookings. As I have found gaps as I interact and engage with all corners of the organisation, it has prompted me to also look for solutions. This has meant, where I initially saw myself as inferior and without voice, now having the confidence to be equal and with a voice.

A survey conducted in 2015 by Avery and Hays looked at career development and key skills, management, and leadership in selected companies in the business sector. Assistants and executives were surveyed, and the results showed that 87% of executives stated they could not do their jobs effectively without their assistants but more importantly, 62% said they saw their assistants' contributions as equivalent to contributions from their management teams or those holding senior management positions. In fact, 1 in 10 bosses said they would defer to their assistants for high-level advice rather than Directors (Avery & Hays, 2015).

More recently there is a movement towards the acceptance of a changing role. At the Modern-Day Assistant conference I attended, guest speaker, Rhonda Scharf (2018), stated that: "The secretary is gone". She talks of the move from secretary to AA, PA, and EA. She now questions that with the use of AI, these roles are diminishing, or even disappearing and suggests that AI like Alexa or Google can replace tradition tasks such as make appointments, confirm schedules, order supplies, etc), meaning what is left is the "strategic partner". Philosophically, there appears to be an irony here – we are talking about the strategic partner in a magazine that refers to the "secretary". My own bias identifies "secretary" as indicative of a less respected/valued member of staff whereas the term "partner" indicates equality at the Board room table.

Society holds perceptions of a profession's identity which leads to public image but may not necessarily be consistent with the realities of the professional practice (Hallam, 2009). Examples of this can be seen in the earlier part of the 20<sup>th</sup> century as more women entered the workforce, occupations such as nursing, teaching, and secretarial work were appropriate. As previously mentioned, it was war that change the work woman traditionally undertook.

Professional identity is often linked with professionalism (Lane, 2018). Whilst the

concepts are closely related, they are not the same. Professionalism is defined as "the <u>conduct</u>, aims, or qualities that characterise or mark a <u>profession</u> or a <u>professional</u> person" (Webster, 1998). Therefore, professional identity is distinguished from professionalism by understanding it as underpinning practice and behaviour (Suss and Ashforth, 2007) relevant to practice. In my practice, this could be identified from the choice of clothing worn to work to the level of reporting undertaken.

In a broader sense, individuals and professional bodies have an opportunity to develop specific practices, measurement, and reporting on change.

Identifying what needs to be changed and why will form the basis of new models of practice (Kerridge, 2012). My belief is that to enable sustainable change an acceptance by senior leadership for those 'on the ground' to take the lead in managing the change will be needed. The new realities of centralisation, strategic alliances, global networks, technological advancement, and administrative temps have rewritten the game of business. (Zhu et.al, 2013)

There is a growing interest and research around administrative practice. Lloyd (2010) suggests that administrative professionals often do not value their role or see themselves as belonging to a professional practice and thus have no career expectations. This could be one reason that has led to limited information and indeed could have led to the misunderstanding, undervaluing, and stereotyping of the role. Lloyd's work took on questioning the availability, capacity, and capability of professional development for administrative professionals.

It is the work of Lloyd, professional bodies such as the AAPNZ and the IAAP, and others that have begun to focus on a misunderstood industry and slowly change perceptions of what the professional administrator can bring to an organisation. I have continued, throughout this study, to draw on their knowledge and expertise.

#### 3.2 Changes

Change is not just a set of tools and techniques; it is a state of mind. Change is not just about fixing yesterday's mistakes; it is about preparing for a new tomorrow. Change need not be the enemy; it can be an ally. Kanter (2010, p. 59) said, "Change can either befriend or foe, depending on the resources available to cope with it and master it by innovating." Organisationally and globally, the skill mix is changing and practice

expanding. This lends itself to an opportunity for the organisation to head qualification frameworks that legitimise the role, the skills, and the contribution an EA makes.

Change is not about developing detailed plans; it is about futureproofing. Change is not about competing in the future; it is about creating the future (<u>https://www.mindtools.com/pages/article/newCDV\_81.htm</u>). Hamel and Prahalad (2012) say, "Given that change is inevitable, the real issue for managers is whether that change will happen belatedly, in a crisis atmosphere, or with foresight, in a calm and considered manner; whether the transformation agenda will be set by a company's more prescient competitors or by their point of view; whether the transformation will be sporadic and brutal or continuous and peaceful."

Hamel and Prahalad (2012) recommend asking the following questions:

1. How do we want this industry to be shaped in the next 5 to ten years?

2. What must we do to ensure that the industry evolves in a most advantageous way?

3. Who will our competitors be in the future?

4. What skills and capabilities must we begin building now if we are to occupy the industry high ground in the future? (Harper, 1998, cited in Hamell and Prahald, p.9).

I have adopted some of these in the interview questions.

Reflecting on the changes in my previous careers I believe this forms a backdrop as to how outside influences led to significant changes in practice and how we might learn from these.

For example, as outlined in the "Development of the New Zealand Nursing Workforce: Historical Themes and Current Challenges", (Gage JD, Hornblow AR, 2009), the development of the New Zealand nursing workforce has been shaped by social, political, scientific, and inter-professional forces. This had led to the introduction of nurse practitioners and rural nurses.

Similarly, the ambulance service, prior to 1977 the "training" of Ambulance Officers was arranged in an ad-hoc fashion. t. It was the establishment of the National Ambulance Officers Training School in 1977 that saw standardization of training. The disestablishment in 1999 saw the introduction of University-led qualifications due to social, political, and organisational factors.

Currently professional bodies like the AAPNZ are working within global networks investigating best practice, the impact and influence of technology on roles and practices, the influences and impacts of societal changes due to events like CoVID-19 and working together to find ways the practice remains fluid, agile and adaptive. Work is underway currently to introduce a set of qualifications and standards that would be recognised internationally to articulate to employers the tiered structures and levels of competency and capability of administrative practice (IAAP, 2019 conference).

#### 3.3 Chapter Summary

The literature in this review has looked at how past and present roles of the EA have continued to evolve, and many are now multi-faceted, highly skilled professional practitioners. There are many influencing factors including societal, organisational business practice changes, HR practice changes, feminist influences, and technology which all contribute to a change in the way professional practice is viewed.

The impact on professional identity is influenced by all these factors but more importantly, it is a deeper and understanding of the role/profession that is key to understanding what is right for the business, what is the right thing for you to do and what is the right manner in which to do it (Lane, 2018).

The narrative enquiry addresses change is constant and ask the question: what measures do businesses and organisations, and the individuals in those existing roles, have in place to address change over the next few years?

# **Chapter 4: Methodology and Methods**

### 4.1 Introduction

The term methodology describes the conceptual approach to the research process, while methods are the practical techniques used to gather and analyse data. This chapter outlines the aim and the research questions. It will explain the design framework and describes the methods for data collection and analysis.

It should be noted my EA and the interest that my experiences and observations have in the changes, I am experiencing is a major contributor to the phenomenon being studied and undoubtedly informs my underlying views.

#### 4.2 Research Aim

The aim was to discover the perceptions of the role of EA's, by those in the role and those that work alongside the role. It was anticipated that the data gathered would provide some validity to my observations that the role is changing from basic administrative skills-based practice to a highly skilled strategic and operational business partnership role.

To that end, I chose qualitative methodology as the most useful form of data collection data. This type of research method focused on obtaining data through open-ended and conversational communication. It is about getting not only the story about 'what' but also being able to delve into the 'why' and 'how'.

By sharing the experiences of other people, there will be an opportunity to learn sustainable practices of other individuals and organisations.

### 4.3 Selecting Participants

Initial data collection took place over 4 weeks. To obtain robust data, a good crosssection of knowledge and understanding of the EA meant a broad selection of participants was required. Representation was sought from incumbent EAs who recently moved into a management role, HR and Recruitment Managers and Chief Executives. The participants were selected from key stakeholders I had interacted with through the varying aspects of my current role. It was envisaged that each of these groups would provide different perspectives and perceptions of the role. Two from each group were chosen initially with the understanding that this could be expanded if data failed to deliver anything of substance.

Once ethics approval was given, 58-2019, (refer to Appendix B) participants were recruited using a gatekeeper to make the initial contact. An email (refer to Appendix B) was sent to each participant outlining the purpose, the background of the study, and giving them the option of refusal without prejudice. Consent forms were signed and returned and are the only link to the participants (refer to Appendix B). All data retrieved from the interviews is anonymised.

Of the 8 original participants contacted, 7 confirmed their willingness to participate. An 8<sup>th</sup> participant was included after asking to be a participant.

Demographic information of the participants is:

- **Positions:** 4 are/were EAs (1 o has moved to a management role), 2 were Recruitment Agency Managers and 2 were Chief Executives.
- **Gender:** 6 are female and 2 are male (both males are in the Manager / Chief Executive category)
- Age: All but 1of the participants are over forty-five years of age.
- **Location:** are located in in New Zealand, 2are offshore.

## 4.4 Ethical Consideration

Careful consideration was given to the potential impact on participants, acknowledging the presentation of suggested change to the role and the industry may cause stresses, especially as we face sector upheaval in the coming months. I respected participants, who may have been affected, should they have decided to withdraw from my study.

Participants were given the option to withdraw up to, and seven days post-interview. None of the participants invoked that option. Participants were offered counselling support should they feel the need for it. No participant is named, and all care is taken to de-identify them by referring to them by letter of the alphabet: Participant A.

### 4.5 Interview

A suitable time was made to meet with each participant allowing 1.5 - 2 hours for each interview, with Four carried out face-to-face, three via Zoom, and by phone (due to poor internet connectivity).

During the face-to-face interviews, I ensured that I dressed in a non-power style and that participants were offered privacy in terms of the rooms that I chose to conduct the interviews.

Each interview was recorded, and notes (keywords) were taken alongside the recording. It was made explicitly clear to each participant this was occurring and ensured ensure this was done unobtrusively.

Unfortunately, due to a faulty recording device, the first two interviews were not recorded in full. I had taken notes during each interview and when typed up, these were sent back to the participants and they approved of the transcripts. I am confident that the integrity of the data was not compromised. I made my mentors aware of the issue as soon as it was discovered. Once the fault was discovered, another device was used for all interviews from that point on and transcribed verbatim.

#### 4.6 Research Question(s):

The overarching research question was:

What has changed over recent years in the EA role and what measures do businesses and organisations, and the individuals in those existing roles, have in place to address change over the next few years?

Eight questions were asked of each participant.

#### Table 1 Participant questions

- Q1: What do you understand the key tasks / responsibilities of an Executive Assistant role to be?
- Q2: How long have you been in your role? Describe how you see the Executive Assistant role. Describe how you think others see the Executive Assistant role.
- Q3: Describe how you think the role has changed over time? What are some of the major differences between the role when you started and the role as you know it now? Describe how you see an emergent changed EA role?
- Q4: Tell me what you think is driving change in the role? e.g. societal, technological, cultural factors and attitudes?

- Q5: What do you see as key capabilities required for the role now and in the future?
- Q6: What development /training opportunities / support are available to the role?
- Q7: Tell me what you about the criteria, key descriptors and tools that are used to develop and evaluate role descriptions (size, level of responsibility and salary bands)? Are there trends known/captured/reported on that clearly show changes over time? Or conversely role changes over time that have NOT been reflected in role descriptions?
- Q8: In your opinion, does the title "Executive Assistant" accurately reflect the role? If not what do you think might be more fitting?

## 4.7 Website Study Methodology

The purpose of this was to examine how the EA role was represented across a wider range of industries globally using digital platforms to search information, other than the narrower selection of the participant pool. It provided outward-facing perceptions and professional identities of EAs inside the industry and more importantly review of the public-facing expectations and perceptions of the role, along with what professional bodies were available to support those in the roles other than the two (2) groups previously mentioned. Key areas analysed were:

- Visibility of high performing EAs was their professional identity clearly articulated?
- Clarity of job descriptions were they still using generic terminology or reflective of the business requirements?
- How professional bodies/groups represented themselves.
- Opinion pieces written in online journals, magazines, and newspapers.

### 4.8 Data Generation and Collection

I transcribed notes and recordings at the earliest opportunity, returned to the participant for checking and agreement, and then transferred responses to a spreadsheet where each question identified emerging themes. The data elicited clear, evident themes very early on in the analysis.

### 4.9 Data Analysis

Data was collated and is presented in Chapter 5. Due to the small number and nonrandom nature of the information collected, it was not possible to present any statistical rationale to my findings. The data is qualitative and presented in a thematic framework and we will look at this in detail in Chapter 5.

### 4.10 Chapter Summary

The interview process was lengthy and on reflection, would have recruited the services of a professional transcriptionist rather than undertaking this task. It is not that I did not enjoy the act of transcribing, but more that I now understand there is a risk that you can interpret answers in one of two ways: either positive, where you believe your participants agree with your phenomenon, therefore lack objectivity. Secondly you can disagree with everything you hear and therefore lack subjectivity. This is where the return of the transcript to the participant becomes critically important to ensure, and preserve, the integrity of the data.

Retrieving data from websites can be fraught with an overload of information alongside balancing research evidenced data against opinion pieces. A growth area identified as a researcher has been to carefully analyse what I have read and measure it against multiple pieces before using as informative contributions.

# **Chapter 5: Research Findings**

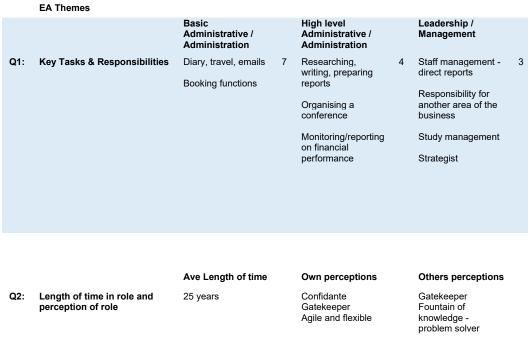
#### Overview

In previous chapters, the background and context of the EA professional identity and role have been explored. The literature review has identified a gap in knowledge and data available until recently through the growth and evolvement of professional bodies such as IAAP and AAPNZ.

This chapter looks at the data collected, and the practicalities of the data collected.

#### 5.1 Themes

Once the interviews were completed, transcribed, and emergent themes summarised on a spreadsheet. The emergent themes quickly became very evident and were logically collated. Literature reviews suggested a lack of statistical analysis or formulas to evaluate qualitative data.



#### Theme examples from data collected

Figure 1 Collected data into themes

# 5.2 Key Tasks

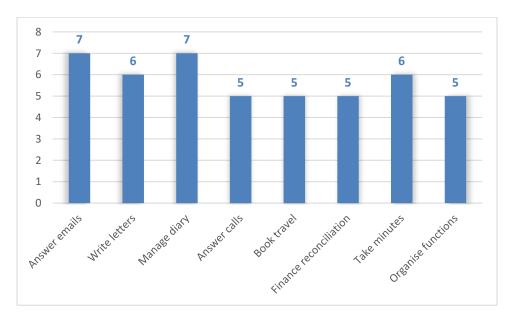
Three themes emerged:

- 1: Basic administrative tasks & responsibilities.
- 2: Advanced administrative tasks & responsibilities.
- 3: Leadership.

The definition of basic administration and advanced administration skills was provided by Platinum Recruitment Agency based on the language often used in role descriptions.

#### Theme 1: Basic administrative tasks & responsibilities.

All eight participants saw basic administrative activity and tasks as being a part of the role (Fig. 6). These tasks included but were not limited to, diary management, travel bookings, taking minutes at meetings, writing letters, replying to emails, booking functions or catering for meetings, reconciling credit cards.



**Emergent sub-themes from interviews** 

Figure 2 Emergent sub themes

These are often referred to as standard fixtures in role descriptions and are also consistent with my own experiences.

When further asked if the participant thought it was the role of an EA to proactively research potential opportunities for the business it was noted the expectations of a manager from that of an EA differed considerably.

Participant D (Manager) did note:

"I would expect that as part of the "gatekeeper" role, the EA should be able to weed out any gems of information that might benefit the business and that could be followed up. I wouldn't see this as being a difficult, nor senior function".

#### In stark contrast Participant A (EA):

"Oh goodness no! That's definitely not part of my role or my responsibility or, for that matter, my right to decide what might be a gem or weed out trivialities for XXXX".

I am not surprised by the variances described above and were within anticipated ranges. Unless it had clearly outlined in a job description or in performance setting KPI's then it would be expected to hear of differences of expectations for an administration role.

### Theme 2: Advanced administrative tasks & responsibilities

Four of the eight participants noted they had an expectation of functioning at a higher level in terms of role function and responsibility. Of the four, two were in EA roles, and two were managers. Regardless of their respective positions, each of the participants was united in their belief that functions such as research gathering, data analysis, drafting a paper or report were an essential part of the role.

### Participant E (Manager) said:

"I would expect to receive a comprehensive written report given me by my EA at a point whereby I only need to make a couple of minor changes may be, and it would then be tabled at the appropriate forum. A good EA can/should be able to ghost-write for their manager".

Other higher-level responsibilities noted were the monitoring and reporting of financial activity and clearly narrating variances. In one case the EA was responsible for providing a risk mitigation plan for over-expenditure.

### Participant A (EA) said:

"I was asked to arrange, in entirety, a large conference spanning days with participants from all over the world. This included planning and reporting on the budget for the event, inviting keynote speakers on behalf of the organisation, overseeing three staff who assisted with registration and payments and running of the event". Whilst it is not unusual for EA's to arrange smaller gatherings, meetings, or events – a large-scaled event of 100+ people would not be considered a normal responsibility. Bigger organisations would have specialist Event Management roles to undertake these duties.

#### Theme 3: Leadership

Four **o**f the participants referred to leadership and leading, within the role as being a key part of the role. Reference was made to managing other staff (direct reports), leadership for an area of the business, the leadership of a study, and strategist.

#### Participant B (EA) said:

"Being fully aware of the goals and objectives of the CEO and the organisation and working alongside them to get there".

#### Participant C (EA) said:

"Knowing the business inside out - spending time in each area to gain an understanding. Be a strategic thinker - operations manager/planner. They need to be constantly scanning the environment - not just of the business but like businesses and the wider environment. It's about intel gathering, interpreting it, and reporting on it".

#### Participant G (CEO) said:

"The roles vary so much now. There are elements of what we know to be the more traditional parts of the role: being diary management, travel bookings, meeting preparation, etc. But then there is an evolving trend for the key tasks and responsibilities to take on a far more senior part in the business. It's almost like being the shadow minister in parliament - the EA is becoming the shadow CEO."

The definition of leadership is described as a "process of social influence, which maximises the efforts of others, towards the achievement of a goal" (Forbes, 2013). If looking at this at face value, we all could provide leadership, but looking at this through an EA lens, they are in prime positions to influence – both up and down the organisational structure.

As an EA, I have managed processes and projects and I have led people. I have been responsible for a team of 10 administrative staff, developed and deployed strategic and operational plans, attended city led meetings on behalf of the manager with the mandate to speak on behalf of my organisation. I have organised events, small and large and I have booked air travel, diarised meetings, written emails, drafted reports and

made the coffee, been responsible for writing many reports in the voice/writing style of my manager. Often, these have gone forward to Boards without any correction of editing which is a validation of my ability and skill to operate at a higher level.

The reality is that a job description does not always reflect everything needed to be an EA. It covers broad, generic tasks, but the role is often made up over time as strengths are recognised and developed, relationships between manager and EA are nurtured and grown, alongside an ever-changing business environment which means being adaptive, agile, and reflective. There is also another dimension to add here as in a complexity where new trends come into vogue, older incumbents may fall further behind because they are not willing, or capable, of keeping up with newer thinking, frameworks, and models.

#### The Executive Assistant Role: Time and Perceptions

All eight of the participants have been in their various roles for over 10 years. The longest serving EA, 30 years. The longest-serving CEO had 25 years. Both HR Industry Managers have 20+ years' experience. All described similar perceptions of themselves and others.

#### Confidante

All eight of the participants saw the EA role, in part, being that of a gatekeeper, confidante, fountain of all knowledge and believed that others would share that perception.

### Participant A (EA) stated that they:

"Know more about the personal life of their CEO than anyone else, perhaps even his wife. It is a privilege but at times can be a curse to know so much! You learn a lot about the person, not just their professional life and character."

#### Participant F (EA)

"In my current role, I'm probably seen as the lady who does (and can) do everything! I see myself as being a very competent, able contributor to the business. I have to be - that is my job!"

#### Participant E (CEO)

"I have worked alongside a number of EA's but have only really had two report to me. I have the deepest respect for the highly effective and efficient partnerships that I have

seen over the years. My own personal experience, having seen what efficient and effective looked like, was not as productive probably as much my fault as it was the EA's for, we never achieved partnership and in one case I did not achieve a level of trust in the EA I inherited, probably because of my observations of the individual taken prior to me taking up the role with the EA. An EA is NOT someone employed to make me cup of tea and I had significant trouble breaking this habit in the individual."

#### **Perception of Role**

Two of the participants, both Managers, offered how they believed what the role needed to be that incumbents may not see themselves.

#### Participant D (Recruitment Manager) said:

"As someone who is recruiting for a business. I often get sent a job description which is really generic, must be able to type yada, yada, yada but then when I go and speak to the CEO and ask them to "tell" me what they want – it is poles apart from the job description. They want someone just like them! A clone. We often end up rewriting job description's after the person is on the role to better reflect what it is, they actually do."

#### Participant E (CEO) stated:

"Diplomacy in manage the manager, particularly close to the end of an allocated time period where a meeting should stop, and another engagement has been committed to. Diplomacy in being able to carefully enter a meeting or board room, read and react to the non-verbal cues provided as two whether it is okay to interrupt or not. Separation of work and home life balance is a delicate balance and one the EA needs to be able to walk alongside, often the conduit of messages between the two worlds or contribution to the time management of the working world to cater for the needs of the individual and family given the allocated time periods can often overlap."

As an EA, I had to dispel my perceptions of the role first and foremost before being able to objectively look at others. When I first became an EA, I believed the role was a pictorial accessory to a manager or CEO. The "work wife". It had no mandate, no voice at the table, and progression was not an option as there was nowhere to go. As I have progressed through the study and engaged with EA's and managers across a variety of sectors, my perceptions have been challenged and have now given me a fresh lens in which to view the role. My attendance at The Modern-Day Assistant as a Strategic Business Partner workshop in Wellington in mid-2019 with global participants was the

real turning point for me though. I now understand the role is not at all what I had perceived it to be. It is varied, complex, complicated, and changing.

My pathway since leaving the ambulance service has shaped my unique strengths, skills, and capabilities. I draw on the knowledge and experience of both in equal measure in my current role and through conversations can share with others how the role is changing.

#### **Changing Roles**

All eight participants described easily identified changes such as technology being a key contributor to the role changing and being a major contributor to future change. Three of the participants noted major differences emerging that will affect future roles.

#### Role changes over time

There was a notable difference between what EA's described as changes in the role to what industry and CEOs described. EA's focused on the task and relationship changes.

Participant A (EA) noted:

"Some increase in delegated authority like approving some finance transactions and approving leave".

#### Participant B (EA) stated:

"More collegial relationships between senior and junior staff – being able to call your CEO by their first name, and for staff to be able to approach the CEO without going through the EA in the first instance".

Participant C (past EA):

"Respect and value of EA's and administrators. It has increased tenfold".

#### Major role differences

In comparison, the recruitment industry and CEO's see the differences being more in line with attitudes and knowledge.

#### Participant G (CEO) noted:

"The Global Financial Crash (GFC) of the late 80's meant that middle management disappeared and so it became the responsibility of EA's/PA's/Senior Secretaries to pick up the tasks that were vacated. Things like HR and Payroll, IT, Marketing and Communications, etc. Even when the market got better, those tasks did not disappear from the EA role. They are still expected to have a sound knowledge base in these areas."

With Participant E (CEO) capturing a wide range of change that sees the role differ from years gone by:

"My experience only spans 35 years, so I might get this wrong. In the early days, there were typewriters, alcohol cabinets, and transactional activities which probably included running errands and making cups of tea. The modern EA is challenged by technology, social media, and a variety of ways that the Executive may get interrupted and/or see opportunities from. Shared calendars, smartphones, AI, IT, changes the dynamics. I have seen an EA become responsible for the study management of entire corporate office moves and major function organisation. Is the role of an EA or is it really a Vice President (VP) I have often wondered? My experience is in a global role so the EA may be operating in a different time zone in a different country still arranging logistics, preparations for meetings, and protecting the productive time of the executive. An effective leader is always going to recognise the gifting and intellect of those around them and utilise them to match their capability. While I have seen males in these roles over the years, the stereotypical attractive individual dressed for attention has been replaced with tertiary qualified very capable and very well-paid peers of the leadership team."

If I am to understand where the differences may have stemmed from in what EA's see as the role and any change to what CEO's believe the role has become, then the recruitment industry may provide a clue.

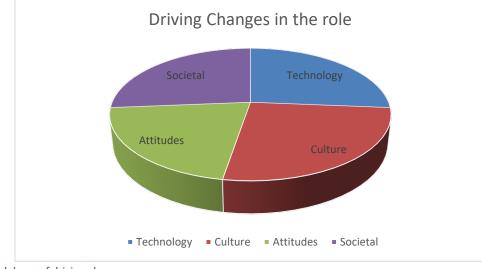
As mentioned previously by one of the recruitment company participants, CEO's often want someone like themselves, who can think fast, provide solutions all whilst keeping an eye on the future with an even keener eye on what is happening in real-time. This expectation though appears to fail to be communicated when advertising positions or through role descriptions or at interview. It is only when the EA starts in the role, the differences become apparent.

My own experience clearly shows the change of how a job description did not clearly express the actual requirement of the role. The descriptors used were broad and the expectations even broader. Whilst it is not necessarily a bad thing to keep descriptors broad, I wonder if there might be a solution to change how we advertise, calling for strengths and attributes needed in a role and leaving the finer task detail of a job descriptor to the successful applicant to develop as they embed themselves into the

role. This allows relationships to grow, understanding of the why and what is needed to then reflect a role more accurately.

### Driving change in the Executive Assistant role:

All (100%) of the participants saw technology, cultural changes, and societal changes being key factors in driving change in the EA role.



Only 80% of the participants believed that attitudes contributed to change.

Figure 3 Breakdown of driving changes

## 1: Technology

All participants agreed the advancement in technology was a massive driver to change in the industry and probably the biggest change.

The key advances, in no order, were noted as:

- Filing documents is now done in a virtual cloud not in a filing cabinet.
- Not always having to be physically present for a meeting platforms like 365 Teams, Zoom, Skype are not only convenient but cost and time effective.
- Voice recognition software a meeting can record on a device and transcribed into minutes as the meeting occurs.
- AI the ability for digital platforms to interpret the need of an individual and action a request within seconds with no human connection needed.

Participant's comments ranged from:

"Technology of course is obvious. We have moved into a highly efficient digital age. It is time-saving, smart, and empowering."

To:

"Executives can be paid multiple millions of dollars per annum. If an individual warrants this sort of pay grade, their minutes are valuable. The person who can maximise the minutes available is often also highly paid. In lower or middle management positions as companies become leaner and more accountable to shareholders admin roles are often the first to be culled in times of cost-cutting or efficiency drives. I have seen this done to the destruction of business where the admin roles have been removed and you are left with highly paid professionals spending hours in basic tasks driving inefficiency back into the business. Conversely, with technology in your hand or on your wrist today allowing cloud computing and access to a multitude of services that perhaps was once the sole domain of the effective EA it often takes longer to task an EA than it does to just do it yourself. That said the capable EA that I have pictured has already anticipated and done the task prior to the executive picking up their smartphone - worth their weight in gold given the time efficiency and time they free from the Executive whom they assist."

There is no escaping it technology is here to stay and is progressing at lightning speed. We all know that as quickly as the latest piece of technological wizardry hits the stores it is already out of date. In the world of the administrative professional, the ability to work from anywhere is real. The VA is already here, administrators who work with executives from the comfort of their home office, often in another country never meeting their executive face-to-face other than the odd online call.

As professional administrators, we need to keep well informed and up to date with platforms, BOTS (a software application that is programmed to do certain tasks), and polygons. We need to lead in this space to keep the executives we partner with effective and efficient.

## 2: Societal

Society has changed. As Participant A (EA) reflected:

"My mum's era left school, worked in the office until they got married and then that was it. They became a full-time wife and mother. Now - you can work, marry, have kids, and still keep working!"

Other observations were:

Participant B: "Male hierarchy has definitely changed!"

"The world our parents grew up in does not exist anymore and the world our children grow up in will be foreign to us. We have to adapt."

"Society frowns less on women in the workforce but also frowns less on men in traditional roles like EA's. We are more accepting of diversity and equity."

My observations of societal change that may have affected the change in the EA are not only a combination of all the above but also from my upbringing. My mother returned to work not long after I was born (early 1960's). It was not for financial reasoning; my father earned a good income, she needed to be seen as an independent person in her right. She may have been slightly ahead of her time and anecdotally I know my grandparents did not approve but was important to her. I followed suit when my children were born (mid-1980's). I left the maternity home and went home via a local Fire Station to teach a CPR refresher course. Not because, I had to or because I was trying to prove a point, but because I wanted to.

So yes, society has changed but it is not society alone that has changed. It is a combination of many factors.

### 3: Attitudes

Attitude is described as a settled way of thinking or feeling about something.

### Participant D said:

"These (attitudes) have changed in terms of, it's not about individuals in roles - it's about organisations as a whole and the part every individual has to play in that organisation to make it successful".

My own observation is that decades of unsettled change including war, politics, pandemics, global financial crashes, technology, social media, and population migrations have created a new kind of settled. This has meant a change in the way in which businesses and organisations structure their workforces and the way each role within that workforce operate and perform. We now begin to see attitudes to what may have been traditional roles, like the EA role, differently.

### 4: Cultural change

There is a subtle difference between culture and cultural.

The Merriam-Webster Dictionary (2014) defines culture (noun) as:

- "The customary beliefs, social forms, and material traits of a racial, religious, or social group".
- "The set of shared attitudes, values, goals, and practices that characterises an institution or organisations".
- "The set of values, conventions or social practice associated with a particular field, activity field, activity, or societal characteristic".
- "The integrated pattern of human nature, belief, and behaviour depends upon the capacity for learning and transmitting knowledge to succeeding generations".

Whereas the adjective cultural is of or relating to culture or culturing. Example: "there are some cultural differences between us" (Merriam-Webster, 2014).

All the participants picked up on varying aspects of what culture and cultural meant to them. Examples were:

Participant C (EA):

"There is a change in the way we perceive titles of different jobs. For example - an EA is seen as "better" than a "secretary". The reality is they are essentially the same role, but we have changed our phrasing to reflect an inequality. There has always been, and probably always will be, an unconscious bias in the workplace".

The integrated pattern of human nature:

Participant D (Recruitment Manager):

"We are a global multi-cultural society. That brings a richness to the workplace".

The customary beliefs, social forms of a group:

Participant B (EA) noted that:

"We are very fortunate here in New Zealand, of the most part the wider western world. There are still many countries where women are still not allowed to work. If they are - they are undervalued and shown little respect. At a conference I attended recently, two of the delegates told the story of a young administrator who had gone to HR to complain of her boss bullying her. He had verbally abused her, made fun of her in front of other colleagues, and often called her demeaning and rude names. HR asked the administrator: "has he beaten you?". The young administrator said: "no". HR replied: "then he has not bullied you – you have no case. This, I believe, shows us that culturally we may not have changed as much as we thought we had". We see culture in different ways and there is no right or wrong. What is worthy of exploring further, I believe, is when we look at introducing cultural plans into an organisation, we are cognizant of the complexities of ethnicities, roles, and historical contributions that everyone can make. Whilst an organisation creates their own unique sense of culture, made up of the culture of many, not just a business-driven need.

As a result of changes are reflected across something bigger than just society or just technology or just attitudes? It is a shift in all these that make up the cultural change.

## Key capabilities:

Three key themes emerged:

- Values
- Hard skills
- Soft skills

#### Values

Core words consistent for all participants were words like "trust/trustworthy, respect / respectful, confidential, honest/honesty, and reliable".

The EA group used other words such as empathetic, caring, stable, and dedicated. Participant A (EA) even used the word "faithful". These are integrity and feelings-based values.

"You need to be "highly confidential and trustworthy"

The recruitment managers used more achievement and intelligence-based values like "accomplished, capable professional, knowledgeable, smart".

Participant D:

"Must be bloody smart! Always one step ahead of the game and the boss. That means being anticipatory, problem solver, and flexible all whilst being the ultimate professional".

The CEO group looked for presence strength and order-based values. Words like "confident, dedicated, alert, attentive, clear, calm, stable, and thorough". Participant E said

"I see my EA as strategic - a partner; he is an outstanding clear communicator; an influencer, a leader - not just below him but can lead above as well (that would be me he leads at times!)".

#### Hard skills

Hard skills are teachable and measurable abilities such as writing, reading, maths or using computer programmes capably.

Attributes such as agile, organised, tech-savvy, articulate, and a leader were used. Being tech-savvy was considered an essential. Again, participants saw these as being core to the job description and the person. Recruitment companies often use online pre-employment testing software to ascertain the level of competency for candidates.

#### Participant H said:

"We routinely put potential candidates through a variety of tests – everything from skills based to psychometric before introducing them to a client. This gives our client the knowledge and security that the candidate we put forward is of the highest calibre".

#### Soft skills

Soft skills are known as the traits that are not often asked for in role descriptions but are what make you a good fit in your organisation and your role. (Platinum Recruitment)

Descriptors such as etiquette, communicative, good listener, get along with others are frequently used. Over recent times, perhaps the past 18 months, is referencing to EQ – emotional intelligence, spatial awareness, leadership.

Of the eight participants, only one of the EA's spoke of soft skills.

#### Participant C (ex. EA) noted that:

"Being emotionally aware of myself and/or others only after I changed my role into a management role. EQ /IQ awareness in self and others is really important for an EA as is being empathetic and sensitive. It is just as important, if not in some case more important, as being organised, dependable, or a good communicator."

The recruitment industry representatives saw these as an emerging requirement in a good EA and both CEO's saw soft skills being a top priority for a high-level C-suite administrator.

Both CEO's lamented that they have seen soft skills as a primary requirement for nearly 10 years now, but despite attempts to have it written into job descriptions, it remained an elusive attribute.

#### Participant E (CE) noted:

"I have been disappointed on more than one occasion when hiring an EA, to discover they were exceptionally organised, trustworthy, a great typist, etc but incredibly inept at reading a situation or person and had no desire or aptitude to think. I wish looking for those skills had been part of the recruitment process".

In conclusion, there appears to be a sub theme developing whereby the perception of how EA's see themselves and their role is widely different from their managers and others aligned with the industry. Further investigation is needed to look at how those differences can be bridged. Is change needed at the recruitment stage and job descriptions reviewed to close the gap between ideologies and expectations?

#### Development, support, and training opportunities:

Only one participant, Participant E (CEO) did not answer this question. He did not feel "knowledgeable or equipped with enough data to answer this".

Of the remaining seven (7) participants, all referred to Level 3 to Level 6 Polytechnic, University and PTE qualifications.

Whilst there is no formal qualification in New Zealand, yet, relevant to the EA role the closest recommended by recruiters would be the National Diploma in Business Administration (Level 5). Postgraduate study, specific to the industry, is yet to be written. From the Hay report (2019), it showed only 17% of EA's had any form of post-graduate qualification.

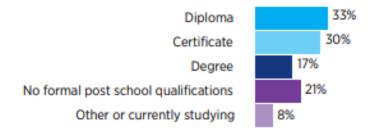


Figure 4 "What it takes to be an EA". A report commissioned 2019, Hays.net.nz

Two EA's referred to conference attendance as a valuable part of professional development. They saw the networking opportunities as important as the actual content of the conference.

Participant F noting:

"Sometimes the opportunity to learn comes from peers and colleagues. Never be afraid to ask questions - lots of them!"

In stark contrast, Participant C (EA) said:

"I know lots of businesses encourage their PA's / EA's to go to conferences, but I do not think these are useful - they can be quite contrite. I would like to see people in these positions encouraged to do a post-graduate study or extend their current qualifications." The one CEO that answered this question said:

"There are so many. I have established a global network of support and opportunity for administrators around the world. We run courses in everything from Managing your Day, how to deal with Imposter Syndrome to How to Avoid Decision Fatigue and so and so on. These are all valuable skills needed by the modern-day administrator. These are only pieces of a much larger picture. In 2014, the American Society of Administrative Professionals proved beyond doubt that Assistants are the new middle management. To take advantage of the new breed of Assistant, both companies and the Assistants themselves need to understand that the role has been reinvented. We are working to find ways of recognising the required skillsets in the form of tertiary and postgraduate qualifications."

In my own experience, I am frustrated by the lack of professional development for EA's, particularly when I first joined the industry. Looking back, I was astounded. It felt as if I been thrown in at the deep end (having never been an EA) and left to sink or swim. I believed that either the recruitment agency or the employer, would have provided me with some basic training as they both knew I had not come from an administrative background. Having come from emergency services and I was trying to map how those skills aligned with those of my perceived EA role. When I asked my manager, he shrugged his shoulders, when I asked other EA's, they said "you learn as you went".

As a nurse, I received training and ongoing training specific to the industry. As medicine advanced, so did the training available, and the qualifications were developed to recognise this shift. Whilst not during my tenure as a nurse, the past 15 years have seen the introduction of the Master of Health Sciences MHSc which allows graduate nurses to further enhance their professional practice. The MHSc can be further endorsed across industries such as Aeromedical Retrieval and Transport, Aviation Medicine, Bioethics, Health Management, and the list goes on.

Paramedicine was the same. When I first started in the industry, the industry was selfregulated, and qualifications were developed "in-house". Advances in both emergency pre-hospital care and indeed the expectations of the public, have seen a robust qualification framework developed along with a registration system that allows monitoring, audit, and professionalism increased in that industry. I appreciate that if we take a hybridity approach to the EA role, then a "one-size-fits-all" qualification may not be feasible. However, I believe there is space to grow the qualification framework and encourage EA's and their employers and the recruitment agency industry to contribute to the development.

#### Criteria and key descriptors of the role:

No theme per se was identified from this question. All the participants were aware of some form of evaluation process in determining salary bands based on role descriptions.

The CEO's relied on recruitment agencies to provide support, writing job descriptions, evaluating the descriptors, and understanding current pay scales relevant to a particular sector.

The only group that understood the intricacies and tools used in the evaluation were the two (2) HR recruitment managers, citing companies like Strategic Pay and Payscale.com (<u>https://www.payscale.com/research/NZ/Country=New\_Zealand/Salary</u>) were widely used, with larger organisations using adaptations of these resources relevant to their industries.

None of the participants were aware of any specific data collection or reporting to capture specific trends.

Participant B (EA) expressed concern about the transparency of the process stating: "Currently believe this is inequitable. Too often there is the perception of the role without fully understanding what it is the business needs. There are so many variables now - it is difficult to accurately quantify the role. Perhaps a skills matrix might be useful to better define the role?"

#### Participant C (ex. EA) supporting that notion by saying:

"Believe there is still some work to be done to create a robust evaluation of the role. With that said - we need to change the way advertise these roles. They are so genericneed a more holistic approach. There has been a shift towards recognising more soft skills like understanding characters, etc. National bodies like AAPNZ could provide useful support - matrices with skills sets/levels of knowledge, etc"

I have always been curious about the evaluation tools used to determine salary against skill. There seems to be a definitive matrix that clearly outlines clear criteria. I am

aware that financial authority and people management are influential in establishing salary and grading. However, there are requirements of the EA role that do not involve people management or financial responsibility but are equally important for the survival and functioning of a business that does not seem to be remunerated. This is an area of further investigation.

#### **Executive Assistant title:**

All eight participants had very strong views.

Participant A (EA): "Yes. I'm really proud to be called an EA."

Participant B (EA):

"Any title needs to fit the role. Once you work out what the key tasks are - then you can fit a name around them. With that said - it is all administrative. Therefore, the role should be xxx Administrator. It can be Executive, Senior, Junior, whatever. Helen Clark was an Administrator at the UN - could not get more senior than that!

It is a bit like an Accountant - they are an accountant because that is the field of expertise. You can add prefixes or suffixes to give the role prestige but at the end of the day, they are still an accountant.

There is currently 160+ titles for the role EA across the world. We are keen to see that change."

Participant C (ex. EA) "Assistant is wildly demoralising so I would love to see it dropped. Business Partner maybe? Executive Officer maybe?"

Participant D (Recruitment Manager)

"Probably not - as I said before - when you actually get down to talking with CE's GM's, etc - they want a senior business partner/study manager: someone who is a high-level thinker and doer.

"Do not know what the best title might be. We are starting to work with individuals once they are in the role to then right their JD's and find the most appropriate titles. The word Partner is starting to appear in a lot more, though."

#### Participant E (CEO)

"We had a number of these roles in a 1600 employee business. When they met once a week together for lunch and networking, I referred to it as the Management Meeting.

The role has the ability to significantly impact the performance of the Executive by which meetings or individuals they favour, provide access, or prioritise. I've seen this power used incorrectly and wielded like a stick or abused.

The title put in a positive frame is a good one. The question could be interrupted to suggest it does not carry enough prestige. It is, in itself, an executive position and being able to operate within the company of highly capable, intellectual, and powerful individuals. That an EA is themselves able to assist in the performance of these individuals gives the current title significant weight - just my personal opinion."

#### Participant F (EA)

"In some cases, and in some cases - not. It depends on the needs of the business. Personally - I do not like the word Assistant. I think Administrator encompasses the role better."

#### Participant G (CEO)

"My work with the International Administrative Professionals body is currently looking at what is an accurate title. There are currently 160+ different names for admins. Whilst some are accurate - some are wildcards. For example, the EA to the head of Google is now called Chief of Staff. They have no HR responsibility as such.

We know the term partner is being used more and more and that does fit to a degree but it is what you fit with it - Administrative Partner, Administration Partner. You then need to acknowledge seniority in a team situation. So where does it stop?"

#### Participant H:

"EA's are more Operations Managers / Leaders and I think it's time the role titles reflected this. Let's face it they have to be proficient and efficient in every skill from A to Z and plus some. They must be technical, operational, and strategic, people centric, business centric, and agile. That's not an EA as we know/knew it – it's an OP manager of today."

# 5.4 Chapter Summary

The comments made by the participants indicate a strong understanding of change in the EA role, thus recognising a need for a title change to better reflect that change. What remains unclear is what an accurate title would be?

It was a after the interviews, that I became aware that there was a missing link to all the information gathering. The phenomenon was not only about the knowledge and skill changes being experienced and witnessing but also the professional identity that was changing. As I have mentioned already, my role title has shifted from EA to Executive Administrator to Executive Business Support Partner, whilst some basic tasks have remained there has been a transition to providing leadership, strategic thinking, and study management. The investigation around professional is a piece of work in itself and would be interesting to follow up at another time.

# **Chapter 6: Discussion**

I have learnt that I am a hybrid professional and that when my identities are isolated by the boss that tells me to or a study that requires it, I get restless and frustrated. That restlessness and frustration can lead to becoming disengaged and therefore reluctant to complete any given task or to fully engage in wider discussions. I work best when I am using all my identities across multiple layers and platforms. I get immense professional satisfaction from identifying gaps by talking and working with multiple stakeholders and then building solution packages that meet everyone's needs. Not only at a business improvement level but a people satisfaction level as well.

#### **Global connections**

There is increasing support from authors like Dr Sarabeth Berk to suggest that EA's are hybrid professionals and no longer singular identities. They are a mix of multiplicity and hybridity brought about by the need to perform exceptional feats, drive new values, and deliver all types of work that cannot be boxed into any one nomenclature or title. Similar to the time in and around the Global Financial Crash, economic changes brought about by COVID-19 have seen some middle management roles being disestablished in some businesses and the expectation falling to those left to pick up tasks and responsibilities of those who have left.

The work that Dr Berk et.al have completed illustrates that by blending innovative strategy and design systems you can rethink old models. This is not just limited to processes or technological systems but to roles and the way people perform in those roles. By working closely with those in a role to document how they do their role alongside mapped key outcomes, it becomes clearer that not every job is the same for every industry. An EA or administrator in a hospital may not perform at the same level or have the same mandate as an EA working at a globally recognised IT company for example.

The size and management structure of a company is also an important component to the outcome of any role discussion. A recent conversation with a senior manager in my organisation, highlighted that he did not understand the role of an EA because he did not know what they did other than what was written in the job description. In a large organisation, the role of the manager is to provide strategic direction to ensure a prosperous future for that organisation. They employ others, usually recruited by an HR department, to carry out the tactical and operational components requirements of implementing that strategy. It is, therefore, not surprising that a senior manager is unfamiliar with the actualities of how a role is executed. The role is words on paper and not experienced by the senior manager.

#### **Chapter Summary**

Throughout this study, I have read many books about change and listened to numerous podcasts on best practices, change management, and professional identity. There have also been recent global events that have impacted our landscape and businesses. But through all this, there has been a common thread. That is, nothing is the same as it was a year ago or even a month ago. Change is constant and to be successful, we have to keep ourselves open to the changes and make the best of what we are given.

# **Chapter 7: Recommendations**

The journey of the research I have undertaken, to this point has been a long and fluctuating landscape. What has emerged has changed my focus and intent several times. Despite these distractions, I keep coming back to my original concept: to capture the change in the industry and to lay some further paving to see the industry recognised as a professional practice with highly skilled, professional practitioners influencing best practice.

## 7.1 What can EAs do?

The industry is changing. For some the change is daunting, for others the changes and the opportunities that bring cannot come soon enough (Kislik, 2018). There is a middle ground of incumbents who seek acknowledgment and recognition for the work they do that contributes to the overall success of a business. They do not wish to be influencers or change-makers but are content just to know they have made a difference.

It is important though whichever camp the EA is seated in, that they remain open to learning, developing new skills, and learning more about the environment around them. Their knowledge and experiences are valuable learning tools for any company or organisation and will form the basis of improvements going forward.

Networking with others in the industry, and outside the industry, is a useful way to build competency and understanding of business, business trends, and business gaps and opportunities. Professional bodies such as the AAPNZ offer not only access to resources but are the best vehicle to facilitate bigger conversations and brainstorming.

## 7.2 What can Leaders do?

Engage with those staff in the roles. Ask what it is they see could change to effect best practice not only for the organisation but for the role as well.

Support development into other areas of the business. Encourage EA's to broaden their skill set by developing not just in the traditional areas of practice but broaden to encompass the area of the business they may be working in. For example, the EA to the Chief Financial Officer could develop some accountancy or audit skills rather than how to take more meaningful minutes at a meeting or the EA to the Head of Human Resources could be developed in understanding the Employment Act or writing role descriptions /job evaluations. This not only adds another dynamic to a team but

contributes to efficiency in the business and builds competency in the EA. Understanding the business as much as the leadership team is a valuable attribute for any good EA to have.

## 7.3 What can my organisation do?

Whilst not all the participants were from within the tertiary sector, my observations from within this environment are that there is an opportunity to partner with industry bodies such as AAPNZ to develop robust and relevant qualifications for the administration industry. I understand that timing is everything and the merging of 16 ITP's into one and the need to align curriculum across the country may not necessarily prove to be the best time. As I have discussed, with change comes opportunity and I believe there is space within micro-credentialing and in the work-based learning, sector to offer a suite of qualifications that would add legitimacy and measurement to the role of administrators and EA's. Micro-credentialing is bite-sized chunks of learning and is described by NZQA as "a certified achievement of a coherent set of skills and knowledge specified by a statement of purpose, learning outcomes, and a strong evidence of need by industry, employers, iwi and/or the community....." (https://www.nzqa.govt.nz).

This legitimacy and measurement could be delivered in a way that leads to certification, like nursing or paramedicine, and offer bolt-on learning in areas of specialty, e.g., HR, accounting, policy writing, health and safety.

This will require careful and considered mapping in consultation with industry bodies and those in the roles. There is a lot of work to be done to ensure alignment with the New Zealand Qualifications Framework (NZQA) and industry, but it is not unachievable.

#### 7.4 What can the industry body do?

Professional industry bodies like the AAPNZ and IAAP are in prime and privileged positions to initiate not only co-ordinated change but to influence the depth of change. They can use their networks, members, and partnerships to initiate conversations with Universities, Polytechnics, and other accredited learning institutions to develop credentialed curriculum applicable to the industry. Using a graded structure that becomes globally recognised,

I witnessed the same changes and growth in nursing and paramedicine, particularly paramedicine. From the time I started in the early 1980s with St John where qualifications were taught and issued by the ambulance service, the industry has now

become regulated, monitored, and NZQA recognised. Qualification frameworks now exist, and a regulatory body is in place. Annual certification is a requirement of practice and a central register of personnel is held.

Whilst each country has slight variances in standards of practice in nursing and paramedicine, the qualification is generally the same across the world. If moving to another country, to practice in that country usually requires a short period of supervised training and practice to ensure meeting that country's standard. It does not require total retraining.

I would challenge that by introducing a structured process and centralised industry body standards, the administration industry could operate at an even higher level of best practice and maintain consistency and professionalism.

## 7.5 Summary

I started this piece of work by asking the question "how we can build readiness for the emerging future role?" I believe that the answer lies in ongoing open and honest conversations acknowledging the contribution that EA's and other administrators make to an organisation. It needs organisations, Executive staff, Human Resource departments, and other influencers to listen to those in the roles to ensure that the roles are described accurately and in line with function and expectation, not just generic words on a piece of paper.

I have been privileged to witness the change in two previous industries, nursing and paramedicine, and the acknowledgment of those industries moving from skilled labour roles to highly skilled professional practices. The change for administrators and EA's has already begun internationally and indeed, nationally. In August of this year, SEEK was advertising a Business Support Partner for a large legal company in Auckland. The descriptors in the role sought skills and attributes such as high level strategic and operational experience ranging from contributing to partners meetings, writing reports, and financial variance reporting to ensuring senior partners were apprised and prepared for client meetings. In essence, this was what would have been previously called an EA. Whilst there is some work still to be done on how the role is framed, there has been movement on the title at least.

# **Chapter 8: Critical Reflections (redacted)**

Hapaitia te ara tika pumau ait e rangatiratanga mo ngā uri whakatipu.

Foster the pathway of knowledge to strength, independence, and growth for future generations.

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