



Building A Strong EA–Executive Partnership: A Phased Approach to Creating Synergy Created by Peggy Vasquez

Trust isn't a switch. It's a muscle.

And like any muscle, it's built through consistent, intentional practice over time.

How to Use This Worksheet

This worksheet guides you through three phases of partnership development—from setting the foundation in your first 30 days to creating a truly synergistic relationship where the result is greater than the sum of individual efforts.

PHASE 1: FOUNDATION (Weeks 1-4) Understanding the basics: how your executive operates, communicates, and prefers to work.

PHASE 2: STRATEGIC ALIGNMENT (Months 2-3) Deepening understanding of what drives your executive and where you can make the most meaningful impact.

PHASE 3: OPTIMIZATION (Ongoing) Continuous improvement, defining success metrics, and evolving together.

How to approach these questions:

- Don't try to answer them all at once
- Schedule dedicated time with your executive for each phase
- Revisit and refine as you learn more
- Use this as a living document—return to it quarterly

PHASE 1 - FOUNDATION (WEEKS 1-4)

Setting the Groundwork for Trust & Alignment

The first phase is about understanding the basics: how your executive operates, communicates, and prefers to work. These questions establish the operational foundation of your partnership.



DAILY OPERATIONS & COMMUNICATION

1. What is your main focus for today?

2. What are your top three priorities for the week?

3. How do you prefer to communicate? (Email, Slack, text, in-person, etc.)

4. Do you prefer daily or weekly check-ins?

5. What meeting cadence works best for you?

6. How much buffer time do you need between meetings?

7. Do you want agendas in advance? If yes, how far in advance?

PREFERENCES & BOUNDARIES

8. Which meetings should never be moved?



9. What tasks should I always handle vs. what you prefer to own?

10. How should urgency be communicated?

11. What past support frustrations should I avoid repeating?

STRATEGIC PRIORITIES & CONCERNS

12. What's crucial to your day, week, month, and year?

13. What are your top concerns right now? (ask in weekly meetings)

14. What are you most concerned about? (ask in daily or weekly meetings)

15. What's on your mind? (ask in daily or weekly meetings)

VALUE CREATION & IMPACT

16. How can I better support you?



17. What's one thing I could do this week to reduce your stress?

18. Where do you see the biggest opportunities for me to add value?

19. What outcomes should I own vs. support?

20. What should my focus be in the first 30/60/90 days?

30 days:

60 days:

90 days:



PHASE 3 - OPTIMIZATION (ONGOING)

Building Synergy & Long-Term Partnership

This phase is about continuous improvement and deepening the partnership. These questions help you understand success metrics, leadership alignment, and how to evolve together.

DEFINING SUCCESS TOGETHER

21. How do you define success for our partnership?

22. If there was one thing you wish I knew or could do, what would it be?

LEADERSHIP & CULTURE ALIGNMENT

23. How would you describe your leadership style?

24. What qualities do you value most in an EA?

25. How do you see my role contributing to team culture?



CLOSING - KEY PRINCIPLES

REMEMBER:

Trust grows in layers.

Start small. Over-communicate. Share context. Invite questions. Celebrate progress.

Partnership isn't a destination—it's practiced daily, in small moments of mutual trust.

Your role isn't only to take work off their plate.

It's to guide them into trust by:

- ✓ Making it easy to say yes
- ✓ Creating visible wins
- ✓ Reducing risk emotionally
- ✓ Being consistent before you try to be fast
- ✓ Building safety before you build speed

Trust isn't rushed. It's engineered through reliability.

And when it clicks, the partnership becomes transformational.

Notes/Reflections

Want more resources for building powerful partnerships?

Visit: www.peggyvasquez.net

And check out Peggy's best-selling book: Not Just An Admin

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