

Upgrade Program Team Plan

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Introduction

This document is part of a series of upgrade plans for every [area](#) of your life. It's broadly designed for a single, middle-class, 30-something living in a major city in a developed country.

It's helpful to think of the concept of a "Personal Team". With a Personal Team, many individuals help you achieve what you value the most. Some teams are just you and a handful of people and some are literally hundreds of people that somehow need to work together smoothly. Even if you have 10+ years building and managing teams, you may have a lot to learn through trial and error before you get your optimal Personal Team down. It's surprisingly difficult.

Please go to "File" > "Make a copy" and make a copy of it for yourself. Then fill it out section by section according to your particular needs and circumstances. Perhaps add sections or items, delete them, change the order, and so on.

Your aim should be to make the plan as applicable and useful to you as possible. You should not follow the plan blindly—think it through for yourself.

Note that this process might be challenging. You might need to teach yourself things you aren't very knowledgeable about yet. You might feel like you need to do preliminary work in a different life area first. That's okay. Figure out broadly what makes sense for you, operationalize that understanding as specific actions in the [Actions](#) section, and then do them.

If it feels overwhelming, just start with the parts you find most valuable and do what you can. Tackle the rest over time. It may also help to set aside a dedicated [day](#) to work exclusively on this by yourself or with friends. Or you may choose to enlist an [UP Coach](#) to co-design and execute this plan alongside you.

Epistemic Status

This is an overview of how confident the principal [author](#) is in this plan.

- Generally high confidence in plan
- Based on 25+ years of recruiting and managing 2-40 person teams across 25+ organizations, and recruiting and managing ~10 executive, personal, and/or virtual assistants over 15+ years
 - Reviewed approximately 10,000+ applicants and worked with approximately 150 directly
 - Used over 100+ recruiting channels (e.g., direct, referrals, social media, platforms, agencies, and headhunters)

Objectives

Decide what objectives you have for this plan and rank them in order of importance. Below are some sample objectives.

1. Build optimal short-term Personal Team
 - a. Outsource 20%+ of current workload
2. Build optimal long-term Personal Team
 - a. Outsource 33%+ of current workload

Metrics

Decide what metrics you will use to evaluate the effectiveness of this plan. Also include the frequency in which you'll evaluate those metrics. For example, ad hoc, once, hourly, daily, weekly, monthly, quarterly, annually or per decade. Below are some sample metrics.

- Team Rating: How would you rate your team, on a 1-10 scale?
- Annual Hours Allocated to Goals
- Annual Net Change in Hours Allocated to Most Important Goals
- Annual Total Compensation Paid
- Successful Autonomous Task Completion Rate (SATCR)
 - Good Performers: 80%+ Task Completion Without Corrective Feedback
 - High Performers: 90%+ Task Completion Without Corrective Feedback
 - Highest Performers: 98%+ Task Completion Without Corrective Feedback
- Estimated [Client Name] Equivalent Hours Saved Every Week

Values

List all of your relevant values and rank them in order of importance. Below are some sample values.

1. Effectiveness (“everything gets done”)
2. Efficiency (“everything gets done inexpensively in terms of time and money”)

Value Analysis

List and then analyze all of the costs and benefits of this plan. Potentially also estimate expected value, cost-benefit, return on investment, and/or net present value.

- Time costs: 1 - 10,000 hours
- Financial costs: \$0 - \$10,000,000 dollars (e.g., salaries, recruiters, agencies, application tracking systems, etc.)

- Benefits: \$X in extremely large objective and subjective benefits

Strategies

Decide on your high-level strategies for achieving your objectives. Below are some sample strategies.

Key People

- Do the design, recruiting, onboarding, and team management yourself
- Outsource some or most of the work to staffing or recruiting agencies
- Outsource some or most of the work to assistants

Personal Team Design

Describe your current and optimal Personal Team.

Team Name

- [Team Name]

Primary Team Members

- [Name] (UP Advisor or UP Coach): strategy, ad hoc support in difficult situations, team coaching - [Number] hours/week
- [Name] (UP Senior Partner or Chief of Staff): strategy, ad hoc support in difficult situations, team management - [Number] hours/week
- [Name] (UP Partner or Executive Assistant): operational, administrative, research, and ad hoc support - [Number] hours/week
- [Name] (Role): [Responsibilities] - [Number] hours/week
- [Name] (Role): [Responsibilities] - [Number] hours/week
- [Name] (Role): [Responsibilities] - [Number] hours/week

Secondary Team Members

- [Members]

Tertiary Team Members

- [Members]

Team Contact List

Develop your Team Contact List. See [UP Team Contact List](#) for an example.

Team Dashboard

Develop your Team Dashboard. See [UP Team Dashboard](#) for an example.

Team Hierarchy

Describe the organizational structure of your Personal Team. Below is an example structure.

- [Client] is #1
 - Personal Team Manager is #2
 - All others are #3 and below

Team Member Types

Consider which types of team members you'd like to include in your Personal Team. Below are sample potential categories of team members.

- [Acquaintances](#): people that you have met but do not know well
- [Advisors](#): individuals with more and deeper knowledge in a specific area and usually also includes persons with cross-functional and multidisciplinary expertise
- [Aestheticians](#): licensed professionals who are experts in maintaining and improving skin, including treatments such as laser hair removal, permanent makeup application, light chemical peels, eyelash extensions, microblading, and electrology
- [Aides](#): individuals who help someone important, such as a member of a government or a military officer of high rank
- [Babysitters](#): individuals who temporarily care for a child or children
- [Board members](#): individuals who are members of a group to supervise the activities of an organization, which can be either a for-profit or a nonprofit organization such as a business, nonprofit organization, or a government agency
- [Bodyguards](#): safety officers, government law authorization officials, or fighters who ensure an individual or a group from risk and danger
- [Bosses](#): people who are in charge of the organization(s) and who tell others what to do
- [Butlers](#): people who works in a house serving and is a domestic worker in a large household
- [Career advisors](#): people who give information about education and/or work opportunities that also help with competencies to children and youths
- [Chauffeurs](#): people who are employed to drive a passenger or company's luxury motor vehicle such as a large sedan or limousine

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- [Chefs](#): trained professional cooks who are proficient in all aspects of food preparation, often focusing on a particular cuisine
- [Chief of staff](#): coordinators of the supporting staff or a primary aide-de-camp to an important individual, such as a president, or a senior military officer, or leader of a large organization
- [Cleaners](#): industrial or domestic workers who clean homes or commercial premises for payment
- [Coaches](#): experienced people who provide training and guidance to support the client in achieving a specific professional or personal goal
- [Colleagues](#): associates or coworkers who are typically in a profession, civil, or ecclesiastical office and often of similar rank or state
- [Consultants](#): professionals who provide expert advice in a particular area such as business, education, law, regulatory compliance, human resources, marketing (and public relations), finance, health care, engineering, science, security (electronic or physical), or any of many other specialized fields
- [Contractors](#): people who are responsible for the day-to-day oversight of a construction site, management of vendors and trades, and the communication of information to all involved parties throughout the building project(s)
- [Counselors](#): individuals who are trained to listen to people and give them advice about their problems
- [Dentists](#): people who are specialized in dentistry that provide oral health services
- [Dermatologists](#): specialist medical doctors who manages diseases related to skin, hair, nails, and some cosmetic problems
- [Domestic helpers](#): servants who are paid to perform menial tasks around the household
- [Employees](#): people who work for another person or a business firm for pay
- [Executive assistants](#): individuals whose job is to help an executive or important manager to do their work
- [Exercise physiologists](#): individuals who study the effect of exercise on pathology and the mechanisms by which exercise can reduce or reverse disease progression
- [Facialists](#): individuals who performs skin care treatments for the face, usually including steam, exfoliation (physical and chemical), extraction, creams, lotions, facial masks, peels, or massage
- [Family members](#): people who are related either by consanguinity (by recognized birth) or affinity (by marriage or other relationship)
- [Family therapists](#): qualified people who do psychotherapy to families or couples aiming to solve family-related issues
- [Financial advisors](#): professionals who suggest and render financial services based on the clients' financial situation
- [Friends](#): people who are attached by feelings of affection or personal regard
- [Hairdressers](#): individuals whose occupation is to cut or style hair in order to change or maintain a person's image
- [Housekeepers](#): individuals responsible for the supervision of a house's cleaning staff

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- [Interns](#): advanced students or graduates in a professional field who are gaining supervised practical experience
- Lawn service providers: companies or individuals who provide proper maintenance of yards and other green spaces where grass, trees, and living plants grow
- [Lawyers](#): professionals who represent clients in a court of law or to advise or act for clients in other legal matters
- [Masseuses/masseurs](#): individuals professionally trained to give massages
- [Mentors](#): individuals who give younger or less experienced people help and advice over a period of time
- [Messengers](#): people or companies that deliver messages, packages, or mail, might also be known as couriers
- [Nail technicians](#): individuals whose occupation is to style and shape a person's nails
- [Nannies](#): people who provide child care
- [Nutritionists](#): people who advise others on matters of food and nutrition and their impacts on health
- [On-demand drivers](#): people who drive the vehicles
- [Outsourcing individuals](#): individuals who are paid to have part of a company's work done
- [Partners](#): individuals who share or are associated with one another in some action or endeavor
- [Personal assistants](#): individuals who assist a specific person with their daily business or personal tasks
- [Personal shoppers](#): people, often store employees, whose job is to assist shoppers in selecting clothing or other merchandise
- [Personal stylists](#): people who advise individuals on new fashion trends, clothing styles, colors, and make-up
- [Personal trainers](#): individuals who have earned a certification that demonstrates they have achieved a level of competency for creating and delivering safe and effective exercise programs for apparently healthy individuals and groups or those with medical clearance to exercise
- [Philosophical counselors](#): practitioners of philosophical counseling who offer their philosophical counseling or consultation services to clients who look for a philosophical understanding of their lives, social problems, or even mental problems
- [Physicians](#): professionals who practice medicine, which is concerned with promoting, maintaining, or restoring health through the study, diagnosis, prognosis, and treatment of disease, injury, and other physical and mental impairments
- [Plastic surgeons](#): surgeons whose specialty involve the restoration, reconstruction, or alteration of the human body
- [Publicists](#): people whose job is to generate and manage publicity for a company, a brand, or public figure – especially a celebrity – or for a work such as a book, film, or album
- [Registered dietitians](#): experts in dietetics (human nutrition and the regulation of diet) who alter patients' nutrition based upon medical condition and individual needs
- [Relationship therapists](#): licensed individuals who listen, respect, understand, and facilitate better functioning between those involved in relationship therapy

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- Romantic partners: individuals who share or are associated with one another romantically
- [Secretaries](#): individuals whose work consists of supporting management, including executives, using a variety of project management, communication, or organizational skills
- [Security consultants](#): alarm systems advisors to prevent burglaries
- [Sex therapists](#): certified individuals who help to resolve various sexual issues such as concerns about sexual desire or arousal, concerns about sexual interests or sexual orientation, sex addiction or compulsive sexual behavior, erectile dysfunction, premature ejaculation, trouble reaching orgasm (anorgasmia), painful intercourse (dyspareunia), intimacy issues related to a disability or chronic condition
- [Sexual surrogates](#): practitioners trained in addressing issues of intimacy and sexuality
- [Shamans](#): practitioners of shamanism, a magico-religious practice involving animism, faith healing, spiritualism, spirituality, and traditional medicine
- [Teachers](#): people who help students to acquire knowledge, competence, or virtue
- [Team members](#): individuals (human or non-human) who are members of a group working together to achieve their goal
- [Therapists](#): individuals specializing in the therapeutic medical treatment of impairment, injury, disease or disorder
- [Tutors](#): people who provide assistance or tutelage to one or more people in certain subject areas or skills
- [Training partners](#): people who are partnering in the process of teaching or developing skills or knowledge for themselves or others
- [Virtual assistants](#): self-employed individuals who provide professional administrative, technical, or creative assistance to clients remotely

Core Team Formation

Decide on which core roles you'd like to recruit first. Be very careful with your first hires. The adage that "A players hire A players" and "B players hire C players" and so on is often true. These core team members may end up managing your future recruiting for you.

Below are a few common approaches to building your core team.

1. **Full-Time Chief of Staff:** Set up a full-time "right-hand person" for \$37,500-\$300k/year (50 hours/week or 2,500 hours/year at \$15-\$120/hour). This person would know you and your preferences exceptionally well and handle both high-level and low-level tasks for you with substantial autonomy. This would normally be a professional Chief of Staff, Executive Assistant, Personal Assistant, Administrative Assistant, Lifestyle Manager, Special Projects Director or Head of Household. This may also sometimes be a recent college graduate you take under your wing to mentor or a semi-retired executive who wants to serve in a support role for someone they respect.
2. **Part-Time Chief of Staff:** Set up a part-time "right-hand person" for \$18,750-\$100k/year (20 hours/week or 1,000 hours/year at \$15-\$100/hour). This person would know you and

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your preferences well and handle both high-level and low-level tasks for you with substantial autonomy. This would normally be a professional Chief of Staff, Executive Assistant, Personal Assistant, Administrative Assistant, Lifestyle Manager, Special Projects Director or Head of Household. This may also sometimes be a recent college graduate you take under your wing to mentor or a semi-retired executive who wants to serve in a support role for someone they respect.

3. **Full-Time Virtual Assistant:** Set up a full-time Virtual Assistant (VA) for roughly \$20k-40k/year (40 hours/week or 2,000 hours/year at \$7-20/hour). This person would know you and your preferences exceptionally well and handle low-level tasks for you with some autonomy. This would be a dedicated VA from a service or someone who wishes to work freelance.
4. **Part-Time Virtual Assistant:** Set up a part-time Virtual Assistant (VA) for roughly \$3.5k-\$7.5k/year (10 hours/week or 500 hours/year at \$7-15/hour). This person would handle low-level tasks for you with very little autonomy. This would be a dedicated VA from a service or someone who wishes to work freelance.

Team Compensation

Decide on the compensation model you will use for your team members. See [UP Client Compensation Model](#) for an example.

Be mindful of the difference in pay based on location. There may be a 10x difference in expected compensation whereas the quality is sometimes equivalent. So you don't *always* "get what you pay for" although it's still a useful adage to keep in mind as you *usually* do. Also keep in mind that the best candidates may earn significantly more than even the high categories below.

- [Team Member #1] Salary:
- [Team Member #1] Bonuses:
- [Team Member #2] Salary:
- [Team Member #2] Bonuses:
- [Team Member #3] Salary:
- [Team Member #3] Bonuses:

See this [analysis](#) of Chief of Staff rates.

See below for example Executive Assistant rates.

- **United States-based Executive Assistant¹**
 - Low: \$42,000/year or \$21/hour

¹ [Average Executive Assistant Salary](#)

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- Average: \$61,000/year or \$30.5/hour
- High: \$86,000/year or \$43/hour
- **Stanford University Executive Assistant**
 - Low: \$51,600/year or \$25.8/hour
 - Average: \$72,000/year or \$36/hour
 - High: \$93,000/year or \$46.5/hour
- **Philippines-based Executive Assistant²**
 - Low: ₱330,367/year or \$6,444/year or \$3.2/hour
 - Average: ₱457,346/year or \$8,977/year or \$4.3/hour
 - High: ₱569,227/year or \$11,103/year or \$5.6/hour
- **India-based Executive Assistant³**
 - Low: INR 99,320/year or \$1,319/year or \$0.7/hour
 - Average: INR 400,000/year or \$5,310/year or \$2.7/hour
 - High: INR 2,000,000/year or \$26,552/year or \$13.3/hour
- **Indonesia-based Executive Assistant⁴**
 - Low: Rp42,840,000/year or \$2,989/year or \$1.5/hour
 - Average: Rp84,000,000/year or \$5,860/year or \$2.9/hour
 - High: Rp129,600,000/year or \$9,041/year or \$4.5/hour

Team Sourcing

List the sources you'll use to find your Personal Team members. See the [UP Recruiting Channels Database](#) for examples. Many of these sources are potentially useful, but may produce very poor candidates interspersed with good candidates. It often takes weeks or months to find an ideal candidate. In general, you should take the time necessary to find the best quality candidates you can. If you rush it, you'll usually end up having to let people go in the future.

Also keep in mind your normal cost-per-hire.⁵ In a corporate environment, this might be \$4,700 (including hard costs) to hundreds of thousands of dollars (including soft costs) per hire.⁶ Most recruiting agencies will take 10-30%⁷ of the new hires' first year compensation.

Before you begin a formal search, you might consider posting on your social media accounts to see if anyone in your network would be a good fit or recommend someone. This might be the fastest way.

² [Executive Assistant, Current Real Minimum Wages Rates](#)

³ [Average Executive Assistant Salary in India](#)

⁴ [Executive Assistant Average Salary in Indonesia 2022](#)

⁵ [Cost-per-Hire Standard | SHRM](#)

⁶ [The Real Costs of Recruitment](#)

⁷ [How Much Do Recruitment Agencies Charge? - Hiring People](#)

Team Advertisements

Write up your Personal Team advertisements to use with agencies, social media, and friends and family. For social media, it helps to include a well-designed visual. An example advertisement is included below.

Hiring Remote Executive Assistant

Our client is looking for a full-time, remote Executive Assistant to support him in his day-to-day activities. As his Executive Assistant, you will increase his strategic focus by helping with the smooth running of his personal and professional work. His aim in life is to [Description]. Your support would be life changing for him.

Criteria:

- Rational*
- Sharp*
- Formidable*
- Conscientious*
- Growth-oriented*
- Autonomous*
- Excellent English*

This role requires a lot of deep thought and self-discipline, but it's also flexible, fun, and deeply rewarding. The client is kind and caring, but does have high standards. You'd be challenged to grow every day.

Generous compensation depending on capabilities. We are looking to hire immediately, but have some flexibility if you have existing responsibilities to manage before starting work.

Please see the job description below: [Link].

If this sounds like the right role for you, please apply here: [Link]. Please mention the typo you saw in this ad. We'll respond very quickly if we see a fit.

Team Job Descriptions

Write out your Job Descriptions for each of the roles you'd like to recruit for, usually in a separate document. Be very specific, especially around exactly what skills, experience, and personality you're looking for. See [UP Team Job Descriptions](#) for examples.

Team Hiring

Develop your hiring process. See below for a simplified example or [UP Team Hiring Process](#) for a more detailed example, which includes example [UP Team Candidate Interview Questions](#).

1. Process applicants based on fit with Job Descriptions
2. Conduct interviews with qualified applicants
3. Select top 2-3 candidates for work trials
4. Conduct candidate work trial and evaluate performance as they go
5. Hire the best candidate for each role
6. Repeat process for each additional team member

Team Candidates

Write down your high-level thoughts on each candidate, including links to their application materials. You can also do this in a separate document or spreadsheet.

- [Candidate #1]:
- [Candidate #2]:
- [Candidate #3]:

Team Onboarding

1. Warmly welcome the team member to your Personal Team on a trial basis
2. Provide account access as needed
3. Provide a basic overview of strategic priorities and current tasks
4. Train them on your [Team Operating Guidelines](#)
5. Train them on any role-specific needs
 - a. Consider requiring your Chief of Staff to complete a relevant training program (e.g., [Becoming a Chief of Staff](#), [Certified Chief of Staff & Master Chief of Staff Program](#), [Leadership and Management Skills For Business - Managing Employees](#), [On Deck Chief of Staff Academy](#), [The Chief of Staff KickStart](#), etc.)
 - b. Consider requiring your Executive Assistant to complete a relevant training program (e.g., [Executive Assistant Skills](#), [Introduction to Administrative Professional Jobs](#), [Partnering with Your Boss: Strategic Skills for Administrative Professionals](#), [Professional Administrative Certification of Excellence \(PACE\)](#), [The Power EA International Masterclass](#), etc.)
6. Be available for a lot of 1-on-1 communication for the first few weeks until they get fully integrated
7. Note and address any concerns with their performance during these 1-on-1s and/or in their [UP Notes](#)
8. After the successful conclusion of their trial, offer them a formal position

Team Management Policies

Write out your management and operating guidelines, policies, and procedures. This is generally done in a separate document which you share with all team members. See [UP Team Guidelines](#) as an example.

These are the most critical we suggest you strictly follow:

- All team members must accurately log hours worked in the [Team Name] Team Work Record on a daily basis
 - Alternatively: All team members must use screen tracking software to verify time spent and overall productivity (e.g., [Insightful](#))
- All team members must review their hours worked on a daily basis with their manager
- All team members must log their successes, failures, insights, and feedback in their personal [UP Notes](#) and review with their manager during their weekly 1-on-1s

Note a common failure mode for people who aren't used to team management is that they expect their new team members to immediately deliver value roughly equivalent to their personal quality level without much management. This rarely happens.

In practice, in the best case scenario most new hires require weeks to months of training and coaching before they perform exceptionally well. In most scenarios, the new hire won't perform as well as you'd like or expect. You'll then have to decide whether the ROI is net positive or not. If it isn't, you'll likely want to let the team member go and restart your search.

Human resources is a large, highly profitable industry for a reason—this plan can't circumvent all the issues inherent in finding and retaining aligned team members.

Team Security Policies

Write out all of the security policies and procedures you'll use with your personal team. Below are some sample policies and procedures.

- Our general security policies are:
 - Ensure all team members thoroughly understand these guidelines
 - Ensure all team members stay up-to-date with [Windows Security](#)
 - Ensure all team members use [ExpressVPN](#) when accessing organizational data
 - Perform yearly “red team” security audits
 - [Client] makes all judgment calls on team user permissions for each service the organization uses
- Our data classification policy is:

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- Restricted: This is the most sensitive data that could cause great risk if compromised. Access is on a need-to-know basis only.
- Private: This is moderately sensitive data that would cause a moderate risk to the organization if compromised. Access is internal to the organization or department that owns the data.
- Public: This is non-sensitive data that would cause little or no risk to the organization if accessed. Access is loosely, or not, controlled.
- Adjust settings/labels for [Google Drive](#) accounts and other shared information based on the data classification
- Our access policies are:
 - Our team policy for who can create, edit, share, and view is:
 - Person #1:
 - Person #2:
 - Person #3:
 - Our external sharing policy for contractors, investors, and clients is:
 - Entity #1:
 - Entity #2:
 - Entity #3:
 - Set [access levels](#) to files and folders in shared [Google Drive](#)
 - Set Google Drive [users' sharing permissions](#)
 - Create a restricted [Google Drive](#) that only [Client] has access to with the most sensitive organizational data
 - Do a [Security Checkup](#) on your account
 - Encrypt restricted files before uploading them
 - In general, don't allow full access to Gmail, Facebook, and other high-value services
 - Create dedicated Gmail accounts with limited access to organizational data for all team members
 - When team members leave the organization, they are required to delete all organization data within 72 hours
- Our password control policies are:
 - All team members must use [1Password](#) to create and share selected passwords
 - Change passwords immediately after each team member leaves
 - Change passwords every year
 - If needed, set expiration dates for sensitive data passwords
- Our team members can use either our organizational devices or their [own devices](#)
 - [Client] pays for and delivers all organizational devices as needed
 - If team members lose or damages an organization-issued or personal device that was used for business purposes, then [Client] pays for a replacement device

Team Financial Policies

Write out all of the financial policies and procedures you'll use with your personal team.

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- [Client] does not allow team members to have access to bank or financial accounts
- [Client] makes all judgment calls on each financial transaction completed on [his/her] behalf
- [Client] makes all payments to team members on the 1st of the month (or on the first normal business day after the 1st)
- [Client] ensures all team members are tax-compliant
- Create a dedicated debit card for <\$500 purchases and issue to selected team members (e.g., [Mercury](#))

Team Legal Policies

Decide how you will contract your team members. In some cases, you may need to have them sign employment agreements, contract agreements, non-disclosure agreements, and the like. Discuss with your lawyer—who is also a member of your Personal Team—if needed.

See [UP Independent Contractor Service Agreement](#) and [UP Independent Contractor Non-Disclosure Agreement](#) as potentially usable templates.

Actions

List the specific actions you will take to achieve your objectives. You should add these tasks to your project management system unless you are choosing to do them now. Below is an example sequence of actions you might take.

1. Create a [mental model](#) of your understanding of a Personal Team
 - a. Create a visual representation of it from memory without referencing the plan or outside sources of information
 - b. Create a new visual representation after thoroughly studying the plan and any relevant sources of information
 - c. Pay special attention to the improvements in the second version as incorporating those new insights may be crucial to the success of your plan
 - d. Share the final version with your Personal Team so you're all on the same conceptual page
2. Finish every section of this plan, including the [assessments](#), [tools](#), and [resources](#) below
 - a. If you have an effective Personal Team already, it's possible you can delegate much of the work to them
3. Revisit this plan every time you need to make a change to your Personal Team

Schedule

Decide on which days you will take which actions. You should add these dates to your calendar now.

- [Date]: Finalize plan
- [Dates]: Execute plan
- [Dates]: Review plan's outcomes

Predictions

Predict how well you will do in achieving your objectives.

- [Name]: I predict with [X]% confidence that I will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].
- [Team Member's Name]: I predict with [X]% confidence that [Name] will [Y] by [Z].
- Combined: We predict with an average [X]% confidence that [Name] will [Y] by [Z].

Outcomes

Objectively record how well you achieved your objectives.

- [Date #1]: [Outcomes]
- [Date #2]: [Outcomes]
- [Date #3]: [Outcomes]
- [Date #4]: [Outcomes]
- [Date #5]: [Outcomes]
- [Date #6]: [Outcomes]
- [Date #7]: [Outcomes]
- [Date #8]: [Outcomes]
- [Date #9]: [Outcomes]
- [Date #10]: [Outcomes]

Assessments

List all of the assessments you might take to understand how you're doing compared to your objectives.

- [The TRUSS Inventory](#): a team role assessment for service-oriented organizations, based on the Big Five model of personality

Tools

List all of the tools you might use to achieve your objectives. Below are some sample tools.

- [1Password](#)
- [AbstractOps](#)
- [Asana](#)
- [Ask Sunday](#)
- [Astrid](#)
- [Athena](#)
- [Athena](#)
- [Bananatag](#)
- [Basecamp](#)
- [Belay](#)
- [Bonusly](#)
- [Bountied Rationality](#)
- [Box](#)
- [Branch](#)
- [Brickwork](#)
- [Clockify](#)
- [CXO](#)
- [Descript](#)
- [Dropbox](#)
- [ExpressVPN](#)
- [Fiverr](#)
- [Get Friday](#)
- [Google Backup and Sync](#)
- [Google Drive](#)
- [Google Meet](#)
- [GoToMeeting](#)
- [Happy Scribe](#)
- [Hubstaff](#)
- [I Done This](#)
- [Insightful](#)
- [Invisible](#)
- [Jira](#)
- [Kanban Flow](#)
- [LastPass](#)
- [Leverage](#)
- [Lifesize](#)
- [Limeade](#)
- [Magic](#)

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- [Mechanical Turk \(MTurk\)](#)
- [Mercury](#)
- [Microsoft Teams](#)
- [MTurk](#)
- [Nifty](#)
- [Notion](#)
- [ODesk](#)
- [OneDrive](#)
- [Pareto](#)
- [Podio](#)
- [Prime Chief of Staff](#)
- [Quintessentially](#)
- [Ravenry](#)
- [Reedsy](#)
- [RemoteWorkmate](#)
- [Rev](#)
- [Skype](#)
- [Slack](#)
- [Sonix](#)
- [Smartsheet](#)
- [Sparrow](#)
- [Tandem](#)
- [TaskRabbit](#)
- [Tasks Assistant](#)
- [Teamviewer](#)
- [The Grand](#)
- [Time Doctor](#)
- [Timely](#)
- [Todoist](#)
- [Trello](#)
- [Tresorit](#)
- [UP Communication Plan](#)
- [UP Environmental Plan](#)
- [UP Exocortex Design](#)
- [UP Independent Contractor Service Agreement](#)
- [UP Independent Contractor Non-Disclosure Agreement](#)
- [UP Productivity Plan](#)
- [UP Team Candidate Fit Assessment](#)
- [UP Team Candidate Interview Questions](#)
- [UP Team Contact List](#)
- [UP Team Dashboard](#)
- [UP Team Guidelines](#)
- [UP Team Hiring Process](#)

- [UP Team Job Descriptions](#)
- [UP Team Meeting Notes](#)
- [UP Team Roles](#)
- [UP Record](#)
- [UP Tools](#)
- [Upwork](#)
- [VChief](#)
- [Verbit](#)
- [Virgin Pulse](#)
- [Whereby](#)
- [Windows Security](#)
- [Wing](#)
- [WooBoard](#)
- [Wrike](#)
- [XMind](#)
- [Zoom](#)

Resources

List all of the resources you might use to achieve your objectives. Below are some sample resources.

- [Becoming a Chief of Staff](#)
- [Certified Chief of Staff & Master Chief of Staff Program](#)
- [Executive Assistant Skills](#)
- [Introduction to Administrative Professional Jobs](#)
- [Leadership and Management Skills For Business - Managing Employees](#)
- [On Deck Chief of Staff Academy](#)
- [Partnering with Your Boss: Strategic Skills for Administrative Professionals](#)
- [Personal Profiles](#)
- [Professional Administrative Certification of Excellence \(PACE\)](#)
- [The Chief of Staff KickStart](#)
- [The Power EA International Masterclass](#)

Notes

Add any random thoughts, questions, and uncertainties you may have.

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