



EXECUTIVE VIRTUAL ASSISTANCE — STANDARD OPERATING PROCEDURES

Executive Support SOPs

Four working procedures for keeping an executive's time, inbox, and priorities under control — written to be handed to anyone stepping into the role.

Scheduling

Briefings

Ticketing

Inbox Management

SOP 1 — Scheduling Across Time Zones

Purpose: prevent double-booking, timezone mix-ups, and meetings scheduled at unreasonable hours for any attendee.

- 01 **Confirm every attendee's actual time zone** from their calendar settings — never assume based on their office location alone.
- 02 **Map overlapping business hours** using a world-clock view (e.g. World Time Buddy or Google Calendar's time zone display) before proposing any time.
- 03 **Offer 2–3 options** that fall within reasonable hours for the majority. Where no full overlap exists, rotate who takes the inconvenient slot across future meetings rather than defaulting to the same person every time.
- 04 **Send invites labeled in each attendee's local time**, not just the organizer's — most calendar tools do this automatically once time zones are set correctly.
- 05 **Send a 24-hour reminder** including the dial-in/video link and each attendee's local start time.
- 06 **Flag daylight saving transitions** — the US and EU shift on different dates, which can silently break a "confirmed" overlap for a week or two each year.

SOP 2 — Weekly Executive Briefing

Purpose: replace a week of scattered calendar and inbox activity with a single five-minute read, delivered every Monday by 8:00 AM.

The briefing always follows the same five-part structure, so it stays scannable even on a packed week:

- 01 **Week-at-a-glance** — total meeting hours, any scheduling conflicts, travel days highlighted.

02 Decisions needed this week — a short list of anything requiring the executive's input, each summarized in one line.

03 Deadlines and follow-ups — what's due this week, plus anything overdue that needs a nudge.

04 Notable inbound — 3–5 flagged emails worth a personal read, summarized in one line each.

05 Logistics reminders — upcoming travel, prep needed, or people to follow up with.

Format note: always the same template, always one page. Consistency is what makes it fast to read — a briefing that changes shape every week gets skimmed less carefully.

SOP 3 — Zoho Desk Ticketing

Purpose: keep every support ticket moving through a consistent, auditable lifecycle so nothing sits unanswered.

01 Intake — every new ticket is tagged by category (billing, technical, onboarding, general) and priority within 15 minutes of arrival.

02 Priority criteria — Urgent: outage or security concern. High: blocks the customer's core workflow. Normal: standard requests. Low: feature requests or general questions.

03 SLA targets — see table below.

04 Escalation — a ticket that passes its SLA unresolved is auto-flagged and escalated with a note on what's already been tried, so context isn't lost in the handoff.

05 Resolution — confirm the fix with the customer before closing, and log a one-line internal note on root cause for future reference.

PRIORITY	FIRST RESPONSE	EXAMPLE
Urgent	1 hour	Service outage, security concern
High	4 hours	Blocks core workflow
Normal	1 business day	Standard request
Low	2 business days	Feature request, general question

SOP 4 — Inbox Zero (Executive Email Management)

Purpose: keep an executive's inbox from becoming a backlog, without the executive having to manage it themselves.

01 Triage twice daily — once first thing, once mid-afternoon.

02 Sort every email into one of five actions: Respond Now, Draft for Review, Delegate, Schedule, or Archive.

03 Use labels, not folders — nothing gets buried, and everything stays searchable later.

04 Same-day summary for anything marked "Draft for Review" — never left until the next morning.

05 End-of-day check — inbox shows zero unread or untriaged messages, even if some replies are still pending.