



EXECUTIVE VIRTUAL ASSISTANCE — CASE STUDY

Supporting a CEO: Julian Meyer

A practical case study built around a fictional CEO client — inbox zero in action, calendar management, and a real sample of a weekly briefing document.

Inbox Management

Calendar

Executive Briefings

The Brief

Julian Meyer is the fictional CEO of Corvus Analytics, a mid-size data analytics company, used as the anchor client for this case study. The brief: take day-to-day inbox and calendar management fully off his plate, and keep him informed through a single weekly briefing rather than constant check-ins.

Inbox Zero in Practice

Applying the five-action triage system (Respond Now, Draft for Review, Delegate, Schedule, Archive) to a live inbox scenario:

INCOMING EMAIL	ACTION TAKEN
Board member requesting a call this week	Scheduled directly against open calendar slots, confirmed same day
Vendor contract renewal notice	Delegated to Operations with a two-line context summary
Press inquiry re: recent funding news	Drafted a response for Julian's review and signature, not sent unreviewed
Internal team standup notes	Archived — informational only, no action needed
Investor asking for a quick data point	Answered directly using information already on file

Calendar Management

Beyond just accepting meeting requests, the calendar was actively managed to protect focus time: recurring "no-meeting" blocks were held firm against all but board-level requests, back-to-back external meetings were never scheduled without at least a 10-minute buffer, and every external meeting was pre-loaded with a one-line agenda note so Julian never walked in cold.

Sample Weekly Briefing

Delivered: Monday, 8:00 AM

Week of March 9 — Executive Briefing

This week: 14 meeting hours, no conflicts. Wednesday is travel to the investor offsite — car booked for 7:15 AM.

Decisions needed: Sign off on the Q2 marketing budget (deadline Friday) · Confirm the final speaker slot for the June conference.

Deadlines: Board deck due Thursday for Friday's meeting · Vendor contract renewal signature needed by Wednesday.

Notable inbound: A journalist requested comment on the funding round — drafted response awaiting your review · An early investor asked for a 15-minute informal check-in, tentatively held Thursday 4pm pending your confirmation.

Logistics: Passport expires in 4 months — flagging now ahead of the July international trip.

Outcome

The goal of this case study was to demonstrate judgment, not just task completion — knowing what needs a CEO's personal attention versus what can be handled or delegated, and packaging the rest into a briefing that respects how little time an executive actually has to read one.