



WORLD ADMINISTRATORS  
**SUMMIT**

# WA-Summit Task Force

## SKILLS SET MATRIX

### REPORT

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*Delegates from 21 countries at the 2018 10<sup>th</sup> WA-Summit in Frankfurt, Germany*

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## Background

At the 2018 10<sup>th</sup> WA-Summit the International Position Titles Team presented their report which was the results from a worldwide survey that received over 3,000 responses. This survey was primarily focussed on position titles as requested by the Delegates from 2015 9<sup>th</sup> WA-Summit. It asked about titles, tasks, and perceptions. The subsequent report and discussion by Delegates at the 10<sup>th</sup> WA-Summit led to the following new recommendation/outcome.

### New Recommendation/Outcome:

At the 10<sup>th</sup> WASummit 2018 discussion of this topic the Chairman proposed that as this topic is very complex, these recommendations are not ones that we can easily vote on. The next step is to consider position descriptions, at this 10<sup>th</sup> WASummit, where we will discuss more about the skillsets that go hand in hand with position titles and every part of the world is to be considered.

The Chairman suggested that as the recommendations of this report are only a beginning, Delegates are asked to vote on this single new recommendation:

THAT this Report forms the basis for further discussions on Position Titles later in this 10<sup>th</sup> WASummit 2018

**ACCEPTED**

The new topics of Position Descriptions and Career Pathways led to useful discussions and the following outcome.

### Outcomes on Position Descriptions and Career Pathways:

A Task Force was developed which includes Andrew Jardine (UK), Cathy Harris (SA), Wendy Rapana (NZ), and Florence Katano (Uganda), with Veronica Cochran (USA) supporting.

Task Force member, Andrew Jardine, to initially contact the Position Titles and Credentialing teams to develop and agree a timeline.

The Task Force to create a unifying framework for administrative/office professionals and HR departments such that, irrespective of country, it is possible to identify levels of work – i.e. performance expectations, salary ranges and career pathways – for a given job/role profile.

**ACCEPTED**

The new Task Force was expanded to include Vicki Faint from New Zealand to take the lead and this report is the outcome of the consultation and discussions within the Task Force over the past two years.

**Please note:** within this document the term “Administrator” is used as a generic to cover all the 160 titles around the world. As an overarching term it links with the World Administrators Summit and the newly incorporated World Administrators Alliance.

## Introduction

Administrators generally work with managers and executives (or for wealthy or celebrity individuals and families), undertaking a variety of business support tasks.

They often act as the manager's first point of contact. Managers often rely heavily on their administrators, trusting that work will be handled efficiently in their absence; discretion and confidentiality are therefore essential attributes of a successful administrator.

Administrators need extensive knowledge of the organisation in which they work. They need to know who key personnel (stakeholders) are, both external and internal, and understand their manager's, and by extension, the organisation's aims and objectives.

In addition, administrators are likely to be responsible for miscellaneous tasks to support their managers, which will vary according to the sector and to the manager's requirements, e.g., completing some corporate governance reporting (to ensure that the business is being run properly and complying with legislation and regulations) or conducting research.

Depending on circumstances some administrators do all the administrative work themselves, while others take responsibility for recruiting and training junior staff and delegate some less demanding and confidential work to them.

Finally, for those administrators who work as an assistant for a wealthy family or individual, instead of for a corporation, in which case, the work undertaken may cover home or personal life maintenance tasks, such as ensuring household bills are up to date or hiring cleaners.

### Job Titles Covered

Job titles for administrative roles, will vary according to the employer. In some organisations, the job titles 'personal assistant' and 'executive assistant' are interchangeable. In others, an executive assistant is more senior than a personal assistant and will take on more responsibility, such as some corporate governance or team organisation work. In some organisations, a personal assistant role is an entry-level job; in others, it requires a great deal of experience and is paid accordingly.

This matrix includes titles arising from the 2017 worldwide survey<sup>1</sup> conducted for the WA-Summit 2018, such as:

*Administrative Assistant* includes administrative assistant (including coordinator, specialist and associate), senior administrative assistant.

*Personal Assistant* includes personal assistant, senior assistant and virtual assistant.

*Project Administrator* includes project administrator (including coordinator, specialist and associate).

*Executive Assistant* includes executive assistant (including senior executive assistant), chief executive assistant (or chief administrative assistant), senior executive assistant.

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<sup>1</sup>[2018 WASummit Universal Titles and Responsibilities](#)

*Office Administrator* includes office manager, office administrator (including operations assistant or operations manager).

*Secretary* includes executive secretary, secretary.

An additional title which is becoming more common at the highest levels is that of Chief of Staff (especially in the United State of America).

In some organizations/countries it may be required to work overtime during peak times and when deadlines are close. Many administrative professionals follow their manager's schedules, which could mean these roles are rarely 9-to-5.

### Skills & Personal Qualities

In addition to relevant experience and secretarial and administrative knowledge, you will need to show evidence of the following:

#### 1. Skills

- exceptional written and oral communication skills
- excellent word processing and IT skills, including knowledge of a range of software packages
- good organisational and time management skills
- the ability to research, digest, analyse and present material clearly and concisely
- excellent interpersonal skills
- tact and diplomacy
- negotiating skills
- problem solving
- emotional intelligence

#### 2. Personal Qualities

- the ability to work under pressure and to tight deadlines
- honesty and reliability
- self-motivating
- flexibility & adaptability to juggle a range of different tasks and to work extra hours to meet deadlines
- attention to detail
- discretion and trustworthiness: you will often be party of confidential information
- service orientation

There are also a number of specific skills which may give you a competitive advantage. For example, shorthand and audio typing are still used, and knowledge of a foreign language in many countries may be essential, in others useful, and in yet others not required.

NB: All skills gained at each level are transferrable through all levels as they make up your skills and knowledge base.

## Credentials

No formal academic qualifications are required as standard, although some employers may require candidates to have minimum qualification at a specific level, and some may prefer degrees.

Although this area of work is open to a large range of people, a qualification in business, management and/or administration increases your opportunities.

Additionally, some subjects are more relevant for certain industries, e.g. English literature for publishing and law for legal work.

Entry without a degree is possible as personal qualities, experience and general office skills are typically considered more important.

A qualification in ICT may also be valuable or even required.

There is also advantage in attaining relevant professional certifications from professional bodies within the administrators' own country as a further demonstration of skills and knowledge.

It is unusual to enter directly into a senior position as a recent graduate (at whatever level) due to the level of experience expected of you. However, it is not impossible and one way of increasing your chances would be to study for a relevant qualification. Relevant qualifications are designed to equip individuals with the skills essential for this profession. Examples of these qualifications and relevant professional certifications are referenced in the Skills Set Matrix at their relevant levels and links to the International Credentialing information for further details are included.

## How to Use this Tool

For those who are administrative professionals very often the most important thing is to know where your role fits. To do this the following steps to use the Matrix may be the best approach.

**Step 1:** Find a Role Title, in column 2, that is the same as or similar to your own.

**Step 2:** Check the Tasks, in column 3, to see if they largely match the tasks that fit with those in your own position description or that you do in your day-to-day work.

If the above steps do not find a match/similarity, then the following steps may help.

**Step 3:** Check through the Tasks listed in Column 3 to see where you best fit.

**Step 4:** You may find further and more detailed information in the Role Profiles which are linked at the bottom of each level to help you find a match/similarity.

**Step 4:** Once you have found either a title and tasks, or role profile which is the same as or similar to your own, then confirm in Column 1 which Level you are within.

At this stage look wider than solely you and your role, to see how you fit within the administrative profession. This information will assist you with determining a pathway for yourself either within your current employment or outside of it, to develop a pathway.

The information contained in the Matrix is intended to assist you as an administrative professional in understanding where you fit and how you can progress. It is also to assist your Executive, your HR Department, and Recruiters to better understand the roles administrative professionals fulfil, the

structure and range of tasks within those roles, and show a clear career pathway for those who wish to progress.

This Tool is not intended to change position titles within your organisation or your country. It is aimed at clarifying what the administrative professional does, how they support and contribute to their employment and how globally this sits together providing a career pathway.

## Conclusion

One of the biggest factors causing ambiguity and confusion about the role of the administrative professional is poor position/job descriptions (PDs/JDs). Far too often, PDs/JDs written for administrative professionals fail to fully grasp the complexities of the roles and the numerous ways in which the administrative professional supports their executive/manager. In many cases, existing PDs/JDs are completely out of date, describing little more than the simplest routine, everyday tasks that have been performed by administrators for decades.

Inaccurate PDs/JDs too often contribute to a lack of understanding of the depth of the administrative professional role, which in turn leads to undervaluing the administrator in the organisation, ill-advised rationalisation of the administrator role in some organisations, equally ill-advised offshoring of administrators and a general failure to make the most of the potential of the administrator.

Professional certification or academic qualifications (referred to as credentialing), where available in countries, will be more fully set out in the **International Credentialing Report**, once completed. Gathering information about qualifications globally is complex. Phase 2 of this project, once endorsed at the 11<sup>th</sup> WA-Summit, will be the gathering of data in respect to global qualifications and credentialing for inclusion in this report.

However, it should be noted that as this is a living document, information on relevant and appropriate qualifications from every country is welcomed, so that the document can be updated and is fully relevant for all Administrative Professionals internationally.

Administrators are valuable within the workplace. But their value can be so much greater with the right approaches with the correct training and education, with the right frameworks and ways of working, and with a better understanding of how they can assist their managers.

## Recommendations

1. **THAT** this report is discussed and following positions are endorsed, or modified, as a starting point of formalising role levels:
  - Level 1a and 1b – showing progression
  - Level 2
  - Level 3
  - Level 4
  - Level 5
2. **THAT** it is noted that this report is a living document and is open to be modified, added to, or adjusted as required.

### NB:

1. The following pages are designed to be printed on A3 paper.
2. The role profiles linked to the Skills Set Matrix are for your guidance only and are by no means definitive.

## WA-Summit - Skill Set Matrix. Version 12

Competence Level	Common Position Titles Include	Common Tasks/Skills	Key Differences
<b>Level 1</b>	<p><b>Level 1a - Entrant:</b></p> <ul style="list-style-type: none"> <li>Administrative Assistant</li> <li>Administrative Officer</li> <li>Administrative Co-ordinator</li> <li>Secretarial roles (basic)</li> <li>Receptionist (often seen as a general administrator)</li> </ul>	<p><b>Tasks:</b></p> <p>General administration which typically may include but is not limited to:</p> <ul style="list-style-type: none"> <li>Generating and/or word processing documents</li> <li>Using software (spreadsheets, databases, presentations, websites, etc)</li> <li>Scheduling meetings, planning staff events such as awards dinners and fundraising events</li> </ul> <p><b>Skills:</b></p> <p>Typically, skills may include but are not limited to:</p> <ul style="list-style-type: none"> <li>Technical skills (computer, software, Apps, AI (application), etc)</li> <li>Verbal and written communication skills (e.g., drafting basic standard letters, memos, emails and other internal communications)</li> <li>Interpersonal and customer service</li> <li>Organisational (including multitasking)</li> <li>Problem solving</li> <li>Discretion and confidentiality</li> </ul> <p><a href="#">Role Profile</a></p>	<p>This covers any role involving general administrative duties for a minimum of 50% of the hours worked and provided by a team or individual to an area of the business, but not exclusively on a one-to-one basis with a nominated executive.</p> <p>Key differences are in the number of tasks asked and the level of those tasks.</p>
	<p><b>Level 1b - Progression:</b></p> <ul style="list-style-type: none"> <li>Personal Assistant (first-time role)</li> <li>Executive Assistant (first-time role)</li> <li>Sole-charge Administrator/Office Manager</li> <li>Business Support</li> </ul>	<p><b>Tasks:</b></p> <p>General Administration</p> <p>Word processing</p> <ul style="list-style-type: none"> <li>Using wide range of software</li> <li>Scheduling meetings and meeting management including some minute taking, arranging and managing events</li> </ul> <p><b>Skills:</b></p> <p>Typically, skills may include but are not limited to:</p> <ul style="list-style-type: none"> <li>Technical as above but higher level and greater depth of knowledge</li> <li>Verbal and written communication skills</li> <li>Interpersonal skills</li> <li>Organisational knowledge</li> <li>Problem solving and conflict resolution</li> <li>Discretion and confidentiality</li> </ul> <p><a href="#">Role Profile</a></p>	<p>This role shows progression from a new entrant to the role which uses similar skills, has some additional skills and adds depth to those skills.</p> <p>This is the catchall term for any role that does not fit into any of the other titles.</p> <p>Key differences from Level 1 – entrant is the number and depth of tasks required.</p>
<b>Level 2<sup>2</sup></b>	<ul style="list-style-type: none"> <li>Executive Assistant</li> <li>Personal Assistant</li> <li>Virtual Assistant</li> </ul>	<p><b>Tasks:</b></p> <p>Administrative tasks as listed in the level above and including:</p> <ul style="list-style-type: none"> <li>Manage calendars and scheduling</li> </ul>	<p>Any role that has a primary focus on providing business support on an individual basis (i.e. one-to-one). In some cases, this may be</p>

<sup>2</sup> In Australia Level 2 is interchangeable with Level 3

Competence Level	Common Position Titles Include	Common Tasks/Skills	Key Differences
	<p>Office Manager (sole charge in small to medium businesses)</p> <p>Other one-to-one support roles e.g. some Business Support roles</p> <p>Some lesser responsibility Secretarial<sup>3</sup> roles</p> <p>Often seen as an “Assistant”, e.g. Team Assistant</p>	<ul style="list-style-type: none"> <li>• Manage meeting documentation</li> <li>• Travel co-ordinating</li> <li>• Project Assistance or co-ordination</li> <li>• Operations duties, including perks, parking, and maintenance</li> <li>• Human Resource duties including onboarding / offboarding</li> <li>• Payroll.</li> </ul> <p><b>Skills:</b></p> <p>Typically, skills may include those listed in the level above and including:</p> <ul style="list-style-type: none"> <li>• Cultural Awareness</li> <li>• Ability to focus and attention to detail</li> <li>• Time Management</li> <li>• Travel arrangement &amp; coordination</li> <li>• Self-Motivated</li> <li>• Ethics</li> <li>• Decision making</li> <li>• Minute taking</li> </ul> <p><b>Role Profile</b></p>	<p>concurrently to more than one executive, however the nature of the work is still of a one-to-one nature.</p> <p>Knowledge is developing depth, duties become more self-directed and widen.</p>
<b>Level 3<sup>4</sup></b>	<p>Executive Assistant</p> <p>Personal Assistant</p> <p>Office Manager (some staff management)</p> <p>Office Supervisor</p> <p>Operations Manager</p> <p>some higher responsibility Secretarial roles</p>	<p><b>Tasks:</b></p> <p>Oversee and supervise all administrative functions as listed in the levels above and including:</p> <ul style="list-style-type: none"> <li>• Supervise and support administrative staff</li> <li>• Assist project teams in timely completion of projects</li> <li>• Manage and maintain budgets for, projects, office expenditure e.g. stationery</li> <li>• Maintain and update administrative and personnel databases, correspondence, support human resources functions including managing, recording and maintaining employee leave time records</li> <li>• Organize meetings (e.g. strategic planning day), conferences, and events</li> <li>• Meeting administration including preparation of agenda, papers, and minutes</li> <li>• Monitor staff morale</li> </ul> <p><b>Skills:</b></p> <p>Typically, skills may include those listed above and including:</p> <ul style="list-style-type: none"> <li>• Staff management</li> <li>• Emotional Intelligence</li> <li>• Mentoring</li> <li>• Delegation</li> <li>• Human Resource duties including payroll and onboarding/offboarding</li> <li>• Project coordination/management</li> <li>• Event management</li> <li>• Office co-ordination e.g. budgeting, perks, parking, vehicles, and maintenance</li> </ul> <p><b>Role Profile</b></p>	<p>Any administrative role where management/supervision of staff is a key component of the role, on top of any administrative duties. This staff involvement incorporates supervision, mentoring, and delegation.</p> <p>This difference should be recognised in the formal description of duties and responsibilities to differentiate it from informal staff supervision, i.e. staff management duties should be clearly identified for the role.</p>

<sup>3</sup> Secretary is not commonly used throughout the world; however, it is still commonly used in much of Asia and in some specific roles in some countries, consequently it is important to be listed here.

<sup>4</sup> In Australia Level 3 is interchangeable with Level 2

Competence Level	Common Position Titles Include	Common Tasks/Skills	Key Differences
<p><b>Level 4</b></p>	<p>Often seen as an Administrative Specialist, higher responsibilities. Administrative specialist roles often have additional responsibilities, e.g. managing events, projects, and governance documentation:</p> <p>Administration Manager Executive Assistant to (e.g.: CEO / Board / General Counsel, etc.) Project Administrator Project Co-ordinator Secretary (e.g. Board Secretary) Business Partner (e.g. Executive Business Partner)</p>	<p><b>Tasks:</b> Oversee and supervise all administrative functions as listed in the levels above and including:</p> <ul style="list-style-type: none"> <li>• Prepare and maintain company documents and reports</li> <li>• Manage email for manager and self</li> <li>• Review and approve the expense reports</li> <li>• Support preparation of project documents, reports, brochures, and budgets</li> <li>• Manage and coordinate employee recruitment, performance evaluation and termination processes</li> <li>• Prepare and maintain office procedures</li> <li>• Governance activities, meeting administration (e.g. AGM, Board Member onboarding) including preparation of Agenda, papers, and minutes</li> </ul> <p><b>Skills:</b> Typically, skills may include those listed in the levels above and including:</p> <ul style="list-style-type: none"> <li>• Integrity</li> <li>• Writing skills (drafting letters and reports)</li> <li>• Leadership</li> <li>• Negotiation</li> <li>• Stakeholder knowledge</li> <li>• Project Management knowledge</li> <li>• Financial knowledge</li> <li>• Business knowledge including 'of the business'</li> <li>• Governance legislation and meeting knowledge</li> </ul> <p><b>Role Profile</b></p>	<p>Any administrative role where a minimum of 50% of the hours worked are sector-specific or involve specialist or technical knowledge. This includes project work, legal, educational, medical, and governance, etc.</p>
<p><b>Level 5</b></p>	<p>Project/Programme Manager (C-suite projects or programmes) Business Partner Chief of Staff (a recent higher-level role with advanced capabilities and responsibilities as a true business partner to a Chief Executive).</p>	<p><b>Tasks:</b> Oversee and supervise all administrative functions as shown in the levels above and including:</p> <p><b>Management</b></p> <ul style="list-style-type: none"> <li>• Manage the office of the CEO, including direct reports</li> <li>• Work closely with senior leadership teams organising and aligning strategic priorities</li> <li>• Analyse and oversee CEO's calendar and engagements</li> <li>• Co-ordinate and oversee team-based administrative support for CEO – seamless and orderly day-to-day operation</li> <li>• Work closely to manage communication and/ or confidential matters for key stakeholders</li> <li>• Lead recruitment process for members of staff</li> <li>• Organise and establish plans from ad hoc and inconsistent practices</li> <li>• Analyse results and use data to drive strategic direction</li> <li>• Understand key priorities organisation wide and shape agenda accordingly</li> <li>• Manage research and advance planning for CEO</li> <li>• Ensure integration processes (board meetings, strategic planning, business reviews, executive council, events, etc.) run smoothly</li> </ul> <p><b>Communications</b></p> <ul style="list-style-type: none"> <li>• Identify and manage priorities and critical issues with public impact which required CEO attention</li> <li>• Be alert to environmental signals – assess and advise CEO when appropriate</li> <li>• Oversee CEO communication strategy with senior managers</li> </ul>	<p>The Chief of Staff (CoS) generally works behind the scenes to solve CEO organizational problems, spearhead new projects, and maximize the CEO's time and focus. This individual works directly with the CEO's direct reports, resolving conflicts and issues as they arise.</p> <p>Often, they act as confidante and advisor to the chief executive, serving as a sounding board for ideas. The private sector role especially requires the proactive identification of issues that could impact the successful execution of the CEO's commitments and responsibilities, which include conducting Board meetings and a heavy reliance on frequent travel.</p> <p>The CoS makes the CEO aware of and brings their focus and attention to challenging issues, providing a framework and positioning of innovative ideas, to help resolve recurring problems and mitigate risk.</p>

Competence Level	Common Position Titles Include	Common Tasks/Skills	Key Differences
		<ul style="list-style-type: none"> <li>• Develop and carry out a consistent high-volume comms strategy from the CEO office in partnership with appropriate communication liaison</li> <li>• Oversee event and travel planning ensuring integrated content/message management taking full advantage of the opportunity</li> <li>• Draft formal CEO communications (speeches, letters, etc), collaborating with corporate resources to ensure strategic processes.</li> </ul> <p><b>Strategy</b></p> <ul style="list-style-type: none"> <li>• Collaborate in strategic and business planning processes</li> <li>• Complement strategic planning (process, priorities, platform) providing connectivity with CEO and senior management</li> <li>• Push CEO agenda, track priorities, say “No” when appropriate</li> <li>• Own or identify areas for special projects on behalf of the CEO</li> <li>• Prepare CEO for speeches, events (press, policy), meetings</li> <li>• be “Devils’ Advocate” – provide second opinion/advise on issues</li> <li>• Represent the CEO at internal and external meetings/engagements</li> <li>• Attend all senior management and strategy meetings</li> <li>• Communicate key priorities, decisions, actions items to CEO</li> <li>• Manage email, correspondence follow-up, and process facilitation</li> <li>• Ensure CEO is working on most important priorities for the company</li> </ul> <p><b>Skills:</b></p> <p>Typically, skills may include those listed in the levels above and including:</p> <ul style="list-style-type: none"> <li>• Broad understanding of all areas of business</li> <li>• Research, analysis and briefing</li> <li>• Strategic thinking, understanding and knowledge</li> <li>• Cultural sensitivity (diverse cultures and multi-generational groups)</li> <li>• High level communication/interpersonal skills (esp. listening, tact, diplomacy, negotiation, problem solving, emotional intelligence, judgement, decision making) across all levels of the organisation</li> <li>• Leadership and management expertise with organisational and strategic dexterity</li> <li>• High performing team building/relationships</li> <li>• Large/complex project management skills</li> </ul> <p><b>Role Profile</b></p>	