Keep hard copies in a safe place at your desk, with you in your briefcase, one copy at your employer’s desk, and electronic copies on your computer, phone, and laptop. One copy located on a cloud ie www.box.com (10GB Free) which can be accessed from anywhere in an emergency.

You can make separate lists in Outlook for personal and business essential addresses and phone numbers. Outlook is an amazing tool, and if you are on an Exchange Server they will translate to your phone and car as well! The following are some examples of lists that you should keep at your fingertips.

If you feel that you need a hard copy these can be exported to Excel or you can keep separate lists in Excel or on your phone if you aren’t on an Exchange Server.

Set up your own versions of these crucial lists.

NEVER LEAVE HOME WITHOUT THEM!
INTERRUPT LIST

The below list is of people you should always advise even if he is in a client meeting or even an internal meeting:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

FAMILY NAMES, PASSPORT INFO, DRIVER’S LICENSE, SIN (Legal ID)

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

Spouse: ______________________________
Parents: ______________________________
Siblings: ______________________________
Children: ______________________________
Pet Information: ______________________________

Keep scans of all legal doc’s in a secure password protected file.

VENDORS

Make sure that if your executive needs to work with vendors directly that you are added as “authorized” on all accounts so as not to require additional calls and approvals. In most cases the individual will need to add you but only the one time. This is especially true with phone companies, doctors, pharma, private schools etc.

- Accountant
- Airlines
- Appliance Repair
- Auto Repair
- Car Rental
- Chiropractor
- Contractor
- Decorator
- Electrician
- Exterminator
- Florist
- Furniture Repair
- Hair Dresser
- Handyman
- Heating/Air Conditioning
- Hotels, Chalets, Villas, Previous Rentals
- Housekeeper
- Landscaper
- Lawyer
- Limo
- Makeup Artist
- Massage Therapist
- Painter
- Phone Company, Land Lines, Mobile Accounts
- Physical Trainer
- Plant man
- Plumber
- Pool Maintenance
- Travel Agent contact information
HOW TO, PINS & GO TO LISTS

- Phone instructions
- Retrieving Voicemail
- How to Update Calendar
- How to Fill in Daily Call Log
- How to handle Mail
- Cloud Login and Sharing
- Computer set-up and passwords
- Online software and passwords
- Meeting room set up
- How to order Car Service
- Fedex info & PIN
- Credit Card info & PINS
- Bank Accounts & PINS
- If Security Company calls re Alarm
- How to use Frequent Flyer Points
- How to use Hotel Loyalty Points
- Car Insurance Info
- Life Insurance Info
- Home Insurance Info
- Paint guide (all paints and codes room by room for all properties)
- Sizes for Clothing
- How to Submit a Health Benefit Claim
- Steps to winterize vacation properties and contacts

HOUSEHOLD APPLIANCE CHECKLIST

- List of Appliances
- Model #
- Serial Numbers
- Location (home, cottage, etc.)
- Warranty Information
- Keep all appliance manuals in one place and go through periodically
- Directions for operating:
  - TV (Blu Ray player, surround-sound, etc)
  - Oven
  - Security System
  - Computer system/wifi

AUTOMOBILE IN FORMATION

- Model &Year:
- Dealer:
- License Plate:
- VIN #: Color:
- Access code:
- For service call:
- For detailing call:
- Auto Insurance Info:
- Sirius Satellite Account Number:
- Radio Security Code in case of disconnection:

FREQUENT FLYER, HOTEL LOYALTY, NUMBERS & PINS

- List Airlines with each FF name and number
- Airline Seating & Food Preferences: (Example) First Class, neither first nor last row, on long flights a window seat, on shorter flights (4 hrs or less) an aisle, no special meal.
- List Hotel preferences, room type, floor, location on floor, proximity to meeting locations etc.

MEDICAL INFORMATION

- Doctors (Specialty, Address, Office Phone #, Cell Phone Number)
- Pharmacist & Address of Pharmacy:
- Prescription Medication Instructions:
- Health Insurance Information : (1-800 # in case of emergency):

BIRTHDAY CHECKLIST

(Names, Relationships, Birthdates)

- Include any notes re: gifts, allergies (flowers), religious affiliations if known, favorite charities
- Set reminders on www.americangreetings.com and/or Outlook Calendar
**EVENT PLANNING INFORMATION SHEET AND CHECKLIST**

The following elements comprise most events. Ask the key questions *What, Who, When, Where and Why?*

1. **What is the occasion of event?**
2. **Who is involved? Create guest list.**
3. **What is the goal of the event? Why is the event happening?**
4. **Date and Time of Event? Consider sending a “Save the Date” note via e-mail for larger events. Set RSVP date and a method to follow-up with invitees.**
5. **What location/venue is being used for the event? Is a contract needed for a space rental?**
6. **What is the budget for the event?**
7. **Is catering needed? Decide on menu. Is extra help needed for serving or bartending?**
8. **What equipment (if any) is needed for the event? Table & Chair rentals, tablecloths, dishes, glassware, silverware, audio equipment, video equipment, podium, lighting?**

**WOMEN’S TRAVEL CHECKLIST**

- How many days is the trip?
- How many special events?
- Special Notes for Trip?
- Eveningwear to match the occasion
- Shoes
- Wrap/coat
- Jewelry
- Business and casual suits
- Blazer or sport jacket
- Skirts
- Pants
- Blouses
- Bathing suit and cover up
- Belts
- Lingerie
- Socks/Stockings
- Shoes
- Nightwear
- Slippers
- Sports clothing (These could be clothes for playing golf, running, tennis or any other sport)
- Equipment including golf clubs, or skis. Check with airline regarding check in for large items.

**MEN’S TRAVEL CHECKLIST**

- How many days is the trip?
- How many special events?
- Special Notes for trip?
- Eveningwear
- Two-piece dinner suit with the either a waistcoat or a Cummerbund
- Suspenders or a belt
- Dinner shirt
- Evening shoes
- Evening socks
- Cufflinks and an evening watch
- Business and casual suit
- Blazer or sport jacket
- Pants
- Shirts
- Neckties/bowties
- Underwear
- Undershirts
- Bathing Suit
- Socks
- Shoes
- Nightwear (either pajamas or nightshirt a robe if requested)

**Sports clothing. (This could be clothes for playing golf, running, tennis or any other sports, don’t forget shoes)**

**Equipment including golf clubs, or skis. Check with airline regarding check in for large items.**

**WOMEN’S TRAVEL CHECKLIST**

- Sweaters/hoodies
- Laundry bag
- Toothbrush, toothpaste and dental floss
- Deodorant/antiperspirant
- Hairbrush, comb, blow dryer, straightener, pins, product, accessories
- Medications
- Manicure items
- Cosmetics
- Hand and Body Lotion
- Shampoo and Body Wash
- Body Wash Puff
- Sunscreen and After Sun
- Umbrella
- Other
- Gloves
- Coat/Raincoat
- Hat(s)
- If the bag is a carry on it should not include any large sizes of liquid products/gels or sharp objects (scissors, metal nail files, wine openers, lighters)

**EXECUTIVE ASSISTANCE**
TRAVEL ITINERARY TEMPLATE

Effectively organizing all of the details of an executive’s travel plans requires a travel itinerary template that you use consistently. Don’t ask your travelers if they want one — JUST DO IT! They’ll thank you for it later. And in the meantime, you’ll have saved them a lot of time and hassle in sorting through multiple documents or scrolling through multiple emails to find the information they need at the moment they need it while they are traveling. I know this because every executive I’ve ever created for initially comes to expect and/or demand them for future trips. I’ve done a fair share of traveling myself, and trips with an itinerary are much more efficient.

Think Chronologically

If you haven’t done a lot of travel planning in the past, one of the first things I encourage you to do is THINK CHRONOLOGICALLY. What is the order of events for your traveler throughout their trip? This will help you get all of the arrangements made that are required from the start (flights, ground transportation, hotel, meals, meetings, etc.).

How to Use This Travel Itinerary Template

This template is designed to cover all of the basic details that need to be included on an itinerary for a traveling executive. Not every trip requires airline travel. Not every trip requires rental cars. It may change from trip to trip and traveler to traveler. Remain flexible. Customize this template to make it fit more specifically to your executive’s specific travel needs.

Here are some tips to get you started:

- All of the items in blue or with blanks are the details you’ll need to insert or fill in as appropriate for each trip.
- If you have executives that travel frequently to the same places, save their past travel itineraries. Open the most recent version, update with the new date and travel details without having to recreate the entire document each time they travel. It’s a huge time saver!
- Print a final copy for your executive AND a copy for your file so you have the same information if they need travel assistance while they are gone. If appropriate, you can also print an additional copy for the traveler’s family so they know where they’ll be and when as well.
- If your executives have e-tickets for their flights, print a copy of the flight reservation from your travel agency or online booking service and staple it to the back of the itinerary just in case there are any issues when they check in at the airport.

Each time you need to create an itinerary, follow these steps to update the template with your executive’s travel information.

Personalize the HEADER information on the template

a. Include your executive’s name and your company name.
b. Insert your company’s name/logo.
c. Update the travel dates.
d. Do this on the 1st page AND also in the header so it prints on any additional pages of the document if your itinerary is more than 1 page long.

e. Insert all pertinent MEETING INFORMATION in order of dates/times.
a. Make sure to reference which time zone the time is listed in.
   [TIP: Go to http://www.timeanddate.com/time/ to find out which time zone abbreviations apply at various times of the year.]
b. Include conference number dial in and passcode information in case their flights are delayed and they need to join the meeting from their cell phone until they arrive at the meeting location. (Trust me, it happens!)

c. How to dial in to get voice messages
d. How to access email (or webmail) remotely

e. Treat the compilation of the itinerary as though you were the traveler.
   What additional information would you want to know?
a. Driving directions
b. Restaurant options and/or locations
c. Entertainment venues
d. How to dial in to get voice messages
e. How to access email (or webmail) remotely

PROOF READ, PROOF READ, PROOF READ the completed itinerary. There are a lot of details here. Make sure you proof it well.

HOW TO NAME YOUR ITINERARY FILES

To keep your electronic files organized nicely, here’s an example of a file naming convention for travel itineraries. Note: XXXXXX = the 6-digit date

XXXXXX – Location – Name or Initials of Traveler (i.e. 073007 — Tampa FL – JLP)

XXXXXX – Location Event Name of Traveler (i.e. 073007 — Tampa FL IAAP Conv JLP)

In these examples, the beginning date of the trip was July 30, 2007. The destination was Tampa, Florida for an IAAP convention. The traveler’s initials were JLP.

When using dates in your file names, consider using full six-digit dates so they always align in order by date. You may also consider starting with a 2-digit or 4-digit year, so you can find things by the year, then the month and day. Using the same sample data from above, that would look like this: 2007 0730 Tampa FL JLP

It may take a few minutes to assemble the information, but sending your executive on business travel with an itinerary is a HUGE value-add you can provide your executive(s) and your team as an Administrative Professional.

HAPPY TRAVEL PLANNING!

Julie Perrine CPS/CAP is a personality strategist, personal brand analyst, and administrative mentor who teaches administrative professionals and entrepreneurs how to increase their professional opportunities and achieve more productive and meaningful relationships by utilizing innovative technology, ideas, and people. www.AllThingsAdmin.
## Travel Itinerary

**EXECUTIVE NAME**

**Company Name Board Meeting**

**City, Province**

### MONTH DAY, YEAR

<table>
<thead>
<tr>
<th>TIME</th>
<th>EVENT</th>
<th>DETAILS</th>
</tr>
</thead>
</table>
| 5:45 AM EST  | Car Service Name will pick you up at ___________ and transport you to the ___________ Airport (XXX – 3 letter airport code here) | Phone: (XXX) XXX-XXXX  
Confirmation #: XXXXXXXX  
Paid for with _________ - $XX |
| 7:05 AM EST  | Depart **City – Airline Name Flight # XXXX** To Chicago, O’Hare Airport (ORD) | Airlines Phone: (XXX) XXX-XXXX  
Confirmation Number: XXXXXXXXX  
E-Ticket #: XXXXXX  
Freq. Flier #: XXXXXXXX  
Food will NOT be available during flight. |
| 8:05 AM CST  | Arrive **Chicago O’Hare**                                             |         |
| 9:00 AM CST  | Depart **Chicago O’Hare – Airline Name Flight #XX to City, State**     | First Class Seat  
Food will be served during flight. |
| 2:25 PM HST  | Arrive **City, State**                                               |         |
|              | Ground Transportation: Car Service Name will provide transportation from the Airport to the ___________. The driver will meet you at the gate with a sign with your name. | Telephone: (XXX) XXX-XXXX  
Cost will be charged directly to __________ account. |
|              | Accommodations: Hotel Name:  
Address: | Hotel Telephone: (XXX) XXX-XXXX  
Confirmation No: XXXXXXXX  
$ XXX.00 USD plus 11.4166% Tax  
Check In Time:  
Check Out Time: |
**Travel Itinerary**

**Executive Name**

**Company Name Board Meeting**

**City, Province**

**MONTH DAY, YEAR**

<table>
<thead>
<tr>
<th>TIME</th>
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<th>DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ground Transportation: Taxi service is available via the valet from the Hotel to the ________________ offices.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Meeting Location: **Company Name**
  **Street Address**
  **City, State Zip** | Corporate Receptionist: (XXX) XXX-XXXX
  Contact Person’s cell: (XXX) XXX-XXXX |
| Please check-in with Security on the ground floor with a picture ID to obtain a badge. |
| 7:30 AM HST      | Continental Breakfast      |                                                                         |
| 8:00 AM – 9:30 AM HST | Audit Committee Meeting   | Attire: Business Casual (no tie or jacket)                               |
| 10:00 AM – 1:30 PM HST | Board of Directors Meeting |                                                                         |
| NOON HST         | Lunch                      |                                                                         |
| 3:00 PM HST      | Ground Transportation: Car service by ________________ from ________________ to the airport. |
|                   | Cost will be charged directly to ____________ account. |                                                                         |
| 5:50 PM HST      | Depart City, State — Airline Name Flight # XX
  To City State (3 digit airport code) | Airlines Phone: XXX-XXX-XXXX
  Confirmation Number: XXXXXXXXXX
  E-Ticket #: XXXXXX |
| Flight time: 8 hours 5 min. | Freq. Flier #: AA XXXXXXXXXX
  First Class Seat |
| 5:55 AM CST      | Arrive City, State         |                                                                         |
| 7:00 AM CST      | Depart City, State on Airline Name Flight # XXXX
  To City State (3 digit airport code) | Food will NOT be served during flight.                                    |
| 7:55 AM CST      | Arrive City State — Airport Name |                                                                         |

**Consider including the following instructions also:**

- How to access voice mail remotely (especially helpful for team members who do NOT travel a lot and may not know how to do this)
- How to login to webmail remotely (if available). Provide the URL they need to get started. Do NOT include their login or password information.