



Executive Assistant

OVERVIEW

The Executive Assistant position is pivotal in providing comprehensive support to the CEO (think right-hand person) and a small business specializing in online training for bankers. This role encompasses various tasks, including CEO calendar management and meeting coordination, meticulous email and inbox management, drafting and sending email responses and sequences, and executing customer service initiatives such as ordering member appreciation gifts and other membership retention activities. Additionally, the Executive Assistant extends administrative and leadership support to other team members as required. The ideal candidate must possess exceptional organizational skills, keen attention to detail, and the ability to work autonomously. Effective communication skills are paramount for success in this position. Experience in the Financial Industry/Banking Institutions is highly preferred.

The Executive Assistant is vital in supporting the CEO's core functions and the overall CRA Today business model. This involves actively engaging with bankers through email and customer service initiatives, aiming to influence and convert them into customers and foster customer retention. The Executive Assistant will fill in for the CEO as needed and provide leadership and supportive resources to the CRA Today team.

PURPOSE

The administrative/leadership support provided by the Executive Assistant is integral to the successful promotion of CRA Today within the online environment, facilitating meaningful engagement with customers, prospects, and partners. Ultimately, the efforts of the Executive Assistant contribute to enhancing brand awareness and creating opportunities to engage bankers, thereby facilitating interactions with the CEO and driving eventual sales.

REPORTING

The Executive Assistant will directly report to the CEO.

CONTINUING EDUCATION/RESEARCH

Continuous improvement of our online presence and the adoption of innovative technological strategies to streamline operations are central to our objectives.



RESPONSIBILITIES AND GOALS

Efficient CEO Calendar Management

Diligent Management of Multiple Email Inboxes (Inbox Zero)

Coordination of CEO Travel, Including Personal Details and Reservations

Maintenance of Tasks and Projects within ClickUp on a Daily Basis

Tech support for customers accessing CRA Hub, etc

Active Participation in Weekly Team Meetings and Ad Hoc Meetings as Required

Administration and Organization of Shared Drives, Standard Operating Procedures (SOPs), Team Activities, etc.

Project Coordination: Facilitate and coordinate various projects and initiatives within the organization, including tracking deadlines, managing milestones, and ensuring timely completion.

Document Preparation: Assist in preparing, editing, and formatting documents, presentations, reports, and proposals for internal and external stakeholders.

Event Planning and Coordination: Organize and coordinate company events, meetings, webinars, workshops, and conferences, including logistical arrangements, agenda preparation, and attendee coordination.

Data Management: Update databases, contact lists, and CRM systems with accurate and current information, ensuring data integrity and confidentiality.

Meeting Facilitation: Prepare meeting agendas, take minutes, and follow up on action items arising from meetings, ensuring effective communication and follow-through on decisions—lead meetings as requested.

Customer Relationship Management: Support customer relationship management efforts by maintaining customer databases, responding to customer inquiries, and delivering exceptional customer service.



BENEFITS AND COMPENSATION

Compensation: Starting at \$23/hour (based on experience)

W2 Full-Time/ Monday - Friday

100% Remote Position

Annual Paid Time Off

Professional Development Support and Training

40 hours per week with some flexibility

Opportunity to advance into Chief of Staff role as the company grows

*US-Based Candidates only