LORETTA RODRIGUEZ, CDFA, IS...

OFFICE GIRL!

CHAPTER ONE: H-E-L-P

Late in 2022, one of the practices in our office won a large project and employees began relocating to San Antonio to help support. I sat closest to this practice area and had been supporting them for over 10 years, so it made sense to continue doing so. However, I quickly became overwhelmed with the number and magnitude of the requests for this new project and growing group while also trying to manage the office and training the other administrative assistant who was still in her first year at the firm.

Then one evening, while working late to keep up, the program manager for the project (who had just relocated) stopped to chat and he revealed that they would need full-time administrative assistance for this project and others moving forward. I immediately started asking if this had been communicated with senior staff as we were in the middle of our annual business planning for 2023.

The answer was no. But that conversation became the catalyst for many, many more conversations and the ultimate decision for me to transition my support, exclusively, to this one practice and obtain approval to hire additional administrative help. No wonder I felt overwhelmed! I was tackling the workload for more than one person. Bottom line: Don't be afraid to start the conversation and ask for help when you sense a shift in your responsibilities/workload. An opportunity may be around the corner.



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