The EA & PA Development Toolkit

Four working tools to help you develop deliberately, and prove it.

Most EAs and PAs develop by accident: a new executive here, a system implementation there, and no record of any of it. Then a review, a restructure or a role they want arrives, and the evidence lives in nobody's memory but their own. This toolkit is four working tools to change that: an honest audit of where you are, a plan for where you are going, a log that proves your value and the case to put in front of the person who holds the budget. Print it, write on it and keep it.

01 The skills audit

An honest picture of where you actually are, rather than where your job description says you are.

Score yourself from 1 to 5 on each line. A 1 means you have never done it and a 5 means you could teach it. The total does not matter; what matters is the pattern. Your 4s and 5s are the strengths you should be evidencing (Tool Three), and your 1s and 2s are what your development plan should target (Tool Two).

	1	2	3	4	5
Diary and capacity management. You shape the diary around what the business needs from your executive this quarter, decline meetings on their behalf and protect thinking time, rather than fitting requests in.	○	○	○	○	○
Inbox ownership. You triage, draft and close on your executive's behalf against agreed rules, and they could go a week without opening their own inbox.	○	○	○	○	○
Meetings and follow-through. Agendas, papers, minutes and action tracking, with actions chased to done. Meetings you service produce decisions, not repeat discussions.	○	○	○	○	○
Judgement and autonomy. You know what to decide, what to escalate and what to quietly resolve, and your executive has stopped checking, because you have never given them a reason to.	○	○	○	○	○
Stakeholder handling. Senior people inside and outside the organisation treat you as the route to your executive, and tell you things they would not put in an email.	○	○	○	○	○
Commercial awareness. You can name the organisation's three priorities this year, and you could explain how your executive's diary serves them, or where it does not.	○	○	○	○	○
Projects. You have owned a piece of work end to end, scoped it, run it and reported on it, and you can state its result in a number.	○	○	○	○	○
Working with AI. You use AI tools regularly, safely and within your organisation's rules, and routine work that took hours a year ago now takes minutes.	○	○	○	○	○
Difficult conversations. You can push back, renegotiate scope or raise a concern with someone senior to you, early, rather than after it has cost something.	○	○	○	○	○
Visibility. The people who decide on pay, progression and headcount know what you actually do, not just that you do it well. Your scope is on record, not just absorbed.	○	○	○	○	○

Reading your audit

What your scores tell you, and what to do next.

Your 4s and 5s are your strongest evidence. These belong on your CV, in your LinkedIn profile and in your next review, each with an example attached. Many EAs and PAs undersell the things they do best because those things have become routine to them, and Tool Three is designed to correct that.

Your 1s and 2s are your development priorities. Choose two rather than five, as a plan that targets everything rarely delivers anything. Pick the two that appear most often in job descriptions for the role you want next, and carry them into Tool Two with a date attached.

Your 3s deserve a closer look. A 3 usually means one of two things: you have done the work but never owned it, or you own it but nobody knows. It is worth working out which, because the remedy is different for each. The first needs opportunity; the second needs visibility.

MY TWO DEVELOPMENT PRIORITIES

THE STRENGTHS I AM NOT CURRENTLY EVIDENCING ANYWHERE

MY 3S, AND WHETHER EACH NEEDS OPPORTUNITY OR VISIBILITY

NOTES FROM THIS AUDIT: ANYTHING IT SURFACED THAT SURPRISED ME

> **A note on honesty.** Score yourself on the evidence rather than on how confident you feel on the day. If you would struggle to give an example of a 4, score it as a 3. If you have an example you have simply never written down, it may well be a 5.

The gap between what you do and what you can prove is often the most expensive one in a career.

02 The development plan

Two priorities on one page, with real dates attached.

A development plan with five priorities quickly becomes a wish list, which is why this template holds two. Keeping each one to a single page is deliberate: a plan you can read at a glance is a plan you will actually use. Fill this in for your first priority, copy the structure for your second, and put the review date in your diary straight away.

THE SKILL OR CAPABILITY I AM DEVELOPING

WHY THIS ONE: WHERE IT SHOWS UP IN THE ROLES OR RECOGNITION I WANT

WHAT I WILL DO: THE SPECIFIC OPPORTUNITY, COURSE OR RESPONSIBILITY I AM PURSUING

WHO NEEDS TO AGREE, AND WHEN I WILL ASK THEM

WHAT DONE LOOKS LIKE: THE EVIDENCE THAT WILL EXIST WHEN THIS IS CLOSED

START DATE

REVIEW DATE

> **The strongest development rarely costs money.** Most gaps close through a responsibility someone gives you rather than a course you buy: servicing one committee, owning one inbox or running one event. Ask for the responsibility first. The course can come second, and Tool Four covers how to fund it.

TOOL THREE

03 The achievement log

If you do not write it down, it is as though it never happened.

This is the single habit we recommend to everyone we work with, from first-role PAs to Chiefs of Staff. Set up a subfolder in your personal email, and every time you deliver something, save something, fix something or take something new on, email yourself one line about it. This page is the paper version: the habit is what matters. When a review, a CV or a salary conversation arrives, you will negotiate from evidence while everyone else negotiates from memory.

DATE	WHAT I DID	THE RESULT, WITH A NUMBER WHERE POSSIBLE

What counts as a number? Hours returned to your executive each week, money saved on a supplier or budget, days taken out of a process, people onboarded, events run and meetings serviced all count. "Halved the advertising budget and still filled every post" is a career-changing line, and it only exists if someone wrote the numbers down at the time.

04 Making the case for funding

You are not asking for a favour; you are presenting a return.

Training budgets exist, and in most organisations they are underspent because the people who would benefit most never put a case forward. The shift that changes everything: stop pitching development as something you want, and start showing your employer what the business gets back.

The four arguments that carry weight are capacity, risk, retention and visible return. Capacity at leadership level means every hour you take off your executive is an hour returned to the most expensive person in the room. Reduced risk means better judgement in the support function and fewer things missed. Retention matters because developing someone already embedded is far more cost effective than replacing them. A visible return, meaning development that produces something the business can see, is easier to fund again next time.

The argument that does not work is "I would find it really valuable". It is true, and it is the version most people default to. It puts the decision on your manager's generosity rather than their judgement, and generosity has a much smaller budget.

Timing matters as much as framing. Ask early in a budget cycle, anchor it to a review already in the diary and let a visible win do the introduction. Your achievement log (Tool Three) is exactly what makes that possible.

THE DEVELOPMENT I WOULD ASK FOR, AND ROUGHLY WHAT IT COSTS

WHAT THE BUSINESS GETS BACK: MY STRONGEST ARGUMENT OF THE FOUR, IN MY ORGANISATION'S LANGUAGE

WHEN I WILL ASK, AND WHAT I AM ANCHORING IT TO

Want the full version? Our guide *Getting Your Development Funded* includes the email to send, the responses to the three most common objections and the one-page attachment that does most of the work. Ask us for it at emily@eavolve.co.uk.

Be part of the eavolution.

The toolkit works on its own, and it works faster with someone in your corner.

If you would like a second pair of eyes on what your audit surfaced, or you want to talk through which development would genuinely move you forward, book a call with Emily Partridge, our Managing Director. The call takes twenty minutes, it is completely free with no obligation, and you will leave with a clearer idea of where to put your effort.

Emily Partridge
MANAGING DIRECTOR

Book your free call with Emily