

Executive Assistant

Sample Assessment

Dear Finalist,

Congratulations on being a finalist for the Executive Assistant role at [company]!

This sample assignment gives you a real-world preview of your day-to-day work — and helps us see your skills in action. As a sign of respect for your time, this is a **paid assignment**.

About [Company]

[Insert a brief description of your organization.]

We value clear communication, transparency, and balancing the needs of both employees and clients — ensuring long-term success for everyone.

Why This Assignment?

This sample task helps both sides assess fit: you'll see what a typical day looks like, and we'll see your work in action. It's a paid, collaborative process to help ensure a strong long-term match.

We're excited to see your work — and we encourage you to showcase your attention to detail, client focus, and proactive communication.

You will be compensated [insert amount] upon completion and delivery, no matter whether or not you get the job-offer; this is out of fairness, and to ensure genuine effort is spent on this sample.

Sincerely,

[Hiring Manager]

References:

<https://www.amzallstars.com/find-a-job>

<https://greatplacetowork.com.ph/companies/amz-allstars/>

As Seen On:



Recommendations & Disclaimer on Use of AI for this Assignment

At [company], we recognize that tools like ChatGPT and other AI platforms have become commonplace in today's workplace. We are not prohibiting the use of AI in completing this sample assignment. However, we want to set clear expectations around its appropriate use.

If you choose to use AI to assist you, please do so responsibly. AI tools can be excellent for brainstorming, refining wording, or improving clarity. That said, relying on AI to fully generate your responses — without your critical input, judgment, and customization — is not acceptable. Directly copying and pasting unedited AI-generated content often leads to generic, off-tone deliverables that do not meet the standards we expect.

It's important to note that we are able to detect purely AI-generated submissions, and doing so will likely result in a failed assessment. We want to see your thinking, your judgment, and your personal touch in the work — not just a machine's output.

To summarize:

- ✓ Use AI for brainstorming, editing, or cleanup.
- ✗ Do not rely solely on AI to produce your final work.

Deliverable

Just like in a real-world Executive Assistant role, one of our key goals is to make things easier for the people we support. By consolidating everything into a single file, we help the client review your work quickly and with minimal effort.

Here's how to structure your submission:

- **Sheet 1 – Summary Tab:** Include all task titles, scenarios, and instructions for Tasks 1 to 5.
- **Sheets 2 and onward – Task Outputs:** Label each sheet clearly by task number and title. For example:
 - *Task 1 – Email Task: Executive Scheduling Change*
 - *Task 2 – Lifestyle Logistics & Vendor Coordination (Personal Support)*
 - *Task 3 – [Insert title]*
 - *Task 4 – [Insert title]*
 - *Task 5 – [Insert title]*

Submission Guidelines:

- Complete all five tasks outlined in the instructions.
- Consolidate everything into a **single Google Sheet or spreadsheet file**.
- Name your file using this format:
"First Name, Last Name, Sample Assessment"
(Example: *Ted Cruz Sample Assessment*)

Let us know if you have any questions as you work through the tasks!

✓ Task 1: Email Task – Executive Scheduling Change

Scenario:

Your executive, *Jim Carry* — a high-net-worth entrepreneur — was scheduled to have a private call with *Jordan Ellis*, Senior Relationship Manager at *Sterling Private Bank*, this **Friday at 1:30 PM PST** to discuss banking matters related to a new investment account.

Due to a last-minute conflict in Jim Carry's calendar, you'll need to notify Jordan of the change and propose a new time of **Tuesday at 10:00 AM PST**.

You should draft an email that:

- Notifies Jordan of the change
- Expresses appreciation and apologizes for any inconvenience
- Proposes the new date/time
- Maintains a warm, polished, and professional tone in line with high-level private banking relationships

Mock Details (for use in your draft):

- Sender: *You (as Executive Assistant to Jim Carry)*
- Recipient: *Jordan Ellis, Senior Relationship Manager, Sterling Private Bank*
- Subject Line: *Proposed Reschedule: Private Banking Call with Jim Carry*

✓ Task 2: Lifestyle Logistics & Vendor Coordination (Personal Support)

Scenario:

Your executive, *Jim Carry*, is currently traveling and needs you to coordinate an AC technician to inspect the central air conditioning system at his 3-bedroom residence in Newport Beach, California. The issue: the unit is running, but blowing warm air and not cooling effectively.

Jim Carry is available for a technician window this **Thursday, between 12:00 PM – 4:00 PM PST**.

He's asked for:

- At least **3 vetted local vendors** within 10–15 miles of Newport Beach
- Pricing for **initial inspection only** (no repair yet)
- Website and contact info for each vendor
- Your **final recommendation**

Instructions:

Using your research skills, compile a table of 3 vendor options and summarize their inspection rates, availability, and any notable features.

✓ Task 3: Luxury Gift Curation – Taste Judgment (Personal + Professional Support)**Scenario:**

Jim Carry has two important gifts he needs help sourcing. Each one requires a thoughtful, well-researched approach that reflects good taste and emotional intelligence.

Gift A: Business Relationship – CEO Follow-Up

Jim Carry recently had a great call with a 45-year-old CEO of a gaming distribution company based in Houston, Texas. He's looking to send a memorable and thoughtful follow-up gift to foster the relationship. Note that long-term Jim Carry is looking to invest in the company, or outright buy the company.

- Budget: Under \$500
- Tone: Professional, tasteful, and memorable (not overly personal)
- Style: Could include design-forward desk items, unique regional products, tech accessories, or experience-based ideas

Gift B: Personal – Fiance Pre-Trip Surprise

Jim Carry's fiancé is excited about their upcoming vacation to Italy and has recently been talking a lot about it. She loves the color yellow and enjoys thoughtful, fun surprises.

- Budget: Under \$500
- Tone: Romantic, playful, and considerate
- Style: Could include travel-themed accessories, Italian-inspired items, custom monogrammed gifts, or experiences to enjoy on the trip

Instructions:

For each gift (A and B), submit 2–3 curated options. Include:

- Product/service name
- Link to view/purchase

- Estimated price
- Rationale (why it's a good fit)

✓ Task 4: Travel Itinerary – Scenic Italy Getaway (Personal Support)

Scenario:

Jim Carry and his fiancé are planning a romantic getaway to Italy from May 15–19. As Jim Carry flies private, no flight bookings are needed — your responsibility is to craft an elegant, scenic, and well-paced travel itinerary that includes:

- A scenic, romantic destination in Italy
- A curated daily schedule of light activities (e.g. wine tasting, boat tour, spa afternoon, historic sights)
 - Please limit physical exertion activities to only 1-2 a day at max.
- Fine Dining or leisure suggestions
- A thoughtfully selected **5-star hotel** nearby that fits the flow of the itinerary and provides a luxurious, romantic experience

Tone: This is a leisure trip with an emphasis on scenic views, quality experiences, and romantic ambiance — think elegance without being too rigid or over-planned.

Instructions:

1. Choose **one destination** in Italy known for its scenic and romantic atmosphere (e.g., Amalfi Coast, Lake Como, Tuscany, etc.)
 2. Build a **4-night itinerary** (May 15–19) with:
 - A summary for each day (morning, afternoon, evening)
 - 2–3 activity suggestions per day
 - Optional dining recommendations
 3. Select a **5-star hotel** nearby that complements the itinerary and include:
 - Hotel name and link
 - Nightly rate estimate
 - Why you chose it (ambiance, amenities, proximity)
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Task 5: Event Booking Research – Private Tasting Dinner in Laguna Beach

Scenario:

Jim Carry is hosting a **small investor dinner in Laguna Beach** for 6 people next Thursday. He wants a private dining experience in a stylish yet low-key location. The dinner should:

- Be located within **15–20 minutes of Newport Beach, California**
- Have availability for **7:30 PM, on Fri night**
- Offer a **multi-course tasting menu only** (prix-fixe with wine pairings preferred)
- Have a private or semi-private dining area suitable for professional discussion

Instructions:

Research and present **3 venue options** that meet the criteria. For each, include:

- Restaurant name and link
 - Price estimate per person
 - Menu description or tasting format
 - Ambiance and relevance for investor-style gathering
- Final recommendation with a short rationale