

# Manager's preferences form

**Question:** I am changing roles and will be supporting new managers. I am looking for a form to keep track of manager preferences (travel, meals, how to handle meeting invites, etc.). I received a form several years ago, but I cannot find it now. I'm so used to my current managers' preferences that I have no need for a formal document that lists their preferences. Does anyone have something that has helped them keep track of several manager's preferences? -- *Anonymous*

## Comments

I have a personal info form for traveling and a form for pre & post meeting check-off list.  
(How do I submit them to you?)

**Posted by: Cynthia Sheeks | February 25, 2005 at 01:28 PM**

Keep each executive's details in your Outlook Contacts separately under their name. Once you have done the first one e.g. Frequent flyer number, credit card details, etc. you need just copy and past into the next contact and change the numbers.

**Posted by: Anonymous | February 28, 2005 at 09:08 AM**

If you subscribe to "Personal Report for the Administrative Professional," you can receive several sample forms for travel preferences through the free E-visory Reports. Visit [www.admin-pro.com/extra](http://www.admin-pro.com/extra) and mark the items you would like to receive.

**Posted by: Amy Beth Miller, editor | March 01, 2005 at 12:57 PM**

I have a word document titled Personal Profile for each of my managers.  
There are 2 columns and as many lines as needed to add the following:  
Name and Nickname; title' business address, phone, cell phone, fax; Employee ID code (if any), email address;  
Org Code, Department, Location code; Start date with company; clearances (if applicable); Company credit card numbers/exp dates; Airline (window/center/aisle and rental car preferences with reward plans and numbers;  
Home address, home phone, home cell phone; SS# and DOB; mom and dad's name and their DOBs; drivers license number.  
Any info prevalent needed for your company.  
Keep these in a very safe place, preferably under lock and key.

