

## Executive and Personal Assistants

Being an Executive or Personal Assistant is a unique position that requires a variety of skills. Whether you are updating schedules, making travel arrangements, minute taking, or creating important documents all must be done with a high degree of confidentiality. Confidentiality is one of the most important characteristics for every assistant.

Our Executive and Personal Assistants workshop will show your participants what it takes to be a successful assistant. Participants will learn what it takes to effectively manage a schedule, organize a meeting, and even how to be a successful gatekeeper. Being an Executive or Personal Assistant takes a special skill set and this workshop will provide your participants with the necessary tools.



### Course Outline:

#### Module One: Getting Started

- Housekeeping Items
- The Parking Lot
- Workshop Objectives
- Pre-Assignment
- Action Plans and Evaluations

#### Module Two: Working with Your Manager

- Adapting to Their Style
- Anticipate Their Needs
- Getting Your Responsibilities Defined
- When to Take the Initiative
- Case Study
- Module Two: Review Questions

#### Module Three: Administrative Soft Skills

- Social Intelligence
- Basic Business Acumen
- Office Management
- Active Listening
- Case Study
- Module Three: Review Questions

#### **Module Four: Effective Time Management**

- Calendar Management
- Prepare for Changes and Surprises
- Keeping Others on Track
- Urgent/Important Matrix
- Case Study
- Module Four: Review Questions

#### **Module Five: Meeting Management**

- Creating an Agenda
- Keeping Minutes
- Keeping the Meeting on Time
- Variations for Large and Small Meetings
- Case Study
- Module Five: Review Questions

#### **Module Six: Tools of the Trade (I)**

- Email Protocol
- Office Machinery
- Computer and Software Skills
- Communication Skills
- Case Study
- Module Six: Review Questions

#### **Module Seven: Tools of the Trade (II)**

- Phone and Voicemail Etiquette
- Word Processing
- Business Writing
- Internet Research
- Case Study
- Module Seven: Review Questions

#### **Module Eight: Being an Effective Gatekeeper**

- Filtering Data and Information
- Learn to Say No
- Dealing with Difficult People
- Recognize the Tricks
- Case Study
- Module Eight: Review Questions

**Module Nine: Organizational Skills**

- Prioritizing Your Workload
- Goal Setting
- Plan for Tomorrow, Today
- Staying on Track
- Case Study
- Module Nine: Review Questions

**Module Ten: Confidentiality Guidelines**

- Your Confidentially Duty
- Be Diplomatic and Discreet
- Keeping Data Secure
- What to Do in Sticky Situations
- Case Study
- Module Ten: Review Questions

**Module Eleven: Special Tasks**

- Project Management
- Trade Shows
- Interacting with Clients
- Social Media Management
- Case Study
- Module Eleven: Review Questions

**Module Twelve: Wrapping Up**

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations