

Executive and PA – Skills & Functions



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.



SDGC
TRAINING & CONSULTING

**SUCCESS DRIVES
GLOBAL CONSULTS**

PROGRAM OVERVIEW

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.

PROGRAM CONTENT

Module One: Getting Started

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

Module Four: Effective Time Management

- Calendar Management
- Prepare for Changes and Surprises
- Keeping Others On Track
- Urgent/Important Matrix
- Case Study

Module Two: Working with Your Manager

- Adapting to Their Style
- Anticipate Their Needs
- Getting Your Responsibilities Defined
- When to Take the Initiative

Module Five: Meeting Management

- Creating An Agenda
- Keeping Minutes
- Keeping the Meeting On Time
- Variations for Large and Small Meetings

Module Three: Administrative Soft Skills

- Social Intelligence
- Basic Business Acumen
- Office Management
- Active Listening
- Case Study

Module Six: Tools of the Trade (I)

- Email Protocol
- Office Machinery
- Computer and Software Skills
- Communication Skills

Module Seven: Tools of the Trade (II)

- Phone and Voicemail Etiquette
- Word Processing
- Business Writing
- Internet Research

Module Eight: Being an Effective Gatekeeper

- Filtering Data and Information
- Learn to Say No
- Dealing With Difficult People
- Recognize the Tricks
- Case Study

Module Nine: Organizational Skills

- Prioritizing Your Workload
- Goal Setting
- Plan for Tomorrow, Today
- Staying on Track

Module Eleven: Special Tasks

- Project Management
- Trade Shows
- Interacting with Clients
- Social Media Management

Module Ten: Confidentiality Guidelines

- Your Confidentiality Duty
- Be Diplomatic and Discreet
- Keeping Data Secure
- What To Do in Sticky Situations

Module Twelve: Wrapping Up

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

WHO SHOULD ATTEND?

- Executive Assistance
- Executive Administrators
- Personal Assistance to Senior Executive
- Office Administrator
- Office Manager

DURATION: 2 DAYS

TRAINING PACK

- Award of Certificate of Participation, on completion.
- Customized Training Materials
- interactive, experiential learning
- Light Refreshment
- 30days On- going mentorship