

The Personal Assistant and Secretarial Master Class

About the Workshop

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 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.

Learning Objectives

Upon completion of workshop participants will be able to:

- Work with a manager
- Manage meetings
- Handle special tasks
- Organize work

Target Audience

This course will appeal to a wide range of audiences and is intended for secretaries and Assistants.

Topics Covered

- 1. Getting Started**
 - a. Housekeeping Items
 - b. The Parking Lot
 - c. Workshop Objectives
 - d. Pre-Assignment
 - e. Action Plans and Evaluations
- 2. Working with Your Manager**
 - a. Adapting to Their Style
 - b. Anticipate Their Needs
 - c. Getting Your Responsibilities Defined
 - d. When to Take the Initiative
 - e. Case Study
 - f. Module Two: Review Questions
- 3. Administrative Soft Skills**
 - a. Social Intelligence
 - b. Basic Business Acumen
 - c. Office Management
 - d. Active Listening
 - e. Case Study
 - f. Module Three: Review Questions
- 4. Effective Time Management**
 - a. Calendar Management
 - b. Prepare for Changes and Surprises
 - c. Keeping Others On Track
 - d. Urgent/Important Matrix
 - e. Case Study
 - f. Module Four: Review Questions
- 5. Meeting Management**
 - a. Creating An Agenda
 - b. Keeping Minutes
 - c. Keeping the Meeting On Time
 - d. Variations for Large and Small Meetings
 - e. Case Study
 - f. Module Five: Review Questions
- 6. Tools of the Trade (I)**
 - a. Email Protocol
 - b. Office Machinery

- c. Computer and Software Skills
 - d. Communication Skills
 - e. Case Study
 - f. Module Six: Review Questions
- 7. Tools of the Trade (II)**
- a. Phone and Voicemail Etiquette
 - b. Word Processing
 - c. Business Writing
 - d. Internet Research
 - e. Case Study
 - f. Module Seven: Review Questions
- 8. Being an Effective Gatekeeper**
- a. Filtering Data and Information
 - b. Learn to Say No
 - c. Dealing with Difficult People
 - d. Recognize the Tricks
 - e. Case Study
 - f. Module Eight: Review Questions
- 9. Organizational Skills**
- a. Prioritizing Your Workload
 - b. Goal Setting
 - c. Plan for Tomorrow, Today
 - d. Staying on Track
 - e. Case Study
 - f. Module Nine: Review Questions
- 10. Confidentiality Guidelines**
- a. Your Confidentially Duty
 - b. Be Diplomatic and Discreet
 - c. Keeping Data Secure
 - d. What To Do in Sticky Situations
 - e. Case Study
 - f. Module Ten: Review Questions
- 11. Special Tasks**
- a. Project Management
 - b. Trade Shows
 - c. Interacting with Clients
 - d. Social Media Management
 - e. Case Study
 - f. Module Eleven: Review Questions
- 12. Wrapping Up**
- a. Words from the Wise
 - b. Review of Parking Lot
 - c. Lessons Learned

d. Completion of Action Plans and Evaluations

Methodology

- Learning Concepts/Presentations
- Group Activities and Discussions
- Tips and Tools
- Individual and Team Exercises
- Role Plays/Case Studies
- Educational Videos
- Action Plan to ensure Application of the Learning

Duration: 12 hours