

# Executive and Personal Assistants 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 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.

## Workshop Objectives:

- Adapt to the needs and styles of management
- Communicate through written, verbal, and nonverbal methods
- Improve time management skills
- Manage meetings effectively
- Act as a gatekeeper
- Use the tools of the trade effectively



For more information or to reserve your spot in this workshop, please contact:

Joseph (J.J.) Frazier  
President  
Mastering the Positive, LLC  
Phone: (757) 962-7073  
Mobile: (757) 952-8340  
Visit: [www.masteringthepositive.com](http://www.masteringthepositive.com)  
Email: [jfraziers@cox.net](mailto:jfraziers@cox.net)



## CLASS CONTENT

### **Module One: Getting Started**

Workshop Objectives  
Pre-Assignment

### **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 26  
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 43  
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 Confidentiality 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

Lessons Learned