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COURSE BROCHURE

Advanced Secretaries and PAs Training Course for Administrative Professionals

18 – 29 January 2027
Milan

Advanced Secretaries and PAs Training Course for Administrative Professionals

Ref: 238_7464 **Date:** 18 – 29 January 2027 **Location:** Milan **Fees:** 11100 GBP

Advanced Secretaries and PAs training for administrative professionals is a 2-week training course for experienced secretaries, personal assistants and administrators who support one or several principals, and it produces a PA operating handbook. Senior support roles now carry heavier diaries, more confidential material and more travel than a single assistant once handled. Jupiter Prime Training offers this course to support professionals ready to run their role as a deliberate system.

Why Secretaries and PAs Matter Now

Principals now split their week between offices, video calls and travel, so the assistant who controls the diary controls the pace of decisions. Shared drives and delegated mailboxes put sensitive personnel and commercial papers within reach of more people, raising the cost of a careless share. Colleagues also expect support staff to act as a reliable first point of contact. An organisation whose secretaries and PAs work from clear routines protects its leaders' time and reputation; one that relies on memory and goodwill sees double bookings, missed renewals and leaked documents. The course rests on established records management practice, the urgency and importance matrix and recognised confidentiality classifications.

Who Gains Most from Secretaries and PAs

- Assistants who run the diaries of two or more senior principals
- Secretaries who control a department's inbox, telephones and visitors
- Administrators who book travel, visas and itineraries for leaders
- Support professionals who organise leadership events and offsites
- Personal assistants who hold confidential personnel and board papers

Pools of assistants serving a leadership floor gain most when several attend together, because they leave with shared diary rules and a common handover format.

Secretaries and PAs Capabilities

Participants leave able to run a senior support desk as a set of documented routines rather than a stream of reactions.

- Design diary ownership and clash rules — principals with competing calls on the same hours
- Apply an urgency and importance matrix to incoming requests — the principal's real priorities
- Build inbox triage and daily digest routines — leaders who need one summary, not fifty messages
- Specify confidentiality handling for restricted papers — HR, legal and board stakeholders
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Build travel and event packs with contingencies — travellers and guests relying on dependable logistics
- Assess records against a file plan and retention schedule — auditors and colleagues retrieving documents

Key Secretaries and PAs Terms

- Principal — the senior person an assistant supports, whose time, correspondence and commitments the assistant manages.
- Diary clash — two or more commitments competing for the same time slot that must be resolved by agreed priority rules.
- Inbox triage — sorting incoming messages into act, delegate, file or delete so nothing urgent waits unseen.
- Run sheet — a timed event document listing every activity, its owner and its location from set-up to close.
- File plan — a structured list of record folders mirroring business functions so documents are stored and found consistently.
- Handover pack — a document set that lets a colleague cover the role during leave without losing commitments or context.

Secretaries and PAs Day by Day

Day 1: The Senior Support Role Today

- Support Role Mapping — Principals, Peers and Gatekeeping Boundaries
- Expectation Agreements With Principals — Authority, Access and Escalation Limits
- Hybrid and Remote Support Patterns — Visibility Without Constant Check-Ins
- Personal Operating System Audit — Where Time and Attention Leak
- Sector Contrasts in Support Work — Healthcare, Energy and Professional Services

Day 2: Multi-Principal Diary Control

- Diary Ownership Rules — Who Books, Who Moves, Who Declines
- Clash Resolution Protocols — Ranking Competing Requests From Several Principals
- Buffer and Preparation Slots — Protecting Thinking Time in Calendars
- Recurring Commitment Reviews — Pruning Meetings That Add No Value
- Shared Calendar Etiquette — Colour Codes, Privacy Flags and Tentative Holds

Day 3: Priority and Workload Judgement

- Urgency and Importance Matrix — Sorting Requests Before Accepting Them
- Saying No Diplomatically — Renegotiating Deadlines on a Principal's Behalf
- Batching and Focus Blocks — Reducing Interruptions in Busy Offices
- Daily Start and Shutdown Routines — Closing Loops Before Leaving
- Workload Visibility Boards — Showing Principals What Is in Flight

Day 4: Inbox Triage and Information Flow

- Inbox Triage Categories — Act, Delegate, File, Delete
- Folder and Label Schemes — Finding Any Message Within Seconds
- Delegated Mailbox Access — Rules for Reading and Replying
- Daily Digest for Principals — Summarising What Needs Their Attention
- Follow-Up Trackers — Chasing Outstanding Replies Without Friction

Day 5: Confidential Information Handling

- Confidentiality Classifications — Public, Internal, Restricted, Secret
- Clean Desk and Screen Practices — Physical and Digital Exposure
- Sensitive Personnel Matters — Handling Salary, Disciplinary and Health Papers
- Secure Sharing Methods — Passwords, Expiry Links and Access Logs
- Discretion Under Pressure — Responding to Probing Questions From Colleagues

Day 6: Travel and Itinerary Logistics

- Travel Request Briefs — Purpose, Budget Band and Preferences
- Itinerary Documents — Flights, Ground Transport, Contacts and Contingencies
- Visa and Document Checklists — Lead Times and Renewal Alerts
- Duty-of-Care Information — Emergency Contacts and Travel Risk Notes
- Expense Reconciliation Packs — Receipts Matched Before Deadline

Day 7: Event and Meeting Logistics

- Event Run Sheets — Minute-by-Minute Timings and Owners
- Venue and Supplier Selection — Capacity, Access and Catering Needs
- Guest List and RSVP Management — Seating, Badges and Special Needs
- Hybrid Meeting Set-Up — Room Technology and Remote Attendee Experience
- Post-Event Wrap-Ups — Thank-You Notes, Costs and Lessons Logged

Day 8: Records Control and Document Discipline

- File Plan Structures — Matching Folders to Business Functions
- Version Control Habits — Naming, Dating and Locking Final Copies
- Retention Schedules in Practice — What to Keep, Archive or Destroy
- Scanning and Digitisation Routines — Indexing Paper Into Searchable Records
- Retrieval Drills — Producing Any Document a Principal Requests Quickly

Day 9: Professional Presence and Relationships

- Front-of-House Presence — Greeting Visitors and Managing First Impressions
- Telephone and Video Call Manner — Screening, Holding and Transferring
- Assertive Communication With Senior Figures — Clarity Without Deference
- Network of Fellow Assistants — Trading Information Across Departments
- Resilience and Boundaries — Managing Pressure From Several Principals

Day 10: Practising the PA Operating Handbook

- Multi-Principal Diary Clash Simulation — Resolution Under Time Pressure
- Inbox Triage Sprint — Clearing a Seeded Mailbox to Zero
- Travel Itinerary Build — Complete Pack With Contingencies
- Handover Pack Drafting — Cover Notes for Leave and Absence
- PA Operating Handbook — Final Routines, Rules and Templates Assembled

Applying Secretaries and PAs After the Course

- Agree written diary ownership and clash rules with each principal and publish them to the leadership floor.
- Run the inbox triage categories and daily digest for four weeks, then review response times with the principal.

Secretaries and PAs Questions FAQ

What are advanced secretaries and PAs skills and why do they matter now?

They are the routines senior assistants use to control diaries, inboxes, confidential papers, travel and records for busy principals. They matter now because hybrid schedules, delegated mailboxes and frequent travel multiply the commitments one assistant must hold without dropping any.

Which roles gain most from advanced secretaries and PAs training?

Experienced secretaries, personal assistants and administrative professionals supporting senior leaders gain most, especially those serving several principals at once. Healthcare, energy and professional services offices, where diaries shift daily, see the clearest return from shared routines.

How does advanced secretaries and PAs training differ from an office administration course?

It focuses on supporting individual principals rather than running office services. Office administration covers supplies, facilities and front desk routines; this course centres on diary judgement, confidentiality, executive travel and the assistant's own operating system.

What do you bring back from advanced secretaries and PAs training?

You bring back a PA operating handbook with your diary rules, triage categories, confidentiality practices, travel templates and handover pack. It turns knowledge held in your head into a system colleagues can follow when you are away.

Secretaries and PAs: The Way Forward

The PA operating handbook gathers diary rules, triage categories, confidentiality practices, travel templates and the handover pack into one reference. Its first use is agreeing with each principal who may book, move or decline their time. Assistants, cover staff and principals all rely on it, and it is worth revisiting after the first period of leave to see which instructions a colleague actually needed.