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COURSE BROCHURE

Advanced Executive Assistant and PA Excellence Training

4 – 15 January 2027
New York

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Advanced Executive Assistant and PA Excellence Training

Ref: 265_8547 **Date:** 4 – 15 January 2027 **Location:** New York **Fees:** 14000 GBP

Advanced Executive Assistant and PA Excellence is a 2-week training course for executive assistants and PAs supporting chief executives and other C-suite leaders, and it produces an executive support charter with a weekly priority rhythm. Leaders now face more demands on their time than any diary can hold, so the assistant decides much of what reaches them. Jupiter Prime Training delivers this course for assistants ready to work as trusted partners at the top.

Why Executive Assistant and PA Excellence Matters Now

C-suite leaders juggle boards, investors, regulators and staff across time zones, and every hour they lose to the wrong meeting has a real cost. At the same time, more sensitive information passes through the executive office than ever, so discretion is tested daily. An organisation whose top assistants anticipate needs, screen access with judgement and prepare decision-ready briefings gives its leaders back thinking time; one whose assistants simply process requests sees leaders overbooked, under-briefed and exposed. The course rests on recognised personal productivity methods and established executive briefing formats, adapted to the pace of senior leadership.

Who Gains Most from Executive Assistant and PA Excellence

- Assistants who protect a chief executive's diary and access
- PAs who prepare briefings and meeting packs for C-suite leaders
- Support professionals who manage relationships with board members and key clients
- Senior assistants who coordinate a leadership team's calendars
- Assistants who handle personnel and board matters in confidence

The assistants supporting a whole executive committee gain most when they attend together and agree shared access rules and briefing formats.

Executive Assistant and PA Excellence Capabilities

Participants leave able to act ahead of the executive's needs rather than react to them, while guarding the leader's time and trust.

- Design an access rules matrix and screening questions — the executive whose time is most contested
- Build one-page decision briefs and meeting prep packs — leaders deciding with limited reading time
- Apply look-ahead scanning and contingency prompts — principals facing fast-changing agendas
- Assess stakeholder relationships and maintenance touchpoints — board members, clients and peers
- Communicate upward feedback with clarity and respect — the executive–assistant partnership

- Specify a weekly priority rhythm and daily huddle — executives aligning commitments and risks

Key Executive Assistant and PA Excellence Terms

- Gatekeeping — deciding, with agreed rules, which requests reach the executive directly, which go to a delegate and which wait.
- Decision-ready brief — a one-page note that states the situation, options and recommendation so a leader can decide immediately.
- Look-ahead scan — a regular check of the coming fortnight to prepare papers, people and logistics before they are requested.
- Access rules matrix — a grid listing stakeholder groups and how, when and through whom each may reach the executive.
- Executive support charter — a written agreement between assistant and executive on authority, priorities, boundaries and working rhythm.
- Upward feedback — constructive observations an assistant gives the executive about working habits that affect support quality.

Executive Assistant and PA Excellence Day by Day

Day 1: The C-Suite Support Landscape

- C-Suite Role Profiles — How a Chief Executive, Finance Chief and Operations Chief Differ
- Executive Working Style Diagnostic — Pace, Detail Preference and Decision Habits
- Assistant Value Ladder — From Task Execution to Anticipation
- Sector Contrasts in Executive Support — Petrochemicals, Banking and Hospitals
- Current-State Support Audit — Requests Missed, Duplicated or Delayed

Day 2: Anticipating Executive Needs

- Look-Ahead Scanning — Reading the Next Fortnight Before It Arrives
- Pre-Meeting Readiness Checklists — Papers, People and Previous Commitments
- Pattern Spotting in Requests — Turning Repeats Into Standing Arrangements
- Energy and Focus Mapping — Placing Hard Decisions in Peak Hours
- Contingency Prompts — What the Executive Will Ask If Plans Change

Day 3: Gatekeeping With Judgement

- Access Rules Matrix — Who Gets Time, Who Gets a Delegate
- Request Screening Questions — Purpose, Urgency and Decision Needed
- Redirecting Requests Gracefully — Offering the Right Alternative Contact
- Open-Door Windows — Protected Slots for Direct Reports
- Escalation Thresholds — When to Interrupt the Executive Immediately

Day 4: Decision-Ready Briefings

- One-Page Executive Brief — Situation, Options, Recommendation, Ask
- Meeting Prep Packs — Attendee Profiles, History and Desired Outcome
- Reading Load Reduction — Summarising Long Reports Into Key Points
- Follow-Up Capture — Commitments the Executive Made in the Room
- Briefing Quality Feedback — Asking the Executive What Was Missing

Day 5: Stakeholder Relationships at the Top

- Executive Stakeholder Map — Board Members, Peers, Regulators and Key Clients
- Relationship Maintenance Calendar — Touchpoints, Occasions and Courtesies
- Chief of Staff and Assistant Boundaries — Dividing Work Without Friction
- Peer Assistant Network — Coordinating Diaries Across the Leadership Team
- Difficult Stakeholders — Handling Pressure for Access or Information

Day 6: Discretion, Trust and Ethics

- Confidentiality Tiers in the Executive Office — Board, Personnel and Commercial
- Trust-Building Behaviours — Reliability, Candour and Owning Mistakes
- Ethical Dilemmas for Assistants — Requests That Cross a Line
- Information Leak Prevention — Printing, Sharing and Conversation Hygiene
- Personal Matters of the Executive — Boundaries Between Private and Corporate

Day 7: Personal Productivity at C-Suite Pace

- Personal Task System — Capture, Sort, Schedule and Review
- Uninterrupted Work Blocks for the Assistant — Protecting Time for Complex Tasks
- Digital Tool Discipline — Notifications, Templates and Shortcuts
- Resilience Under Pressure — Recovery Routines During Peak Periods
- Delegating Downwards — Using Junior Administrators and Shared Services

Day 8: Partnership Conversations With the Executive

- Expectation-Setting Conversation — Preferences, Pet Hates and Priorities
- Daily Huddle Format — Ten Minutes That Align the Day
- Weekly Priority Rhythm — Reviewing Commitments, Risks and Next Week
- Giving Upward Feedback — Raising Concerns Respectfully and Clearly
- Performance Conversations — Showing the Value of Executive Support

Day 9: Executive Support Under Change

- New Executive Onboarding — Building Rapport in the First Three Months
- Supporting an Executive Through Restructuring — Sensitivity and Confidentiality
- Crisis-Day Support — Clearing Diaries and Managing Inbound Pressure
- Leadership Transitions — Handover Between Outgoing and Incoming Executives
- Remote and Travelling Executives — Keeping Control From a Distance

Day 10: Practising the Executive Support Charter

- Gatekeeping Role-Play — Screening Five Competing Access Requests
- One-Page Brief Drafting From a Live Scenario — Executive Critique
- Weekly Priority Rhythm Simulation — Running the Review Meeting
- Upward Feedback Rehearsal — Peer Coaching and Refinement
- Executive Support Charter — Agreed Access Rules, Rhythms and Boundaries Finalised

Applying Executive Assistant and PA Excellence After the Course

- Hold the expectation-setting conversation with the executive and agree the first draft of the access rules matrix.
- Run the daily huddle and weekly priority rhythm for a month, then ask the executive which briefings saved most time.

Executive Assistant and PA Excellence Questions FAQ

What is executive assistant and PA excellence and why does it matter now?

Executive assistant and PA excellence is supporting C-suite leaders by anticipating needs, guarding access and preparing decision-ready briefings. It matters now because leaders' time is more contested than ever, and assistants decide much of what reaches them and how prepared they are.

Which roles gain most from advanced executive assistant and PA excellence training?

Executive assistants and PAs to chief executives, finance chiefs and other C-suite leaders gain most, along with senior assistants preparing for those roles. Petrochemical, banking and hospital leadership offices show particularly clear gains.

How does executive assistant and PA excellence training differ from general secretarial training?

It works at C-suite level, where judgement matters more than procedure. Secretarial courses cover office routines; this course covers gatekeeping, executive briefings, stakeholder relationships, discretion dilemmas and a partnership charter with the leader.

What do you bring back from executive assistant and PA excellence training?

You bring back an executive support charter agreed in draft with your leader, covering access rules, briefing formats, boundaries and a weekly priority rhythm that keeps both of you aligned.

Executive Assistant and PA Excellence: The Way Forward

The executive support charter records access rules, briefing formats, confidentiality boundaries and the weekly priority rhythm agreed between assistant and executive. Its first use is deciding which meetings and requests the executive will stop handling personally. The assistant, the executive and their direct reports all rely on it, and it is worth revisiting after a quarter to see whether access rules still match the leader's priorities.