

Copilot for Executive Assistants

Become a More Strategic, Productive, and Influential Executive Partner with Microsoft Copilot

4-Hour - Executive Productivity & Leadership Support Programme

Executive Assistants are often the operational hub of an organisation. From managing executive calendars and coordinating stakeholders to preparing leadership meetings, triaging communications, tracking actions, and supporting strategic initiatives, the role demands exceptional organisation, judgement, and efficiency.

Microsoft 365 Copilot is transforming how Executive Assistants work by providing an AI-powered assistant that helps manage information, prepare executives for meetings, prioritise communications, draft professional correspondence, and streamline administrative processes.

Copilot for Executive Assistants is designed to help Executive Assistants, Personal Assistants, Executive Coordinators, and Administrative Professionals leverage Microsoft Copilot to reduce administrative effort, improve executive support, and deliver greater strategic value to leadership teams.

Business Outcomes

Build a foundation for using Copilot effectively across executive support activities.

- Understanding Microsoft 365 Copilot
- Copilot Chat versus Copilot within applications
- Organisational information and Enterprise Data Protection
- Responsible AI practices
- Prompt fundamentals
- Reviewing and validating AI-generated content

Gain the confidence to use Copilot effectively and responsibly while maximising the value of organisational knowledge and Microsoft 365 investments.

Target Audience

This programme is ideal for:

- Executive Assistants
- Personal Assistants
- Executive Coordinators
- Office Managers
- Administrative Professionals who support executives or leadership teams
- Professionals who want to use Microsoft 365 Copilot to work more efficiently, strengthen executive support, and contribute greater strategic value

- Participants with no prior AI experience

Prerequisites

Participants should have access to Microsoft 365 Copilot and a working knowledge of Microsoft Outlook, Teams, Word, PowerPoint, and Excel.

Calendar Management and Executive Scheduling

Support executives with greater visibility, prioritisation, and time management.

Key Topics

- Reviewing executive commitments and priorities
- Creating daily and weekly executive briefings
- Managing scheduling conflicts
- Identifying critical stakeholder engagements
- Supporting executive focus time
- Coordinating complex calendars
- Improving executive time management

Business Outcome

Enable executives to spend more time on strategic priorities by improving schedule management, reducing conflicts, and providing greater visibility of commitments and opportunities.

Meeting Preparation and Executive Briefings

Prepare executives for productive meetings using information available across Microsoft 365.

Key Topics

- Gathering meeting context and background information
- Reviewing previous discussions and outcomes
- Identifying open actions and commitments
- Summarising stakeholder communications
- Preparing executive briefing notes
- Supporting executive decision-making
- Creating meeting preparation packs

Business Outcome

Reduce preparation time while ensuring executives are fully informed, better prepared, and positioned to make effective decisions.

Inbox Triage and Email Management

Manage high-volume email environments more efficiently using Microsoft Copilot.

Key Topics

- Summarising email threads
- Prioritising communications
- Identifying important actions and deadlines
- Managing information overload
- Catching up after leave or travel
- Understanding key themes and conversations
- Supporting executive responsiveness

Business Outcome

Reduce email processing time, improve responsiveness, and ensure important communications, deadlines, and commitments are not overlooked.

Drafting Executive Communications

Create professional communications quickly while maintaining executive standards and tone.

Key Topics

- Drafting executive emails
- Leadership announcements
- Stakeholder communications
- Internal updates
- Executive correspondence
- Adapting tone and messaging
- Rewriting content for different audiences

Business Outcome

Produce high-quality communications faster while maintaining professionalism, consistency, and executive presence across all stakeholder interactions.

Meeting Summaries, Actions and Follow-Up

Transform meetings into clear actions, communication, and accountability.

Key Topics

- Creating meeting summaries
- Recording decisions
- Capturing action items
- Preparing executive follow-up communications
- Producing stakeholder updates
- Tracking commitments and responsibilities
- Improving meeting outcomes

Business Outcome

Increase accountability, improve follow-through, and reduce the administration associated with documenting and communicating meeting outcomes.

Supporting Executive Projects and Priorities

Use Copilot to support projects, initiatives, and leadership objectives.

Key Topics

- Project status updates
- Initiative tracking
- Stakeholder reporting
- Executive summaries
- Risk and issue visibility
- Leadership priorities
- Operational and strategic reporting

Business Outcome

Provide executives with timely, concise information that improves project visibility, supports decision-making, and enables proactive management of priorities.

Building Your Executive Support Toolkit

Develop a practical roadmap for integrating Copilot into everyday executive support activities.

Key Topics

- Daily Executive Assistant workflows
- Recommended prompts
- Productivity opportunities

- AI best practices
- Personal productivity planning
- Adoption strategies

Business Outcome

Create sustainable productivity improvements through the effective use of AI-powered workflows and proven executive support practices.

Learning Approach

This workshop combines:

- Instructor-led demonstrations
- Real-world business examples
- Interactive discussions
- Practical AI exercises

Participants leave with practical techniques that can be applied immediately in the workplace.

Included with the Program

- Comprehensive course workbook
 - Practical Exercises and Examples
 - Certificate of Completion
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Delivery Options

Course: Copilot for Executive Assistants

Duration: 4 Hours

Cost: \$450+GST per person

Delivery: Classroom or Virtual Instructor-Led Training

Level: Beginner to Intermediate

Audience: Executive and Personal Assistants

2027 Dates (9am to 1pm):

- Wednesday, 10 February 2027
- Tuesday, 16 March 2027
- Tuesday, 20 April 2027
- Friday, 21 May 2027
- Thursday, 24 June 2027
- Thursday, 29 July 2027
- Wednesday, 1 September 2027
- Tuesday, 5 October 2027
- Friday, 5 November 2027
- Thursday, 9 December 2027

Business Benefits

Following this programme, organisations can expect Executive Assistants to:

- Reduce administrative workload
- Improve executive and stakeholder communications
- Enhance meeting preparation and follow-up
- Increase executive productivity
- Improve visibility of priorities, commitments, and projects
- Strengthen organisational coordination
- Accelerate adoption of Microsoft 365 Copilot
- Deliver greater strategic value to leadership teams

Software Solutions

Empowering Executive Assistants to Move Beyond Administration and Become Strategic Business Partners Through the Effective Use of Microsoft 365 Copilot.

Practical Microsoft Copilot training that helps Executive Assistants deliver exceptional executive support, improve productivity, and unlock the full value of AI-powered work.