

Excel for Executive Assistants

Elevating Executive Support Through Data, Reporting, and Productivity

4-Hour Executive Administration Excellence Programme

Executive Assistants play a critical role in supporting senior leaders, coordinating priorities, managing information, and ensuring executives have the data and insights required to make informed decisions.

Today's Executive Assistants are increasingly expected to produce reports, analyse information, manage budgets, coordinate projects, track activities, and present information in a clear and professional format. Developing strong Excel skills enables Executive Assistants to work more efficiently, improve reporting quality, and provide greater strategic value to executives and leadership teams.

Excel for Executive Assistants is a practical, business-focused programme designed to help Executive Assistants, Personal Assistants, and administrative professionals build the Excel skills needed to manage information effectively, create professional reports, support executive decision-making, and increase workplace productivity.

Business Outcomes

Organisations investing in this programme can expect Executive Assistants to:

- Improve the quality and professionalism of executive reporting
- Reduce time spent preparing recurring reports and spreadsheets
- Enhance executive decision support through better information presentation
- Increase productivity through automation and advanced Excel techniques
- Improve the management of budgets, projects, events, and administrative data
- Create dashboards and reports that provide meaningful insights
- Strengthen confidence when working with data and senior stakeholders
- Leverage AI-powered tools to accelerate reporting and analysis

Target Audience

This programme is designed for:

- Executive Assistants
- Personal Assistants
- Senior Administrators
- Office Managers
- Business Support Coordinators
- Executive Coordinators
- Team Administrators
- Management Assistants
- Operations Support Staff

Prerequisites

Participants should have a basic understanding of Microsoft Excel, including workbook navigation and simple formulas.

Programme Objectives

By the end of the programme participants will be able to:

- Create professional spreadsheets and reports for executives
 - Analyse and summarise business information efficiently
 - Track budgets, projects, meetings, and activities
 - Build dashboards and management summaries
 - Use formulas and functions confidently
 - Automate repetitive administrative tasks
 - Present information visually through charts and dashboards
 - Use Microsoft Copilot to improve productivity and reporting
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Program Content

Creating Professional Executive Reporting Solutions

Executive reporting requires information that is accurate, concise, and easy to interpret.

Key Topics

- Design professional business spreadsheets
- Structure information for executive audiences
- Organise reporting workbooks effectively
- Improve consistency and presentation standards
- Create reusable templates

Business Outcome

Improved reporting quality and greater confidence in executive communications.

Managing Administrative Data Efficiently

Executive Assistants regularly work with large volumes of information from multiple sources.

Key Topics

- Manage contact and stakeholder lists
- Track projects, actions, and priorities
- Organise event and meeting information
- Consolidate information from multiple reports
- Maintain accurate administrative records

Business Outcome

Improved efficiency and reduced manual administration.

Core Excel Skills

- Excel Tables
- Sort and Filter
- Data Validation
- Conditional Formatting
- Flash Fill

Budget, Event and Activity Tracking

Monitor organisational activities and expenditure with confidence.

Key Topics

- Track departmental budgets
- Monitor event costs
- Analyse expenditure trends
- Create executive summaries
- Report against budget allocations

Business Outcome

Better financial oversight and reporting support.

Core Excel Skills

- SUMIFS
- COUNTIFS

- IF Functions
 - SUBTOTAL
 - Basic variance reporting
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Analysing and Summarising Business Information

Executives rely on concise information to make effective decisions.

Key Topics

- Analyse large datasets quickly
- Identify key trends and exceptions
- Summarise information effectively
- Create management-ready reports
- Develop KPI reporting summaries

Business Outcome

Enhanced decision support and improved insight generation.

Core Excel Skills

- PivotTables
 - PivotCharts
 - Slicers
 - Data summarisation techniques
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Working Smarter with Advanced Functions

Reduce manual effort and improve reporting accuracy.

Key Topics

- Match information from multiple sources
- Automate common reporting tasks
- Validate and reconcile information
- Simplify repetitive processes

Business Outcome

Time savings and improved data accuracy.

Core Excel Skills

- XLOOKUP
- VLOOKUP
- INDEX and MATCH
- IFERROR
- Text Functions
- Date Functions

Creating Executive Dashboards and Visual Reports

Executives need information that is visual, concise, and actionable.

Key Topics

- Create executive dashboards
- Design KPI scorecards
- Develop status reporting dashboards
- Build interactive charts and visuals
- Present information clearly and professionally

Business Outcome

Better communication of key business information and stronger executive engagement.

Productivity Techniques for Executive Support Professionals

Discover practical tools that save time every day.

Key Topics

- Automate repetitive tasks
- Use Excel shortcuts effectively
- Improve spreadsheet navigation
- Work more efficiently with complex workbooks
- Create reusable templates and reports

Business Outcome

Increased productivity and reduced administrative effort.

AI and Microsoft Copilot for Executive Assistants

Explore how AI is transforming administrative and executive support roles.

Key Topics

- Generate formulas using natural language
- Summarise data instantly
- Create executive report drafts
- Analyse trends and identify key insights
- Accelerate reporting and administrative activities

Business Outcome

Faster reporting, improved productivity, and enhanced executive support capability.

Learning Approach

This programme combines instructor-led demonstrations, practical exercises, real-world business scenarios, and executive reporting case studies to ensure immediate workplace application.

Every concept is reinforced through hands-on activities focused on the day-to-day responsibilities of Executive Assistants and administrative professionals.

Included with the Program

- Comprehensive course workbook
 - Practical exercises and datasets
 - Executive reporting templates
 - Dashboard examples
 - Budget and activity tracking templates
 - Quick reference guides
 - Certificate of Completion
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Delivery Options

Course: Excel for Executive Assistants

Duration: 4 Hours

Cost: \$450+GST per person

Delivery: Classroom or Virtual Instructor-Led Training

Level: Intermediate

Audience: Executive Assistants, Personal Assistants, Office Managers and Administrative Professionals

Business Benefits

Organisations investing in this program can expect to:

- Improve the quality, consistency, and professionalism of executive reports and business information
- Reduce the time required to prepare recurring spreadsheets, reports, and management summaries
- Increase productivity by streamlining administrative processes and automating repetitive tasks
- Strengthen decision support through clearer analysis, dashboards, and meaningful business insights
- Improve the accuracy and reliability of budget, project, event, and activity tracking
- Enable Executive Assistants to respond more confidently to requests from senior leaders and stakeholders
- Build greater internal capability in Excel, reducing reliance on manual workarounds and external support
- Use Microsoft Copilot responsibly to accelerate analysis, reporting, and information preparation

Software Solutions

Empowering Executive Assistants to Deliver Greater Insight, Stronger Reporting, and More Strategic Support to Leadership Teams.

Professional Microsoft Excel training designed to help Executive Assistants increase productivity, improve reporting capability, and provide outstanding support to executives and business leaders.