




# Essential PA

FOR PERSONAL ASSISTANTS

Course information pack

**Your Excellency**  
DEVELOPING EXCEPTIONAL EAs & PAs

  
**SFJ**  
AWARDS  
APPROVED CENTRE

Excellent  4.7 out of 5  Trustpilot



# Essential PA

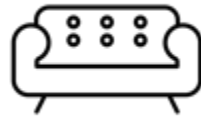
## FOR PERSONAL ASSISTANTS

Become a truly exceptional PA by learning inside  
The Virtual Academy with the Essential PA  
Programme for Rising Personal Assistants.

[WATCH VIDEO](#)



5 x One Day Units delivered face to face online via our Virtual Academy.



Learn remotely from anywhere in the world from your home or office.



Receive **regular check-in calls** and open access with the lead trainer for support throughout the Programme



Complete The Essential PA Programme in 5 months and receive your accredited qualification

***" This Programme was amazing. I learned so much, not only about my role but also myself. Looking back at my first bit of coursework to my last bit I can see a real difference.***

*Lindsay is amazing and was very helpful and accommodating to my extra needs. The Programme is broken up into very useful Modules with plenty of time between putting the work into action and doing the coursework. The Modules are relevant to the PA world. "*

**Natalie Douglas, Essential PA Programme learner**



Contact Lindsay Taylor via email to book or find out more: [lindsay@yourexcellency.co.uk](mailto:lindsay@yourexcellency.co.uk)



# Why learn with Your Excellency?



## Accredited Courses & Qualifications

All our EA and PA courses and Programmes are accredited, so you can be sure you're receiving training recognised by employers. Our Qualifications are Ofqual regulated.



## Over 6000 EAs & PAs trained worldwide

Over 6000 EAs and PAs have benefited from our training worldwide and are now enjoying the benefits of our industry leading training and coaching.



## Blended learning approach

Our training is delivered via both virtual group sessions and pre-recorded videos - combining group learning and modules you can watch in your own time.



## Qualified trainers & coaches

All our trainers are qualified and experts in the topics they deliver. We are long-standing members of The Association for Coaching ®



## Five-star training & coaching

We always strive to over deliver in our training.

**Check out our reviews from previous course attendees.**

## Your Excellency are proud supporters of:



**Executive Support magazine**







## Essential PA FOR PERSONAL ASSISTANTS

Become an exceptional PA

### Who is this Qualification for?

Become an exceptional PA with our **Essential PA Programme** incorporating an Ofqual regulated Qualification. This Programme reflects the diversity of the PA role. You will learn the knowledge and skills to become an exceptional PA.

The Essential PA Programme has been specifically designed to develop the knowledge and skills required by PAs and professional administrators. It is perfect for ambitious rising Personal Assistants who want to take their career to the next level. The Programme is also suitable for aspiring PAs who want to join this profession.

To achieve your Qualification and graduate from this Programme, you complete 5 one day Modules (shown opposite). After completing each Module, with the support of the trainer, you submit a written assignment which is marked and internally verified. When you have achieved 5 pass marks, you receive an electronic certificate as a Graduate of the Essential PA Programme and the Ofqual regulated Qualification 'SFJ Awards Level 3 Award in Professional Executive Assistant Personal Assistant & Administration Skills'.

Learning cohorts are capped at 10 people to ensure optimum interaction with the trainer and a supportive learning environment. The Programme and Qualification takes 5 months to complete.

**This is the only Qualification on the Ofqual register to use 'PA' in its title. It is current, relevant and recognized by recruiters and employers.**

\*Qualification number 601/8731/1 on the Ofqual register.

- ✓ Ofqual Regulated Qualification
- ✓ 5 x One-Day Units
- ✓ Learn over 5 months
- ✓ Certificate upon completion
- ✓ The only Qualification on the Ofqual register to use 'PA' in its title\*

*"I completed my Qualification studying with Lindsay and Your Excellency Limited. Lindsay is a fantastic facilitator. She is down-to-earth and wants everyone to succeed. She kept all the Modules engaging and ensured everyone was comfortable throughout. The Programme provided some great, transferrable skills."*

**Saffron Mackintosh, Essential PA Graduate**

### Qualification Modules

- 👑 **Introductory Session**
- 👑 **The Role of the Executive Assistant & Personal Assistant**
- 👑 **Managing your Workload Effectively**
- 👑 **Introduction to Project Management**
- 👑 **Principles of Persuasion & Influencing**
- 👑 **Principles of Self Development**

Delivery is in our Virtual Academy by qualified trainers who are experts in the learning they share with you. Co-Founder & Director, Lindsay Taylor delivers some of the Modules personally. A former PA herself, Lindsay is highly regarded and recognised as the industry expert for this profession.

You will receive a personalised Delegate Course Workbook and copies of the slides we use during training to encourage Continuous Professional Development (CPD).

As a valued Your Excellency Graduate, you will be invited to join our private alumni group for continued learning support.

# The Essential PA Programme Contents

## Introductory Session

Meet the trainer and your fellow learners on the Programme. This session will detail the Programme flow, timings and expectations in between Units. It also gives you the opportunity to ask any questions you may have.

[WATCH VIDEO](#)

## Unit 1: The Role of The Executive Assistant & Personal Assistant

The role of the EA & PA can be complex, varied and challenging, particularly when you are new to the profession. This Unit covers how to communicate, network and influence others, different management styles and skills in the business environment, time management, organising meetings and setting goals.

[WATCH VIDEO](#)

## Unit 2: Managing Workload Effectively

This Unit is about working to deadlines and gaining more control over your workload. There are many tools that can help you manage your time and work more effectively.

This Unit also focuses on managing your energy. It will introduce you to proven methods and strategies which you can put into immediate practice.

[WATCH VIDEO](#)

## Unit 4: Introduction to Project Management

This Unit will give you a thorough understanding of project structure, risks and priorities, EAs and PAs will be able to add more value to their role and bring best-practice methodologies to the team.

[WATCH VIDEO](#)

## Unit 3: Principles of Persuasion & Influencing

This Unit is about persuasion and influencing skills. It covers how to recognise and work with the communication styles of others and the use of different questioning techniques.

[WATCH VIDEO](#)

## Unit 5: Principles of Self Development

This Unit will develop your knowledge and understanding of your personal values and goals. This will enable you to more effectively plan, monitor and evaluate your professional development activities.

[WATCH VIDEO](#)



**Essential PA**  
FOR PERSONAL ASSISTANTS

“

“I would recommend this Programme to any aspiring PA/EAs and those wanting to progress in the role and build a true partnership with their executives.

The trainers are knowledgeable, and the assessments are an excellent way of applying and cementing the learning delivered during the training days.

In my opinion, this Programme provides rounded knowledge for the learners. It's a good investment in a PA's professional development and a good investment for the business, backed by a recognised Qualification.” ”

**Elizabeth Villalvilla**

PA to Managing Director, Forcam UK  
Graduate of The Essential PA Programme

# Essential Finance for the PA Masterclass

[WATCH VIDEO](#)



**At the end of this Masterclass you will be able to:**

- ✓ Understand the business flow of money and business cycle phases
- ✓ Recognise different financial structures of organisations
- ✓ Read and interpret the main financial statements - Profit and Loss/Income Statement, Balance Sheet/Position Statement and Cashflow
- ✓ Differentiate between Capex and Opex and understand the process of depreciation
- ✓ Develop and monitor a department or project budget
- ✓ Identify, manage and control costs
- ✓ Demystify financial terminology and jargon

This Masterclass will enable PAs and Administrators to better support their teams from a financial perspective. You will be able to interpret the key financial statements including Income Statements, Position Statements and Cashflow reports. You will be able to create and monitor departmental and project budgets and understand financial terminology and jargon.

This is a live Virtual Instructor Led One-Day training course that runs from 9.30am – 4.30pm UK time with a break for lunch.

***Normal course cost £495***

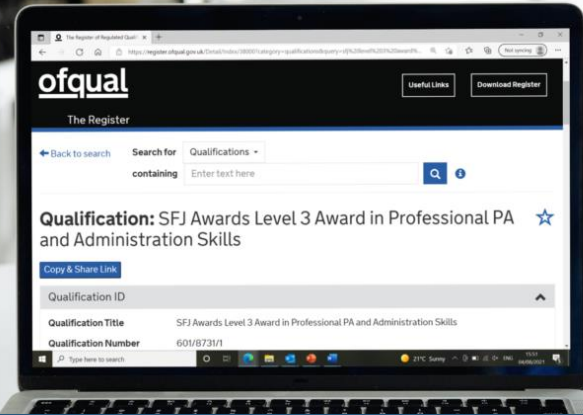
**Essential PA Programme alumni offer just £250**

*"I wish I had done this training years ago! It answered so many questions I have always felt scared and almost embarrassed to ask. It has helped me to understand massively the fundamentals and importance of finance, why decisions are made, why we need to take time to evaluate and how it can be such a fantastic tool to plan for the future. This course really adds so much value."*

***Daniel Skermer, Founder of PA Forum***

Contact Lindsay Taylor via email to book or find out more: [lindsay@yourexcellency.co.uk](mailto:lindsay@yourexcellency.co.uk)





\*The Level 3 Award as part of The Essential PA Programme is Qualification number 601/8731/1 on the Ofqual Register



## About SFJ Awards & the Ofqual Qualification

SFJ Awards are the Ofqual regulated Awarding Organisation for The Essential PA Programme.

As an approved SFJ Awards Centre, Your Excellency Limited meet stringent quality standards.

You can be assured of content that is current and relevant, delivered by expert qualified trainers.

This is the only Qualification on the Ofqual register to use 'PA' in its title.\*

“ I want to say a huge thank you to Lindsay Taylor and all the trainers at Your Excellency. I have never been so proud of achieving something. The team at Your Excellency took the time to help me every step of the way to achieve the SFJ Awards Level 3 Award in Professional Executive Assistant Personal Assistant & Administration Skills.

Thank you from the bottom of my heart!

**Marion Marling, EA at HSBC**

(and now a Graduate of The Mini MBA for Senior & Executive Assistants Programme, having continued her study with Your Excellency)





“

I am at the start of my career as a PA and my learning Programme with Your Excellency.

To anyone considering joining their Virtual Academy and The Essential Programme, I say "do it"! It's brilliant.

I've learned things I didn't know I needed, like the AIDA Assertiveness model, liaising with clients and how to prioritise my working day.

The assignment writing has been good too as I've been given all the support I need.

**Daisy Squires, PA to Jo Mercer at Ascent Ltd**

”

## Feedback from the PA and the employer

“

We have recently enrolled Daisy onto the Essential PA Programme to support her career transition into an Executive Assistant.

We selected this Programme based on the relevance of the syllabus, the qualification and the support and guidance provided by Lindsay while researching training options.

We are still at the start of Daisy's learning journey, but she has been extremely well supported as she has embarked on the first part of the Programme, which has been important to build up her confidence as she returns to study and embarks on a career change.

Based on my experience to date, I would not hesitate to recommend Your Excellency to other organisations looking to develop and build their PA and EA capabilities.

I am looking forward to watching Daisy grow and flourish in her new role.

**Jo Mercer, Director at Ascent Ltd**

”



## Meet Your Trainer



Lindsay Taylor

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+44 7930 194147

[Connect with me on LinkedIn](#)



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Lindsay believes that PAs are some of the most unsung heroes in any organisation. She should know, having spent 10 years as a PA/EA to high profile CEOs in transatlantic organisations like Transamerica Corporation. She has organised major international conferences and events and led large teams of administrative and secretarial staff, so fully understands what a great PA looks like. That's why she is passionate about raising the profile of PAs and EAs so that they receive the kudos and recognition they deserve.

Lindsay has introduced accredited qualifications for PAs through Your Excellency to provide additional credibility. Most importantly, she thinks training should be jargon-free and fun! She is determined to create a community of exceptional PAs who deliver excellent performance for their Executives, their organisations and most of all, for themselves.

Lindsay is the proud author of 'A-Z Pearls of Wisdom for Executive PAs', an invaluable resource to help PAs perform at their best. She produces a monthly podcast "EA/PA Chataway with Lindsay" and writes regular articles and features for admin magazines and websites including the highly regarded Executive Support Magazine and PA Life.