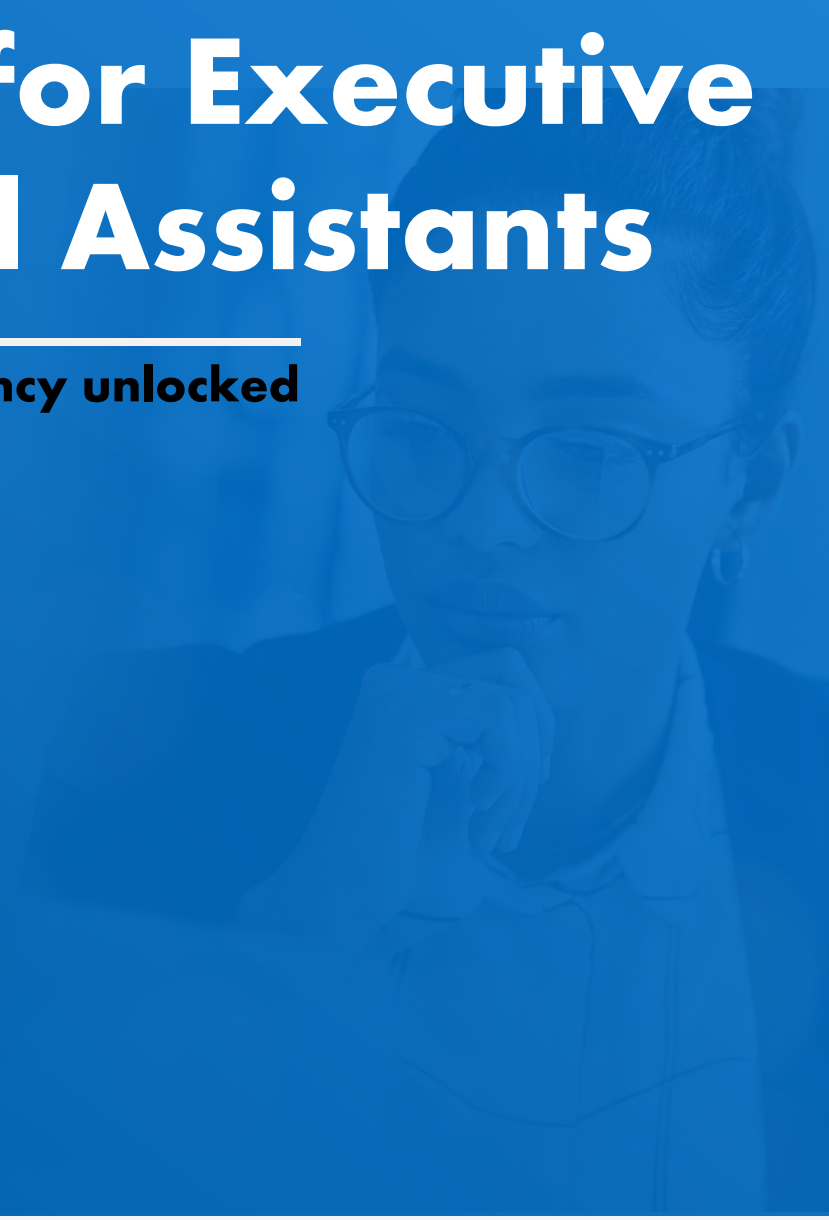
AI & Copilot for Executive and Personal Assistants

AI-powered productivity: efficiency unlocked



2 – 4 November

NH Hotel Sandton / Online

Limited to 25 Seats

Certificate on Completion

FREE Apple iPad Book Now

COURSE OVERVIEW

This highly practical and forward-looking masterclass is designed to empower administrative professionals with the knowledge, confidence, and hands-on skills needed to leverage artificial intelligence tools effectively in their daily roles. The course introduces participants to the transformative capabilities of AI technologies, with a special focus on Microsoft Copilot and its integration across Microsoft 365 applications such as Outlook, Teams, Word, Excel, PowerPoint, and OneNote.

Participants will explore how AI can streamline repetitive tasks, enhance communication, improve document creation, automate meeting management, simplify reporting, optimise scheduling, and support smarter decision-making. Participants will leave with actionable tools, techniques, and strategies to increase efficiency, reduce workload pressure, and position themselves as high-value strategic partners within their organisations.

DAY 1:

Understand AI Copilot's Capabilities:
Discover how AI-powered tools can automate tasks, streamline communication, and enhance decision-making.

Foundations and Everyday Productivity

Session: Hands On Scenarios

- Welcome and Introduction to AI for Executive Assistants
  - Understanding how AI transforms the Assistant's role from administrative support to strategic operations partner
- Introduction to Copilot
  - Navigating Copilot, prompting techniques, productivity workflows
- Email Management and Communication
  - Drafting executive emails, responding to urgent requests, summarizing long email threads, preparing stakeholder communications
- Calendar and Meeting Scheduling
  - Coordinating executive calendars, resolving scheduling conflicts, setting priorities, booking recurring meetings
- Meeting Preparation and Briefing Packs
  - Creating executive meeting briefs, summarizing previous meetings, preparing agendas and talking points
  - Daily recap and practical tips



DAY 2:

Implementation Plan and Best Practices:
Share experiences, address challenges, and develop a personalised plan for integrating AI Copilot into your daily workflow.

Collaboration, Reporting and Travel Management

Session: Hands On Scenarios

- Day 1 Recap and Prompting Clinic
  - Improving prompts and workflows
- Meeting Notes and Action Tracking
  - Generating meeting summaries, tracking decisions, assigning action items automatically
- Travel Planning and Coordination
  - Creating itineraries, Comparing, Preparing travel
- Expense Claims and Financial Tracking
  - Drafting expense reports, organising receipts, summarising travel costs, preparing approvals
- Executive Reporting and Dashboards
  - Creating weekly Executive reports, leadership summaries, operational trackers leadership summaries, operational trackers
- Presentation Creation with AI
  - Creating executive ready presentations, summarising, reports into slides, generating visuals and speaker notes
- Hands On Simulation
  - Participants manage a simulated executive travel and reporting scenario end to end

End of Day Two



DAY 3:

Enhanced Support for Executives:

Explore ways to provide more strategic, high-value support using AI Copilot, freeing up time for critical thinking and business growth.

Automation, Collaboration and Strategic Support

Session: Hands On Scenarios

- Recap and AI Workflow Optimisation
    - Best practices for AI adoption and workflow efficiency
- Task and Project Coordination
    - Managing executive projects, tracking deliverables, coordinating teams
- Workflow Automation for Executive Assistants
    - Automating approvals, leave requests, reminders, and repetitive tasks
- Creating Smart Forms and Expense Trackers
    - Building automated forms, trackers, and approval workflows
- Knowledge Management and Collaboration
    - Managing shared notes, collaborative planning and information organisation
- Responsible AI and Confidentiality
    - Secure handling of executive formation and ethical AI usage
    - Wrap up, action plans, and adoption roadmap

Booking Form

#: **AP**

AI & Copilot for EA's and PA's | 2 – 4 November | @NH Hotel Sandton ■ Online ■

Please complete this form and return to: info@kapitalbiz.co.za & will confirm your booking.

Company Name:

Postal Address:

Country: VAT Number:

Tel Number: Cell Number: Date:

Authorized By: Position / Signature:

Delegates Details (*please use block capitals*)

First Name & Last Name(s)	Email Address	Designation	Cell Number
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1. Payment Terms On the return of the registration form, full payment is required within 14 working days. Payment must be received prior to the training start date. **KapitalBiz** reserves the right to refuse entry into the conference should full payment not have been received prior to this date. Cancellation will be charged under the term set out below. **2. Cancellations, No shows & Substitutions:** Cancellations received in writing more than 21 days prior to the event being held carry a 50% cancellation fee. Should cancellations be received between 21 days and the date of the event, the full training fee is payable and non – refundable. Non- payment or non-attendance does not constitute cancellation. No show will be charged the full registration fee. Cash alternatives will not be offered, however, substitutes at no extra charge are welcome. **3. Alterations to advertised package: KapitalBiz reserves** the right to alter this program without notice or penalty and in such situations no refunds or part – refunds or alternative offer will be made. Should **KapitalBiz** permanently cancel an event, for any reason whatsoever; the Client shall be provided a credit of the equivalent amount paid towards the cancelled event. In the case of a postponed or cancelled event, **KapitalBiz** will not be responsible for covering airfare, accommodation, or other travel cost incurred by Clients. **4. Copyright:** All intellectual property rights in the materials distributed by **KapitalBiz** in connection with this event are expressly reserved and any unauthorized duplication, publication or distribution is prohibited. 5. **Program Information** indicated in brochure is for indicative purposes only. Final program details including daily schedule and topics schedule may vary. Training assessment for SAQA/NQF points purposes not included as part of training. Skills evaluation and assessment may be available through 3rd party if required.

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☐ **(A) LOCAL**
Training Fee 3 (Days) = R 18,999 + VAT

☐ **(B) INTERNATIONAL**
Training Fee 3 (Days) = $ 1, 300