



# **Module 1: Introduction to the PA Course**

- The role of a personal assistant/secretary
- Associated job role and responsibilities
- Requisite skills required for the job
- The difference between a personal assistant and a secretary

This course is designed to introduce and teach you how to become a PA/secretary. This module will give you a brief guideline on a PA's job profile, role and responsibilities. Being a secretary/PA can be a demanding yet very satisfying job role.

## **In this module you will learn:**

- The role of a personal assistant/secretary
- The difference between a personal assistant and secretary
- Associated job role and responsibilities
- Requisite skills required for the job

## **1.1 Introduction**



**A personal assistant or secretary is often known as a PA for short, they usually work very closely within private sectors.**

They work with senior management and directing staff to provide them with administrative support. This is often done on a one-to-one basis and you would be expected to maintain confidentiality and display discretion in your interactions.

Personal assistants play a crucial role in the functioning of the organisation and help the senior management achieve their goals and objectives.

In fact, every effective leader will most likely attribute their success to a competent PA.

Personal assistants help their superiors battle a diary full of challenging commitments and keep them on track. The role of a PA has evolved over the decades and they often take on the role of middle management; they often work with CEOs, directors and top management and play key roles in decision making.

## **FACT**



There are nearly 16,000 Personal Assistant job vacancies on Reed at the time of print. This shows how well the current trade is for people to be looking for career prospects as a PA

*Source: Reed.co.uk*

## 1.2 Difference between a Secretary and a Personal Assistant



**Before proceeding to explain other aspects related to efficient office administration, it's important to appreciate the difference between a secretary and a personal assistant.**

Although the terms are used interchangeably, there are distinctive points of difference between the two roles.

Secretaries can be viewed as older versions of modern-day personal assistants. They used to be in charge of typing, copying, attending to phone calls and booking appointments. Over the years, and with the advancement of technology, the role of the secretary has evolved. Secretaries have been released from earlier tasks (thanks to the introduction of the computer, printer, photocopier and other office devices).

As a result, they are now free to take on additional responsibilities and play a much larger role in the organisational decision-making process.

Hence, while a PA may still be required to book appointments and attend to correspondence, they may also be expected to stand in for their boss during a meeting. They may also negotiate rates and terms with suppliers and vendors.

A personal assistant's job is more multi-dimensional, involves higher levels of responsibility and requires a people-centric approach.

From a reactive and restrictive role, a PA now plays a proactive part in the organisation. They are able to take initiative and contribute to organisational goals and objectives.

From rather humble beginnings, the PA of today is usually university qualified, certified and commands a high level of remuneration.

## 1.3 Explaining the Importance, Roles and Attributes of a Personal Assistant



**A PA needs to be efficient, competent and extremely detail oriented.**

They must also be a person who does not get frazzled under pressure and they should be able to juggle shifting schedules.

As a PA, you must possess (or develop) the ability to set a harried, chaotic and busy day on its feet. PAs may often be required to think on their feet and manage stressful situations calmly. You must possess effective communication skills as your job will involve managing interactions with internal and external organisational entities.

You have the potential to mould and shape your job profile to suit your organisation as well as your boss. The job profile of a PA is far beyond a supportive role; they are often at the heart of the organisation.

PAs help their managers with time management, taking on any tasks that will alleviate the stress of their boss, or free up their time to focus on other things. This could include secretarial and administrative tasks. As a PA, you will need extensive knowledge regarding the organisation that you are working for; this will help you contribute to the functioning of the organisation.

PAs work in different sectors and industries and the role could involve full-time, part-time or temporary work.

You need to have a working knowledge of the key personnel within your company, as well as their colleagues. You should ideally be familiar with the role and name of everybody within the organisation, along with their aims and objectives.

A manager or CEO would rely heavily on a PA and there is a significant level of trust that needs to be built. In the absence of your superior, you will need to be resourceful, diligent and efficient. Confidentiality and discretion are two extremely important attributes of a successful PA.

### **Key Attributes of an Effective PA**

1. **Understanding Business Strategy** For the senior management to be able to perform at their best, it's vitally important that the PA should have a grasp of business strategy. This will help you speak the language of the senior management and provide them with the support that will help them achieve success.
2. **Understanding Broader Business Issues** A competent PA is the eyes and ears of the boss. It's extremely helpful for a PA to understand the motivations, priorities and goals of employees across the organisation. It will typically help you to separate the wheat from the chaff and you can focus on the important issues at hand.
3. **Efficiency and Competence** Senior executives of companies are often extremely busy

individuals and they need an effective PA in order to perform well. Being effective (doing the job correctly) is as important as being efficient (doing the job on time). For example, it's no use preparing a 15-page report full of errors in 30 minutes. On the other hand, it's also no use if you prepare the same 15-page report after 2 days. Preparing the report within say 2 hours and delivering it without errors represents a blend of efficiency and competence.

4. **Problem Solving** Problem solving is a skill that can be learnt and developed. This skill will contribute greatly to the success of a PA. The best way to become a great problem solver is to frequently ask the question 'why'? You may want to get into the habit of ferreting out the fundamental cause behind problems. Once you are able to get into the root of issues, you will be able to streamline inefficient processes and minimise delays.
5. **Planning** Your ability to plan will have a significant impact on your boss's success. The boss may often be unable to sit down and plan their schedules with you; you may be forced to plan their day on your own (although they will still expect their day to go without hitches). However, it's a good idea to review your planning with your boss.
6. **Influencing** An effective PA must possess the ability to influence colleagues, bosses and subordinates alike. You may need to explain, persuade, consult or discuss (as the situation warrants) in order to become a good influencer. Influencing in the right way and for the correct reasons is a tactic that can be learnt and proves extremely useful while getting things done.

## Activity 1 - Attributes of a Personal Assistant

*Estimated time: 10-15 minutes*

You have learned the many ways in which a personal assistant can help organisations stay on track and make decisions. You also learned the difference between a secretary and a personal assistant.

If you plan on becoming a personal assistant, there are a few key attributes that will contribute to your success. List some of the skills, or attributes, that will help you in your career as a PA.

## 1.4 Tasks and Functions



**You will often be a manager's first point of contact, acting as the coordinating node between external and internal organisational entities.**

As your role will involve verbal and written correspondence, it's a huge plus to possess effective communication skills. It helps if you are a friendly, interactive and approachable person.

**Tasks will include**

- Devise and maintain office networks, systems, including data management, filing etc.
- Arrange travel, accommodation, working permits, visas, travelling with your manager, if necessary, to take notes, dictate during meetings and provide other general assistance during presentations.
- Answering and making phone calls, responding to enquiries and requests whenever appropriate.
- Meet and greet all visitors with a professional attitude at all times.
- Organise diaries and maintain a schedule, make appointments, keep reminders and ensure that no times or dates ever clash. It is also your job to keep your manager updated.
- Handle incoming emails, fax and post as well as correspond with managers of other companies.
- Conduct background research, present findings and execute findings if necessary.
- Print or produce documents, brief papers, presentations or other reports.
- Organise or attend meetings, ensure that your manager is well prepared for all of their meetings and rendezvous.
- Coordinate with clients, suppliers and all other staff whenever necessary.

In addition to supporting managers, teams and other departments, you will have your own specific workload and responsibilities.

The role of a PA can be extensive and varied.

**You could be required to:**

- Perform project research and other tasks.
- Manage accounts and stick to budgets.
- Accept some of the manager's responsibility and work closely with them as your career develops.
- Act as a deputy for the manager, make decisions, delegate work to other employees of the company in your manager's absence.
- Offer creative input and be involved in the decision making process.
- Some PAs do all secretarial work and leave training or recruiting to other staff members.

Tasks associated with a PA's job may also include maintaining and implementing processes, planning social events and ordering office supplies.

A driven personality will get you far as a PA and can be a fantastic platform toward further progress in your career. You will get to meet interesting personalities, attend important meetings and develop important contacts.

## **1.5 Key Skills for a Successful PA**

- Proactive support and action helps anticipate challenges and crises
- Exceptional time and task management skills that would involve prioritising issues on the basis of urgency and importance
- Commitment to an ongoing learning process with respect to technology, people, travel issues (visas, passports and so on), business and other companies
- Strong listening and intuitive skills. In order to become a successful PA, you need to develop the ability to perceive other people's thoughts. Listen with an open mind and be receptive to ideas and suggestions
- Strong relationship management and relationship skills: Since a PA's job is essentially people-centric, you should be able to inspire trust and confidence in the people that you meet. Effective relationship management also includes the ability to give a firm but polite 'no' when required
- A successful PA needs to stay abreast with the latest office technology. This will help you keep pace with a rapidly growing modern business culture. In short, if there is a new technology that helps you perform a task faster and more efficiently, you should learn the ropes

- Keep an emotional distance from the swirling events around you and be able to develop a good sense of humour. It pays to keep three steps away from the emotional energy of a situation. This will help you maintain focus and find solutions to stressful situations

## Activity 2 - Reviewing Your Skills

*Estimated time: 10-15 minutes*

After reviewing your personal skills and attributes, you will be able to utilise your strong suits in your career as a personal assistant. For instance, if you discovered that you are good with planning, you will find that particularly useful when working with meetings, or your boss's schedule.

For this next activity, we are going to switch gears and focus on the tasks and functions that you will perform as a personal assistant. Take a few moments to review the tasks that are required of a PA, then cross reference it with the list of attributes that you made in the first activity. What do you think your strong suits will be in this career? Which areas do you think you might need to work on?

### FACT



The average salary for a Personal Assistant in the UK is approximately £33,697.

*Source: Reed.co.uk, 2024*

**Take a Quick Recap Test**



[viralQuiz id=66]

## **Assignment**

### **Introduction to the PA Course**

*Time: 30+ minutes*

Hopefully, you took in as much of the information in this first module as possible. To find out how well you have done, complete the following worksheet.

Download the worksheet below and complete.

[Download Worksheet \(PDF\)](#)

[Download Worksheet \(Word\)](#)

## **Module Summary**

This module explains the role, importance and functions of a Personal Assistant. It is a varied role that involves a great deal of responsibility and organisational ability.

This kind of work can prove to be very rewarding. A personal assistant must have good communication skills, computer/technical skills and a solid business mind.

A PA or secretary needs to be able to work on their own accord, be accountable for their actions and make important decisions.

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