

Executive Assistant

ADMINISTRATION · O*NET 43-6011.00 · EXECUTIVE SECRETARIES AND EXECUTIVE ADMINISTRATIVE ASSISTANTS

PROTECT THE DIARY AND THE INBOX, AND TURN NOTES INTO FINISHED WORK.

1 YOUR ROLE TODAY

Executive assistants run the diary, the inbox and the logistics around a leader. The discretion and the judgement on priorities stay human. The scheduling, drafting and note-taking are where AI gives the most back.

WHAT THE JOB INVOLVES

- Manage calendars, meetings and travel.
- Screen and handle correspondence and calls.
- Prepare documents, reports and presentations.
- Take and circulate meeting notes and actions.
- Coordinate events and logistics.
- Maintain records and files.

SKILLS THAT MATTER MOST

- Time management
- Active listening
- Writing
- Reading comprehension
- Coordination
- Speaking

O*NET job zone: Job Zone 3 — medium preparation.

2 THE FOUR COPILOT TOOLS

COPILOT CHAT	Free, secure chat. Works from the open web and anything you paste or upload. No access to your internal files unless you give it.
M365 COPILOT	Sits inside Word, Excel, PowerPoint, Outlook and Teams. Works on your own emails, files and meetings (only what you already have permission to see).
COPILOT COWORK	You hand over a longer job and it works through the steps, showing progress so you can steer. Good for multi-stage work that used to eat an afternoon.
COPILOT AGENTS	A custom helper you (or IT) set up once to handle a specific, repeatable job — answering a common question, triaging a queue, drafting from a template.

3 AI OPPORTUNITY MAP

Where the four tools fit the real work — with a practical example for each.

TASK	BEST TOOL	PRACTICAL EXAMPLE
Draft and triage email	M365 COPILOT	Draft replies in Outlook and summarise a busy inbox into what needs the boss.
Take and circulate meeting notes	M365 COPILOT	Use Copilot in Teams to summarise the meeting and send out clear actions.
Prepare documents and decks	M365 COPILOT	Draft the briefing or the deck from rough notes, then polish.
Coordinate a complex schedule	COPILOT COWORK	Delegate the legwork of arranging a multi-party meeting or trip, for you to confirm.
Pull a pre-read together for the boss	COPILOT COWORK	Delegate: gather the relevant files and draft a one-page brief for the day.
Find a quick answer or template	COPILOT CHAT	Get a fast first answer or a draft format to start from.

4 SKILLS TO BUILD

The AI-literacy habits this role needs.

- Keeping confidential diary and correspondence on approved tools.
- Editing drafts to match the leader's voice exactly.
- Checking facts, names and times before anything goes out.
- Knowing which jobs are worth delegating to Cowork.

5 GETTING STARTED — 3 QUICK WINS THIS WEEK

- ✓ Summarise the boss's inbox into a short daily 'needs you' list.
- ✓ Draft your next round of replies in Copilot, then match the tone.
- ✓ Turn your last meeting's notes into circulated actions.

6 GETTING AHEAD — YOUR 90-DAY PLAN

Days 1–30 · Get started Use M365 Copilot for inbox, notes and documents daily. Build the leader's voice into your prompts.

Days 31–60 · Build the habit Hand scheduling legwork and pre-reads to Cowork. Standardise your daily brief format.

Days 61–90 · Get ahead Delegate recurring coordination to Cowork as a saved skill. Measure hours handed back to the leader.

7 WHERE TO LEARN NEXT

Four short intro courses, in order. Start at the top.

- 01** Start with Copilot Chat
The no-risk way in. Ask, draft, summarise, compare. One hour.

02 Work inside M365 Copilot
Use it in the apps you already live in: Outlook, Word, Excel, Teams.

03 Delegate with Copilot Cowork
Hand over the multi-step jobs. Learn to brief, check and steer.

04 Build a Copilot Agent
Turn your most repeated task into a helper that runs itself.

Sources — Occupation overview: O*NET 30.2, occupation 43-6011.00 (oneline.org/link/summary/43-6011.00) and the ESCO occupational profile (esco.ec.europa.eu). Copilot tool descriptions: Microsoft 365 Copilot and Copilot Cowork product documentation, Microsoft, May 2026. AI mapping and pathways: Craig Stanley Studio. Verify figures and policy against your own systems before acting.

