Course : Assistant: efficient reporting

Practical course - 2d - 14h00 - Ref. RPI
Price : 1500 CHF E.T.

★★★★½   4,6 / 5

This course will show you how to create effective dashboards and produce clear, relevant reports. It will also teach you how to communicate more effectively, both orally and in writing, in order to increase your persuasiveness.

Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Choose high-performance indicators for your business
- ✓ Building effective documents
- ✓ Present reports with ease

Intended audience
Executive assistants and secretaries.

Prerequisites
No special knowledge required.

Practical details
Hands-on work
Theoretical input and practical exercises. Case studies and scenarios with personalized debriefing.

Course schedule

PARTICIPANTS
Executive assistants and secretaries.

PREREQUISITES
No special knowledge required.

TRAINER QUALIFICATIONS
The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS
The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more.
Participants also complete a placement test before and after the course to measure the skills they've developed.

TEACHING AIDS AND TECHNICAL RESOURCES
• The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
• At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
• A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

1. Understanding the challenges of reporting

- Support managers in their role as business leaders.
- Understand the importance of the dashboard: strategic steering, activity indicators, link with the budget...
- Understand the logic behind a dashboard: types of objectives and indicators.
- Understand how the management system is organized around the dashboard: accountability, delegation...

Group discussion
Collective reflection and exchanges, feedback.

2. Managing dashboards

- Dashboard design: project methodology.
- Determine the relevant indicators and levels of information required, depending on the recipients and their needs.
- Select and prioritize indicators for results, progress, steering, reporting and management.
- Monitor and control the dashboard: check figures, alert managers to discrepancies and errors...
- Build and optimize the reporting process: organize dashboard animation with teams.
- Make suggestions: comment on, optimize and promote the development of indicators.

Exercise
Selection, from among the most common indicators by function, of those most relevant to your business.

3. Present information clearly in writing

- Prioritize, classify and select relevant information.
- Summarize: build a clear and appropriate plan, construct an argument, say the essential...
- Making numbers talk: Excel charting and PowerPoint visual tricks.
- Extrapolate: translate figures into examples, give concrete examples.

Role-playing
Preparation of a written reporting document.

4. Communicate essential information orally

- Prepare for a successful speech.
- The golden rules of a successful oral presentation.
- Organize your ideas in a plan, find the right words and adapt your language.
- Enhance your oral impact.

Role-playing
Role-playing and role-playing around oral reports.

Dates and locations

REMOTE CLASS
2026 : 30 Mar., 21 May, 5 Oct.