



Bank Administration and Executive Support Training Course

12 – 16 July 2027
San Diego



Bank Administration and Executive Support Training Course

Ref: 423_134285 **Date:** 12 – 16 July 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Bank Administration and Executive Support Training Course is a five-day professional course for bank administrators, executive assistants, secretaries, office coordinators, and governance support staff. Participants connect executive workflow with banking confidentiality, controlled correspondence, meeting evidence, document access, customer and visitor coordination, decision follow-up, and operational escalation. They leave with a Bank Executive Support Control File. Agile Leaders Training Center delivers this bank administration training course in a banking-specific context rather than as generic assistant training.

Who Should Attend

- Bank administrators coordinating management workflow, records, and office services
- Executive assistants supporting senior managers, functions, and committees
- Secretaries preparing correspondence, meetings, minutes, and follow-up records
- Office coordinators managing calendars, visitors, documents, and service requests
- Governance support staff maintaining decision and action evidence
- New supervisors responsible for administrative quality, confidentiality, and escalation

The course assumes basic office experience. It does not provide legal or regulatory advice and does not replace each bank's information-security, records, customer-data, or approval policies.

Departments and Industries

- Executive offices, business management, and corporate secretariat support
- Retail, corporate, investment, digital, and transaction-banking teams
- Risk, compliance, audit, legal-support, and governance offices
- Operations, finance, treasury, human resources, and technology departments
- Branches, contact centers, shared services, and customer-service functions
- Banking groups, finance companies, payment firms, and adjacent financial services

Learning Objectives

By the end of this course, participants will be able to:

- Prioritize executive workflow using service, risk, confidentiality, and urgency criteria
- Control calendars, meetings, visitors, and sensitive communications
- Prepare accurate agendas, minutes, decisions, actions, and follow-up records
- Classify, route, store, retrieve, and dispose of banking documents appropriately
- Coordinate professional service across customers, managers, functions, and third parties
- Use checklists, registers, escalation paths, and handovers to strengthen administrative control



Course Agenda

Day 1: Banking Administration and Workflow Control

- Bank Support Role, Boundary and Stakeholder Map
- Request Intake, Priority and Service-Level Triage
- Daily Workflow Board and Deadline Control
- Delegation, Approval and Segregation-of-Duties Check
- Operational Issue and Escalation Route

Day 2: Executive Calendar, Visitors and Communication

- Sensitive Calendar Planning and Access Rules
- Meeting, Travel and Executive Brief Coordination
- Visitor Identity, Access and Reception Workflow
- Professional Call, Email and Message Handling
- Bank Executive Support Course Scenario: Competing Priorities

Day 3: Meetings, Minutes and Decision Follow-Up

- Purpose, Participant and Agenda Preparation
- Document Pack Version and Distribution Control
- Accurate Minute, Decision and Dissent Recording
- Action Owner, Deadline and Evidence Register
- Committee Follow-Up and Overdue Escalation

Day 4: Correspondence, Records and Confidentiality

- Banking Information Classification and Need-to-Know
- Controlled Correspondence Draft, Review and Release
- Physical and Digital File Naming and Access
- Retention, Retrieval, Handover and Disposal Evidence
- Bank Document Control Course Case: Misrouted Record

Day 5: Service Quality and Administrative Resilience

- Internal Customer and Stakeholder Service Standards
- Complaint, Error and Sensitive Request Routing
- Administrative Risk and Control Self-Check
- Absence, Handover and Business-Continuity Pack
- Performance Dashboard and Improvement Review



Practical Workshops

- Use a banking secretarial skills course workflow simulator
- Prioritize a congested executive calendar with confidentiality constraints
- Prepare an agenda, minutes, decision register, and action tracker
- Classify and route correspondence using bank-specific control rules
- Resolve a visitor, customer, and operational escalation scenario
- Assemble the Bank Executive Support Control File

Course Deliverables

- Executive Workflow and Priority Board
- Sensitive Calendar and Visitor Checklist
- Agenda, Minutes, Decision and Action Templates
- Correspondence and Document Control Register
- Escalation and Administrative Handover Plan
- Bank Executive Support Control File

Frequently Asked Questions

How is this different from a general administrative assistant course?

The course uses banking confidentiality, governance, customer, access, record, and operational-risk scenarios throughout its workflow and controls.

Does the course cover board-secretary legal duties?

No. It covers administrative meeting support and evidence management, not legal opinions, formal company-secretary responsibilities, or jurisdiction-specific rules.

Will participants practise meeting minutes?

Yes. They prepare agendas, document packs, minutes, decision records, action trackers, and overdue escalation evidence.

Does the course address confidential banking records?

Yes. Participants practise classification, access, routing, storage, retrieval, handover, and disposal using the bank's own policies.

What will participants take back to work?

They leave with reusable workflow, calendar, visitor, meeting, correspondence, document, escalation, and continuity tools in a Bank Executive Support Control File.