



Working Sm@rt with Outlook

HelpDesk BC

Metrotown Holiday Inn Express, Burnaby

November 15, 2011

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WORKING SM@RT

Today we will look at how you can use Outlook to help you plan and execute your day, your week, your month--your life!

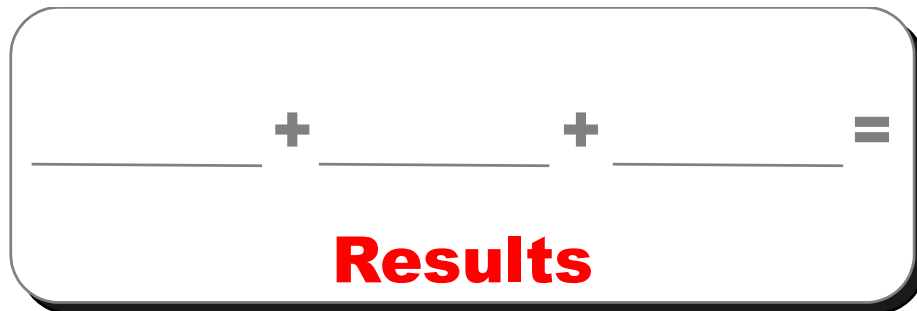
However, it is important to realize that Outlook is only a tool. Its effectiveness depends on *how*, *when* and *why* you use it. Outlook can't think, plan, or make decisions for you.

How effective *you* are, depends on the processes you apply to planning and organizing:

- How do you organize your work?
- How do you prioritize your work?
- How often do you set up a daily plan?
- How many reminders do you have surrounding you?
- How often do you check your e-mail?
- How often do you choose not to answer your phone?

THE PRODUCTIVITY FORMULA

The goal of your work is to get the Results you want--this requires three pieces to come together. Do you know what they are? Which one is the most important?



HOW DO YOU ORGANIZE YOUR TO-DO'S?

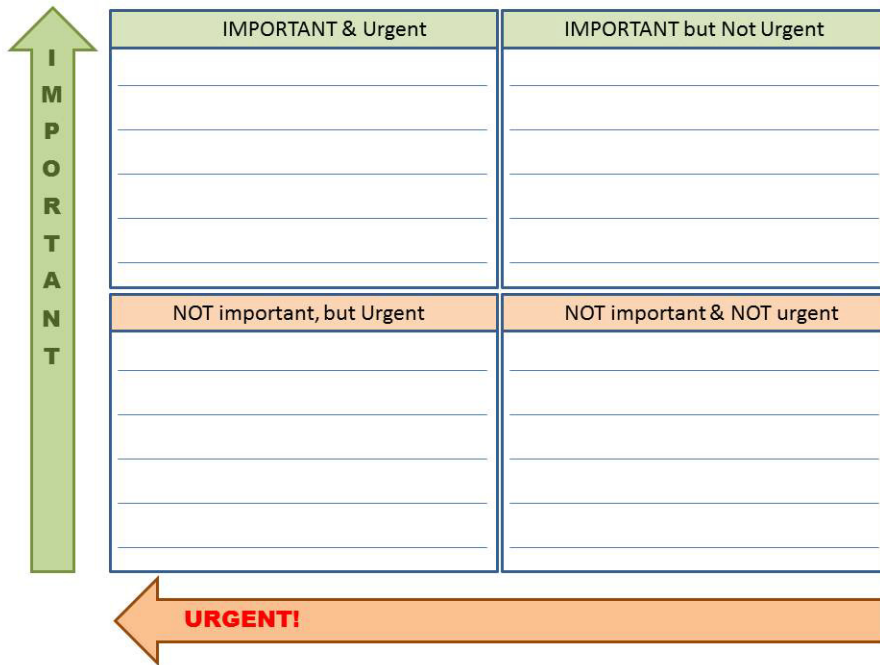


Which of the above tools do you use? What other tools do you use?

PRIORITIZING: THE 4Ds

Whether it be long-term strategic, or short-term operational, planning is a vital process in effective workload management. To help you make decisions quickly and reduce your mind traffic, use the 4Ds:

- **D**o it now
- **D**ate activate it (decide *WHEN*, not just “Later”)
- **D**elegate it
- **D**elete it



- What are some of your important-not-urgent, responsibilities?
- What important-and-urgent events are likely to occur in your job?
- Do you give sufficient time and attention to the important activities?

LEARNING THE TOOL OR FOLLOWING BEST PRACTICES?

Scenario: You've arrived back at your desk from a meeting. A number of issues surfaced in the meeting, which you now need to follow-up on: send two separate e-mails, make a phone call, schedule a follow-up meeting, research a topic. As you sit back down at your desk, what is the VERY FIRST thing you do?

This is an example of one of those 'magic moments' in our day. Your answer will depend on the *process* you use, rather than the *tools* you use. Do you:

- a Start working on the issues related to the meeting.
- b Review your e-mail to see 'what's new' since you last checked, to see if anything urgent needs attention before you start anything new.
- c Check your voice mail to see if anything urgent needs attention before you start anything new.
- d Go to your "To-Do" list and enter the new luncheon issues on it.
- e Get an update from the people in your office to learn if anything urgent needs attention before you carry on.
- f Check your daily plan to see what is on it and what is up next.
- g See what has landed on your desk in your absence and check to see if anything urgent needs attention.
- h None of the above.

PRODUCTIVITY PIRATES



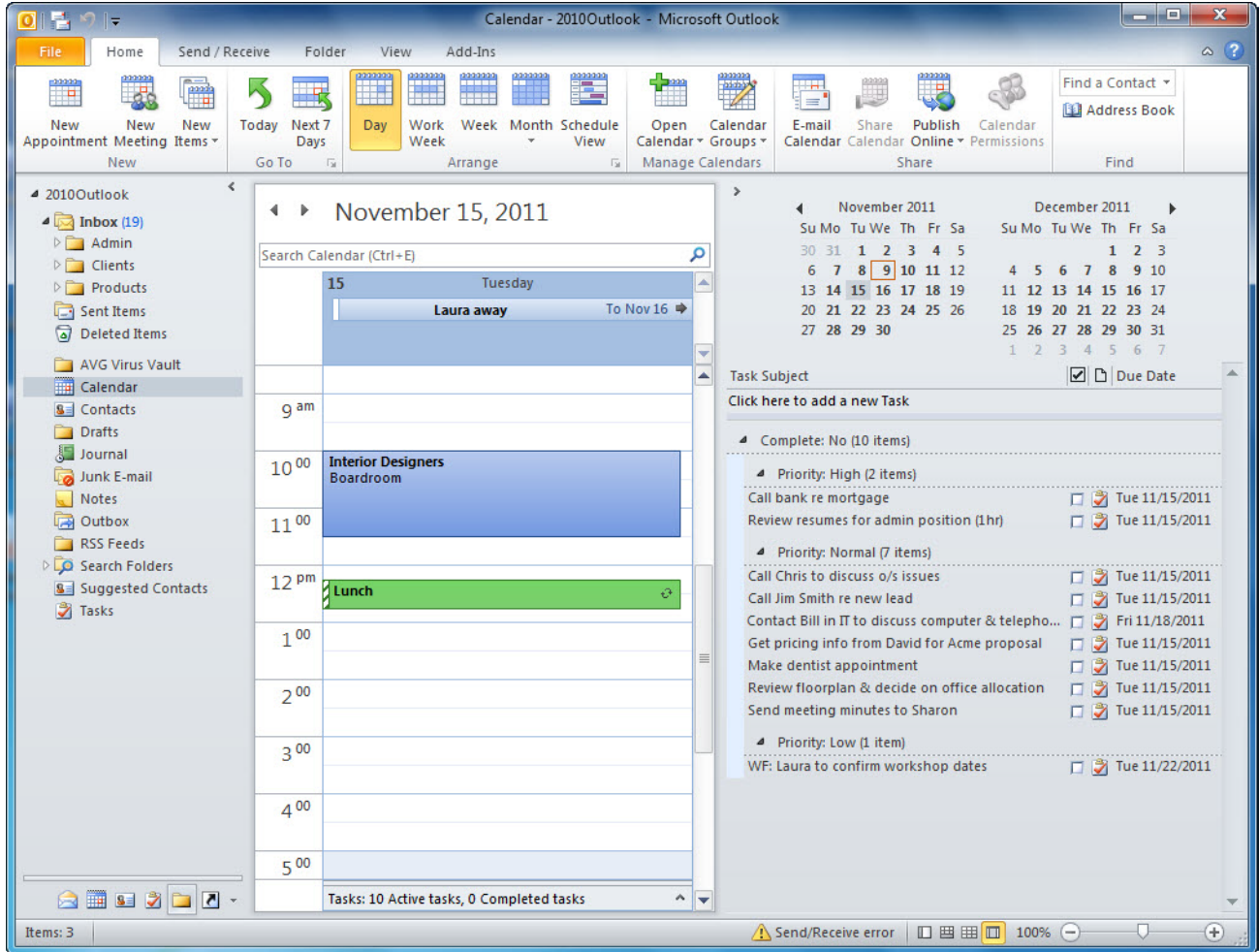
What are your Productivity Pirates? What can you start doing to minimize their impact?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

A PRO-ACTIVE VIEW IN OUTLOOK

Staying focussed on *your* priorities is easier if you can *clearly see* your priorities.

- Where do I need to be?
- What do I need to do & when do I need to do it?

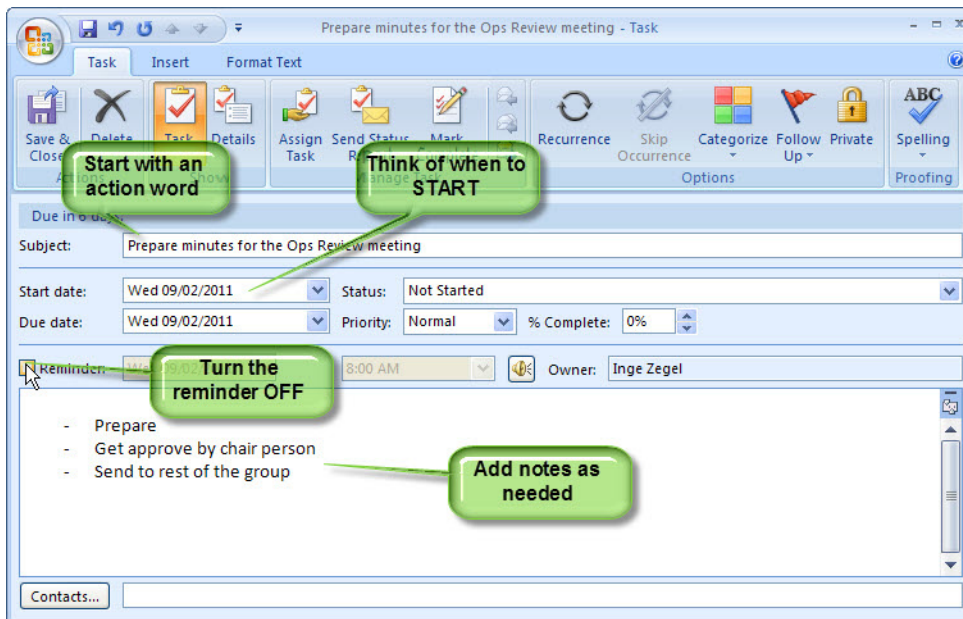


ORGANIZING YOUR TO-DO'S

How many to-do lists do you use? Are you surrounded by “reminders”? A good To-Do list should tell you WHAT you need to do and WHEN.

To create a task:

- ▶ In the To-Do Bar, double-click on any blank space (or press **Ctrl+Shift+K**), enter the necessary information, then click **Save & Close**.



MANAGING E-MAIL

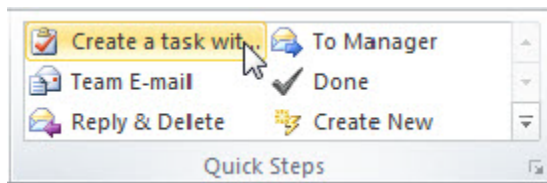
Do you manage your e-mail, or does it manage you?

- Reduce interruptions: turn off e-mail notifications.
- Check your e-mail a few times a day--not every time a message arrives. We recommend 3 to 4 times a day.
- Read a message once and reply to it, task it, file it, or delete it. Use the 4Ds!
- Use rules to filter out non-actionable, low(er) priority e-mails (e.g. newsletters, reports, reading material etc.)
- Create one or more folder to store e-mails you want to keep for future reference. Don't store them in your inbox.
- End your day with an empty inbox!

To turn an e-mail into a task:

Right-drag the e-mail(s) to the Tasks folder and attach the e-mail to the task. Choose to copy or move the e-mail as an attachment, depending on whether you need to keep the e-mail for future reference.

TIP: In Outlook 2010, you can create a "Quick Step" to quickly create a task from an e-mail:



PLANNING YOUR DAY - EVERY DAY!

Wrapping up the current day and planning for the next day is key to managing your priorities and time. Schedule a 10 minute recurring appointment with yourself about an hour before you leave the office to plan for the next day!

Daily planning process:

- 1 Review today's calendar and unfinished tasks.
- 2 Check your inbox and decide how much time you need to process any remaining messages.
- 3 Review tomorrow's calendar and tasks. Is your plan realistic or do you have too much on your plate? If so, defer non-urgent tasks to a later date or delegate them.
- 4 Block time for high priority tasks. (Drag a task to desired date and time slot in your calendar.)
- 5 Review today's accomplishments.

