

OUTLOOK STRATEGIC MANAGEMENT – 4 PART SERIES

Outlook is the Grand Central Station of our workplace. It is the first thing most lawyers open at the start of the day and the last thing to be turned off. Many lawyers struggle just to keep up with the many messages, tasks, meetings, and follow-ups that need to be managed and at the same time working on most important projects, documents and files needing their attention. In this transformational course participants will learn the soft skills, technical skills, and optimal settings in Outlook that can change the way they work to a much more focussed, productive, effective, and less stressful process. Each session is uniquely powerful, but all four topics are interdependent and greatest value is by attending all four sessions.

SESSION 1

CREATING AN OUTLOOK DASHBOARD TO PLAN AND MANAGE YOUR WORK – 1 HOUR

In this course Lawyers will learn to create a single dashboard, one place where they can see all appointments, tasks, contact follow ups, and important emails. Lawyers will learn the most important ten minutes of their day and what to do and not do during that time and to create the right amount of “breathing room” in their day to manage the unplanned, unexpected items that arrive each day. They will also learn how to work from that single screen to create emails, contacts, tasks, and appointments. Finally, lawyers will easily be able to identify their capacity for more work, with a special focus on detailed scheduling over the next two weeks.

Course Content

- Creating a single dashboard with everything on it
- How to work from the dashboard
- The most important ten minutes of your day
- Setting up a custom toolbar and shortcuts
- How to make the plan and how to execute the plan

SESSION 2

FIVE D’S TO KEEPING YOUR INBOX EMPTY – 1 HOUR

For many lawyers their Inbox might feel like a bottomless pit that requires endless effort every day. It can be a stress choosing between leaving emails unanswered and doing real work that adds value to the organization. In this course lawyers will learn the 5 D’s, effective strategies for emptying their Inbox everyday, leaving them free to focus on the most important and valuable work. Even if they currently have hundreds or thousands of emails in their Inbox right now and/or if they have a massive list of folders, they will learn strategies to get on top of their emails and never miss or drop an important item.

Course content

- How to organize and manage emails
- Working through the 5 D’s of managing emails

- Tips for creating effective email communication
- How to NOT live in your InBox

SESSION 3

USING MICROSOFT TODO LIST TO CREATE A PLAN INSTEAD OF AN ENDLESS LIST – 1 HOUR

Lawyers need to constantly manage task associated with various files. Tasks are an important and typically poorly utilized tool in Outlook. Lawyers will learn how to shift from an endless To-Do list to a realistic plan for their work. Delegating is so much more than firing off an email asking someone to do something for you. What happens if they don't do it on time? Who gets the blame? Learn how Outlook can free up your mind to focus on present work and not be busy trying to remember things and how to use tasks to build a "Plan" for themselves and their team.

Course content

- Creating Tasks quickly
- Managing and delegating work
- Creating a "Plan" versus a "List"
- Creating multiple projects (i.e. files) that each have multiple tasks
- Creating reports
- Managing workload and priorities

SESSION 4

EFFECTIVELY AND REALISTICALLY USING THE OUTLOOK CALENDAR TO MANAGE WORK – 1 HOUR

Lawyers often are trying to squeeze one more item into an already unrealistic calendar. The calendar should be a powerful tool to create freedom to work on the most valuable things and to avoid the clutter that drains energy and wastes time. Lawyers will learn practical skills of how to move through your calendar quickly, setting up meetings in with few keystrokes, creating a series of meetings that don't follow a regular recurrence pattern, connecting notes to meetings and jumping to specific dates. Lawyers will also learn the importance of creating "breathing room" in their schedule, and how to get their team to bring their "best" to a meeting.

Course Content

- Customizing the Calendar to optimize focus
- Preparing for the unexpected. Creating "breathing room" in the schedule
- Quick shortcuts for moving and working in the calendar
- Tips for managing meeting invitations
- Getting the most out of a meeting

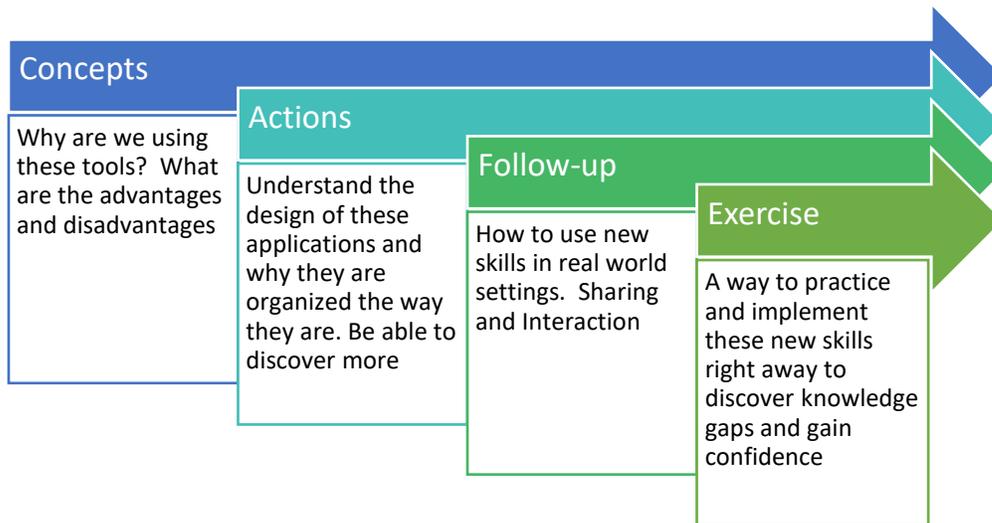
ABOUT POWERCONCEPTS

PowerConcepts is a group of Microsoft Certified trainers led by Master Instructor Frank Byl. PowerConcepts has been operating for 25 years and has trained tens of thousands of people on how to better use their application software. Frank has worked with many law firms and understands the time pressures and processes of law firms and how using these applications can streamline and benefit the operation of the firm.

TRAINING STYLE

This training is provided remotely to eliminate time required for travel. The focus is on having participants experience and use the new tools in an instructor led environment. All participants should have dual monitors or dual devices. This allows them to watch the instructor while applying the new skills. The instructor is also able to assist participants on the participants computer. Sessions are broken into a series of short presentations with interactive breaks to resolve questions and exchange ideas.

All PowerConcepts Instructors are Microsoft Certified and use the CAFÉ training principles



FREE SUPPORT

In addition, all training is recorded, and videos of the training are made available to the participants for 3 months following the training for additional support and follow-up. PowerConcepts also provides free refreshers for 3 months.

INSTRUCTORS

All courses are taught and facilitated by PowerConcepts team of Microsoft Master Instructors. Led by Frank Byl, they have taught thousands of clients and companies over more than 20 years.