

# Outlook Strategic Management



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## CONTENTS

Does Email hijack your day?.....	2
Outlook Strategic Management.....	2
Quick Access Tool Bar.....	3
Calendar .....	3
Contacts.....	3
Tasks .....	4
To Do .....	4
Managing Email .....	5
Strategic Management.....	6
Set up for Strategic Management.....	6
Working from the Dashboard View.....	7
Epilogue.....	8
Handle it Once! .....	9

## DOES EMAIL HIJACK YOUR DAY?

Jason arrives at work planning to finish a report that is due next week and to do some research on a recurring software problem. He has a meeting with a client at 10:00 and plans to do a 30 minute power walk at lunch with a colleague. As he settles into work the first thing he does is open his Outlook and then gets a cup of coffee. By the time he comes back his Outlook has opened to his Inbox. He immediately has a twinge of guilt about the many emails piling up in his Inbox, compounded by the numerous messages that he has not even read other than a quick glance at the subject line.

Just to make sure he has not missed anything important he quickly scans the first few screens of his mail looking for important items, stopping to click and preview a few that might be important. Someone has endorsed his skills on LinkedIn and he pauses for minute to accept the endorsement by clicking on the link which directs him to the LinkedIn site. He accepts the endorsement and notices two more messages waiting for him on LinkedIn. He quickly reviews the two messages. The second is mentioning a workshop that might be of interest to him and he clicks on the link to review the content.

Finally, getting back to his Outlook he continues to check a few more emails before quickly going to his Task list to review a growing list of red tasks. He gets out a pad of paper and creates a To-Do list for the day and pledges to complete the list of important items today.

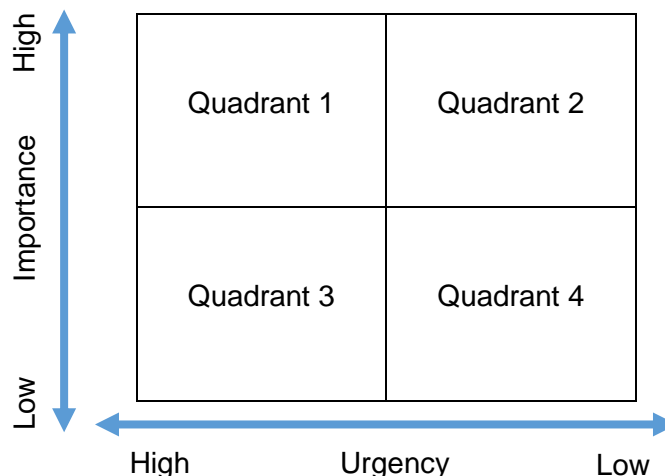
Just then another colleague comes and asks him for a little help with an Excel function that he is struggling with. After helping his colleague, he gets back to his desk and realizes the client for his 10 o'clock meeting is about to arrive and he hastily clears his desk and pulls the client file. During the hour long meeting Jason jots down a few items on a note pad to follow-up on. He returns a couple calls that came in during the meeting and uses a few Post-it notes as reminders for follow-up items. He quickly checks his email before settling in to finish the report that he needs to get done for next week. After 20 minutes of focused work his cell phone buzzes with a message that his colleague is waiting outside to go for that walk.

By the end of the day Jason has added a few post-it notes to his desk, has a list of items from the meeting that he needs to follow-up with on the side of his desk, more messages piling up in his Inbox, his must do list items and a report that is still not completed. The research for the recurring problem didn't get touched.

Maybe tomorrow.

## OUTLOOK STRATEGIC MANAGEMENT

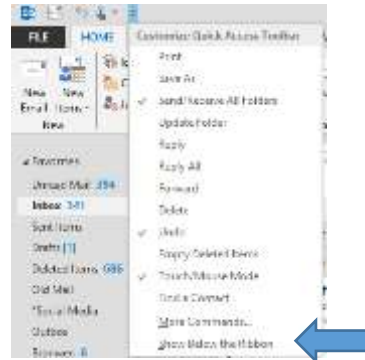
Each day many demands are placed on our time. The demands and activities that we spend our time on can generally be ranked on two scales; Importance and Urgency. Steve Covey created this grid for ranking all activities.



Covey explains that our most significant work happens when we spend time on the Important and non-urgent items in our lives. He calls this Quadrant 2 living.

## QUICK ACCESS TOOL BAR

- 1) Move the Quick Access Tool below the ribbon to make it more accessible
- 2) Add key buttons to the tool bar
  - a) Find a Contact
  - b) Any other function that is used frequently
  - c) Right click on a function to add to QAT

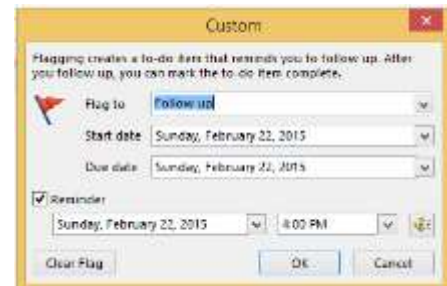


## CALENDAR

- 1) Add "Next 7 day" view to QAT
- 2) Use Ctrl + G to "Go To"
  - a) Specific date m/d
  - b) Enter time descriptions like fri, next mon, end of month, 6w, 3d, 4w 2d.
- 3) Enter meetings with drag, type and Enter.
- 4) Add files and "items" to meeting notes.
- 5) Invite attendees to meeting
  - a) Always include a location when using a meeting.

## CONTACTS

- 1) Add yourself as a contact
  - a) Share as a "Business card" only shares info found on a business card
  - b) Share as an "Outlook Contact" includes all information and notes in the contact
- 2) Add "Reminder" option to QAT
- 3) Add "Mark Complete" to QAT
- 4) Add reminder
  - a) Add detailed notes in "Flag to" field
  - b) Tab to due date and enter time using "3d" or "2w" etc.
  - c) Tab to reminder time and enter desired time for reminder with text like "11a" for 11:00 AM.
  - d) Tab to OK and press Enter



## TASKS

- 1) Enter tasks on list and tab to due date and use time short cuts like “Fri” or “10d”
- 2) Always assign tasks instead of sending emails when requesting people to do things
- 3) Create project view
  - a) Add Change Views to QAT
  - b) Select Simple View
  - c) Select “Save Current View as New View”
  - d) Name new view “Projects”
  - e) Add a custom field called Projects
  - f) Right click on the Projects header and select “Group by this field”
- 4) Creating a Project
  - a) Switch to Project View
  - b) Brainstorm tasks for Project (do not enter due date)
  - c) Enter the name of the Project in one of the tasks (this will immediately separate it from the other Projects)
  - d) Select all tasks in Project with Click on first task and Shift Click on last task
  - e) Drag the selected tasks to the one task that is already separated out
  - f) Enter due dates for tasks
  - g) Enter further notes in tasks
  - h) Assign tasks as required.
- 5) Toggle between planning view (Projects) and working view (Simple List)

## TO DO

- 1) To Do list is different than “Tasks” since “Tasks” are limited to just tasks while the To Do list includes both tasks and contacts and/or emails with reminders.

**Don't prioritize your schedule  
instead schedule your priorities**

— Stephen Covey

## MANAGING EMAIL

Key principle in managing email is to handle email just once if possible (Remember “Bob” principle). Apply five D's:

- 1) **Delete It**
- 2) **Do It**
  - a) If it can be done in 2 minutes or less
  - b) Then delete or file it
- 3) **Defer It**
  - a) Flag it and file it if you need to keep a copy of the email when completed
  - b) Convert it to a Task if you do not need a copy of the email when completed
- 4) **Delegate It**
  - a) Convert to Task and Assign. This will keep an updated copy on your task list
    - i) Use Quick Step
  - b) Remember the forwarding a message to be completed by someone else is not “managing”, it is “hoping”.
- 5) **Date It**
  - a) If the email is really a meeting request then convert it to an appointment
    - i) Use Quick Step

Setting up email

- 1) Set up Folder System
  - a) No more than 8 key folders
  - b) Create key folders under Inbox
  - c) No more than 8 subfolders in each folder unless it is a list of folders of the same thing (e.g. clients or staff or projects)
  - d) Never have folders and files at the same level
- 2) Set up Quick Step to do the following:
  - a) Create a task from the text of message
  - b) Create a task with message as an attachment
  - c) Create a meeting from the text of message



- 3) If you have more than 30 emails a day then consider setting mail to open the next item automatically
  - a) In File / Options / Email go to the very last setting and change it to “open the next item”.

### Other

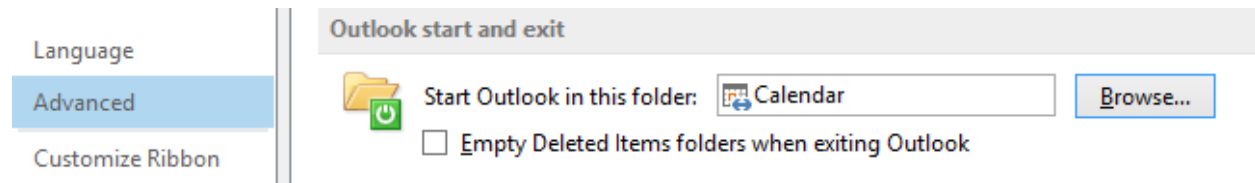
- Show **P**aste Options button when content is pasted into a message
  - Enable Microsoft **I**nfoPath E-Mail Forms
  - Show **N**ext and **P**revious links in the message **h**eaders when reading messages
  - Don't **a**utomatically expand conversations when using the keyboard to change messages
- After moving or deleting an **o**pen item: open the next item

- 4) Open and Email and add the following to the QAT in an email
  - a) The **reminder** and **Clear Flag** option
  - b) Move to Other folder
    - i) Click on the **M**ove icon and then right click on the **O**ther **F**older option

## STRATEGIC MANAGEMENT

### SET UP FOR STRATEGIC MANAGEMENT

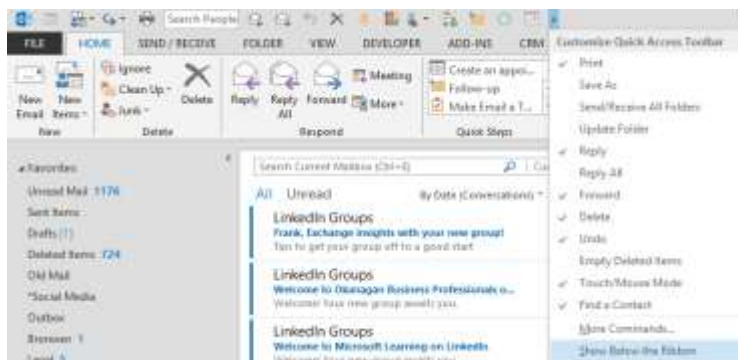
- 1) Change default view to open Outlook to the Calendar instead of Inbox
  - a) Go to **File / Options / Advanced** and Browse to **Calendar**



- 2) Change Calendar view to **Next Seven Days**
- 3) Under **Calendar, View** turn **Daily Task List** to **Normal**



- 4) Move Quick Access Toolbar Below the Ribbon
  - a) Click on the drop down at the end of the toolbar and select **Show Below the Ribbon**



- 5) Go to **More Commands** and add some or all of the following buttons to the Quick Access toolbar:
  - a) Next 7 days
  - b) New Items
  - c) Change View
  - d) Print
  - e) Find Contact
  - f) Reply
  - g) Forward
  - h) Undo
  - i) Delete
  - j) Add Reminder...
  - k) New Task Request
  - l) Move to Other Folder
  - m) Collapse All Groups





## WORKING FROM THE DASHBOARD VIEW

- 1) Switch to seven day view
- 2) Notice appointments on screen
- 3) Notice To Do Items on bottom of screen
  - a) Includes all tasks organized by day
  - b) Includes all reminders on emails and contacts organized by day
  - c) Level items by dragging
  - d) Add new tasks by adding them directly to the To Do bar on the due date
- 4) Create new email with custom button on QAT or Ctrl + Shift + M
- 5) Create new Task with custom button on QAT or Ctrl + Shift + K
- 6) Assign Task with custom button on QAT
  - a) Go to "New Item" and then to "more items" and then add the "Task Request" to QAT
- 7) Search for Contact with "Find Contact" on QAT
- 8) Stay focussed on today's meetings and To Do Items
- 9) Only at fixed times go to Mail and process all email remembering Bob principle and process every email in no more than two minutes else defer it for later today. Keep focussed on priorities

## EPILOGUE

Jason finishes his day by quickly reviewing his plans for tomorrow. A staff meeting at 9:00 am and he has to distribute a notice of change to his team. The documents are printed on the side of his desk. A client meeting at 1 pm and he has his folder ready for that meeting. He notices that the day after next is fairly full of meetings and a training session and that he has four follow-up calls scheduled for the same day. He has a report that he needs to complete and he still would like to research that software issue that is hindering his teams' efficiency. He quickly moves 2 of the follow-up calls to tomorrow and one for the following day. He has a plan for the balance of the week.

The next morning Jason arrives and opens his Outlook to his dashboard and reviews the priorities for the next week. He notices that he has a very difficult client next week Monday. He'll talk to his manager about that today right after the staff meeting and get some ideas on how to handle that. He makes a couple follow-up calls scheduled for today, gets through with one client and leaves a message for the second. He has 15 minutes before the staff meeting so he goes to his Inbox and notices 12 new messages. He quickly empties his inbox with a series of deleted, quick replies, changes one invite to go for a walk at 12:15 to a meeting and defers two emails for later that day. Inbox empty, he gathers his notice of change documents and heads for the staff meeting.

The staff meeting lasts almost an hour and after the meeting, he connects with his manager and they brainstorm a few ideas for the client meeting next week and then Jason returns to his desk and works at completing his report for the next 75 minutes. By 11:30 he's putting the finishing touches on his report. He makes one more attempt at the follow-up call but gets a voice mail again and hangs up without leaving a message. He quickly reviews his client folder in preparation for his 1:00 meeting. He checks his email and notices 8 new messages which he clears off before lunch and heads out for a walk at 12:15.

After lunch Jason has his client meeting. During the meeting, he used his tablet to add 5 items to his task list. He doesn't put dates on them but quickly enters just the subject. He thanks the client for the meeting and promises to get back to him in a week with new information. Back at his desk he changes his task list to Project view and notices the unscheduled tasks at the top of his list. He selects them all and categorizes them with the client name. He switches back to his dashboard view and quickly reviews the coming week. He notices his To Do list for today including four emails that he flagged earlier that would take some time to respond to. He decides their priority and begins to tackle them one at a time. After each one is completed he reviews their priority and selects the next item.

After coffee break he devotes 45 minutes to research a solution to a software problem that has been plaguing his team for weeks and just burning up time. He finds a couple potential solutions and tasks them to a software engineer in his group to review.

45 minutes before the end of the day he once again checks his email and notices another 15 messages. He plows through each one and flags 3 for follow-up. Once he's emptied his Inbox he switches back to his dashboard and tackles a couple of the emails he's just flagged. 15 minutes before he has to go he reviews the coming days activities and adjusts the due dates on some of his tasks to reduce the pressure on the days that are filled with meetings and sends a text to confirm details for his evening.

# HANDLE IT ONCE!

