

Personal Productivity Practices

Using Outlook

This seminar provides participants with step-by-step instructions to set up a system utilizing Microsoft Outlook to manage all their responsibilities for maximum productivity. Participants will learn our system of e-mail management & file folder organization to leave the office each day with a clean inbox. They will also learn to use Outlook to plan for appointments and meetings, understand and utilize the power of tasks, delegation, and tracking communication.

Outlook

Tasks	Email	Scheduling	Functionality
Task pad for understanding workload commitments and managing activities to deadlines, as well as capacity	Email work flow management using a prioritization system of imperative, important and pending with two easy clicks to make a task	Scheduling appointments & meetings	Customizing Outlook for productivity practices so that it looks like a traditional planner
Delegating tasks or emails with one input and automatic follow up for tracking of performance	Utilizing quick steps to integrate with email management	Scheduling meetings using the group feature	Communication to staff on the delegation feature/ use and the benefits
Status updates on tasks delegated	Delaying email to be sent	Recurring appointments and meetings	Effectively using the categories and color coding for visual reference and sorting to drive efficiency
Using quick steps for efficiency in email management to create tasks	Decision tree on email management	Using meeting invites to organize data and information for meetings	Tracking communications with staff, vendors, customers, etc.
Inserting documents and emails into tasks to consolidate needed information	Leveraging follow up flags for critical emails that require a reply or where information is needed	Setting up groups for efficiency when scheduling or emailing	Creating an electronic file system for increased organization
Using the task feature to manage workload and make decisions on commitments	Integrating actions from Goal Planning Sheets, Project Management or Goal Action Plans in OneNote* into tasks to accomplish with a few clicks	Search function to find emails, appointments and tasks	Utilizing the sort function of categories to group assigned tasks or tasks related to a project
Estimating the time required to complete tasks to schedule work	*Available in the Microsoft Office Suite		