

**Optimizing Your Outlook:**

Including Strategies for Taming the E-mail Beast for Busy Outlook Users

Presented by  
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A Leading Time Management/Smart Phones & Tablets/  
 /E-mail & Info Overload/Distracted Mgt. Training Firm  
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**Agenda of Program**

- Introduction
- Quick Tips on E-mail Management
- Calendar Management Strategies
- Some Quick Calendar Time Savers
- Managing Projects/Tasks Using Outlook
- Tracking & Managing Deliverables from Others
- Clearing Your Head of the Clutter Using Notes
- Some Fun Additional Tips

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**Five Key Functions in MS Outlook**

E-mail  
 Calendar  
 Task/To Do List  
 Notes/Memos  
 Addresses/Contacts

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**Let's Talk E-mail!**  
**The Harsh REALITY**

\_\_\_\_\_ **HOURS**

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**THE Definitive CLUTTER Buster!**  
***The 3-Minute, One Touch Rule***

Every piece of information (*paper, fax, e-mail, v-mail, etc.*) that you get you should touch one time.

If you can take care of this task (accomplish, reply, file, read, forward, delete, toss, etc.) *in three minutes or less*, **DO IT RIGHT NOW!!!**

If not, file appropriately into the Priority box or task list (**Drag & Drop!**) to be accomplished in order of priority or urgency (you decide).

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**A Great Outlook Tip**  
**for "Tasking" Your E-mails**

- ↳ Use "Drag and Drop" to create a new task
- ↳ Works also for:
  - New Calendar Entries
  - Creating a New Contact
  - Creating a New Memo/Note
- ↳ Can also drag and drop from these other functions to e-mail and each other

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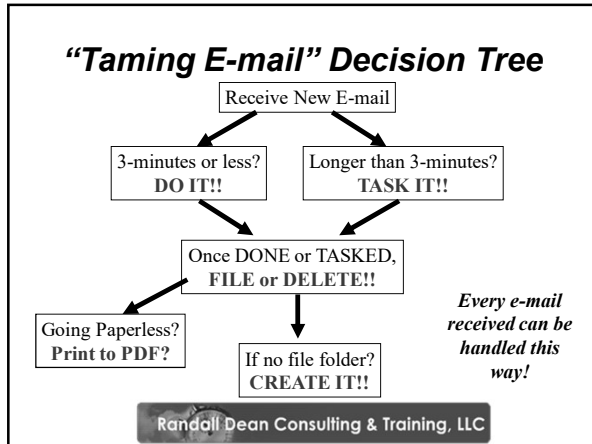
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### Two Key E-mail Strategies

- Use your “Signatures” tool as an “Auto-Emailer”
  - Great way to automate “frequently recurring” e-mail messages
- “Divide & Conquer”: Separate accounts for work, personal, and internet (junk/spam)
- If SPAM gets through, use SHIFT-Delete!

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### Identify Your Most Important Senders

- Set special notifications for most important senders
- Use “Rules” to also autofile messages, delete repeat spammers, automate processes
- Quick Steps also useful – makes some of these processes “push button”

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## A Little Exercise

- Write out key projects and goals
  - Work and Personal
- Also, write out “bucket list”
  - List anything you'd like – possible, not sure, etc.
  - Will show odd place I keep my “work” bucket list

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## Calendar Management Strategies




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## Let's Start With a Calendar Tip for the Guys

- Ever forgot a birthday? Or anniversary?
- NEVER do it again!
- Use the same “recurrences & alarms” strategy for meetings and appointments
- Learn and use other calendar capabilities

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## Useful Calendar Management Tools

- USE your calendar assertively!
  - Get in all meetings, appointments, travel time
  - Decide about personal items and how to handle
  - Even use “time blocking” in shared calendar environment
- Note ability to change views both on top bar and using “right click” on side bar
- Also, look into “Calendar Options” for more!

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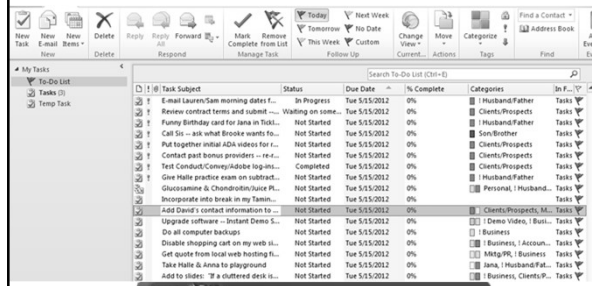
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## Project & Task Management Using Outlook



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## Cost of Interruptions to American Business:

**\$650 Billion/Year**

Average Time Lost Per Interruption:

**4-15 Minutes**

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### Outlook is GREAT for managing projects/tasks/roles!

- Feeds my “Type A” nature!
- Capture key projects/roles in categories
- Use individual tasks for “next steps”
- Favorite view is “Today's Tasks”
- Can also sort by “Category”, “Complete”
- “Next Steps” for Family & Friends?
- Capturing **Projects & Roles in Your Category List** Helps w/ Focus & Balance

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### Waiting On's . . .

- *Anything owed to you by anybody . . .*
- Money? Tax refund?
- Books/CD's loaned to friends/relatives
- Phone call's/faxes/e-mails with info you are waiting on.
- Develop your new personal brand – “the polite but persistent pest”
- A great urgency reduction tool

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### Assigning Tasks

- In Outlook, can use “Assign Task” button to assign/delegate any task
- Turns task back into e-mail
- Recipient has option to “accept” or “decline”
- If accepted, added to THEIR task list
- If connected, you'll get status updates
- *Really cool in conjunction w/ “drag & drop”*

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### Recurring Tasks

- Can manage any task that repeats on a regular schedule
- Can recur daily, weekly, monthly, yearly (and more!)
- When done with “current” occurrence of task, mark “Complete”
- That then files the completed task and posts the next instance of the task

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### Daily Start-Up Routine

- Calendar FIRST!! (NOT E-mail!!)
- Check ahead 1-2 weeks – look for actions and “train wreck” days
- Then, look at today's calendar – how much time?
- Then, adjust task list per time available
- Next, check e-mail and other information inputs
- Finally, adjust task list one last time, then ...
- GET TO WORK!!!

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### Contact Strategies

- More than just name, address, phone, fax
- Use as way to build stronger relationships:
  - Spouse/Kids Names
  - Directions
  - Quirky Habits/Behaviors
  - Contact Management Tracking
- “Activities” button useful for Search

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### How About Some Useful Notes/Lists?

- Priorities and Possibilities
- Staff Management Memos
- Company/Firm Archive
- Personal Goals/Dreams List
- Shopping Lists
- Travel/Financial/Medical Archives
- Business/Personal Trip packing list
- Golf Club Shot Selector
- Gifts??

Outlook the best for these??? Maybe something in "the cloud"???

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### Final Thoughts:

- Lots of info to chew on here:
  - Pick the ideas/strategies that work best for you
- Come back to your notes later to integrate more
- If an area of opportunity, consider a longer-form program in time management/personal organization
- Continue learning/practicing/perfecting your use of time
- Send me a note if you think of more!

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"Be the change you wish to see in the world."

– Gandhi

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### Other Randy Dean Programs:

- *Taming the E-mail Beast*: Key Strategies for Managing E-mail & Info Overload
- NEW! **From Distracted To Productive**: Finding Your Focus in a Hyper-Interrupted, e-Distracted World
- Smart Phone Success: Getting More Productivity (and Fun!) from Your Smart Phone & Tablet Devices
- Time Management in "The Cloud": Using Google Apps to Manage Your Time, Life, Work, Projects, People & More
- Ending the Office Clutter: Managing Your E-mail, Info, Documents, E-docs, "Stacks & Piles"
- Managing & Leading Great Staff & Team Meetings
- Go to [www.randalldean.com/programs.html](http://www.randalldean.com/programs.html)

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### Where to Get More Info:

- Randy Dean's *Taming the E-mail Beast* (Available on Amazon.com – search "*Taming Email*")
- David Allen's *Getting Things Done*
- Malcolm Gladwell's *Blink*
- Randy's E-newsletter: *Timely Tips – 1 Tip a Month to Save You Time!* <http://www.randalldean.com/signup.html> Or just send me an e-mail ([randy@randalldean.com](mailto:randy@randalldean.com)) w/ "Timely Tips Please" in subject line – there is no cost to subscribe and you can unsubscribe anytime
- Randy's *Taming E-mail Facebook Fan Page*: <http://www.facebook.com/TamingEmailBeast>
- Randy's *LinkedIn Page*: <http://www.linkedin.com/in/randydean>
- Twitter: @timelyman

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### We're Done!!!

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