

Overview

WorkSMART: Time and Information Management using Outlook

1 day – Instructor-led

COURSE OBJECTIVES

Outlook is often viewed as a group of separate tools to keep track of and store your information. WorkSMART with Outlook is designed to leverage a tool that you already have as a solution to your time and information management needs.

This **interactive, lecture style course** will provide the necessary skills to be more effective and efficient by combining a more comprehensive understanding of Outlook in conjunction with time management concepts. This series provides a holistic approach to using Outlook as a single multi-faceted time and information management tool. We will discuss best use of the tools in Outlook, how to integrate their use and how to apply their uses to solid time management concepts. The goal of this session is for attendees to be able to save approximately 30 minutes in every working day. What will you do with your extra time?

PREREQUISITES

Before attending this class, students must have some prior use of Outlook.

Outline

Managing Your Inbox

- Keeping your inbox to one screen or less
- Streamlining your e-mail
- E-Mail Best Practice
- Dictating responses
- Tracking Responses
- Repetitive e-mails made fast & easy
- Organizing “reference” mail
- Automatically manage mail
- Seeing only what you need

Managing Your Information

- Creating complete contact records
- Cross referencing contacts
- Filing contacts to find them more easily
- The role of categories in Outlook
- Hiding & Sharing contacts
- Working with groups effectively
- Converting contacts to e-mail
- Eliminating floaters
- Making notes (and more!) available outside of Outlook
- Tracking contact activities

Managing Committed Time

- Turning e-mails into appointments
- Using proximity dating
- The “Covey Quadrant”

- Specialized views to more efficiently see time commitments
- All Day Events
- Populating calendars through contacts
- Dealing with repetitive tasks

Managing Discretionary Time

- The quadrant and its relationship to tasks
- Task & Time creation tips
- Workflow – Converting appointments to tasks
- The role of importance & due dates
- Customizing your views to create action

Managing Others

- Making meeting requests work
- Tracking meeting responses
- Re-establishing contact with meeting attendees
- Giving up ownership of tasks & Tracking Progress
- Sharing your Outlook containers
- Establish sharing responsibilities
- Group mailboxes