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Take Back Your Life:

Using Microsoft Outlook to Get Organised and Stay Organised

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Laying the Foundation

Organisational Heirarchy

(Pyramid from top to bottom: Goal/Mission, Meaningful Objectives, Supporting Projects, Tasks and Subtasks, Strategic Next Actions (SNA). Left side labels: Prioritize and Plan, DO)

Defining Meaningful Objectives:

6 characteristics of a Meaningful Objective (p. 117):

- Rolls up to corporate or personal mission and goals statement
- Has clearly defined outcome(s)
- Involves multiple supporting projects
- Takes place over time and has specific due dates
- Includes corporate/ personal metrics

Defining Your Strategic Next Actions (p 135)

Once you have your Meaningful Objectives defined, the next step is to break down these objectives into Strategic Next Actions (SNA's). Here are some questions which will help. (p 136)

- What do you need to do to complete it?
- What information do you need to have with you to complete it?
- Where do you need to be to complete it?
- How much time will it take to complete it?
- Does it link to an objective or project?

Change Your Approach, Change Your Life (p 4)

Are you limiting yourself with these ten beliefs?

1. There's too much information coming at me too fast.
2. I get too many interruptions.
3. I don't have the discipline to be organized.
4. I have to keep everything.
5. 1 can't find what I need when I need it.
6. It takes too much time to get organized.
7. Organization cramps my freedom and creativity.
8. I'm no good with technology.
9. There's not enough time in the day.
10. I'm not organized by nature.

Cycle of Productivity (p 24)

- Identify Meaningful Objectives
- Create Strategic Next Actions
- Schedule and Complete Strategic Next Actions
- Review and Acknowledge Progress

Make a point of consistently referring to the organizational objectives when defining your own Meaningful Objectives and Strategic Next Actions.

"Boundary setting is not about getting other people to change (even though at first , it may seem that way). It's really about decided what you will and won't tolerate in your life and then communic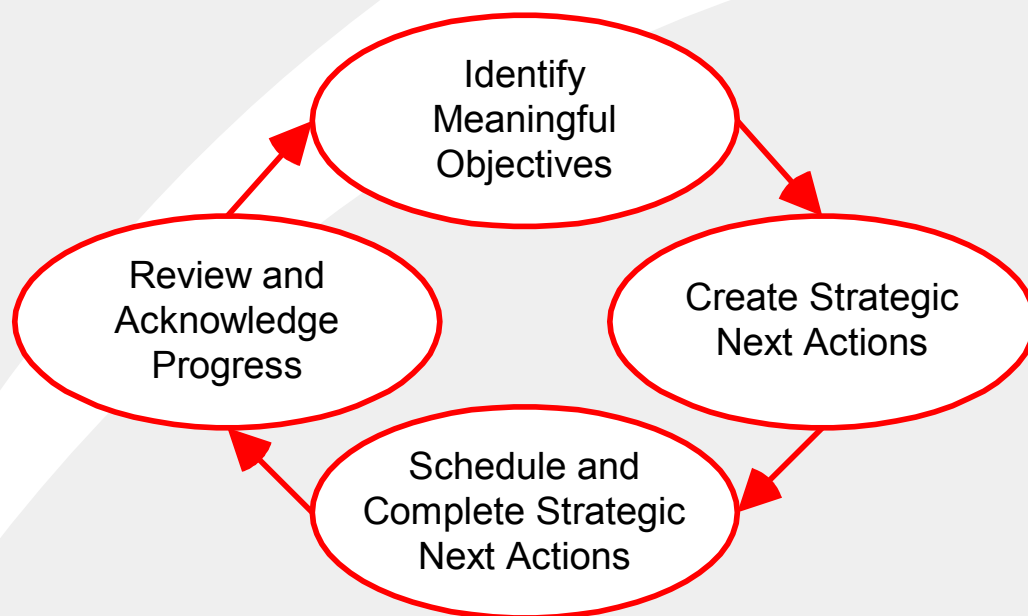ating this firmly and consistently whenever you need to. Boundaries are essential to becoming a healthy adult and balancing your work and personal life effectively. They demonstrate your commitment to self-respect."

- Natalie Gahrmann

Remember to Plan and Prioritize Tasks on your Calendar.

Integrated Management System (IMS) (p 30)

Three components of your Integrated Management System:

- Collecting System
- Reference System
- Action System

Collecting System
The collecting system should consist of the following collecting points:

- A paper inbox and/or a portable paper inbox for mobile staff
- A paper notepad and/or digital notepad
- Voice mail—preferably 1 or 2 maximum
- Microsoft Outlook Task List (or equivalent)
- Email

Remember—you are **not** a collecting point!

Reference System
The following six reference locations are recommended:

- Folder list—tracking emails
- Contacts—personal and business
- My Documents—tracking documents
- OneNote—for tracking miscellaneous notes
- Filing cabinet—for tracking paper

Action System
Refer to the MPS (McGhee Productivity Solutions) Workflow Model on the right for the recommended action system for the Take Back Your Life program.

Tips for Setting up Your Approved Collecting Points:

- Get 2 physical paper inboxes — one for work, one for home
- Label paper inboxes; teach staff how to use them
- Get a portable paper inbox
- Label Portable paper inbox sections
- Purchase Pocket PC that synchronizes with Microsoft Outlook
- Learn how to synchronize the Pocket PC with your computer
- Cancel voice mail box, enable message forwarding to another mailbox
- Download reminders from head into Categories (none)
- Avoid using sticky notes or paper (use Pocket PC, Tablet PC, task list, leaving to-do's in voicemail)
- Put mail in inbox and not on desk
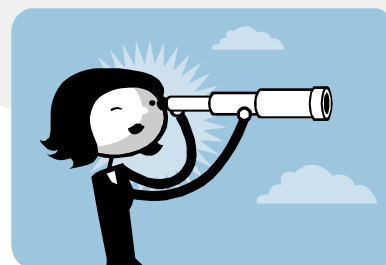
The MPS Workflow Model (p 41)

The MPS Four D's for Decision Making

Delete It

- It does not relate to an objective
- You can find it somewhere else
- You will not refer to it within 3-6 months
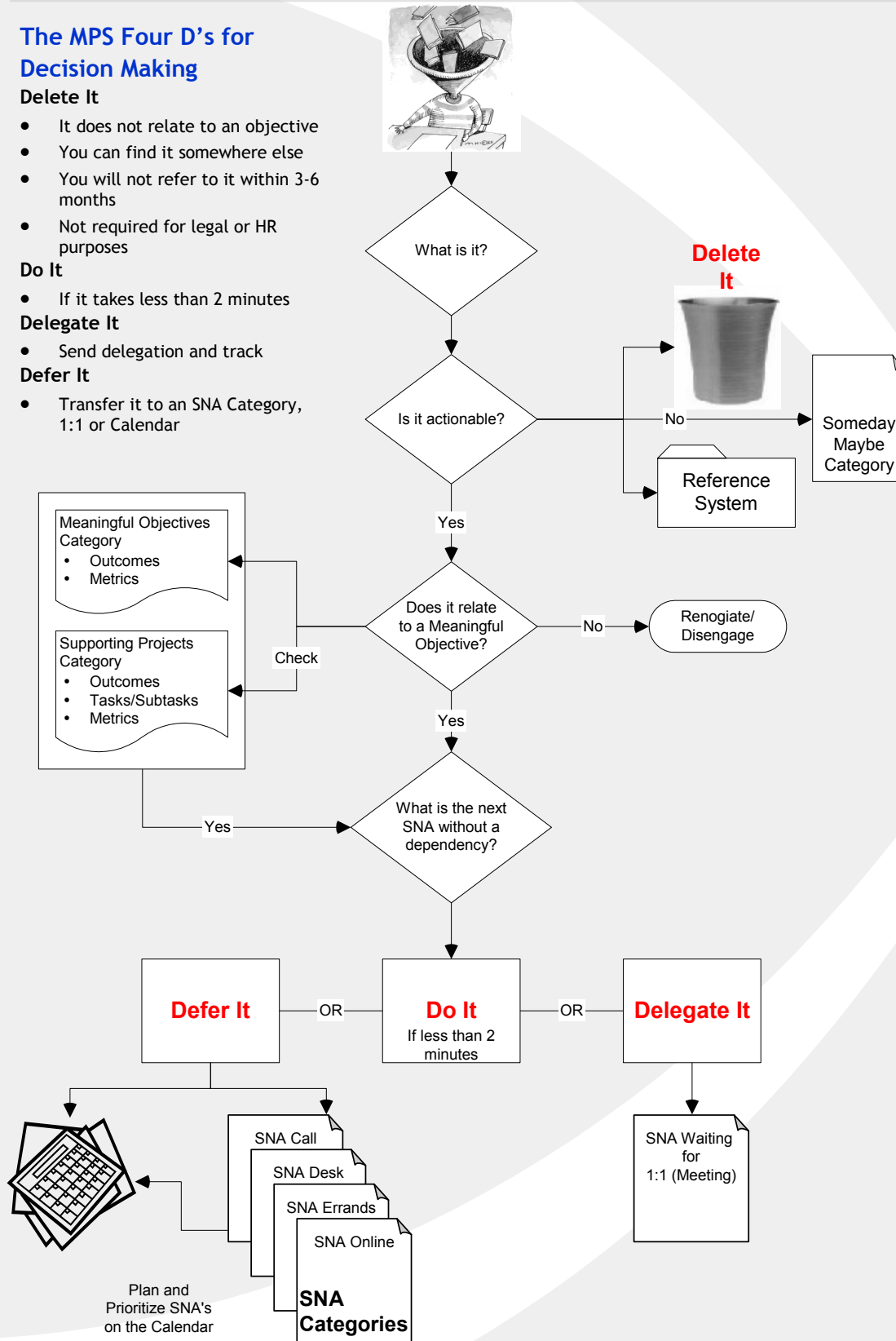- Not required for legal or HR purposes

Do It

- If it takes less than 2 minutes

Delegate It

- Send delegation and track

Defer It

- Transfer it to an SNA Category, 1:1 or Calendar

What is it?

Is it actionable? — No

Delete It

Someday Maybe Category

Reference System

Yes

Meaningful Objectives Category
- Outcomes
- Metrics

Supporting Projects Category
- Outcomes
- Tasks/Subtasks
- Metrics

Check

Does it relate to a Meaningful Objective? — No — Renogiate/ Disengage

Yes

Yes

What is the next SNA without a dependency?

Defer It — OR — **Do It** If less than 2 minutes — OR — **Delegate It**

SNA Call

SNA Desk

SNA Errands

SNA Online

SNA Categories

Plan and Prioritize SNA's on the Calendar

SNA Waiting for 1:1 (Meeting)

Use Categories to effectively manage your Contacts folder in Outlook.

The Four e-Mail PASS Model Questions (p 183)

- **P**—What's the **P**urpose of our communication and does it relate to a Meaningful Objective?
- **A**—What **A**ction is involved and does it have a due date?
- **S**—What **S**upporting documentation do I need to include in my response?
- **S**—Have I effectively **S**ummarized my communication in the subject line?

It's important to handle each email message only once wherever possible. Use the Workflow Model to determine how to simplify this process.

Prioritizing and Planning

Setting up Your Baseline Calendar (p225)
Your Baseline calendar is a tool for capturing the core activities that you must do daily, weekly or monthly. It reflects the recurring tasks that must be done no matter what therefore all other work should be structured around these core tasks.

The Weekly Review (p 240)
The three steps to keeping your Control Panel up to date using the weekly review are as follows:

- Processing and organizing all of your Collecting Points
- Reviewing and prioritizing your Planning categories
- Prioritizing and planning your Action categories

Challenge yourself to not only reduce your own work load, but also be aware of when you're making unnecessary work for others.

Success Factors for Processing and Organizing

- Schedule uninterrupted time to process and organize your Collecting Points—usually one hour/day works well
- Use the Workflow Model to clarify your commitments and communications when processing and organizing
- Process tasks one at a time—this develops the habit of emptying your Collecting Points
- Using the Planning and Actions categories to organize your actions into the Task List
- Remember: Meaningful Objectives and Supporting Projects are Planning Categories. They're loaded with dependencies and they're not Strategic Next Actions
- Strategic Next Actions are Action categories and do not have dependencies
- Organize all your tasks in the Task List so that your list is centrally located, accessible and flexible
- Identify personal behaviour changes so that you can successfully maintain your system going forward

Success Factors for Prioritizing and Planning

- Use your Calendar as the central location to track all of your commitments
- Create a Baseline calendar
- Regularly prioritize your SNA's and transfer to your calendar
- Empty your Collecting Points regularly
- Review and prioritize your Planning categories
- Prioritize your Action categories
- Use colour codes to create distinctions and add value to your Calendar
- Review your Calendar for work/life balance
- Keep your appointments with yourself

Tips for Reducing the Volume of e-Mail (p 208)
- Send less e-mail
- Write clear emails to avoid response questions
- Use the CC line only when it impacts the recipients objectives
- Unsubscribe from all both the most urgent newsletters and online subscriptions
- Meet with your team to discuss when to CC on email. Get consensus and stick to it.
- Clarify roles to avoid misdirected email
- Resist getting involved in e-mail threads that don't impact your objectives
- Post information on an internal website instead of mass mailing
- Create a best practice guide for your team to discuss the appropriate uses of email, phone and instant messaging

How to Setup Outlook as a Control Panel
1. Make sure the Navigation Pane is open on the left side:
2. Click View - Navigation Pane
3. Click the Calendar Icon at the bottom lower left corner
4. Click View — Task Pad to display the Task pad on the right side
5. Click the folder icon in the bottom left

How to Open Outlook to your Control Panel automatically
1. In Outlook, Click Tools — Options
2. Click on the "Other" tab 2 last tab across the top)
3. Click on the "Advanced Options" button (in the 'General' section)
4. In the 'General Settings' section, beside "Startup in this folder" click the "Browse" button
5. Click on "Calendar"
6. Click "OK" three times

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