

1.

TITLE SLIDE: CURBING E-MAIL OVERLOAD

This overview of how to use Microsoft Outlook to manage your email, tasks, and calendar will teach you time- and sanity-saving tools and tips to increase your productivity.

2.

Section Title Slide: The E-mail Problem/Solution: An Overview

We're going to touch on two accesses to the problem AND the solution because you can't change if you don't know how things are to begin with!

3.

If You Want to Change Your Results, Change Your Approach

1. What beliefs are limiting or expanding your e-mail productivity?

2. What habits/actions are affecting your e-mail effectiveness?

Our two accesses: BELIEFS + HABITS/ACTIONS

4.

BELIEFS: In today's culture, it's common knowledge that our beliefs limit or expand what is possible for us. As Henry Ford put it, "Whether you think you can or think you can't, you're right."

Look over these beliefs from "Take Back Your Life." Now take one minute with the person next to you, what do you believe about email? The good, the bad, and the ugly! 1 minute each way....

Ten Beliefs that Limit Productivity

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. It Takes Too Much Time to Get Productive
6. I Can't Find What I Need When I Need It
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

5.

Is what you were sharing with your partner a belief or "THE TRUTH?" Be willing to consider that, if you change your belief, you can alter "the truth" to be more empowering and productive

6.

HABITS/ACTIONS:

Now, describe your current habits and actions (including reading and answering emails at trainings and meetings! 1 minute each way....

7.



5 years ago, I wrote a radio commentary about "drowning in E-mail overload."

What inspired it was that I was informed of this funeral service via e-mail. 3 years ago it was shocking to get an email with that news instead of a phone call. Now it's a matter of course. Think about this – all the kinds of information that come at us via e-mail. I end the commentary with "E-mails – the best and worst of the human heart, arriving in your inbox daily. Even your own graveside service won't stop them."

Think about that! E-mails will be coming to you even after you're dead! They are relentless! A tsunami!

8.

We can each contribute to the solution by mindfully managing our emails themselves: to ask ourselves before we even click to compose a new email is to ask ourselves, Will this email contribute to the problem or to the solution? And Is e-mail the most appropriate, effective means to relay or request this particular information?

And mindfully manage our habits, actions, and beliefs. Why not take on this belief of Sally McGhee's that she thinks is "the truth."

9.

According to Sally McGhee,
The reality is:

The volume of E-mail isn't the issue.

How you process and organize the volume is the issue.

My belief is that the tools in Microsoft Outlook are a life raft – or, better yet, a surf board!

I didn't think it was possible to have my inbox at 0, and now that I'm using this system, it happens often – and I have a greater volume of email than I've ever had. So our belief, at least for the duration of the workshop is...

10.

The solution to drowning in email overload is to quickly, effectively (and regularly) process and organize our e-mail.

Note that this is a belief! "I Can't Believe That Said Alice...." It's a made-up one (you can do that, you know.!) I hope you'll notice your beliefs and alter them as needed to empower yourself. Let's focus now on our second access, habit and actions.

11.

What habits/actions are affecting your e-mail effectiveness?

Let's look at a few

How many e-mails do you have in your inbox right now?

How many times a day do you check e-mail?

How many hours a day do you spend on e-mail?

How much of that time is spent scrolling through to find a particular email?

How many times, on average, do you find yourself looking at the same email?

12.

What habits/actions would make you more effective?

All these habits and actions are what we're going to work on impacting – if they're not working for you and you're not happy with them, that is.

13.

Make your emails work for you and your readers.

First, consider the emails you're writing. The better job you do, the better the emails you get back will be.

14.

Respond to Email Effectively

TO TURN ON AUTO SPELLCHECK:

Tools

Options

Spelling Tab

Check "Always check spelling before sending"

15.

Effectively and Regularly Process and Organize Your Email

Difference between Monitoring and Processing (Grazing and Dining – eat your tangerine! Gandhi)

16.

**SECTION TITLE: THE INTEGRATED MANAGEMENT SYSTEM
AN ACCESS TO QUICKLY, EFFECTIVELY (AND REGULARLY!)
PROCESSING AND ORGANIZING OUR E-MAIL**

THE INTEGRATED MANAGEMENT SYSTEM

Where do you keep the information in emails that you need to refer to?

How do you ensure that you're taking the actions you need to take?

These two questions are related to what "Take Back Your Life" calls "Your Reference System" and "Your Action System." Both ARE parts of the 3-part Integrated Management System to give us better results by changing the way we "process and organize our volume of e-mail." NOTICE THAT WE COLLECT, AND THEN WE PROCESS... INBOX IS OUR COLLECTION POINT. Once an email comes in, we decide what it is and what we will do with it. Let's take a quick look at the components:

17.

Part 1: The Collecting System

18.

Email is one!

Three useful Collecting Points are:

- **e-mail**
- **voice mail**
- **A paper inbox**

Sometime during the day, you'll need to stop to process the information in these Collecting Points, and make decisions about what to do with each

item. You'll either throw the item in the trash can, store it in your Reference System, or store it in your Action System.

The fewer, the better! (Chapter 4 & 5 show how to set up an effective Collecting System.)

19.

The Reference System

The Reference System enables you to track information that *does not require action*, but that you want to keep to access later.

(Chapter 8 shows how to set up an effective Reference System.)

20.

Where/what you use....

Six useful Reference Information locations are:

- **Folder list – tracking e-mails**
- **Contacts – tracking contacts**
- **My documents – tracking documents**
- **SharePoint – tracking shared documents**
- **OneNote – tracking notes:** OneNote is a place for gathering, organizing, searching, and sharing notes, clippings, thoughts, reference materials, and other information. All your notes will be visible here — organized by notebooks, sections, and pages. You can create them by clicking **File > New**.
- **Filing Cabinet – tracking paper**

F.Y.I.: inbox is not a good place for reference information!

Page 161 – 163 Description of each

169 (Stop Using Your E-mail As a Reference System!)

174 The Contacts Folders **Page 31, Chart page 32**

21.

The Action System

will track any information that *requires you to take an action*; for example, your Meaningful Objectives, Supporting Projects, 1:1 Meetings, and Strategic Next Actions.

(You'll learn more about this if you get the book...

Chapter 6 covers, in detail, how to set up an effective Action System.)

tracked in the Microsoft Outlook Task list and Calendar.

And you can keep track of and manage it all!

"Strategic Next Actions"???? !!!!!

22.

“Strategic Next Actions”

3 parts: Collection, Reference, Action! Lovely Three’s!

23.

Your Command Central for Managing the Deluge is
The “ControlPanel”

24.

My CONTROL PANEL



(To set up, see page 32 of “Take Back Your Life.” (Page numbers are for Outlook 2003, but it’s also in the same book for Outlook 2007, different page number.) Also see page 42-43. To make the Control panel your default view, see page 232. To view categories in your TaskPad, see page 230.)

Set yours up! You can always put it back!

1. Click Calendar
2. Open Navigation Pane if it isn’t (Click on view and check it)
3. Open TaskPad if it isn’t (Click on view and check it)
4. Drag bottom left up and down to make tabs become icons if needed
5. Click on “Folders” icon

Say this after they set up, so they’re looking at PP and the slide:

25.

The CP” The Calendar and TaskPad, on the right, gives you access to your Action System, showing your Meaningful Objectives, Supporting Projects, 1:1 Meetings, and Strategic Next Actions.

The Folder list, on the left, gives you access to your Reference System, showing all of your e-mail and other folders.

This view enables you to see everything you have to do in one place, which makes prioritizing and planning much easier.

Now, on to:

26.

The Three Phases for Creating an Integrated Management System

27.

Phase 1: Collecting

28.

Where will you collect all your commitments and agreements?

29.

Not, we hope in your head! (Ask if they've used Tasks, tell them this is a good thing to do.)

30.

Phase 2: Processing and Organizing

31.

Where will you store the reference and action information you collect?
(See suggestions – they're good ones – are you all using these?
Action information is information you need to complete an action.
Reference information is not required to complete an immediate action.
You may want to look at it later.
the difference between action and reference p. 157
You're on your own for reference, with the help of the book.
Let's set up an action system in the TaskPad.
p. 100, 101. Do this!

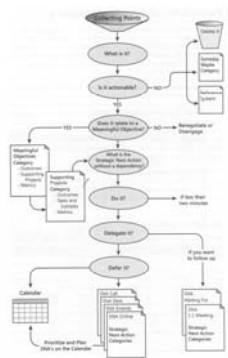
32.

How will you process and organize all that information?

Introducing the Workflow Diagram (Here's where the 4 D's come in!)

33.

The WorkFlow Model p. 40 41



34. The key... slow down to speed up!

FIRST SAY ALL THESE!

It takes "processing" not "monitoring 206-07, 210, 216
When is the best time? You have to really focus...

It takes scheduling appts and keeping
Sally McGhee recommends recurring one-hour meetings
outside busy meeting times (8 to 9, 4:30 to 5:30) mark it busy on your
calendar, respect others and your own!

p. 216

Turn off the ding!

You're just distracting yourself!

210

35.

Now... Let's each take an email and learn about the Workflow Model by
using it.

Back to the Workflow Model (Workflow Diagram page 40)

What is it?

36.

Is it actionable?

Yes, or no....

d # 1: DELETE

37.

Yes, but does it relate to a meaningful objective? JUST BECAUSE YOU
CAN DO SOMETHING WITH IT DOESN'T MEAN YOU SHOULD!

38.

Yes, next SNA?

39.
Do I Do, Delegate, Defer? (# 2, 3, 4)
40.
Try this system to process emails for a few minutes...
Processing and Organizing Your E-mail for 5 Minutes 204
Chart on page 41.
41.
Small Stuff, etc. (See Sep Sheet for more)
- A. Transferring E-mails into your Calendar or Task List (Drag 'n' Drop)
 To insert an E-mail into a task, page 145
 - B. Attaching E-mails/Email Attachments to Calendar
 Appointments/Tasks (pp. 201 - 202)
 - C. Color-coding to Create Differentiation (A Peek at Outlook 2007
 Features!) (pp. 237 - 39)
 - D. Success Factors for Processing and Organizing E-Mail (p. 218)
 - E. Focusing on Small Things First (p. 45)
 - F. She recommends on p. 160 making a folder called "E-mail
 reference" and moving all the old E-mails to it!
42. Tsunami... we're riding the surf!

Turn off alerts

1. On the **Tools** menu, click **Options**.
2. On the **Preferences** tab, click **E-mail Options**, and then click **Advanced E-mail Options**.
3. Under **When new i**

You can use an audio alert to inform you each time that a new item arrives in your mailbox. The default sound is a short .wav audio file, but you can change the sound to any .wav file of your choice.

The audio file can be located anywhere on your hard disk, or on any network share to which your computer always has access. If you move the audio file from the current location, or if the file is not accessible, the sound will not play when new mail arrives.

Tip To turn off the sound, see [Turn sound effects on or off](#).

1. Exit Microsoft Office Outlook.
2. Click **Start**.
3. Click **Control Panel**.
4. Do one of the following:
 - **Windows Vista**
 1. Click **Hardware and Sound**, and then click **Sound**.

Note If you are using Classic View, double-click **Sound**.

2. On the **Sound** dialog box, on the **Sounds** tab, under **Program**, under **Windows**, click **New Mail Notification**.

- **Microsoft Windows XP**

1. In Control Panel in Category view, click **Sounds, Speech, and Audio Devices**, and then click **Sounds and Audio Devices**.

Note If you are using Classic View, double-click **Sounds and Audio Devices**.

2. On the **Sounds and Audio Devices Properties** dialog box, on the **Sounds** tab, under **Program**, under **Windows**, click **New Mail Notification**.

5. Click **Browse**, and then select a different .wav audio file.
6. Click **OK**.
7. Restart Outlook.

COLOR CODING: Color an appointment or meeting

- In **Calendar**, right-click an appointment or meeting, point to **Label** on the shortcut menu, and then click a color in the list.

To remove a color from the appointment or meeting, in the **Label** list, click **None**.

Color a recurring appointment or meeting

1. In **Calendar**, open an appointment or meeting.
2. Click **Open the series**, and then click **OK**.
3. In the **Label** list, click a color.

To remove a color from the appointment or meeting, in the **Label** list, click **None**.

Color appointments and meetings automatically

1. In **Calendar**, right-click the calendar grid, and then click **Automatic Formatting** on the shortcut menu.
2. Click **Add**, and then type a name for the rule.
3. In the **Label** list, click a color.
4. Click **Condition** to specify the conditions under which the color will be applied.

Note If you manually assign a color to an item, automatic coloring cannot be used on that item.

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Focusing on Small Things First

Most of the changes I recommend are small changes that aren't difficult to make and that create a big difference.

For example, I'm sure you've opened an e-mail, decided you didn't want to deal with it, and closed it back in the Inbox. This is a small thing that takes seconds to do. If you repeat the same thing over and over, it doesn't take long before you have hundreds, or perhaps thousands, of e-mail messages in your Inbox. This is an example of "small things done consistently in strategic places create major impact." Conversely, if every time you open an e-mail you make a decision about what to do with it and where to put it, you can immediately remove it from the Inbox and dramatically reduce your e-mail volume. This is equally as powerful as the previous example, but with more positive results.

There's no way you can make all the changes I'll suggest in one sitting. Modifying behaviors takes time for all of us. However, you can choose two or three changes that would make the biggest impact and focus on them first.

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