



Time Management for Microsoft® Outlook®

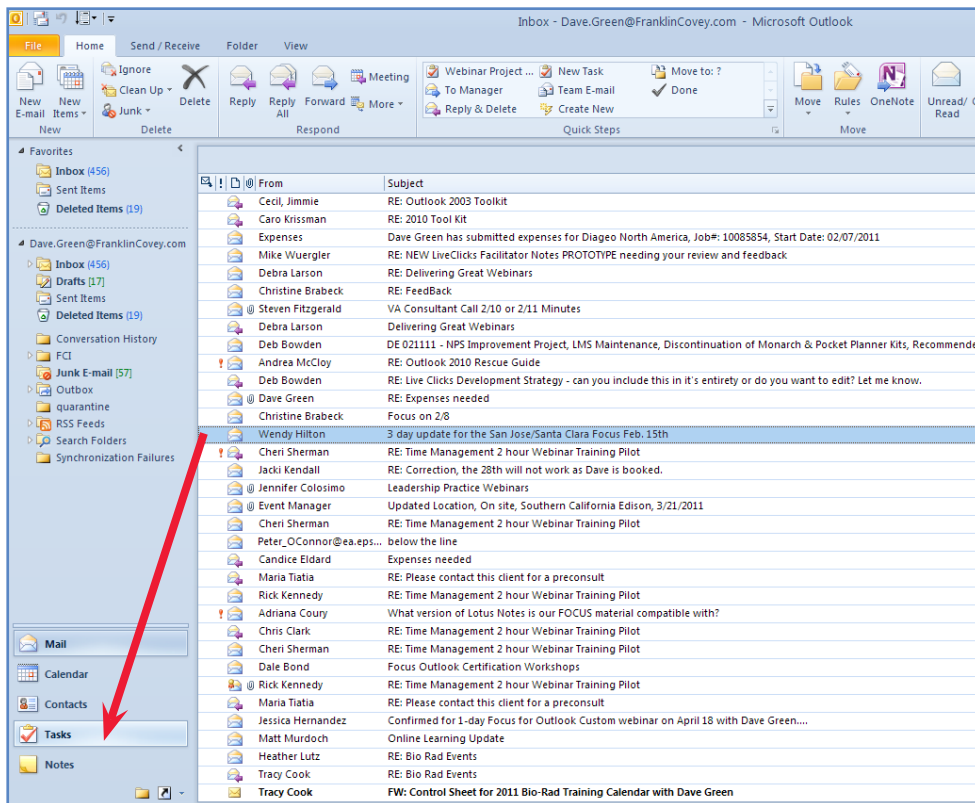
Increasing Your Productivity through
the Effective Use of Outlook 2010

Rescue Guide



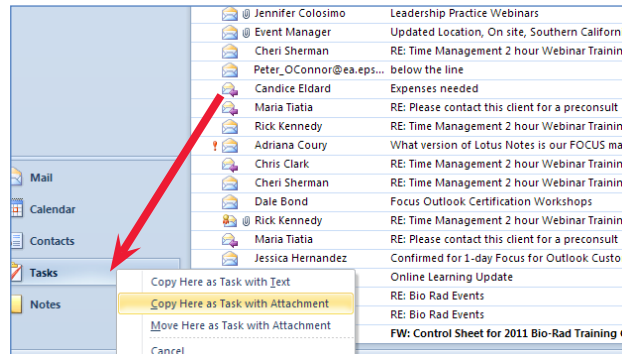
Turn E-Mail Into Tasks, Calendar Entries, Contacts, and Notes

1. Select an e-mail, then drag and drop it onto the CALENDAR, CONTACTS, TASKS, or NOTES bar in the Navigation Pane (or folder list). When you drag and drop the item, the dialog entry box for the task, calendar entry, or contact will open. You can make notes, set reminders, etc., as needed.

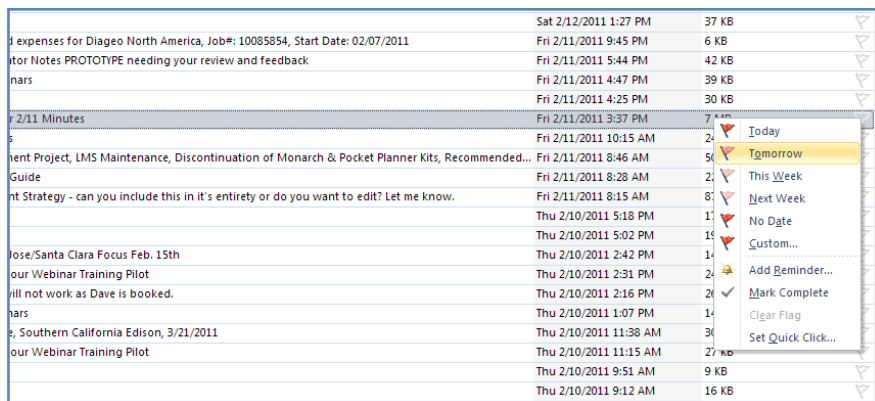


Turn E-Mail Into Tasks, Calendar Entries, Contacts, and Notes

- If you are turning an e-mail with an attachment into what it is, you may want to right-click the e-mail as you drag-drop it and select **MOVE OR COPY WITH ATTACHMENT** so that the attachment also comes to the task, calendar entry, contact, or note.



- A quick option to turn an e-mail into a TO DO is to right-click the **FLAG** and quickly put the e-mail as a TO DO on a specific date like **TODAY** or **TOMORROW**. Left-clicking the **FLAG** marks it **COMPLETE**.

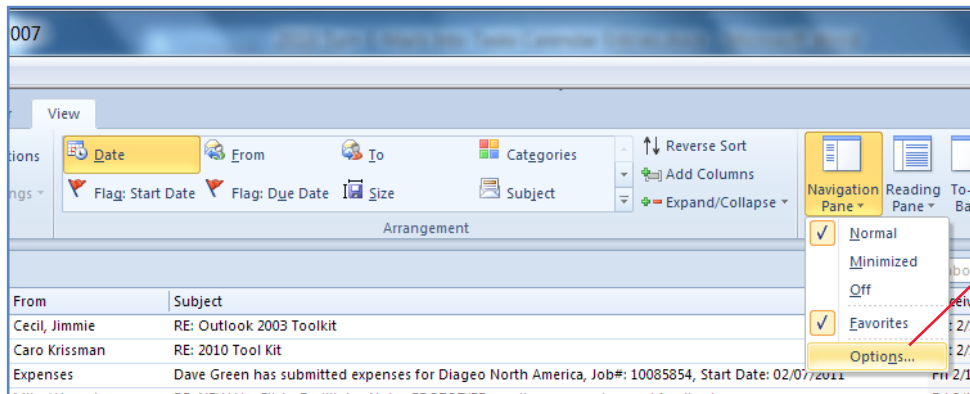
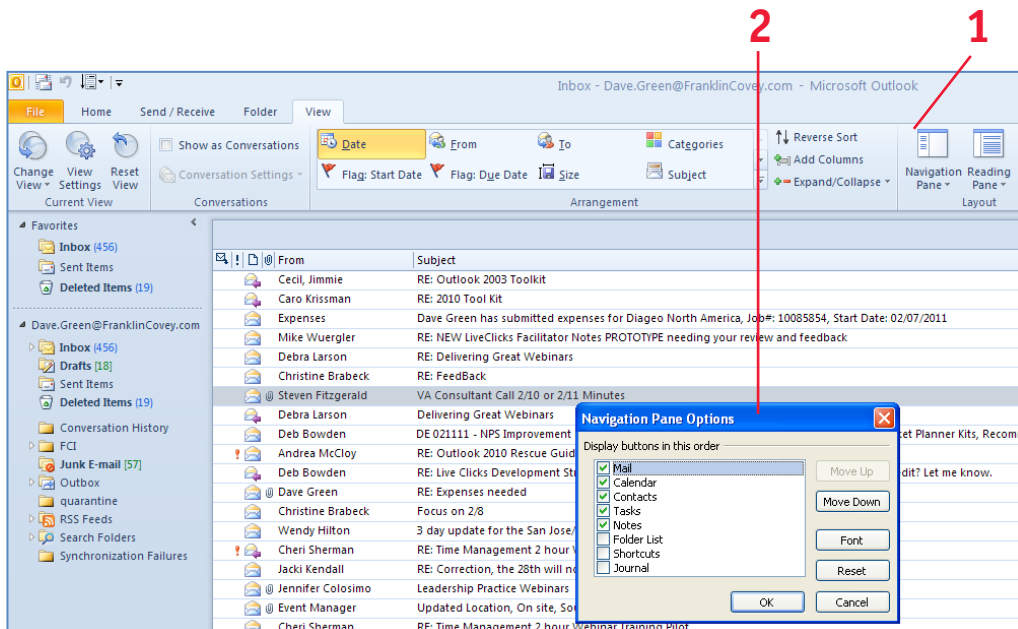


You know you need rescuing when you miss an important meeting with the big boss because you forgot to turn it into an appointment.

Turn E-Mail Into Tasks, Calendar Entries, Contacts, and Notes

You may want to set up your Navigation Pane in the suggested order so that you have commonly used functions showing and easily clicked.

1. From the INBOX, click the NAVIGATION PANE button on the top ribbon. From the resulting menu, click OPTIONS.
2. Select the functions and order as shown.
3. This sets up the Navigation Pane.



New in Outlook 2010: Quick Steps

Customize common actions in Outlook 2010 with the new Quick Steps feature.

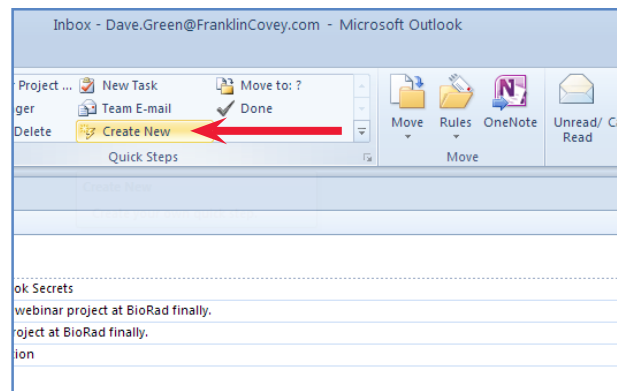
As you gain advanced proficiency with Outlook, you will often do the same multistep process several times a day. Quick Steps allow you to reduce these often-used functions from multiple commands to just one “quick step.”

For example, suppose you are currently managing a webinar project and every day you receive e-mails that you turn into tasks in this project category. Then you typically delete the e-mail. As you’ve learned, this is three separate steps:

1. Drag and drop the e-mail into TASKS.
2. Put the new task in the proper project category.
3. Go back and delete the e-mail from your INBOX.

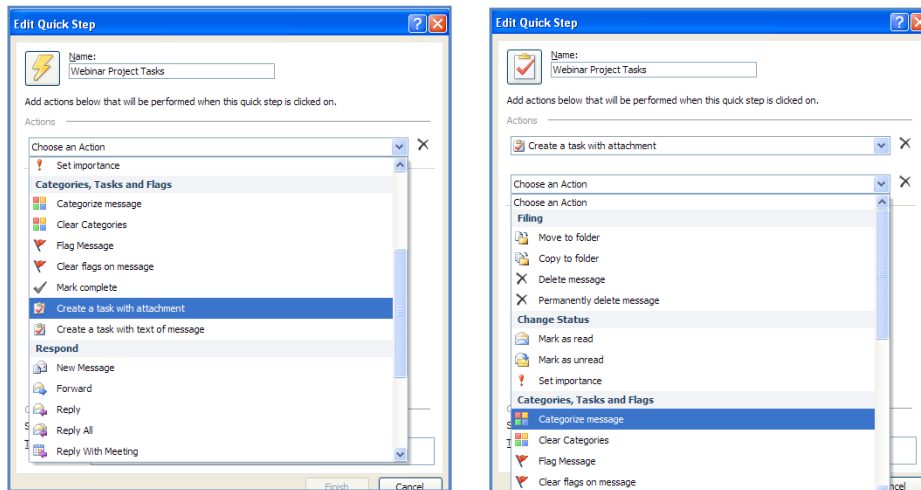
With Quick Steps, we can reduce this to one step. Here is how:

1. On the top ribbon of your INBOX, click *CREATE NEW* in the Quick Steps box.
2. Give the Quick Step a name...”Webinar Project Tasks.”

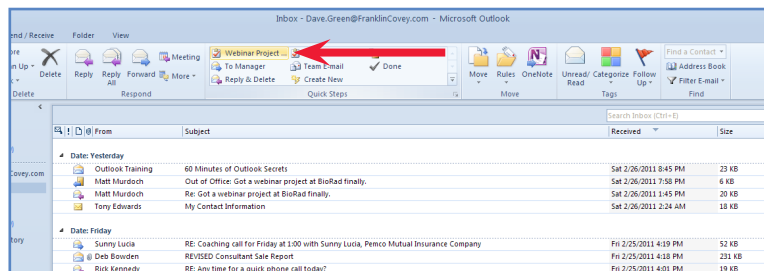


New in Outlook 2010: Quick Steps

3. For the first action, scroll down and select **CREATE A TASK WITH ATTACHMENT**.
4. Click **ADD ACTION** and scroll to **CATEGORIZE MESSAGE** for the second step. Choose the category **Webinar Project**.
5. Then **ADD ACTION** a third time for **DELETE MESSAGE**. Enter a brief description of what the Quick Step does. Give it a shortcut key if you wish. Click **FINISH**.



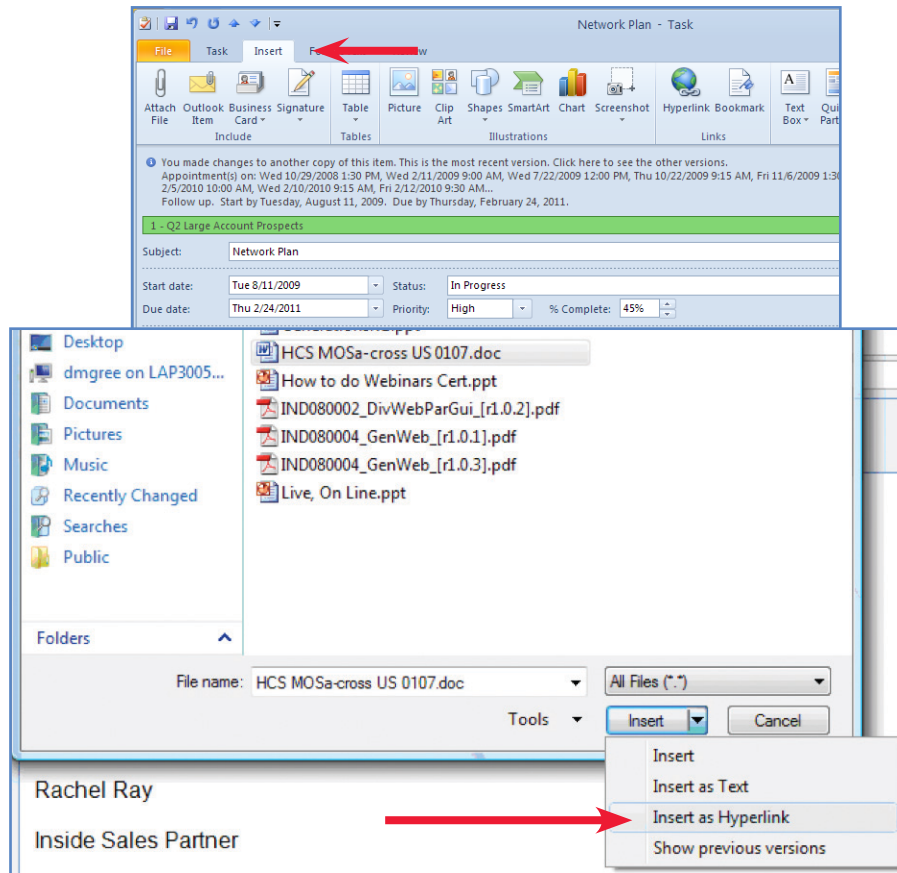
Your new Quick Step will show in the **QUICK STEP** box in your **INBOX**. Clicking the Quick Step one time will accomplish the entire chain of functions. Try it.



Insert Documents and E-Mails Into Your Tasks, Calendar Entries, Contacts, and Notes

When you have opened the task, calendar entry, contact, or note you wish to insert the e-mail or document into, make sure you have selected INSERT on the top ribbon.

- Attach File lets you drop copies of documents into the task, calendar entry, contact, or note.
- Outlook Item does the same for e-mails.
- You can also insert hyperlinks.



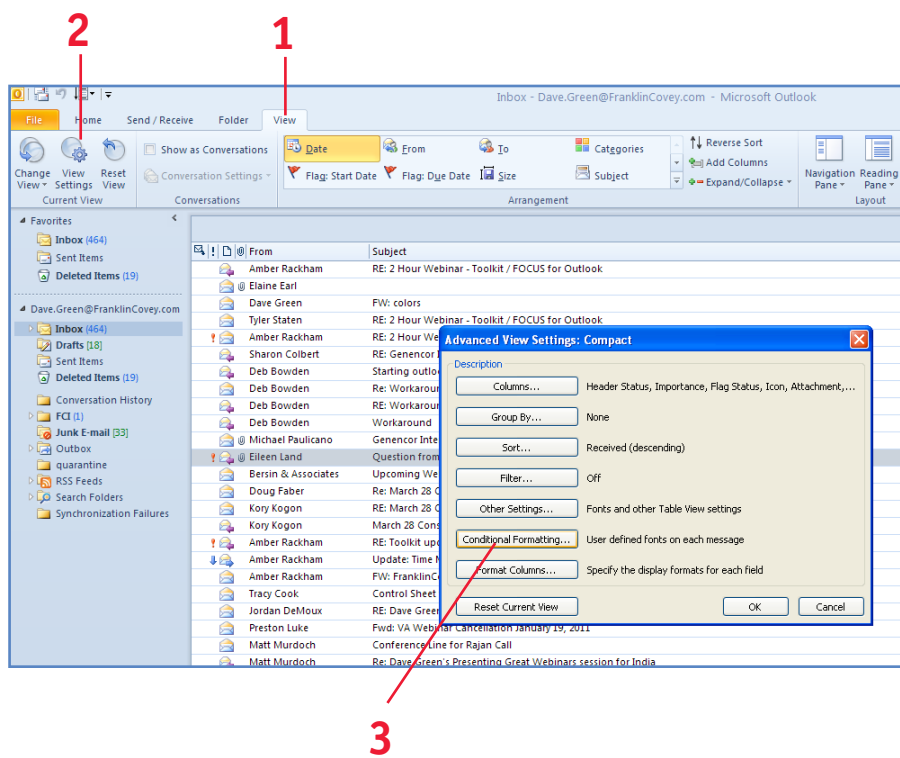
You know you need rescuing when it takes you an hour to gather the documents you need for a half-hour meeting...and then you're 15 minutes late for the meeting.

Use Colors

You can set up your incoming mail to display in different colors to differentiate senders, groups, teams, your boss, etc.

We recommend you allocate three to four colors to people or teams who consistently send you urgent and important Q1s. That way you can give them first attention.

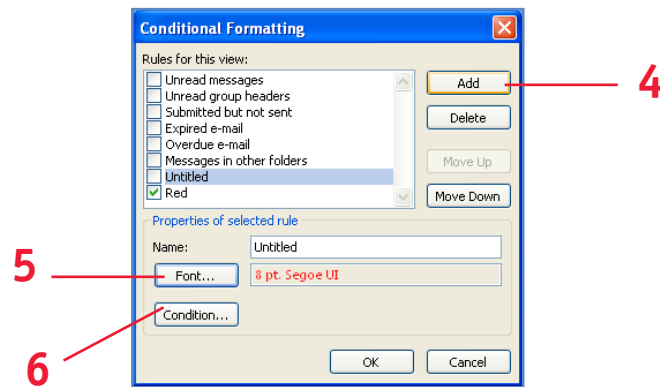
1. In your INBOX, click on the VIEW tab.
2. Then, click VIEW SETTINGS.
3. In the Advanced View Settings window, click CONDITIONAL FORMATTING.



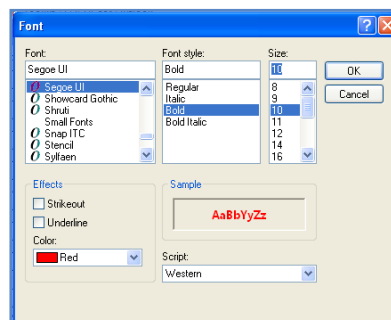
You know you need rescuing when you've given your boss's messages the color white, on a white background.

Use Colors

4. Click ADD and give the rule a name, like “red.”

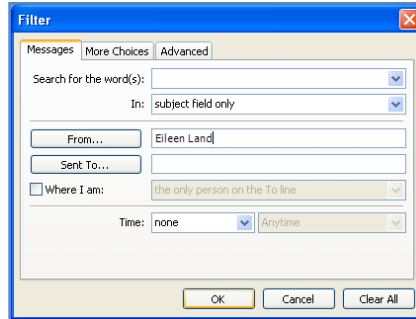


5. Click FONT. Choose the font color you need; bold and increase the font size to 10. Click OK.

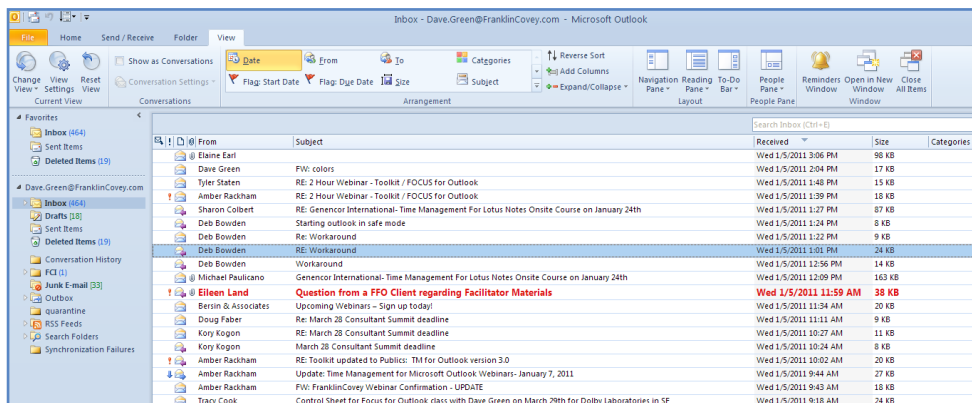


Use Colors

- Now click **CONDITION** in the **FROM** block, type in the address or name of the sender (in this case, Eileen Land), and click **OK** on the consecutive screens.



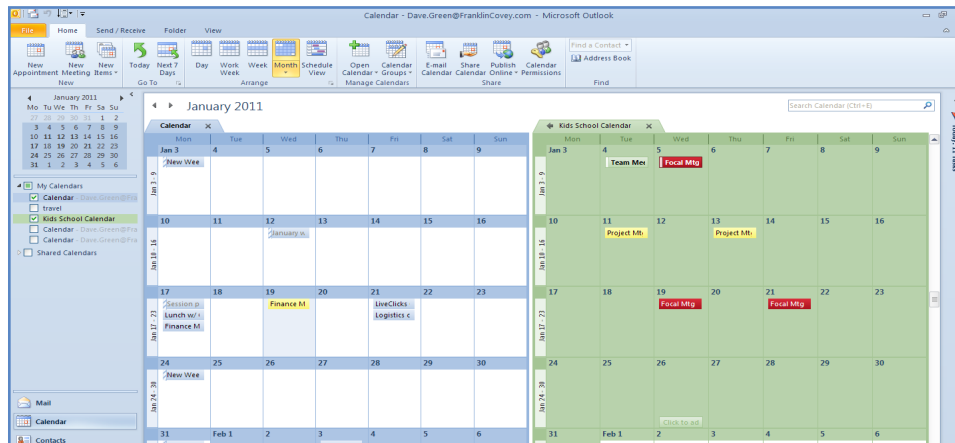
Now this Q1 message stands out, allowing us to give it immediate high-priority attention.



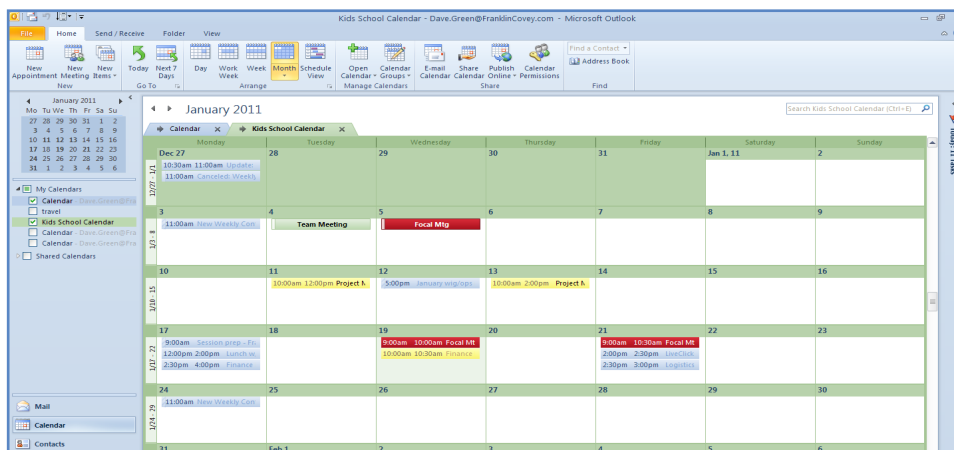
Use Multiple Calendars

You've got a busy work calendar. And you also make being involved in your kids' schools a priority.

Manage these separate but important Q2 roles by using multiple calendars. Position them side by side to see both sets of calendar entries.



Or merge them together to see all your Q2 roles in one day. Below, “Kids’ School Calendar” entries are highlighted.

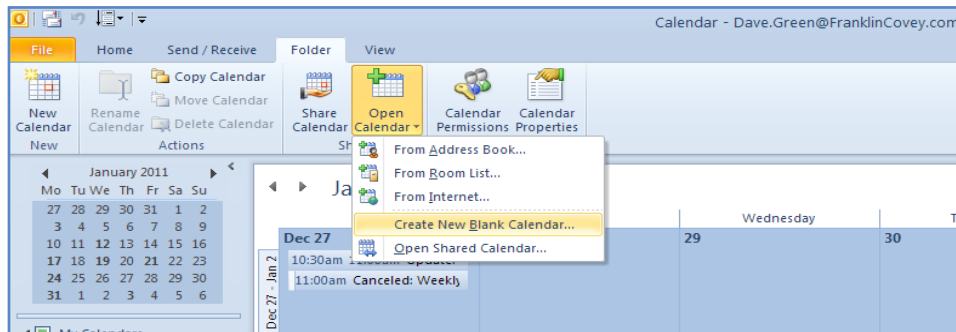


You are a mom, a working professional, treasurer of the PTA, a regular in your local choir, and more. Multiple calendars on the refrigerator door just doesn't work anymore and you hate missing appointments.

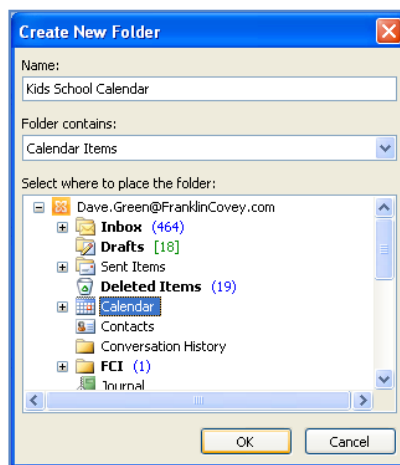
Use Multiple Calendars

1. To use multiple calendars, you first have to set up each additional calendar.

While in CALENDAR, click the FOLDER tab, then OPEN CALENDAR and CREATE NEW BLANK CALEDAR.



2. Name the new calendar, then click OK.

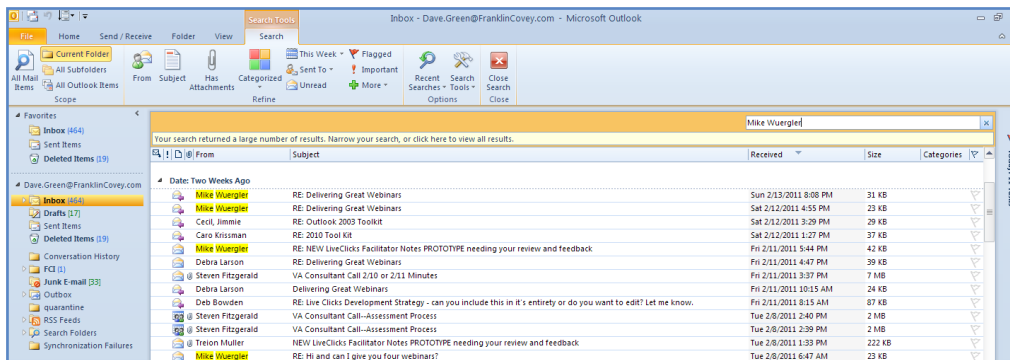


Now you can view any additional calendar alone or merged in with your work calendar.

Manage Information Using the Outlook 2010 Search Functions

In Outlook 2010, searching is easier, faster, and associative.

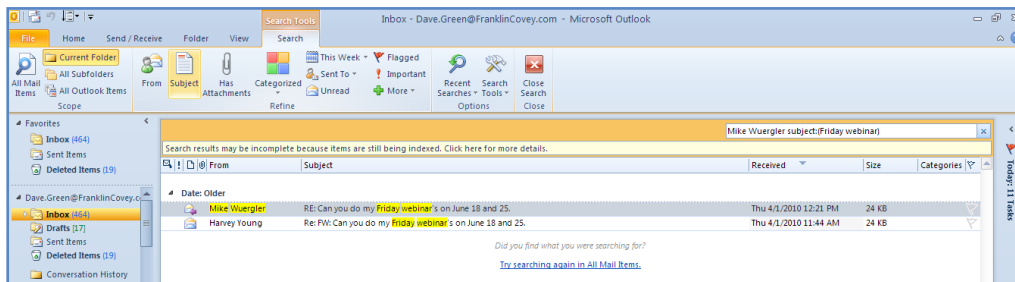
In any area in Outlook, there is an INSTANT SEARCH box in the upper right or upper center area. Type in the first few letters of any name or keyword and Outlook's Search immediately presents you which what matches. Try it!



You know you need rescuing when your inbox has 42,871 items in it because the only way you can find anything is to scroll back.

Using the Search Tools

Need to further refine your search? In the ribbon, under SEARCH, there are several more labeled boxes that allow you to further refine your search. For example, what if I am only looking for one message from Mike Wuergler about “Friday webinars.” Click the SUBJECT box and add “Friday webinars” to the search criteria, and the search produces fewer targeted hits. You can refine your search using the new SEARCH TOOLS in areas like “Has Attachments,” “Categories,” “Flagged,” or “This Week.”



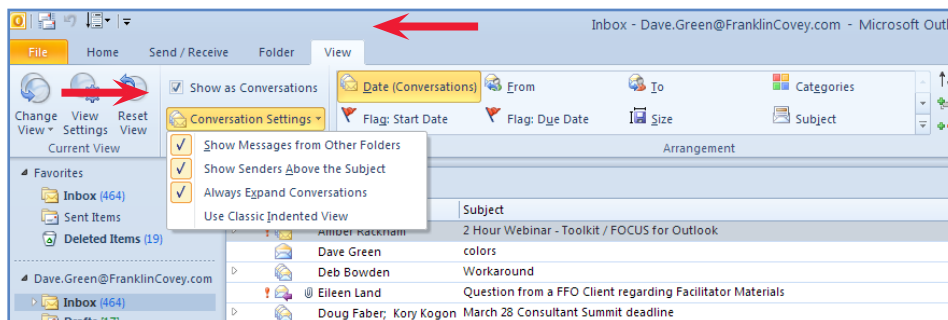
New in Outlook 2010: Find All Related Messages Quickly Using the Conversation Function

By default, your INBOX is sorted by date with the most recent messages on top. But work comes at us in what Outlook terms “conversations.” Someone messages you, you respond, he or she replies, another person replies to the first message, both you and the first person reply to the new person, and so on.

A new feature in Outlook 2010 lets you arrange your INBOX by “conversations” so that you can see all messages with the same subject arranged by date. In one view, you can see the latest message and all previous messages you’ve received, or sent, on that subject. New messages with that subject automatically become a part of the “conversation.”

You can turn the CONVERSATION function off and on as you need it. To turn it on:

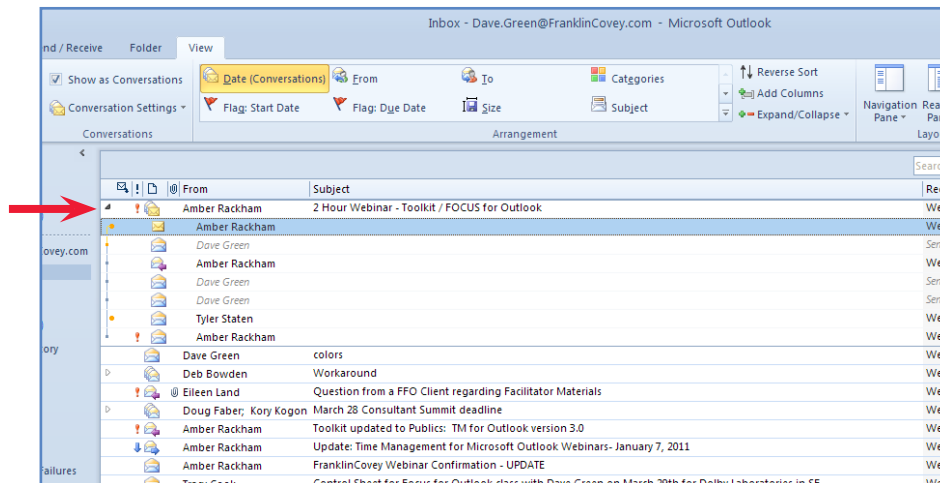
1. In your INBOX, click the VIEW tab and check the box SHOW AS CONVERSATION.



2. As above, you can determine the settings for your conversation.

New in Outlook 2010: Find All Related Messages Quickly Using the Conversation Function

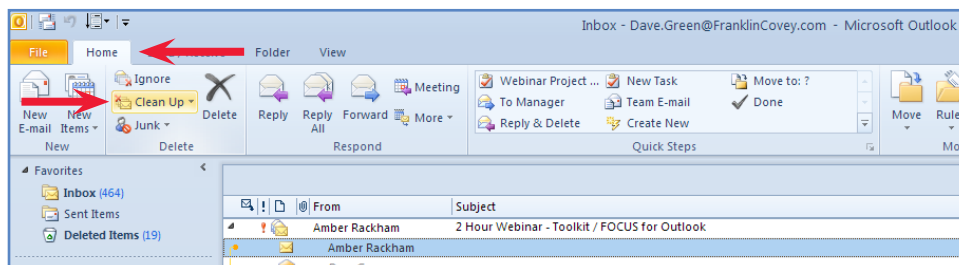
When the CONVERSATION function is on, messages that are part of a conversation will have an icon with multiple envelopes and a small triangle just to the left. Click the triangle, and the entire conversation opens, even if messages are stored in other folders.



The vertical lines and dots tell you who replied to whom. You can reply to any message in the conversation thread.

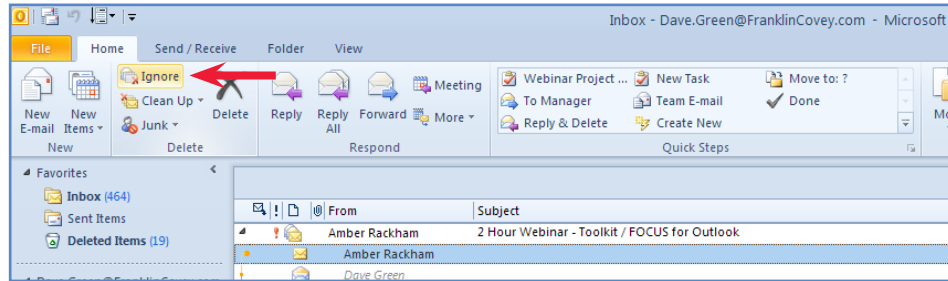
The CLEAN UP CONVERSATION function allows you to remove all the redundant copies of messages that occur when someone replies to a thread and all the previous messages are automatically copied into that person's message.

Select the conversation, click the HOME tab, and select CLEAN UP.



New in Outlook 2010: Find All Related Messages Quickly Using the Conversation Function

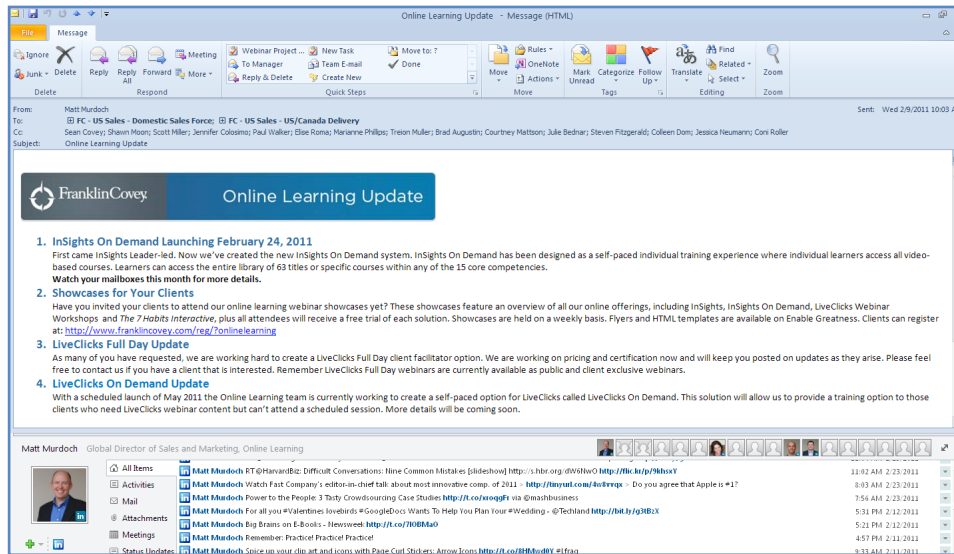
The IGNORE function allows you to dispense with conversations that are no longer valuable. When you select it, all INBOX messages from that conversation (and any other folder you may have moved them to) are moved to DELETED ITEMS. However, sent messages from the conversation remain in the SENT ITEMS folder. If new messages arrive with the conversation subject, they are also ignored and sent to DELETED ITEMS.



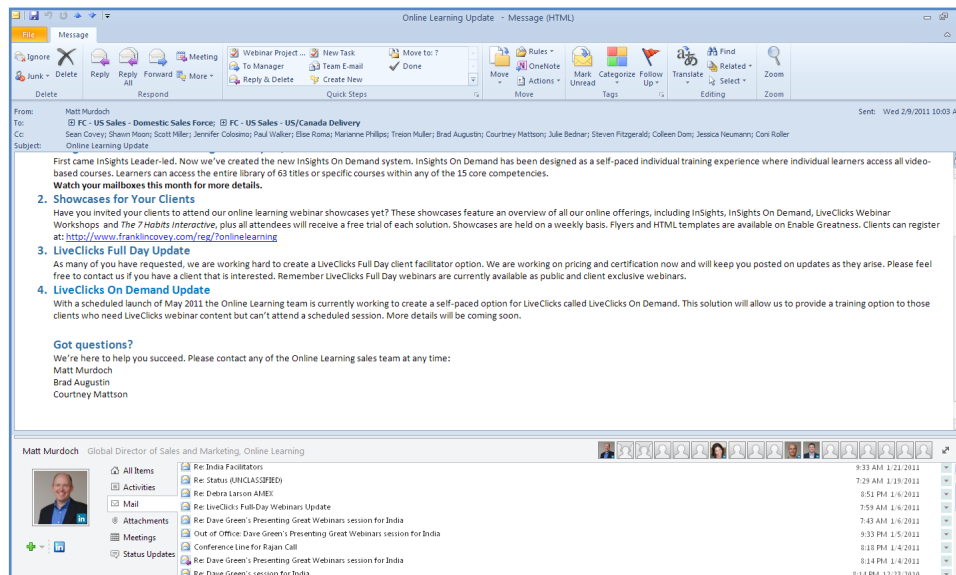
New in Outlook 2010: See Your Colleagues'/Contacts' Social-Media Activities Using the Social Connector

Though e-mail remains the dominant channel of business communication, many people now share information about their activities, contact information, status updates, and so forth on social sites like LinkedIn, Facebook, Myspace and Windows Live. Outlook's Social Connector allows you to see information from a person's social site (such as LinkedIn) in two places:

- At the bottom of the Reading Pane when reading an e-mail from him or her.



- At the bottom of that person's Contact Entry when opened.

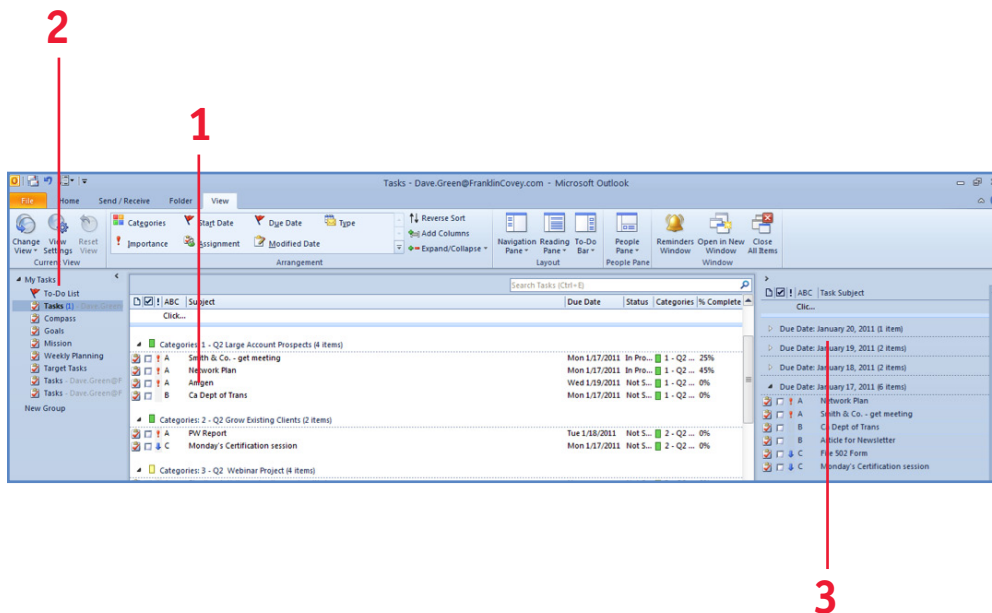


Use the Task Area to Spend More Time on Q2 Priorities

The TASK area of Outlook 2010 can be confusing. There are three areas: TASKS, the TO-DO LIST, and the TO-DO BAR that sound the same, yet are different. What goes where?

A FranklinCovey perspective can line up these three areas properly and make you a power TASK user doing more of the right things.

1. The TASK area, with its categories and listed tasks, is a perfect home for high-payoff Quadrant 2s, projects, role-based priorities, and areas of growth and interest.
2. The TO-DO LIST works well for lower-value Quadrant 3s—simpler “one off” tasks that can be flagged from your INBOX.
3. The TO-DO BAR functions as a Prioritized Daily Task List in that it contains just the Q2s and Q3s you’ve selected to do today.



You know you need rescuing when everything important you have to do is in your head or on sticky notes. If only there were a way to set up a master plan.

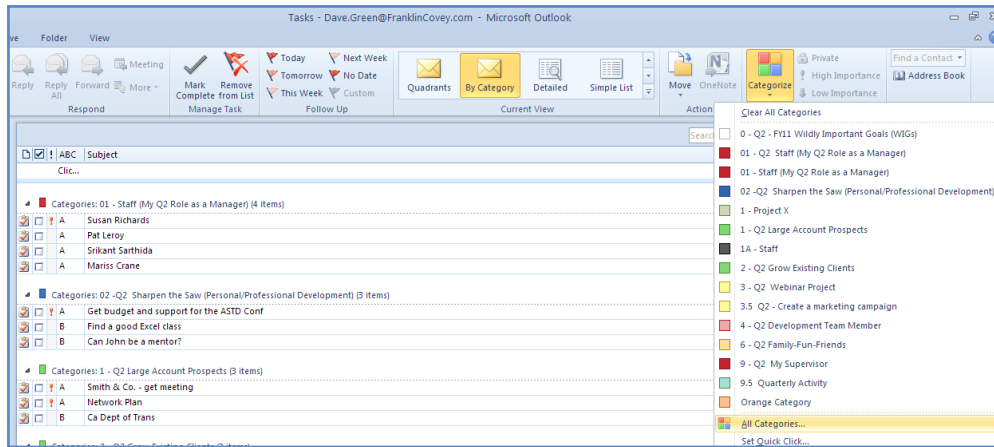
Set Up the Q2 Task Area

Let's begin in the area with the highest payoff. Your goal is to set up two to six task categories that reflect your most important Q2 areas. In the sample Q2 TASK AREA below, you see Q2 categories that are roles (staff, my role as a manager), Sharpen the Saw priorities (professional development), key-result areas (like prospecting and growing existing accounts), important projects (webinars and marketing campaign). Keep in mind that this area is for high-value Q2 tasks only...the Q3s go elsewhere.

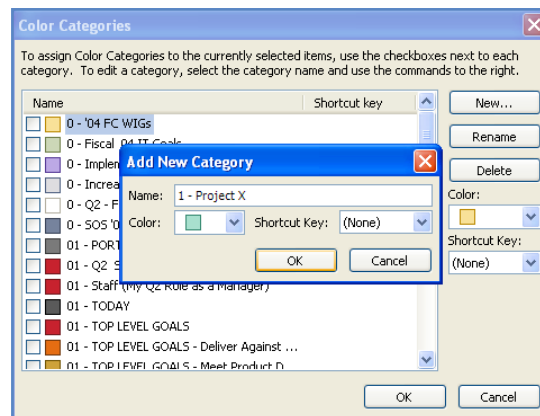
Tasks		(Filter Applied)	Sea
<input type="checkbox"/>	<input checked="" type="checkbox"/>	! A...	Subject
Cl...			
<input type="checkbox"/>	<input type="checkbox"/>		Categories: 012 - Q2 My Staff (3 items)
<input checked="" type="checkbox"/>	<input type="checkbox"/>		Lisa Simpson
<input checked="" type="checkbox"/>	<input type="checkbox"/>		Steve Smith
<input checked="" type="checkbox"/>	<input type="checkbox"/>		Dave Green
<input type="checkbox"/>	<input type="checkbox"/>		Categories: 02 -Q2 Sharpen the Saw (Personal/Professional Development) (3 items)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	! A	Get budget and support for the ASTD Conf
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Find a good Excel class
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Can John be a mentor
<input type="checkbox"/>	<input type="checkbox"/>		Categories: 1 - Q2 Large Account Prospects (3 items)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	! A	Smith & Co. - get meeting
<input checked="" type="checkbox"/>	<input type="checkbox"/>	! A	Amgen
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Ca Dept of Trans
<input type="checkbox"/>	<input type="checkbox"/>		Categories: 2 - Q2 Grow Existing Clients (4 items)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	! A	PW Report
<input checked="" type="checkbox"/>	<input type="checkbox"/>	! A	Network Plan
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Article for Newsletter
<input checked="" type="checkbox"/>	<input type="checkbox"/>	↓ C	Monday's Certification session
<input type="checkbox"/>	<input type="checkbox"/>		Categories: 3 - Q2 Webinar Project (3 items)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	! A	Pipeline Activity - set call agenda with Juan
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Managers Certification
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Finish BBG Proposal
<input type="checkbox"/>	<input type="checkbox"/>		Categories: 3.5 Create a marketing campaign (2 items)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Calendars Updated 90 days out
<input checked="" type="checkbox"/>	<input type="checkbox"/>	B	Do e-post cards

Set Up Your Q2 Task Categories

1. While in TASKS, click the CATEGORIES tab and select ALL CATEGORIES from the drop-down menu.



2. Select NEW and type your category names in using numbers to determine the drop order. Assign colors or use color to group like categories of TASKS.



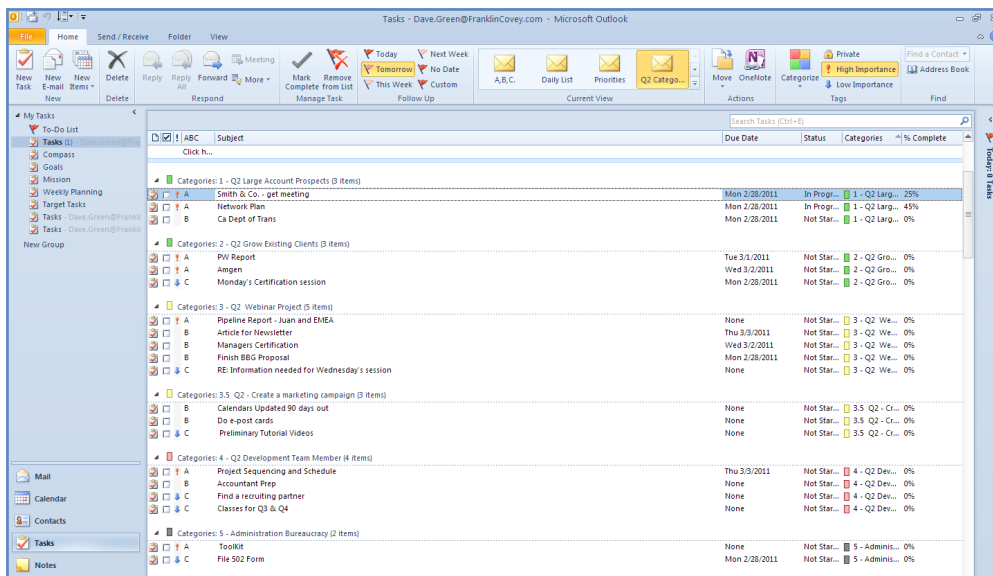
Set Up Your Q2 Task Categories

- Repeat for any other priority areas you want installed as Master Task Areas. Consider opening task categories for important projects, roles, and other Quadrant 2 areas.
- Once your Q2 View Master Task Areas are set up, save this view as “Q2 Categories” so that you can consistently select it.



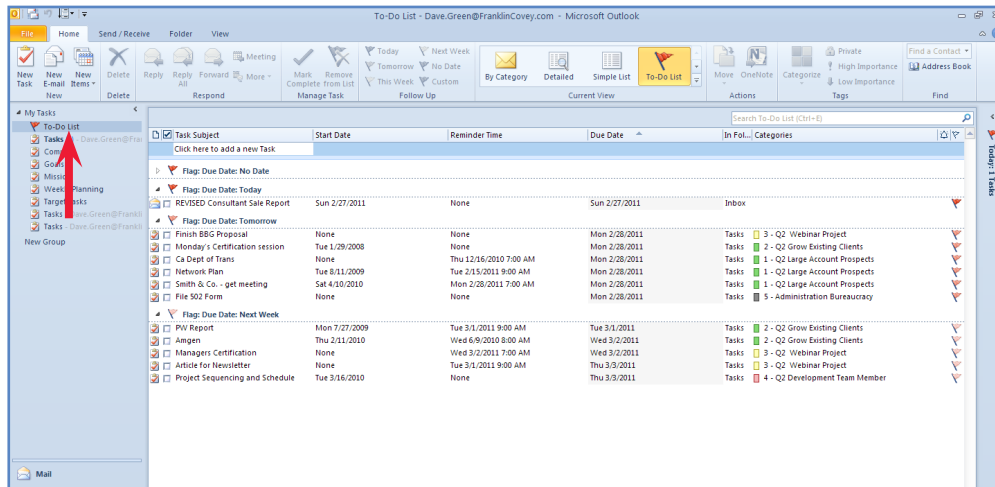
- There needs to be at least one task in a category for it to stay open and visible.
- Whenever starting up a new task, remember to put it in a Q2 Category.

The end result is a great Q2 Master Task Area. Think of it as the “home” in Outlook for your high-value Quadrant 2 priorities. This is the best place to manage tasks that are part of projects, longer-term areas, role-based priorities, development areas, and more.

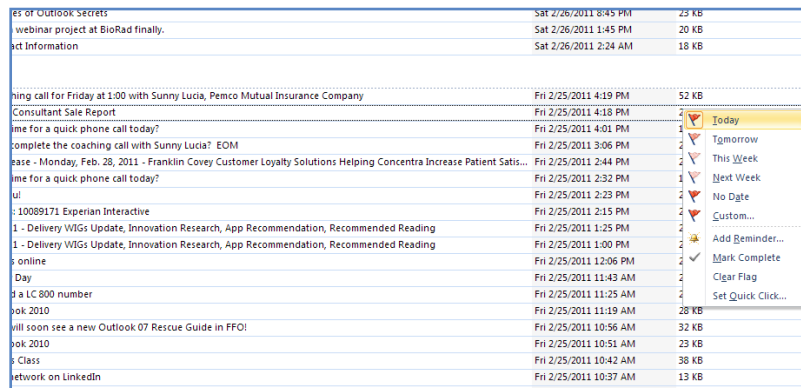


Use “To-Do” Flags for Lower Priorities

The TO-DO LIST works well for Quadrant 3s—smaller, less-value, one-off tasks like returning a message or sending quick information to someone. Remember that you want to reduce the amount of time spent in Q3, but the best way to manage those Q3s that remain in your day is to put them on your TO-DO LIST by flagging them from the INBOX.



To turn an e-mail into a TO-DO, right-click the flag and put the e-mail as a TO-DO on a specific date, like TODAY. Left-clicking the flag marks it complete.



Set Up a Prioritized Daily Task List

Now that you have a home for your high-value Q2s in the TASK area, and a place to list those Q3s on the TO-DO LIST, you need a strong daily task list to keep you on track with your priorities on any given day. In a FranklinCovey approach, the 10-minute daily planning period and the Prioritized Daily Task List that comes out of it are crucial. Your daily task list should have both Q2s and Q3s on it.

Option A: The Prioritized Daily Task List on Paper

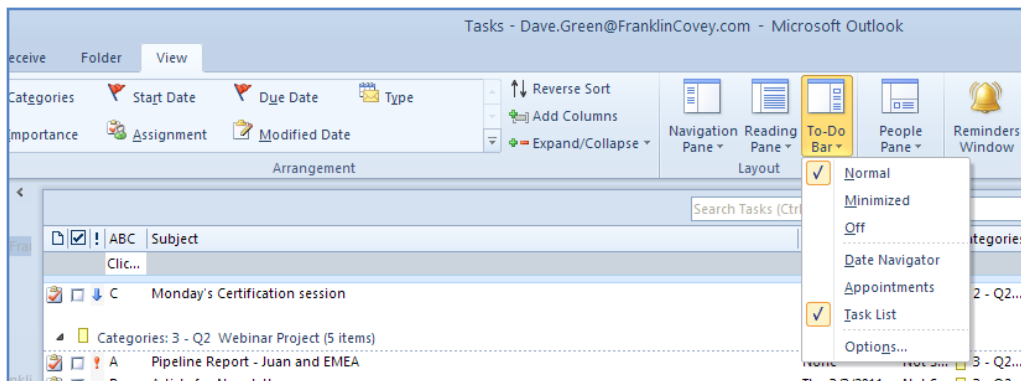
Many of those who do everything else in Outlook still like to write the 5- to 10-item daily list on paper. The act of writing the list is a commitment to these priorities for their day. It is also an enjoyable accomplishment to cross things off the list. And a written daily task list has all the portability of paper.

Option B: Use the Outlook To-Do Bar as a Daily Task List

The best use of the TO-DO BAR is to see just today's tasks. Best of all, it can be viewed from any area of Outlook 2010, meaning that you can turn on your TO-DO BAR with today's tasks while in any Calendar view, or Contacts, or even from the INBOX!

To set up your TO-DO BAR and make it viewable from any Outlook function area:

In TASKS, click the TO-DO BAR tab, then click NORMAL and TASK LIST.

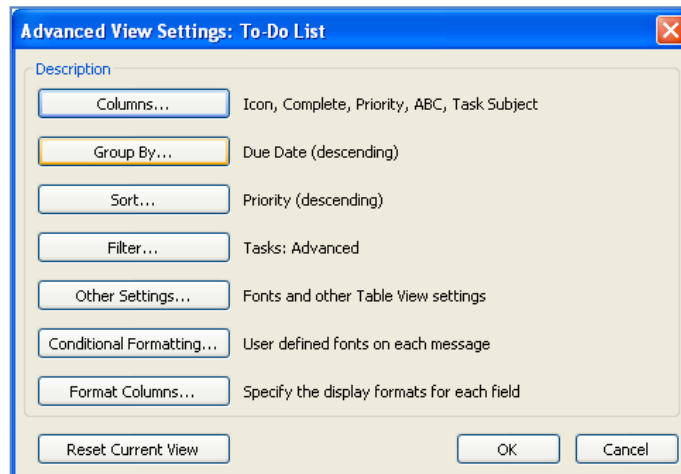
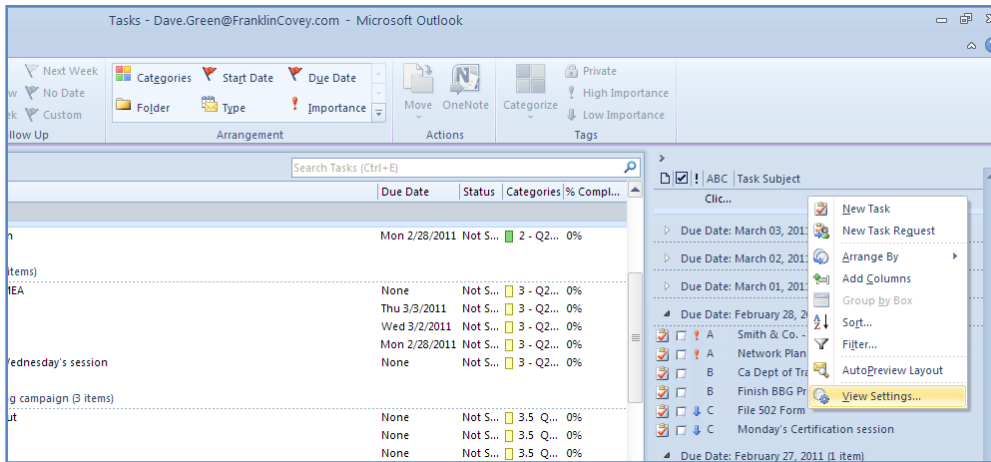


You know you need rescuing when your task list for today is written on your arm.

Set Up a Prioritized Daily Task List

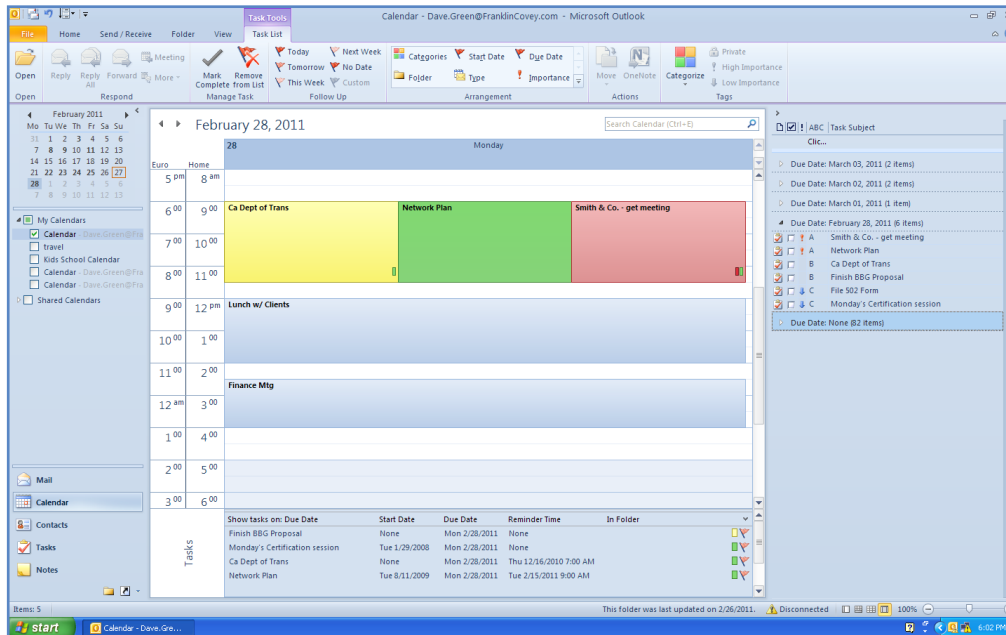
Make sure DATE NAVIGATOR and APPOINTMENTS are unchecked so that just TASKS show on the TO-DO BAR.

To make your TO-DO BAR just show today's tasks, right-click anywhere on the TO-DO BAR. Select VIEW SETTINGS. Select GROUP BY... Set it to DUE DATE descending.



Set Up a Prioritized Daily Task List

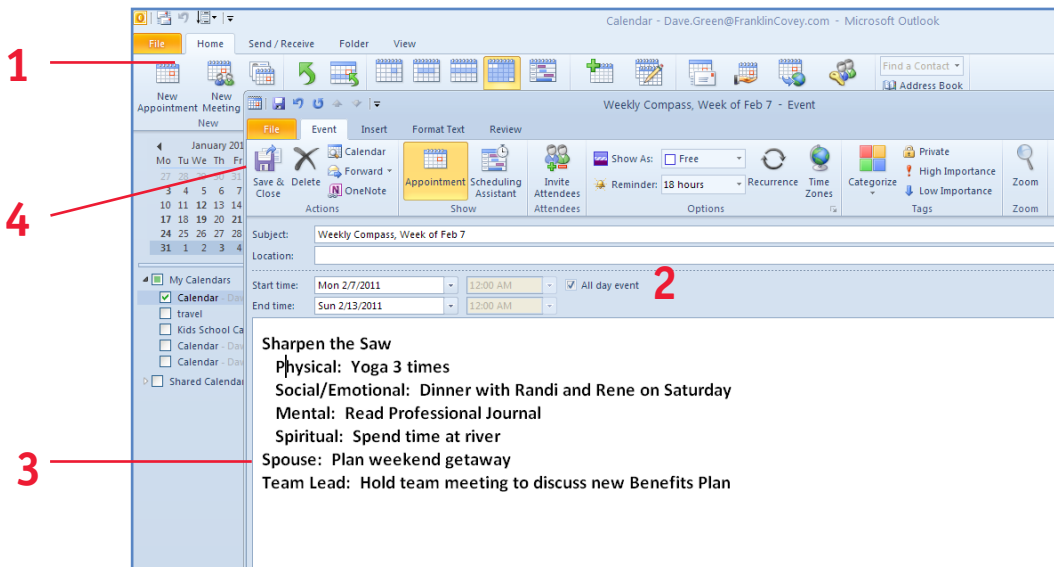
You now have a great daily “dashboard view” of your tasks for today right alongside your meetings and other important calendar entries.



Set Up Your Weekly Compass in Outlook 2010

In CALENDAR:

1. Open a new appointment, title it “Weekly Compass, Week of ____” in the subject line, and set start and end times for the week your are planning.
2. Be sure to check the ALL-DAY EVENT box.
3. Create your Weekly Compass in the large “dialog” field of your appointment. Enter “Sharpen the Saw” and your other roles. List this week’s activities planned in support of your roles.
4. Click SAVE AND CLOSE and you will now have your Weekly Compass just one click away as you look at your appointments each day.



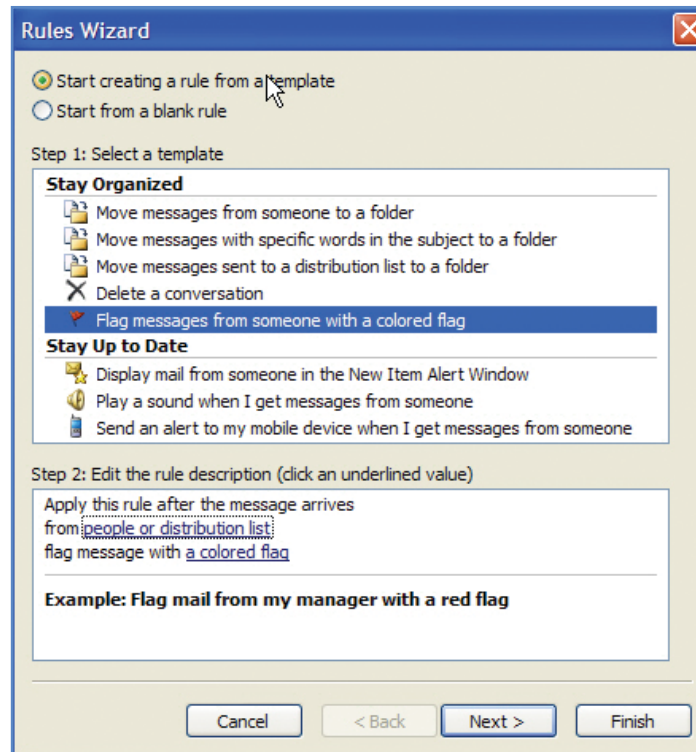
TIP

You can also plan weekly by adding your Big Rock tasks in ALL CAPITAL LETTERS to any of your Big Rock categories.

Get to Know Your Rules Wizard

Mastering the Rules Wizard will increase your productivity.

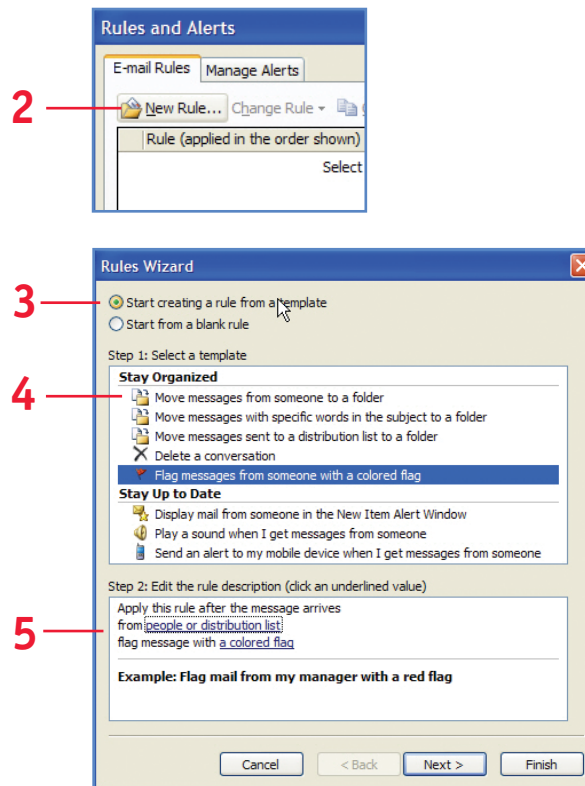
- You may set up a rule to move messages to a folder where you are copied (cc'd) as part of a distribution list.
- You may set up a rule to “red flag” or play an audible sound when messages arrive from someone. For example, “Red-flag all messages from my manager,” or “Play a custom recording when my family e-mails me.”
- Switching to START FROM A BLANK RULE at the top of the box allows even more time- and information-management strategies.



You know you need rescuing when you have more corporate e-mails in your Inbox than you can read in a month, let alone in a week.

Auto-Send E-Mail to Folders by Sender or Address

1. In your INBOX, click the RULES tab and then select MANAGE RULES ALERTS.
2. In the Rules and Alerts dialog box, click NEW RULE.
3. In the Rules Wizard dialog box, select START CREATING A RULE FROM A TEMPLATE.
4. In the Step 1 box under the Stay Organized option, select MOVE MESSAGES FROM SOMEONE TO A FOLDER.
5. In the Step 2 box, click PEOPLE OR DISTRIBUTION LIST and indicate who “someone” is. Then click SPECIFIED FOLDER to indicate where you want the message automatically moved. You can also create a new folder for this purpose.

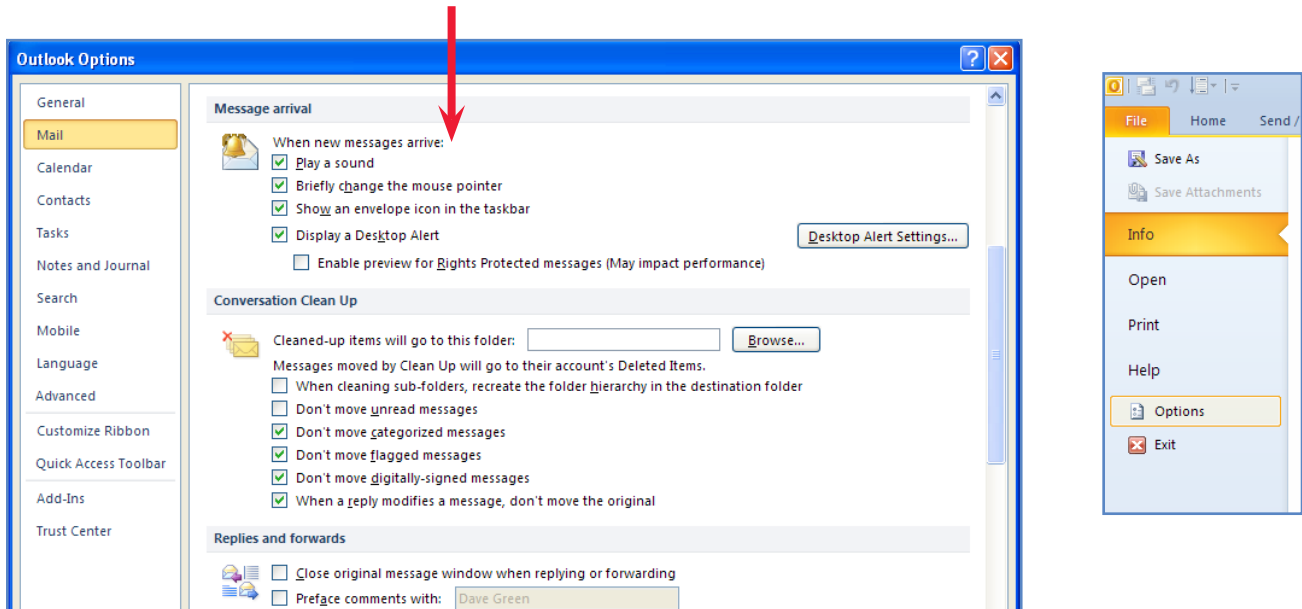


You know you need rescuing when it comes as a complete surprise that you could automatically send all the jokes from your cousin Chip straight to a “jokes” folder.

Turn Off E-mail Notifications

In the INBOX, click FILE and then OPTIONS.

Select MAIL and scroll down to MESSAGE ARRIVAL. Uncheck all boxes under WHEN NEW MESSAGES ARRIVE.



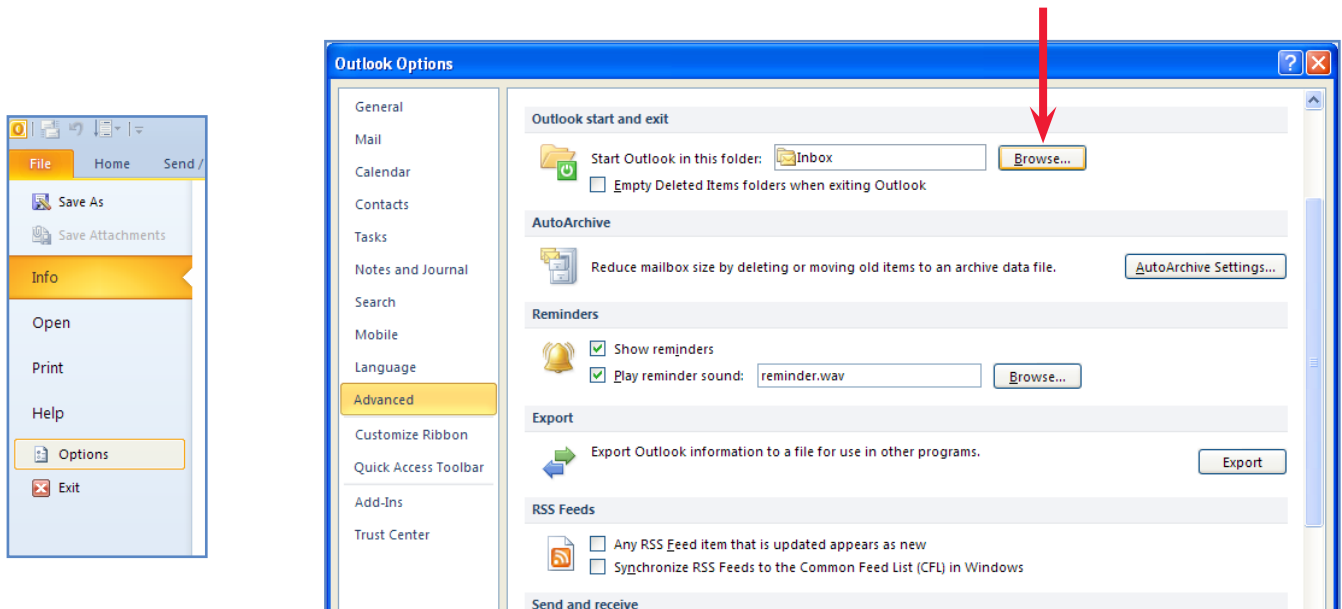
Have Outlook Start Up in Tasks (or Calendar) Instead of Your Inbox

In the INBOX, click FILE, and then OPTIONS.

Select ADVANCED and scroll to OUTLOOK START AND EXIT.

Under START OUTLOOK IN THIS FOLDER, click BROWSE.

In the Select Folder dialog box, choose either CALENDAR or TASKS as the default view when Outlook opens.

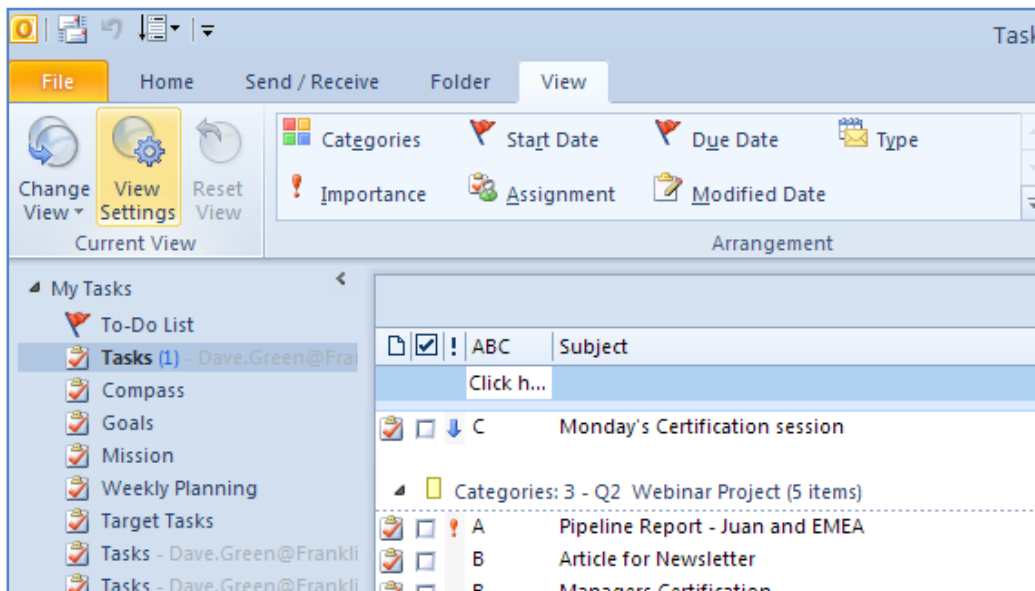


Set Up an “ABC” Priority Field

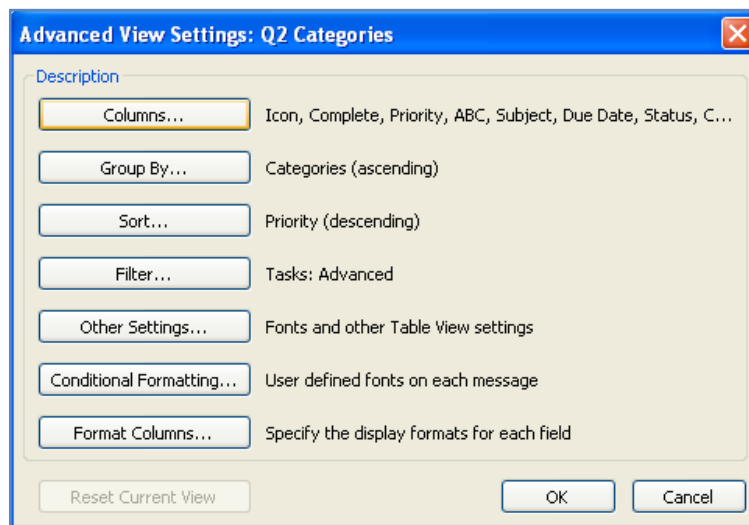
Despite Outlook’s built-in, three-part prioritization scheme (High, Normal, Low) some users are more comfortable with an ABC approach.

In TASKS...

1. On the VIEW tab, click the VIEW SETTINGS button.

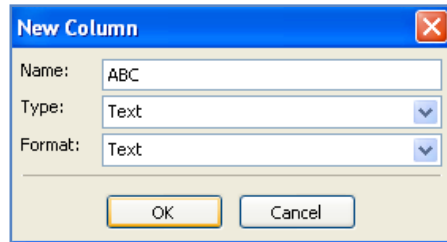


2. In the resulting box, click COLUMNS.

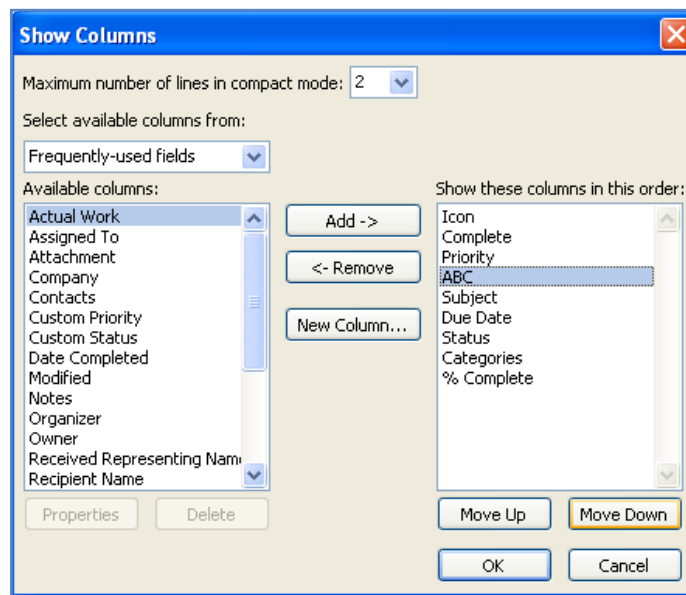


Set Up an “ABC” Priority Field

3. In the COLUMNS dialog box, click the NEW COLUMN button.
4. Name the column “ABC.”
5. Click OK.



6. In the SHOW COLUMNS dialog box, position the new “ABC” field in the order you want it to appear on the Column Bar.

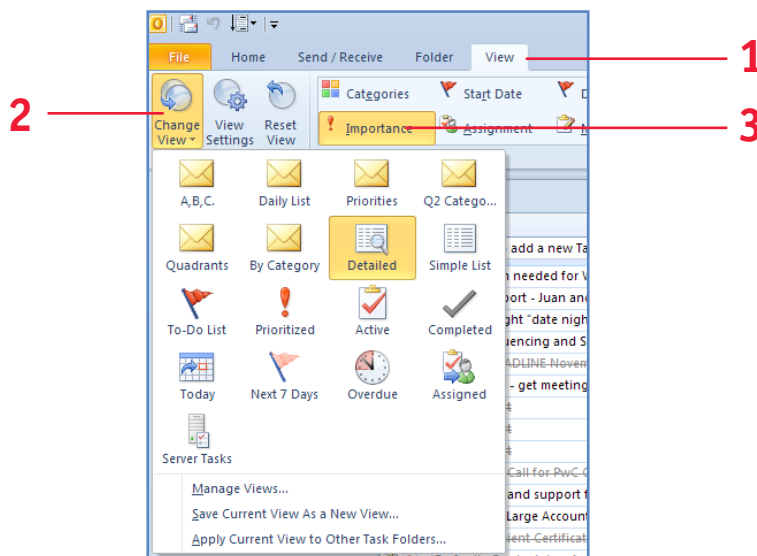


Show My “A” Priorities Across All Categories

You can see your “A” priorities across all categories.

In TASKS:

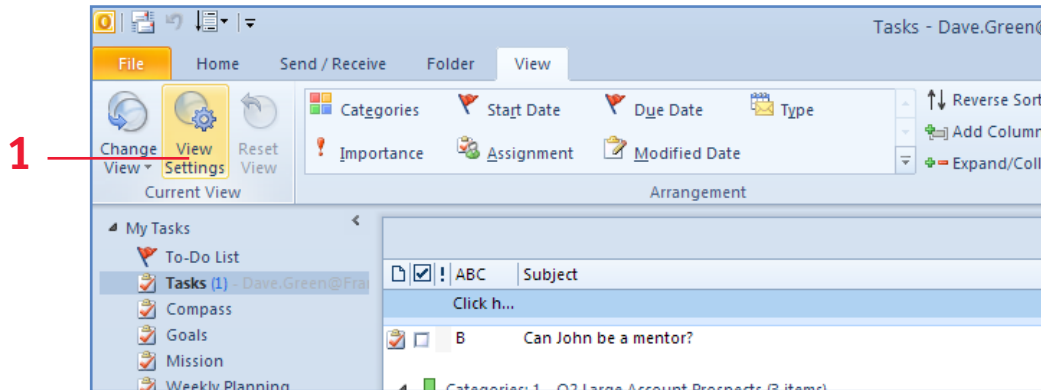
1. Select the VIEW tab.
2. Click the CHANGE VIEW button.
3. With the setting on DETAILED, select the IMPORTANCE view.



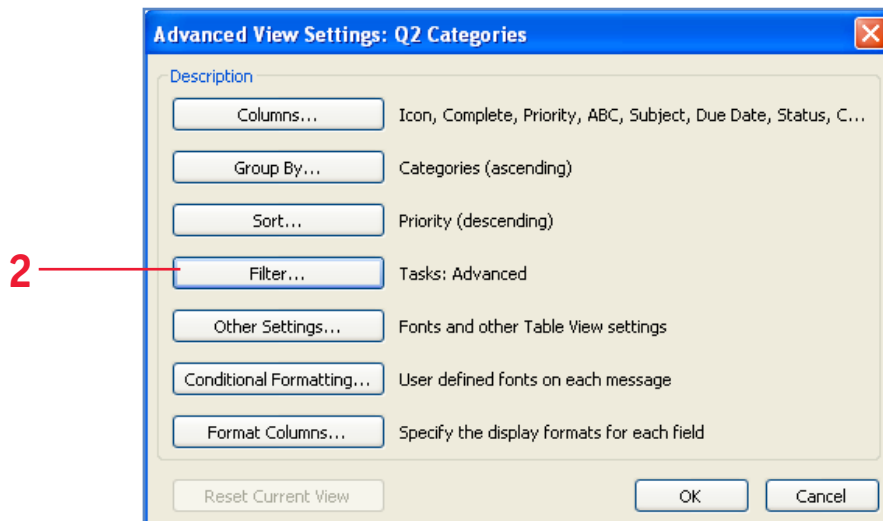
Hide Completed Tasks

In TASKS:

1. From the VIEW tab, click VIEW SETTINGS.



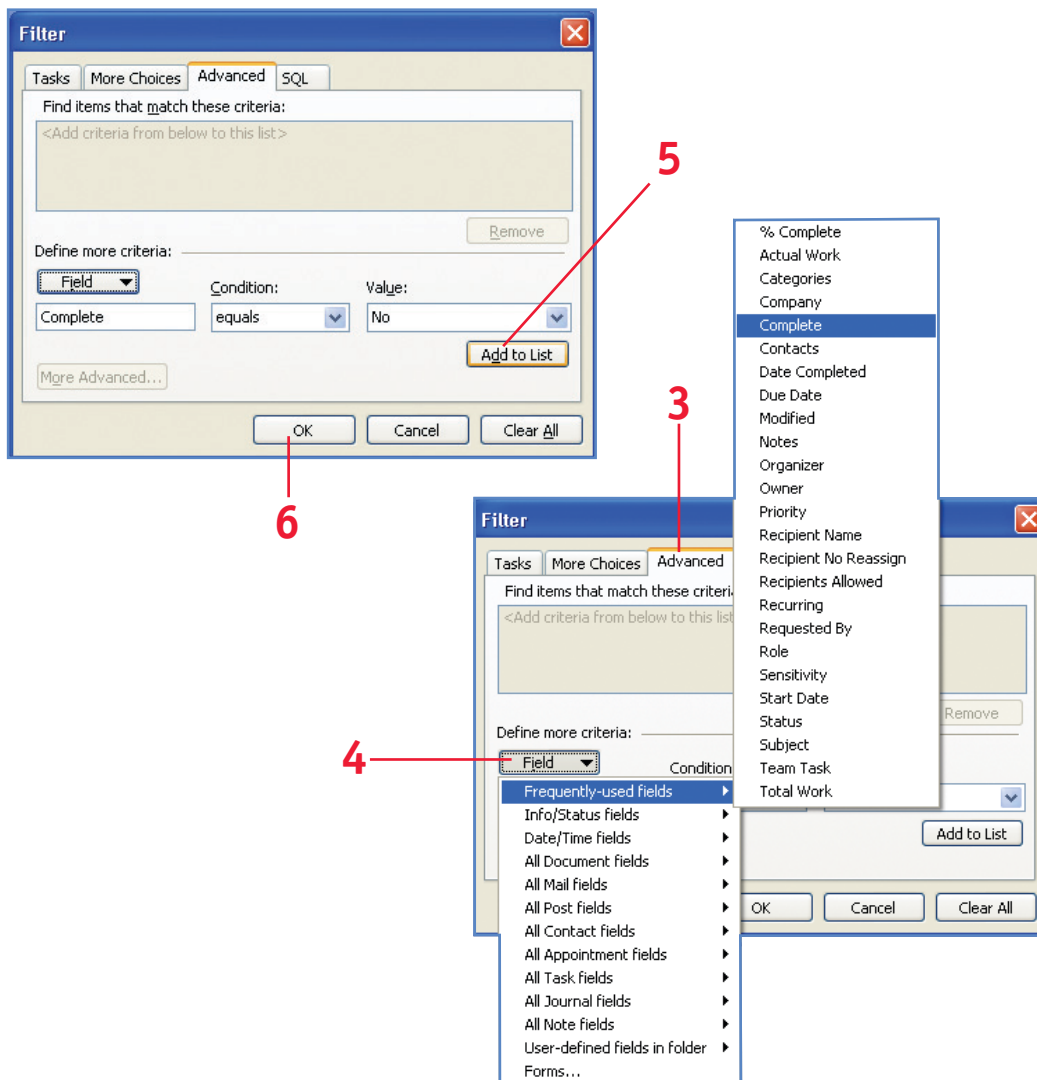
2. In the resulting ADVANCED VIEW SETTINGS box, click FILTER.
3. In the dialog box, click the ADVANCED tab.



Hide Completed Tasks

4. Click the FIELD tab on the left side of the box, then select FREQUENTLY USED FIELDS, then COMPLETE.
5. Click ADD TO LIST.
6. OK out.

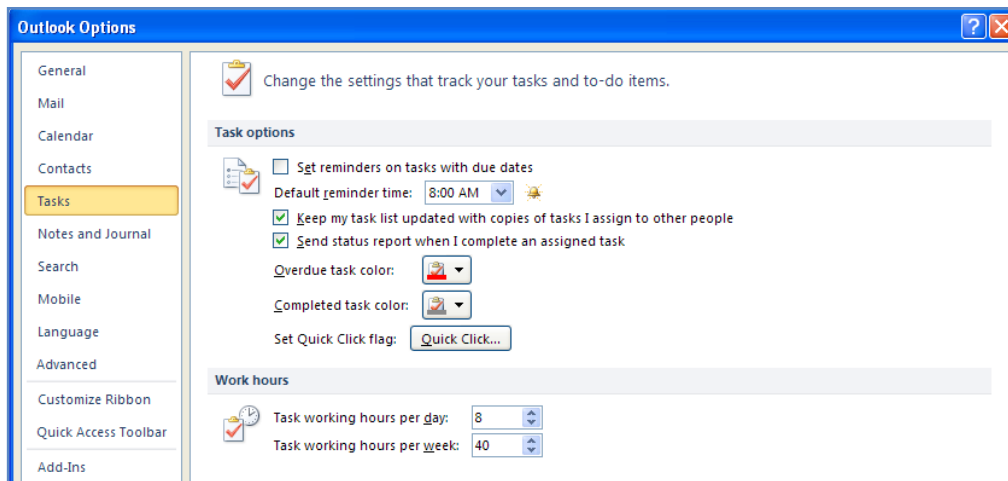
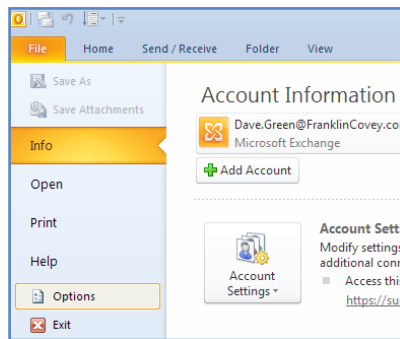
If you need to retrieve a completed task, select the task. Double-click the task and change the status from “Complete” to “In progress.”



Turn Off Reminders

When you create a task, Outlook will make a reminder for that task. In a very stressful way, you will be “reminded” each morning of every task on your list for that day. To turn off automatic reminders (you can still set reminders automatically), in TASKS:

1. Click the FILE tab, then OPTIONS.
2. In the OUTLOOK OPTIONS dialog box, select TASKS and then clear the box SET REMINDERS ON TASKS WITH DUE DATES. Click OK to close.



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