

Effective EDGE™ for Professionals



Mastering Life & Work Flow
Using Microsoft Outlook®



effectiveedge

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v.14.23.07

Intro: Removing E-mail Distractions

TO REMOVE E-MAIL DISTRACTIONS [OUTLOOK 2010/2013]:

1. Click on the FILE tab.
2. Click on OPTIONS.
3. Click on the MAIL option.
4. Under the MESSAGE ARRIVAL section, uncheck all 4 boxes.
5. Click OK to close.

TO REMOVE E-MAIL DISTRACTIONS [OUTLOOK 2007]:

1. From the menu, click on TOOLS.
2. Click on OPTIONS.
3. Click on the E-MAIL OPTIONS button.
4. Click on the ADVANCED E-MAIL OPTIONS button.
5. Under the WHEN NEW ITEMS ARRIVE IN MY INBOX section, uncheck all 4 boxes.
6. Click OK three times to close the dialog boxes.

Intro: Dashboard View Outlook 2010/2013

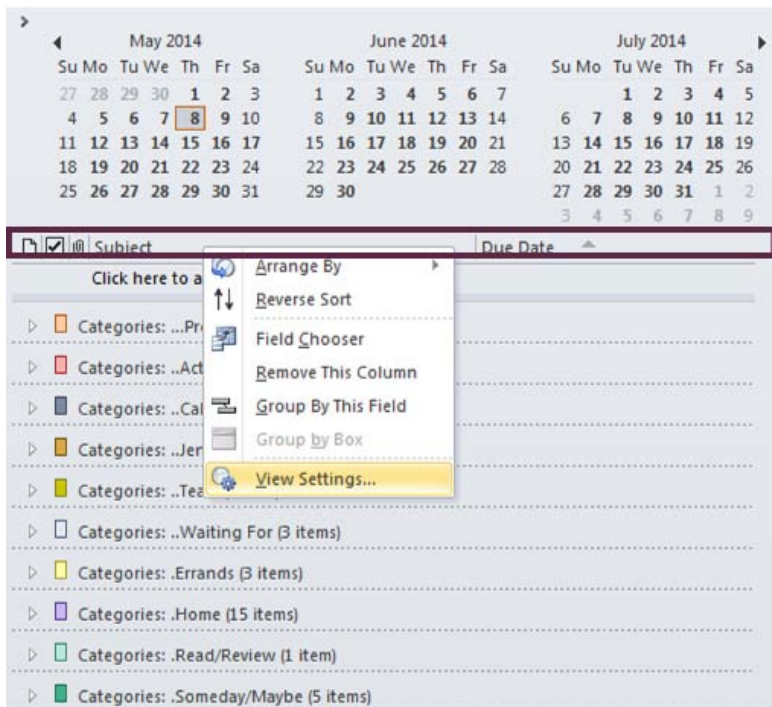
TO CUSTOMIZE THE RECOMMENDED CALENDAR VIEW, YOUR DASHBOARD VIEW [OUTLOOK 2010/2013]:

1. View the Calendar.
2. In the bottom left corner of the window, click the Folder List icon in the Navigation Pane, to display your Folder List.
3. Click on the HOME tab. Click the DAY button.
4. Click the VIEW tab. Click the TO-DO BAR button and check NORMAL, uncheck APPOINTMENTS and uncheck QUICK CONTACTS (if showing). [2013: Select TASKS.]
5. Click the DAILY TASK LIST button and check MINIMIZED.
6. Place the cursor between the Calendar and To-Do Bar so that the mouse pointer turns into bi-directional arrows, and drag the To-Do Bar panel to the left to display three months on the top right. *Outlook 2013 monthly calendars may not appear in the To-Do Bar panel. Your calendar will show in the lower left.

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Intro: Dashboard View Outlook 2010/2013

7. In the To-Do Bar panel, below the three months, right click on the word TASK SUBJECT, **or** on the words CLICK/TYPE HERE TO ADD NEW TASK. Select VIEW SETTINGS from the menu. This will open an advanced view settings dialog box. (See image below)



8. Click the COLUMNS button to change the default column headings:
 - a. Highlight all of the columns in the SHOW THESE COLUMNS IN THIS ORDER list box and click the REMOVE button.

(continued on the next card)

Intro: Dashboard View Outlook 2010/2013

- b. Change the SELECT AVAILABLE COLUMNS FROM to FREQUENTLY USED FIELDS. (Scroll to the top of the list to access).
 - c. From the AVAILABLE COLUMNS list box, select the following: ICON, COMPLETE, ATTACHMENT, SUBJECT, and DUE DATE by clicking on each one and then clicking on the ADD button.
 - d. Click OK to close the FIELDS dialog box.
9. Click the GROUP BY button to show the list, categorized:
 - a. Uncheck AUTOMATICALLY GROUP ACCORDING TO ARRANGEMENT.
 - b. From the Group Items By dropdown menu, select Categories.
 - c. Under Expand/Collapse Defaults in the lower right, select All Collapsed.
 - d. Click OK to close the GROUP BY dialog box.
10. Click the SORT button to customize how your list displays:
 - a. From the Sort Items By dropdown menu, select Subject for your list to display in alphabetical order, or Due Date for chronological order.
 - b. Click OK to close the SORT dialog box.
11. Click the FILTER button to remove flagged items:
 - a. Click the Advanced tab.
 - b. Highlight the Flag Completed Date option and click REMOVE.
 - c. Click the FIELD button, select ALL MAIL FIELDS, FLAG STATUS, from the drop down menu.
 - d. Click the ADD TO LIST button then click OK to save and close the FILTER dialog box.
12. Click the OTHER SETTINGS button to get flexibility in column sizing:
 - a. Uncheck the top right box AUTOMATIC COLUMN SIZING and press OK.

Intro: Dashboard View Outlook 2007

TO CUSTOMIZE THE RECOMMENDED CALENDAR VIEW, YOUR DASHBOARD VIEW [OUTLOOK 2007]:

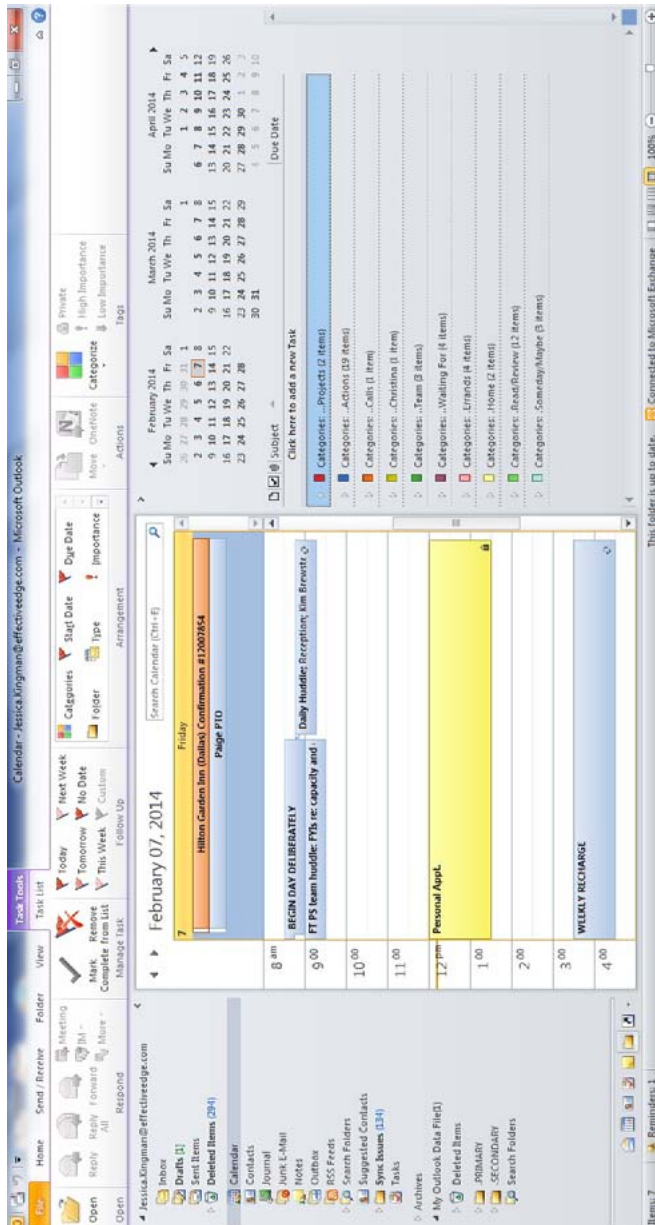
1. View the Calendar.
2. In the bottom left corner of the window, click the Folder List icon in the Navigation Pane, to display your Folder List.
3. Click the DAY tab at the top of the Calendar.
4. Click VIEW, TO-DO BAR, NORMAL from the menu to turn on the To-Do Bar.
5. Click VIEW, TO-DO BAR and uncheck APPOINTMENTS.
6. Click VIEW, DAILY TASK LIST and select MINIMIZED.
7. Place the cursor between the calendar and To-Do Bar panel so that the mouse pointer turns into bi-directional arrows, and drag the To-Do Bar panel to the left to display three months on the top right.
8. In the To-Do Bar panel, below the three months, right click on the words Arrange By, or on the words Click Here to Add New Task. Select CUSTOMIZE CURRENT VIEW from the menu. This will open a View Settings dialog box.
9. Click the FIELDS button to change the default field headings:
 - a. Highlight all of the columns in the SHOW THESE FIELDS IN THIS ORDER list box and click the REMOVE button.
 - b. Change the SELECT AVAILABLE COLUMNS FROM to FREQUENTLY USED FIELDS (Scroll to the top of the list to access).
 - c. From the AVAILABLE COLUMNS list box, select the following: ICON, COMPLETE, ATTACHMENT, SUBJECT, and DUE DATE by clicking on each one and then clicking on the ADD button.
 - d. Click OK to close the FIELDS dialog box.

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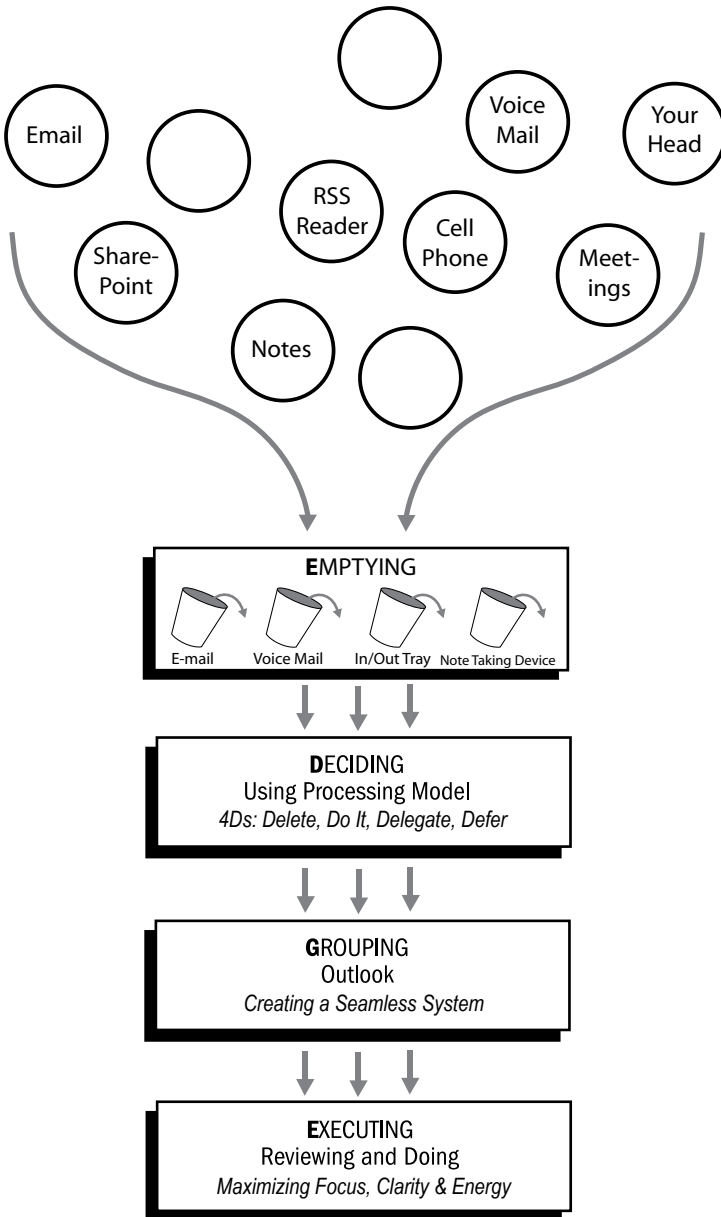
Intro: Dashboard View Outlook 2007

10. Click the GROUP BY button to show the list, categorized:
 - a. Uncheck AUTOMATICALLY GROUP ACCORDING TO ARRANGEMENT.
 - b. From the Group Items By dropdown menu, select Categories.
 - c. Under Expand/Collapse Defaults in the lower right, select All Collapsed.
 - d. Click OK to close the GROUP BY dialog box.
11. Click the SORT button to customize how your list displays:
 - a. From the Sort Items By dropdown menu, select Subject for your list to display in alphabetical order or Due Date for chronological order.
 - b. Click OK to close the SORT dialog box.
12. Click the FILTER button to remove flagged items:
 - a. Click the Advanced tab.
 - b. Highlight the Flag Completed Date option and click REMOVE.
 - c. Click the FIELD button, select ALL MAIL FIELDS, FLAG STATUS, from the drop down menu.
 - d. Click the ADD TO LIST button then click OK to save and close the FILTER dialog box.
13. To Remove the default task due date:
 - a. Right click on a task in your Task List, then choose FOLLOW-UP, SET QUICK CLICK from the menu.
 - b. Change the setting to NO DATE and click OK.

Intro: Completed Dashboard View Outlook 2010



Emptying: EDGE System



Emptying: To Do vs. ACTIONS

"Ctrl Shift K will make your day!"

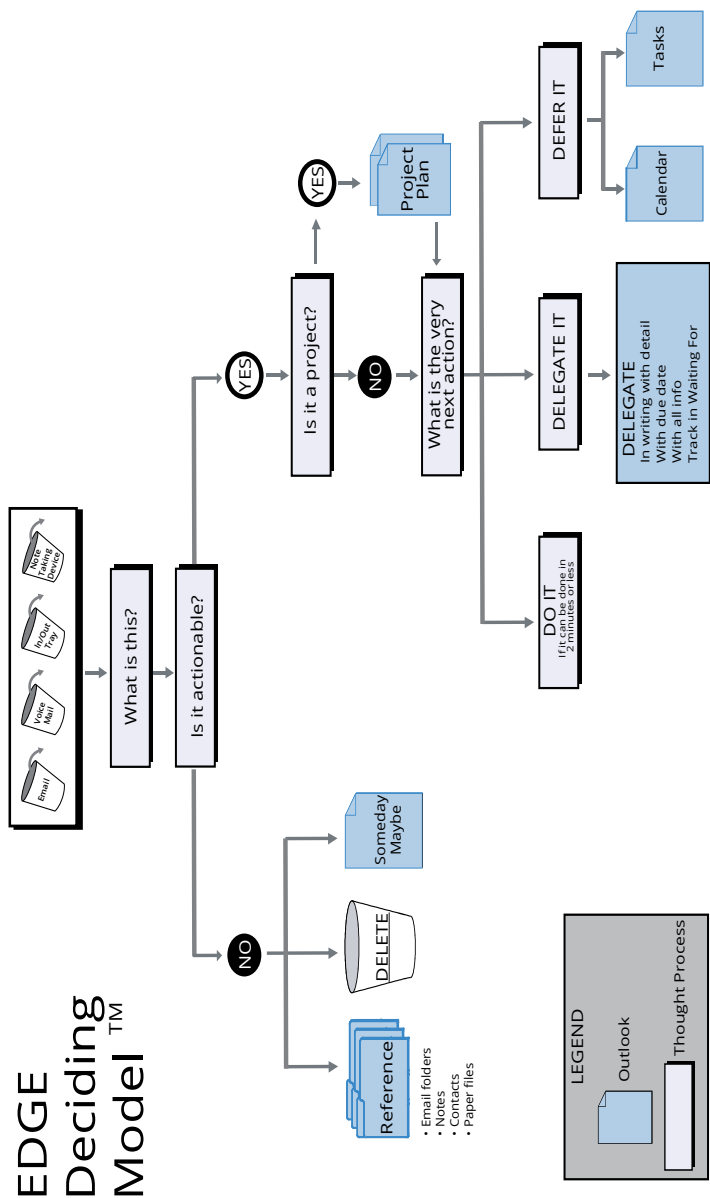
TO CREATE A TASK:

1. Press CTRL + SHIFT + K or double-click in the Task List in the space that says 'Click to Add a New Task.'
2. Fill in the SUBJECT box.
3. Set a DUE DATE for the Task, if the task meets the criteria for having a due date.
4. Select CATEGORY from icon in top ribbon.
5. Click SAVE AND CLOSE to save your changes to the Task.

To-Dos vs. Actions	
TO-DOs:	ACTIONS
<ul style="list-style-type: none"> ✗ Come directly from brain ✗ Specific or vague in nature ✗ No thought process applied ✗ Has dependencies 	<ul style="list-style-type: none"> ✓ Action verb at beginning ✓ Can see yourself doing it ✓ Thought process applied ✓ Independent ✓ One sitting to complete ✓ Next strategic step ✓ Specific
<p><i>Examples:</i></p> <ul style="list-style-type: none"> ✗ Training for Marketing ✗ Clean garage ✗ Weekly report 	<p><i>Examples:</i></p> <ul style="list-style-type: none"> ✓ E-mail Fred re: training ✓ Schedule Saturday with spouse to purge old items in garage ✓ Measure wall for shelving ✓ Talk to Joanne re: report format

The more specific we are, the faster we can engage with a task.

Deciding: EDGE Deciding Model



Deciding: Where ACTIONS Go

When to use Calendar vs. Task List	
CALENDAR	TASKS
<p><i>Time Specific: AT</i></p> <p>Example: Lunch Meeting with Steve AT 12 pm.</p> <p><i>What:</i> Appointment</p> <p><i>How:</i> Type CTRL+SHIFT+A to create the appointment.</p>	<p><i>Due By: BY</i></p> <p>Example: Complete survey BY December 15th.</p> <p><i>What:</i> Task with Due Date</p> <p><i>How:</i> Type CTRL+SHIFT+K and type the ACTION to create the task. Add the due date for the item.</p>
<p><i>Day Specific: ON</i></p> <p>Example: John PTO ON Monday</p> <p><i>What:</i> All-Day Event</p> <p><i>How:</i> Double-click on the date at the top of the day and type in the ACTION to create an All-Day event.</p>	<p><i>No Due Date: NO</i></p> <p>Example: Research new computers.</p> <p><i>What:</i> Task with NO Due Date</p> <p><i>How:</i> Type CTRL+SHIFT+K and type the ACTION to create a task.</p>

Just say "NO" to fake appointments that actually belong on a task list.

Grouping: Suggested Categories

...PROJECTS: This category contains the name, description and outcome of the project commitment. Because this is the 'big picture' for us, we have elevated it to the top of the list by placing '...' in front of the word Project. We all need to be reminded of the 'big pieces' that we have around us. For some of us, we may think of them as projects, focuses, priorities, etc. Keeping this list of projects creates a reminder for you to keep those big picture goals moving forward. Great for any task that has 5 or more steps.

..ACTIONS: The word Action denotes a generic name for the list of actions which you must take. It represents the very next physical, do-able step on an item that you must complete to move forward. Your 'Actions' list is the main list.

..CALLS: (OPTIONAL) Many of us spend a significant amount of time on the phone. If this is true for you, then this category may serve you well. "Calls" is a subcategory of **..ACTIONS**. When entering a call, enter the person's name, subject matter, and phone number, then categorize the task as **..CALLS**.

.._____ (INSERT YOUR MANAGER'S NAME IN THE BLANK): In the blank space enter your manager's name (..Christina). This is where you capture non urgent items to discuss with your manager either in person or on the phone.

..TEAM: If you have several team members that you frequently speak with, this is a place to capture those non urgent things that you need to discuss with them and need to follow up on. If you have regular 1:1s with your team, track items here to discuss. In order for this list to work most effectively, begin each new task item with the name or initials of the individual, followed by the task description. This allows you to easily review items when you are talking with each of your team members.

Grouping: Suggested Categories

..WAITING FOR: This category reflects information promised to us by someone else. Until they perform their work and get back to us, we cannot move forward with that item. This allows us to keep a clear head about what we can and cannot act on because we are waiting for someone else. Use the name or initials at the beginning of the subject line.

.ERRANDS: This list represents the stops outside of the home or office that you must take. For instance you can add: "Return shoes to department store," or, "Buy Anniversary card."

.HOME: This list is made up of actions that we need to take while at home. We frequently are reminded of things that we must do at home when we are at the office. However, we cannot do anything about them. This list helps us to keep focused while at work and provides us with one place to look for the things that we need to take care of when we are at home.

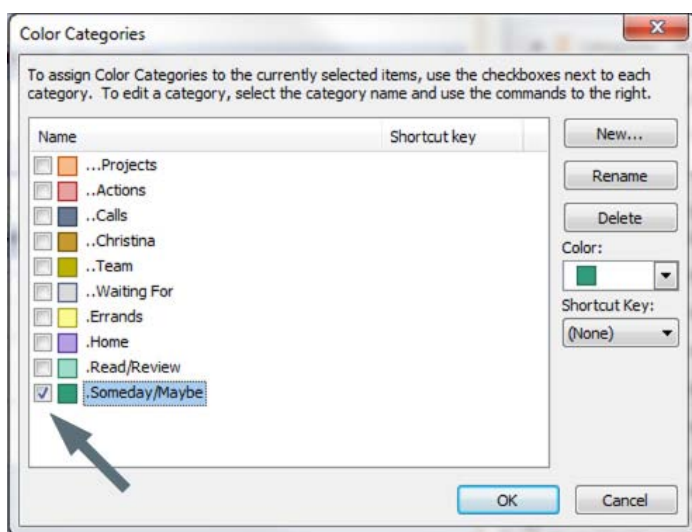
.READ/REVIEW: If your work or life requires significant reading and reviewing; whether it's legal documents, periodicals, magazines, internal memos, e-mails and e-mail attachments, etc.; it's easy to become overwhelmed with the sheer volume. This list allows you to log the important reading so that it is distinguished from other reading, such as interest & leisure.

.SOMEDAY/MAYBE: This category list is for the ideas, future projects or "maybe someday I'll get to that, but not now" list. It is important to keep the ideas and creativity flowing. However, there is little to do with these items except to keep them in an area to 'incubate.' There is a clear line between this list and all your other lists. You have not committed the time, energy and resources needed to fully deliver on this list – at this time.

Grouping: Creating Categories

TO SET UP NEW CATEGORIES:

1. Press CTRL + SHIFT + K to create a new task.
2. Click the CATEGORIZE button on the TASK tab and select the ALL CATEGORIES option.
3. To add a new category, click the NEW button. Type the name in the Category Name text box. If desired, click on the Color drop down-box to assign a color to the Category. Choose OK to save the Category.
4. Repeat step 3 for each new Category you wish to add.
5. When all Categories have been entered, uncheck all the boxes to the left of the category names and click OK to close the Color Category dialog box. Close the Task by clicking the X in the top right corner of the dialog box. You do not need to save the empty task.



Grouping: Creating Categories

SUGGESTED TASK CATEGORIES:

- ...Projects
- ..Actions
- ..Calls (optional)
- ..____(Manager's Name)
- ..Team
- ..Waiting For
- .Errands
- .Home
- .Read/Review (optional)
- .Someday/Maybe

TO CATEGORIZE A TASK:

1. Double-click to open the task.
2. Click the Categorize button on the Ribbon and select the Category from the drop-down list.
3. If there's a real due date, assign the task a due date.
4. Click Save and Close to save your changes to the Task.

-OR-

1. Right-click on the task.
2. Select the Categorize option from the menu and select the Category from the drop-down list.

Grouping: Task List View Outlook 2010/2013

TO SET UP THE TASK LIST VIEW [OUTLOOK 2010/2013]:

1. Select TASKS from the folder list.
2. From the HOME tab, select SIMPLE LIST from the CURRENT VIEW box.
3. To customize the view of Tasks, click on the VIEW tab and click VIEW SETTINGS.
4. To group the Tasks by Category, click the GROUP BY button.
 - a. Uncheck the AUTOMATICALLY GROUP ACCORDING TO ARRANGEMENT option.
 - b. Select CATEGORIES from the GROUP ITEMS BY list. Click the ASCENDING radio button to sort in alphabetical order.
 - c. Select ALL COLLAPSED from Expand/Collapse Defaults field.
 - d. Click OK to close the GROUP BY box.
5. Click the SORT button to customize how your list displays:
 - a. From the Sort Items By dropdown menu, select Subject for your list to display in alphabetical order or Due Date for chronological order.
 - b. Click OK to close the SORT dialog box.
6. Click the FILTER button to change the filter settings.
 - a. Select the ADVANCED tab.
 - b. Under the DEFINE MORE CRITERIA section, select the FIELD button and choose ALL MAIL FIELDS, FLAG STATUS.
 - c. Click the ADD TO LIST button, then choose OK to close the Filter dialog box. Click OK again to close the View Settings dialog box.

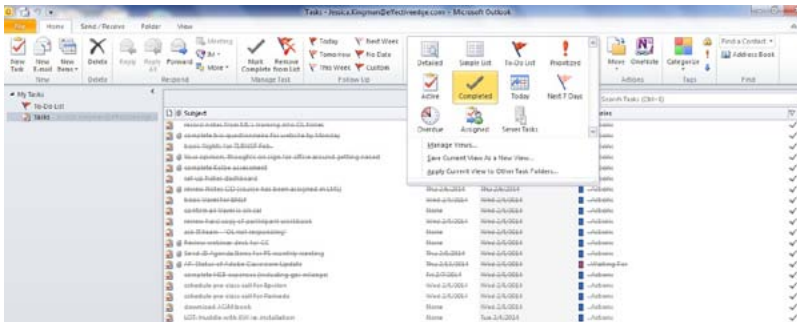
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Grouping: Task List View Outlook 2010

7. To turn off the To-Do Bar, choose View, To-Do Bar, Off from the menu.

*Other recommended views: (View tab > Change View)

- Completed Tasks
- Next 7 days, "What's coming due in next week?"
- Overdue Tasks



Grouping: Task List View Outlook 2007

TO SET UP THE TASK LIST VIEW [OUTLOOK 2007]:

1. Select Tasks from the folder list. Select the Simple List View under Current View on Left.
2. To customize the view of Tasks, right click on the field heading and select CUSTOMIZE CURRENT VIEW from the menu.
3. To group the Tasks by Category, click the GROUP BY button.
 - a. Uncheck the AUTOMATICALLY GROUP ACCORDING TO ARRANGEMENT option.
 - b. Select CATEGORIES from the GROUP ITEMS BY list. Click the ASCENDING radio button to sort in alphabetical order.
 - c. Select ALL COLLAPSED from Expand/Collapse defaults field.
 - d. Click OK to close the GROUP BY box.
4. Click the SORT button to customize how your list displays:
 - a. From the Sort Items By drop-down menu, select Subject for your list to display in alphabetical order or Due Date for chronological order.
 - b. Click OK to close the SORT dialog box.
5. To filter the Tasks:
 - a. In the Customize View box, click the FILTER button
 - b. Select the ADVANCED tab.
 - c. Under the Define More Criteria section, select the Field button and choose the All Mail Fields, Flag Status options.
 - d. Click the Add To List button, then choose OK to close the Filter dialog box. Click OK again to close the Customize New dialog list.

Grouping: Copying Tasks to Calendar

TO COPY A TASK TO THE CALENDAR FROM YOUR DASHBOARD VIEW:

1. Click on the Task and drag and drop it in the calendar.
2. By default, the Appointment will be today's date in a 30-minute increment. To customize this, double click the appointment and change the date and time.
(Great for when you want to block time on your calendar to complete a task)

TO COPY AN APPOINTMENT TO A TASK LIST FROM YOUR DASHBOARD VIEW:

1. Click on the Appointment and drag it to the Task List on the right and release the mouse button.
2. Rename the Task to a specific, Action - oriented task, beginning with an action verb. Give a due date if appropriate.
3. Delete the existing Appointment if appropriate, to avoid potential confusion and duplicated information.

Grouping: Five Steps to Getting the EDGE on Projects

1. Write down the name of the project.
 - Open a new Task and write the Project name in subject line.
 - Change the category of the Task to ...Project.
 - Add a due date (if there is a real due date).
2. Write the desired outcome statement.
 - A clear statement of what the project will look and feel like when completed.
 - E + Motion - We need to be fully engaged. When we add our emotion and hearts, projects move more smoothly because we are using our “whole self.”
 - Outcome Focus - We focus on what we want to identify with. The Outcome Statement has the power to draw to us what we need.
3. Perform a Project Mind Sweep exercise in the Task text box.
4. Insert hyperlinks.
 - a. Click on INSERT.
 - b. Click on HYPERLINK.
 - c. Select the filename that you would like to link to.
 - d. In Text Display field, type abbreviated name of file if desired.
 - e. Click OK.
5. Copy the very next ACTION in a new Task item.
 - a. Highlight the next action from your Mind Sweep list.
 - b. Right-click on the highlighted text and choose COPY.
 - c. Minimize the Project Task.
 - d. Press CTRL+SHIFT+K to create a new Task.
 - e. Right-click in the Subject text box and choose PASTE.
 - f. Add a DUE DATE and CATEGORY to the Task.
 - g. SAVE AND CLOSE the action for that project.

Grouping: Adding Contacts

Save time searching for contact information in the inbox and instead, store them for quick and easy reference, in Contacts.

TO CREATE A CONTACT FROM AN E-MAIL:

1. From the Inbox, drag the e-mail to the Contacts icon on the Navigation pane. Outlook copies the sender's name and e-mail address to the appropriate text boxes and places the body of the e-mail in the Notes text box.
2. Find the details you want to store, like their company name, in the Notes text box. Highlight the text and drag it to the appropriate field on the Contacts screen. For example, highlight their company name in the Notes text box and drag it to the Company text box. (You don't have to cut and paste!)
3. Repeat the process as necessary to populate the Contact record.
4. Highlight the unnecessary text or press Ctrl+A in the Notes text box and press the Delete key on the keyboard to clear it out.
5. Click SAVE AND CLOSE to save the Contact record.
6. Delete or file the e-mail as appropriate.

Grouping: Adding Notes

Outlook Notes are a great place to store handy reference information that you need to access quickly without having to dig through an e-mail folder. You can store passwords, process instructions, bookmarks, templates or checklists in Notes. Notes can only contain text; they cannot contain attachments or graphics.

TO CREATE A NOTE:

1. Click the NEW button in the Notes section or press CTRL + SHIFT + N on the keyboard to create a new Note.
2. Enter the title for the Note at the very top of the note.
3. Enter the details in the body of the Note.
4. Click the X on the title bar (top right corner of the window) to close and save the Note.

TO CREATE A NOTE FROM AN E-MAIL:

1. From the Inbox, drag the e-mail to the Notes icon on the Navigation pane. Outlook copies the text of the e-mail into the Note.
2. Type a title for the Note on the top line.
3. Delete any unnecessary text from the Note.
4. Click the X on the title bar (top right corner of the window) to save and close the Note.
5. Delete or file the e-mail as appropriate.

TO CLEAN THE NOTES VIEW:

1. Click VIEW, To-Do Bar, Off
2. Click VIEW, Reading Pane, Right

Grouping: E-mail Effectiveness

Below are a few key tips to help make e-mail more effective:

- Consider whether the best medium is e-mail. In some instances, i.e., urgent, too complex, personnel/confidential issues, too much emotion is present or emotion needs to be communicated – then it is better to speak face-to-face or use the telephone. Sometimes Instant Messenger services can be used for urgent matters or “two minutes or less” communications.
- Process e-mail periodically rather than constantly. Practice stretching your batching intervals - 30 Mins, 60 Mins, etc.
- Make the Subject Line reflective of the action and subject (e.g., Action Requested, FYI or For Your Records).
- Use CC and Reply All only if absolutely necessary.
- Be appropriate. Ask yourself if you could look them in the eye and say the same thing.
- Only include someone in the To line if a response is expected.

Grouping: E-mail Effectiveness

"We teach people how to treat us."

Other good tips include:

- Identify the players by name (no Dear Sirs: on e-mail).
- No jargon, acronyms, slang or colloquialisms, especially when English might be their second language.
- Ask for clarification rather than assume.
- Distinguish between fact and opinion.
- Do not respond to gossip.
- Be mindful of what you send, as your e-mail might be forwarded to others.
- Assume the best intentions of people.
- Be curious.
- Avoid blaming.

**Consider picking ONE tip to focus on each month, and enroll your whole team at your next team meeting.*

WRITING EFFECTIVE E-MAILS PASS

"Take time on the front end to save time on the back end."

- **Purpose** - Why are you sending it?
- **Actions** - What do you want them to do?
- **Specifics** - How do you want it done and by when?
- **Supporting resources** - Where are the tools or info they need to complete the Action?

Reminder: Most people scan e-mails. You only have 8-10 seconds to convey your message.

Momma used to say, "A stitch in time saves nine!"

Grouping: Instant Messaging Chat Effectiveness

- **Mute the chime.** Most chat applications provide multiple ways for you to be notified of a new conversation. Opt for the pop-up notification over the chime as it is less disruptive.
- **Show your status.** Reflect your availability in the IM tool so that others know your availability. When necessary and appropriate, sign out to help focus on completing work. Remember to sign back in.
- **Check availability.** Be sure to check the available status of the person you want to chat with before you send a message.
- **Keep conversations short – use the 2 minute rule.** Escalate long or complicated conversations to email or phone. If you are sensing tension or a misunderstanding has occurred, switch to video chat or phone. No actions should be requested on IM.
- **Respect their time.** Just because the recipient's status was marked available doesn't mean they have time to engage in conversation immediately. Don't expect an immediate reply. If you have something urgent to communicate, the phone is your best resource.
- **Chat professionally.** Even though you are using chat, you are still conducting a professional conversation. Don't say anything in chat that you wouldn't say in person or in public. Be succinct, but clear in your messages and remember that in electronic messages all capital letters is the equivalent of shouting.
- **Focus - Don't multi-task.** It's difficult to have more than one successful conversation at a time whether that conversation is in person or in a chat window. Limit your chat conversations to one at a time whenever possible.

Grouping: Meeting Effectiveness

- Aim to spend no more than 60% of your day in meetings.
Decline invites strategically, according to priority.
- Share the agenda and clear desired outcome of the meeting before and/or at the start of every meeting.
- Assign someone to track/record actions; distribute within 24 hours after meeting.
- Assign a time keeper, action tracker and facilitator (typically the event organizer).
- Schedule meetings for no longer than 1.5 hours. This is the longest amount of time that people can focus (if the meeting needs to be longer, take breaks every 1.5 hours).
- If meetings frequently start late/run over in your company, ask yourself what you can do to help shift that culture.

When Booking a Meeting:

- State the meeting objectives and agenda clearly in the invite.
- Invite the “right” people: key attendees who will contribute and can make decisions.
- Talk to the assistants of key players. Admins know the most about their managers’ schedules, and can recommend when the most productive meetings can be held.
- Schedule meetings consecutively or in blocks to allow for less interruption in the day.
- Allow lead time: giving attendees at least two weeks notice will ensure maximum attendance.
- Send a reminder and desired outcome for the meeting the day before to further enhance your attendance.

Grouping: Communication Effectiveness

	Chat/ Text	E-mail	Collaboration Tool	Call	Virtual Meeting	In Person Meeting
Quick Question	X					
Urgent Question/ Issue				X		
Sharing Updates		X	X			
Sharing Files			X			
Group Decision			X		X	X
Heated/Difficult Discussion				X		X
Performance/ Feedback						X

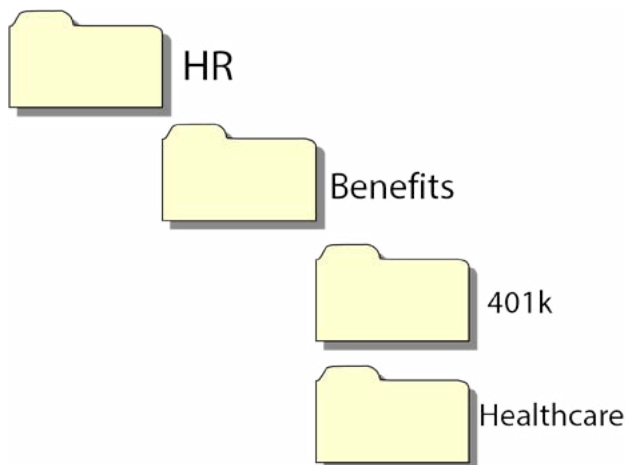
Grouping: Creating E-mail Folders

TO ADD A FOLDER OR SUBFOLDER:

1. Right click on the file folder you want the subfolder to be located under.
2. Select NEW FOLDER, type in the name for the new folder, and select OK.

- Consider using PROJECTS and REFERENCE as file cabinet 'drawers.'
- It is recommended to have no more than 2 tier levels deep under each main level folder.
- Remember the red dots? How can you more tightly consolidate your folder list? Look for common themes and find a way to group those.

An Example:



Grouping: Data Files Outlook

Most users have a maximum mailbox limit set by the system administrator for their Microsoft Exchange account. If you have a large amount of mail that you need to store, an **Outlook Data File (PST)** allows you to store messages in a separate file that is not part of the mailbox. Please check with your IT department to determine if Outlook Data Files are allowed at your company.

TO CREATE AN OUTLOOK DATA FILE [OUTLOOK 2010]:

1. From the mailbox, click on the HOME tab and click on the NEW ITEMS button.
2. Select MORE ITEMS, OUTLOOK DATA FILE from the menu.
3. Select a location where you want to store the file, enter a file name and click OK.
4. Enter a password, if desired, and click OK.

TO CREATE AN OUTLOOK DATA FILE [OUTLOOK 2007]:

1. On the FILE menu, click NEW.
2. Select OUTLOOK DATA FILE.
3. Select MICROSOFT OUTLOOK PERSONAL FOLDERS FILE (.pst).
4. Personal Folders appears in the Folder List.

Grouping: 4Ds for E-mail Processing



- **DELETE** OR FILE IT
- **DO** IT IN 2 MINUTES OR LESS
- **DELEGATE** IN WRITING WITH SPECIFICS AND A DUE DATE, THEN TRACK IN 'WAITING FOR' TASK
- **DEFER** TO A CALENDAR OR TASK ITEM

TO CREATE AN ACTION FROM AN E-MAIL [OUTLOOK 2007]:

1. Using the EDGE Deciding Model, choose whether the ACTION belongs on your CALENDAR (do ON a certain day, and/or AT a certain time) or in your TASKS (due BY or NO due date).
2. Right-click on the message and drag it to Calendar or Tasks icon.
3. Edit the subject line to reflect the ACTION, fill in any detail.
4. Click the CATEGORIES button on the Ribbon and select the desired category for the ACTION.
5. Click SAVE & CLOSE to save the item.

Grouping: 4Ds for E-mail Processing

TO INSERT AN E-MAIL IN AN EXISTING TASK OR CALENDAR ITEM:

1. Double-click on the *existing* Appointment or Task to open the item.
2. Click the INSERT tab on the Ribbon.
3. Click the ATTACH ITEM/OUTLOOK ITEM button on the Ribbon.
4. Select the folder the item is stored in. The list defaults to the InBox, but you can change the folder in the Look In list box. Select the item you want to be inserted.
5. If you want to see the attachment on your handheld device, select TEXT ONLY under INSERT AS, otherwise select ATTACHMENT.
6. Click OK, and the message will appear as an icon or text in the appointment or task.
7. Click SAVE AND CLOSE to save the changes to the ACTION.
8. Delete or file the original e-mail from the Inbox.

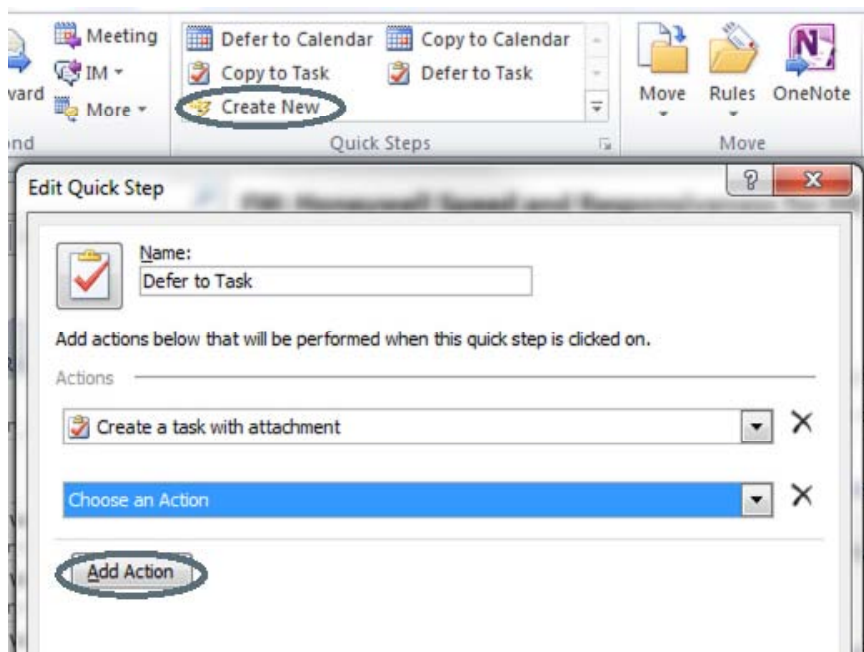
TO CREATE A QUICK STEP SHORTCUT [OUTLOOK 2010/2013]:

1. From the mailbox, click on the HOME tab.
2. In the QUICK STEPS box, click the CREATE NEW button.
3. In the NAME text box, enter Defer to Task.
4. Click the down arrow next to the Actions list and choose CREATE A TASK WITH ATTACHMENT from the menu.
5. Click the ADD ACTION button.
6. Select DELETE MESSAGE from the menu.
7. Click FINISH.

(continued on next card)

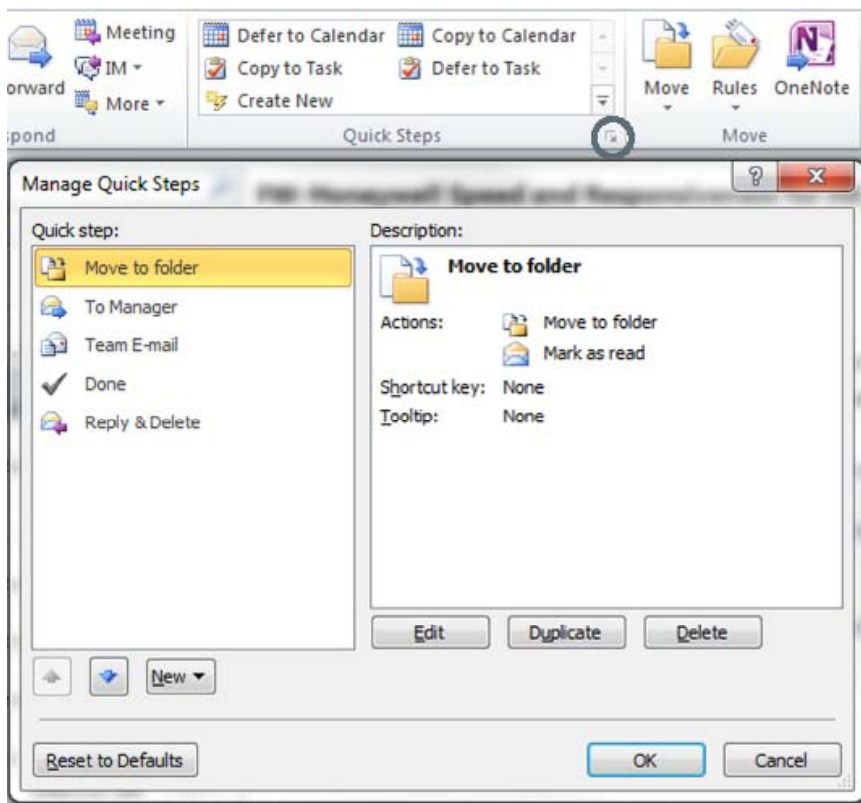
Grouping: 4Ds for E-mail Processing

**TO CREATE A QUICK STEP SHORTCUT [OUTLOOK 2010]:
SEE SCREENSHOT BELOW:**



Grouping: 4Ds for E-mail Processing

**TO MANAGE YOUR QUICK STEPS [OUTLOOK 2010/2013]:
SEE SCREENSHOT BELOW:**



It is recommended that you remove any default Quick Steps by selecting the Quick Step and pressing Delete.

Grouping: Mailbox Tips Outlook 2010/2013

EMAIL TIPS & TRICKS [OUTLOOK 2010/2013]:

TO VIEW YOUR INBOX BY CONVERSATION [OUTLOOK 2010/2013]:

1. From your mailbox, click on the VIEW tab.
2. In the CONVERSATIONS group, checkmark the SHOW AS CONVERSATIONS option.
3. Click the ALL FOLDERS option to apply the Conversation view to all of your mail folders.
4. Click the down triangle next to the top level message in the conversation to view the conversation thread. To collapse the conversation, click the triangle again.

TO IGNORE A CONVERSATION [OUTLOOK 2010/2013]:

1. Click on the HOME tab.
2. In the DELETE group, click on the IGNORE button. The conversation and all of its associated messages (previous and future) will be moved to the Deleted Items folder.

TO CLEAN UP A CONVERSATION [OUTLOOK 2010/2013]:

1. Highlight your inbox by pressing Ctrl + A.
2. Click on the HOME tab. In the DELETE group, click on the CLEAN UP button and choose CLEAN UP CONVERSATION. Any redundant messages (messages whose entire content is contained in another message) will be moved to the Deleted Items folder.

TO FILTER YOUR INBOX [OUTLOOK 2010/2013]:

1. Click on the FILTER E-MAIL button on the HOME tab.
2. Select the type of messages you would like to view.
3. Click the CLOSE SEARCH button on the ribbon to return to your full mailbox.

Executing: Beginning the Day Deliberately

"How we start our day can set the tone for our whole day."

- Perform a Mind Sweep.
- Review Outlook Today to see what is due today and what meetings you have.
- Ensure that you are prepared for any meetings (i.e., agendas, paperwork, directions, etc.)
- Review ..Actions list for any key upcoming actions due.
- Set an intention for the day.
- Begin the day!

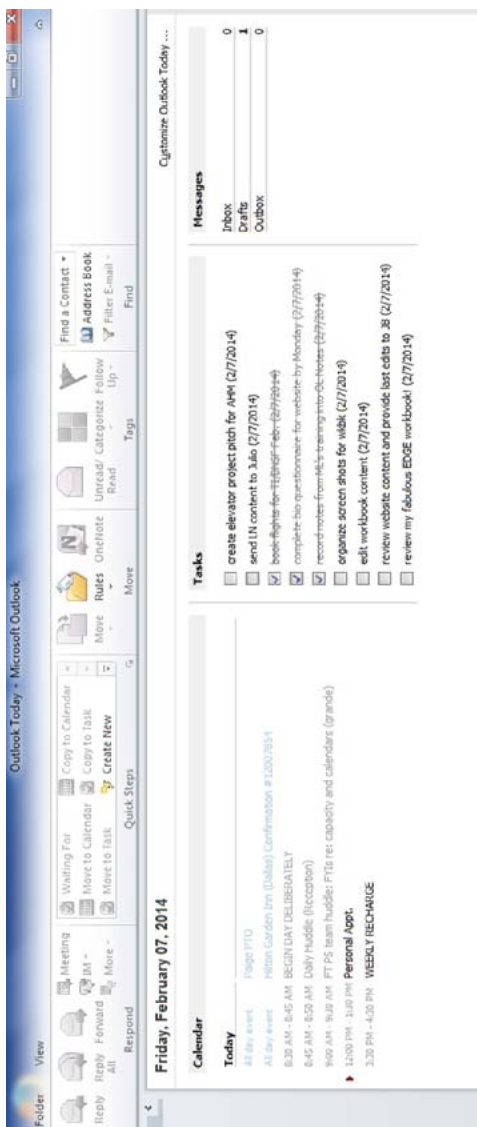
TO SET UP OUTLOOK TODAY:

This is your new default view and is a great place to come back to after an unexpected interruption.

1. Click on the Mailbox folder, typically your email address found at the top of folder list.
2. Select CUSTOMIZE OUTLOOK TODAY.
3. Check the WHEN STARTING, GO DIRECTLY TO OUTLOOK TODAY option.
4. Change the SHOW THIS NUMBER OF DAYS IN MY CALENDAR option to 1.
5. Change the IN MY TASK LIST, SHOW ME OPTION to TODAY'S TASKS.
6. Unselect the INCLUDE TASKS WITH NO DUE DATES option.
7. Click the SAVE CHANGES command in the top right corner of the screen.

Executing: Beginning the Day Deliberately

OUTLOOK TODAY SCREENSHOT [OUTLOOK 2007/2010/2013]:



Executing: Doing & Prioritizing

Doing, the Critical Piece

- Manage from your lists – not your head.
- Review lists as frequently as needed to keep work flowing.
- Acknowledge completion of items and move quickly to the next ACTION
- Handle things as they show up – don't wait until they blow up!
- Create a mind set that you will get it done!
- Ask "How can I get this done in 2 minutes or less?"
- Focus vs. multi-tasking.

Prioritizing & TEST

- Use the TEST criteria to make moment by moment choices throughout the day:
 - **Time** (How much time do you have?)
 - **Energy** (How much energy do you have?)
 - **Situation** (Location, Context)
 - **Top Level** (What is the highest leverage action I can take at this moment?)
- Capture everything in one place so that you can see and know what you have to take care of.
- Ask the question, "Is it actionable?" with each new piece of information you receive.
- Take action on items that require 2 minutes or less and delegate to remove another 30% to provide quick responses and manage the workload.

Executing: The Weekly Recharge

PROCESS YOUR NOTES & VOICE MAIL

Review meeting notes, notes scribbled from conversations, etc. Insert any action items (actions, calls, review, waiting for) into the task list as appropriate.

E-MAIL

Process any outstanding E-mail, leaving your inbox totally clear.

CALENDAR

- **Prior Week:** Review in detail prior week's calendar. Acknowledge completed items!
- **Upcoming:** Overview upcoming calendar events – long and short term. Capture any action items needed to prepare for upcoming events. Review upcoming week to ensure 100% success can be achieved. Renegotiate any events or action items if necessary.

REVIEW PROJECT LISTS

Evaluate the status of each project, goal and outcome ensuring at least one current action item is listed for each. Remember, the more you review your outcomes, the greater the likelihood that you will achieve them!

(continued on next card)

Executing: The Weekly Recharge

MIND SWEEP

Add to task list any Actions, Projects, Waiting For, Someday/ Maybe, etc., that are in your head using Ctrl Shift K.

CHECK “NONE” & “DRAFTS”

E-mail in drafts and uncategorized items on the task list can create leaks in the system. Make sure e-mails have been sent and tasks categorized.

REVIEW ACTIONS FROM ALL CATEGORIES

Mark off completed items from each of the task categories and drag to completed items folder or delete.

Review reminders of further action steps to add to the list. Celebrate completions!

REVIEW PAPER FILES & SUPPORT FILES

Browse through all work-in-progress support materials to trigger new actions. Remove material no longer needed.

REVIEW “SOMEDAY/MAYBE” LIST

Scan this list to see if there is anything that you are now willing to commit the time, energy and resources to achieving.

BE CREATIVE & COURAGEOUS

Any new, wonderful, hare-brained, creative, exciting, thought-provoking, risk-taking ideas you are ready to add into your system? Is there anything else you need to be reminded about? If so, add to your system.

NOW GO HAVE FUN!

Appendix: Outlook Quick Keys

New Task.....Ctrl + Shift + k

New Mail Message.....Ctrl + Shift + m

New Appointment.....Ctrl + Shift + a

New Contact.....Ctrl + Shift + c

New Note.....Ctrl + Shift + n

To save and close an Outlook item.....Alt + s

To highlight all text.....Ctrl + a

Permanently delete.....Shift + Delete

For additional Quick Keys go to keyword:
Keyboard Shortcuts in Outlook Help

Appendix: Resources

More from Effective Edge™

Congratulations! You've now experienced the transformational work of EDGE for Professionals™. Our mission at Effective Edge is to inspire our clients by giving them the tools to live their best life. We also offer programs of this quality for teams and leaders that improve productivity and accelerate results.

Individuals

Check out our website at EffectiveEdge.com for more resources to support keeping you and your EDGE System, along with your technology, going strong. We offer programs that support you in being more effective and efficient in a sustainable way.

Teams

Collaborating together and delivering results seamlessly can be a challenge. We support teams in having effective conversations and constructive dialogue, in clarifying roles and responsibilities, driving innovation and creativity, and better leveraging their collaboration tools such as Microsoft SharePoint – all to get results in less hours with fewer meetings and less conflict.

Leaders

Leading through complexity and change while managing oneself can challenge even the best leaders. Through 1:1 coaching and highly tailored approaches to maximize leadership effectiveness, we support leaders in clarifying and aligning their priorities and their teams' priorities with the big picture. We also coach executives on decision making, communication and getting the most from themselves and those they lead.

Organizations

As advocates for the leaders, the culture and everyone who works for the organization, we take a big-picture approach and architect best-in-class, highly-customized solutions that support shaping a winning culture that gets the right things done at the right time in the right way.

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