

Gaining Your Effective EDGE™

with Gmail and Google Calendar
Best Practices



Whitepaper

Provided by



Gaining Your Gmail EDGE™

Best Practices with Gmail and Google Calendar from

Effective Edge®

While many of us use server-based e-mail tools like Outlook or Lotus Notes at work, we use free internet-based e-mail tools to manage our personal communication and commitments. Gmail from Google is one such e-mail tool that can help us manage our personal lives with ease using our EDGE system®. As of late, we are seeing some businesses begin to use this as their platform, too.

To use Gmail most effectively with the EDGE System, we recommend that you also use the Gmail Contacts, Task List and the Google Calendar.

Turning Off Distractions

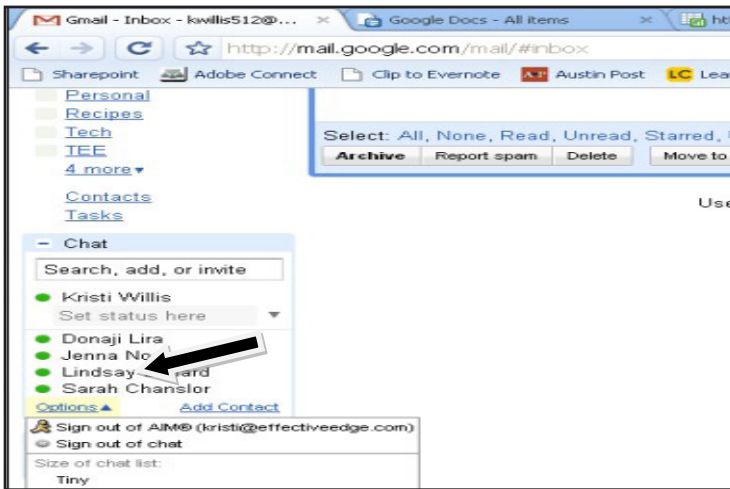
One of the key learnings from your EDGE for Professionals class was to manage your distractions so that you can focus on the work in front of you. Having our e-mail chime or pop-up every time we get a new message causes us to jerk out of the zone of concentration and costs valuable productive time as we try to get back in that zone.

One of the great things about Gmail is that it does not have automatic notifications built in to the e-mail tool. However, there is a separate tool called Gmail Notifier that can be installed to alert you when new e-mail arrives. If you have installed Gmail Notifier, we recommend uninstalling the tool or exiting it so that you can maintain focus.

Gmail includes a Chat tool which can be very helpful when you have quick questions that don't require a full e-mail. But, when you are trying to focus, colleagues interrupting you with chat questions can be quite distracting. When you need to focus, you can sign out of chat to minimize it as a distraction.

To sign out of chat:

1. Click at the top of the Chat section, if necessary, to expand it so that you see the Options menu (see graphic on next page).



2. Click on the Options menu.
3. Choose Sign Out of Chat from the menu.

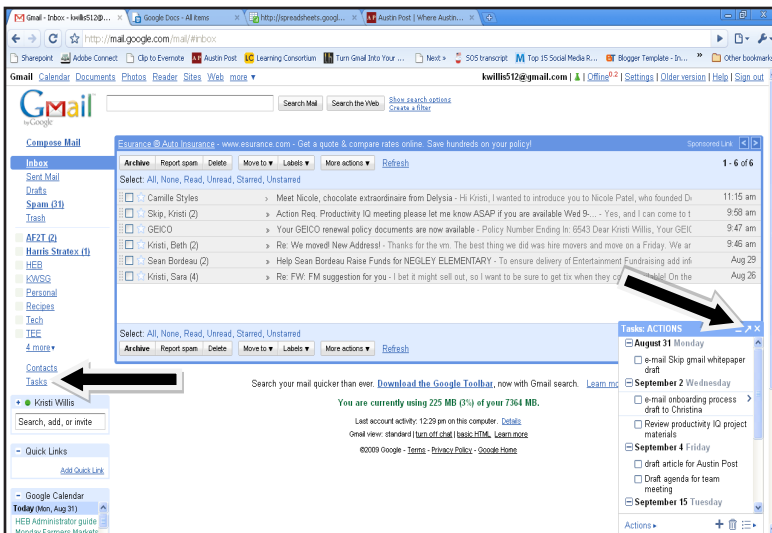
When you are ready to return to chat, choose Options, Sign In to Chat.

Setting up your Task List

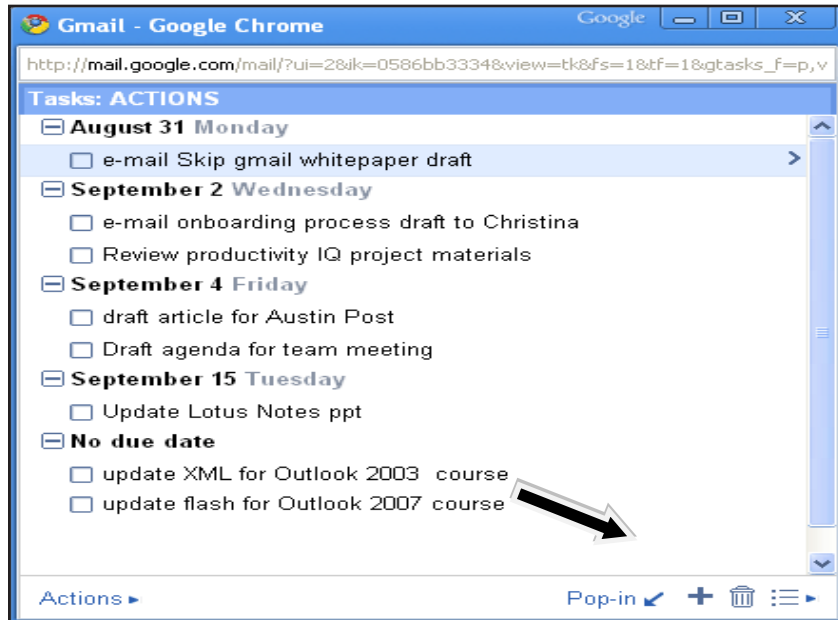
The Task List feature in Gmail allows you to easily track the actions you are going to take and prioritize when you are going to work with them.

To view the Task List:

1. Click the Tasks link in the navigation list.



2. The Task list appears as a pop-up in the bottom right corner of your screen. If you would like the task list to appear as a separate window, click the arrow icon on the title bar. To pop the Task window back into the Gmail window, click the arrow icon again on the title bar.



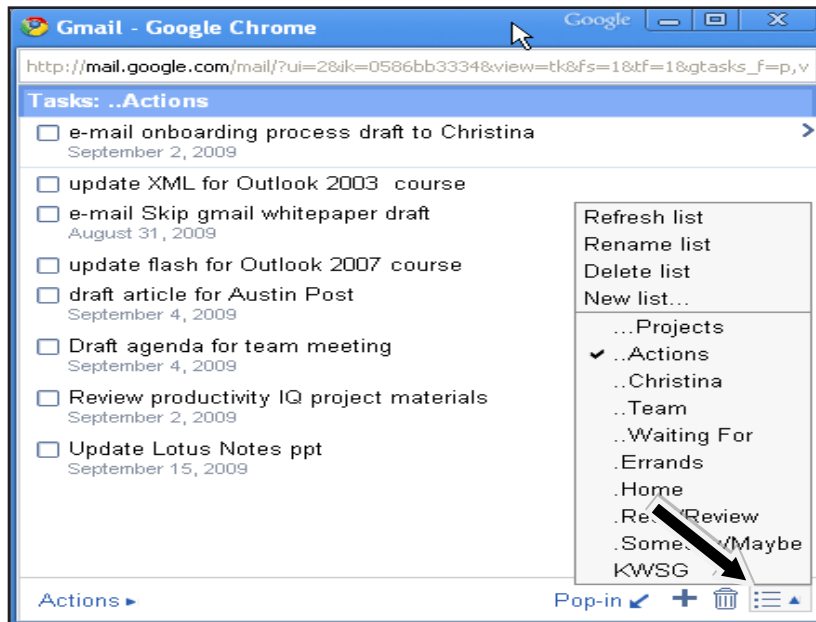
You can view your Task list in one of two ways. You can create your own view order or you can sort the list by due date. If you choose to view in your own order, you can click on the Actions list and use the Indent, Un-indent, Move Up and Move Down commands to change the order of any task.

To view your list by due date, click on the Actions button and choose Sort by Due Date from the menu.

Unlike some other e-mail tools, the Gmail Task list does not offer categories as a way to organize your tasks by topic. You can, however, create multiple lists so that you can group similar things together.

To create a new Task list:

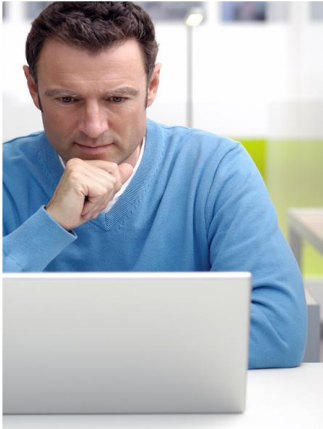
1. Click on the Switch List option in the bottom right-hand corner of the Task list.



2. Choose the New List... option
3. Enter the name you wish to give the list. You might consider creating lists for each of the EDGE System categories you use. When you need to work with that type of task, you can easily view that list.

Following are the suggested categories for your Gmail EDGE system:

- ...Projects
- ..Actions
- ..Manager (list your manager's name rather than the word manager)
- ..Team
- ..Waiting For
- .Errands
- .Home
- .Read/Review
- .Someday/Maybe



Stay in the Know

EDGE for Professionals alumni get ongoing, practical, useful and inspiring reminders to continue enhancing their productivity by reading our monthly eNewsletter.

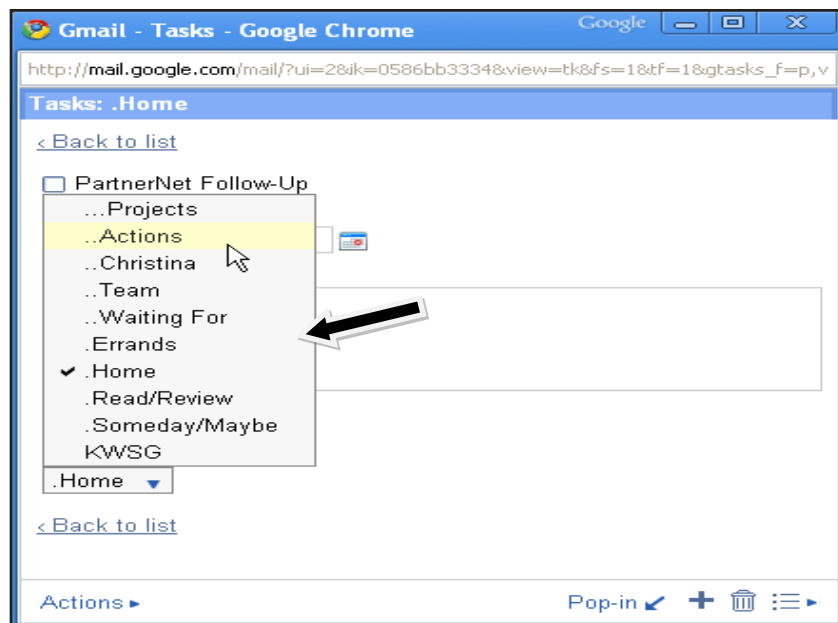
Alumni can sign up to receive our newsletter by visiting www.effectiveedge.com/blog, and entering their email under the "Receive our Newsletter" heading.

To view a particular list in Gmail:

1. Click on the Switch List option.
2. Select the list you wish to view.

You can move a task between the lists if you need to re-categorize an item. For example, you might have an item on the list to discuss with your manager that becomes an action for you. You can move the item to your Actions list using the following steps:

1. Highlight the task in the appropriate list and click on the chevron to the right of the task to open it.
2. Click the down triangle in the Move to List option and select the list to which you want to move the task.



3. Change the subject or other details of the task if necessary.
4. Click the Back to List option to return to the list. To view the task that you moved, click on the Switch List option and select the list to which you moved the task.

When you have completed a task on the list, check mark the item to indicate that you are finished. You can periodically clear your completed tasks off the lists using the following steps:

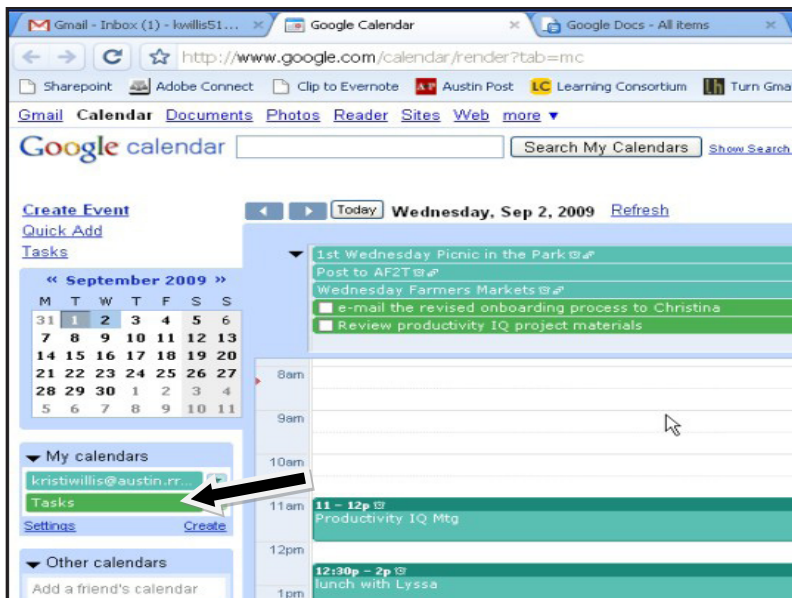
1. Click on the Actions command.
2. Choose Clear Completed Tasks.

Setting up your Calendar View

The Google Calendar allows you to easily organize your appointments and meetings. You can create multiple calendars and share calendars with other people. For example, you could create a family calendar and add each family member as a user so that you can each view the calendar whenever you want.

You can customize the view of the calendar to help you be more productive. We recommend the following settings to support your EDGE system:

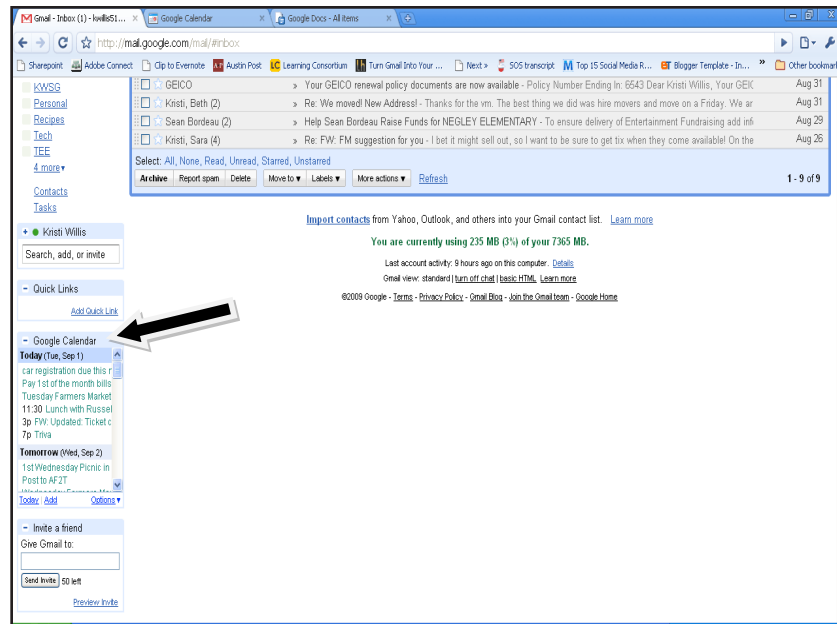
1. Under the My Calendars section, click on the Tasks option to view your Tasks that are due that day at the top of your calendar under the All Day Events.



2. Click on the Settings option in the My Calendars section to open the calendar options. Click on the General tab and change the following items:
 - a. Change the Default View option to Day.
 - b. Change the Automatically add invitations to my calendar option to Yes, but don't send event reminders until I have accepted.
 - c. Click the Save button.

You can view your Calendar from your Gmail window by adding the Google Calendar Gadget. To add the Gadget:

1. From the Gmail window, click on the Settings tab.
2. Click on the Labs option.
3. Scroll down to Google Calendar gadget and click Enable. The calendar will appear under the Chat window in Gmail.



Using the 4D's with Gmail

Now that your views are setup, it's time to clean out your Gmail inbox using the 4D's:

- Delete or file
- Do it
- Delegate
- Defer

Delete

When you delete a message in Gmail, it moves to the Trash where it will remain until you empty the trash. To empty the Trash:

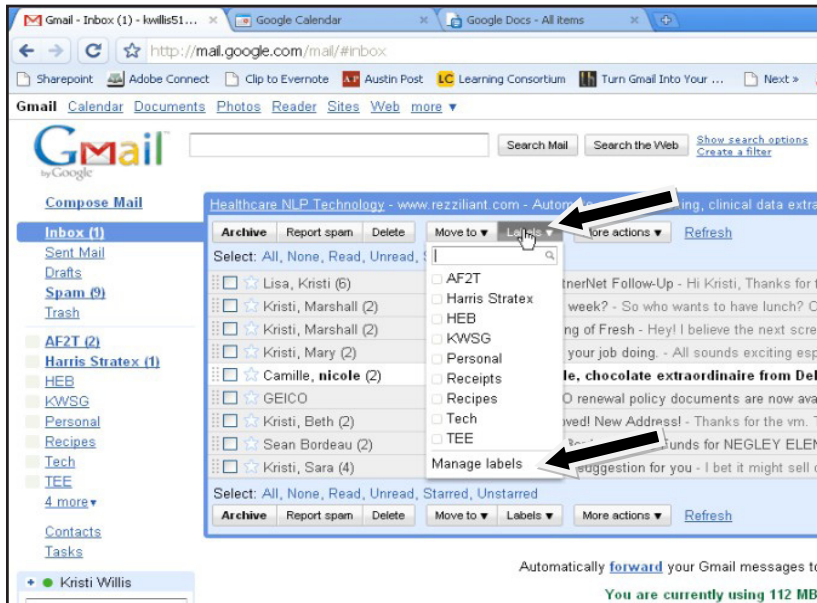
1. Click on the Trash link.
2. Click Select All. If you have more than one screen of items in your trash, an option will appear above the first message that gives you the option to select all of the items in your trash at one time. To empty the trash more quickly, click the option.
3. Click the Delete Forever button.

File

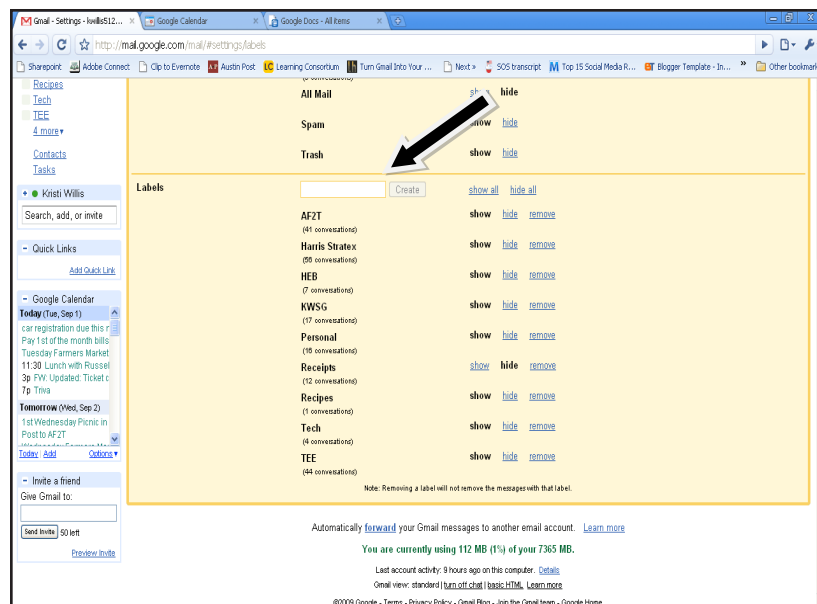
Gmail does not use the traditional folder structure used by some e-mail tools. Instead, it uses labels to allow you to group similar messages together. You can move e-mails from the inbox to a labeled list so that you can find them when you need them.

To create labels:

1. Click the Labels button at the top of the inbox.



2. Choose Manage Labels.
3. Enter the name of the label you would like to create in the Labels text box and click Create.



4. Click on the Inbox link when you are finished to return to your Inbox.

To apply a label:

1. Select the message you want to move to a labeled list.
2. Click the Move to button.
3. Select the name of the list. The e-mail will be moved to that labeled list.

To view the contents of a labeled list:

1. Click on the list name on the left-side of the Gmail screen.

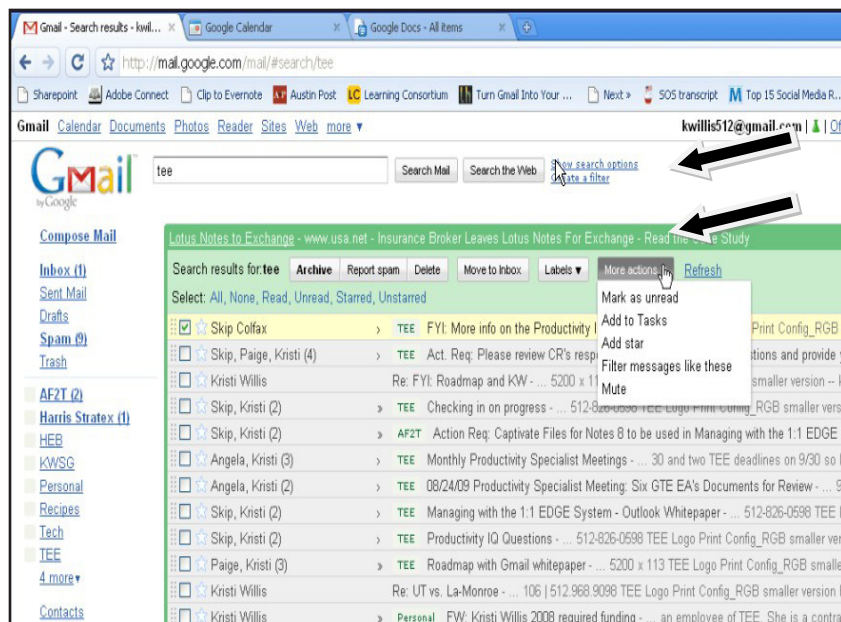
Do It!

If you can do the action in two minutes or less, take action now and then delete or file the message from your inbox.

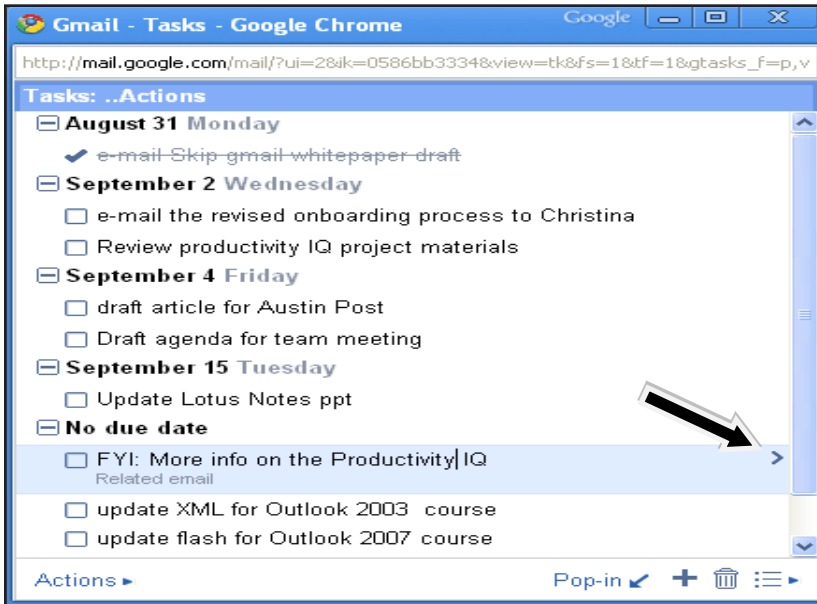
Delegate

When you receive an e-mail that needs to be delegated to someone else, forward that action to the other person with clear instructions on how and when to complete that task. You can then track that item in your Waiting For list by adding it to your Task list.

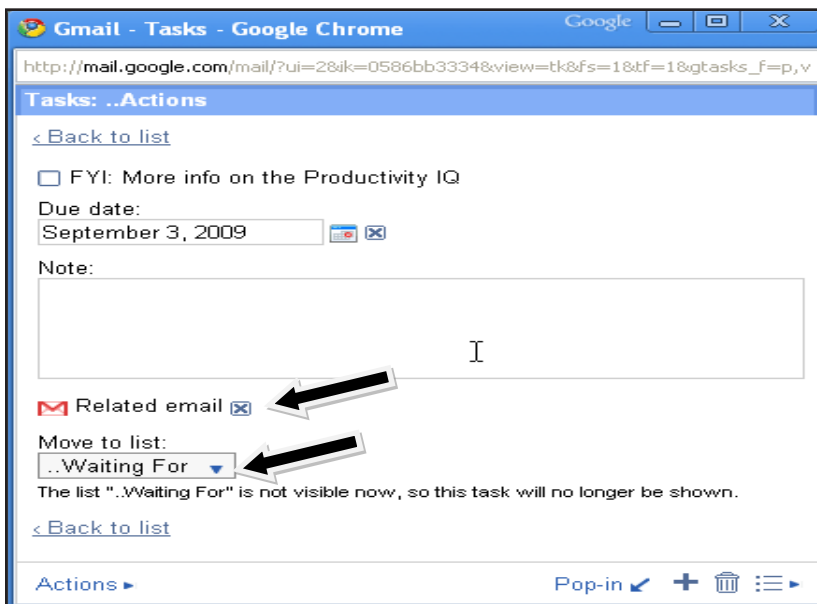
1. Send the e-mail with detailed instructions of how and when to complete the task to the person to whom you are delegating the action.
2. Click on the Sent Mail link.
3. Select the message from the list and click on the More Actions button.



4. Choose the Add to Tasks options.
5. Click on your Task list and find the task in the list.



6. Click the arrow on the right side of the task to open the edit window.
7. Select a due date if there is one and change the Move to List option to ..Waiting For. Notice that the e-mail includes a link to the e-mail you used to create it. You can view that e-mail from the task by clicking on the Related E-mail link.



8. Click the Back to list option to return to the main Task list.
9. Return to the Sent Mail view and uncheck the e-mail you selected.

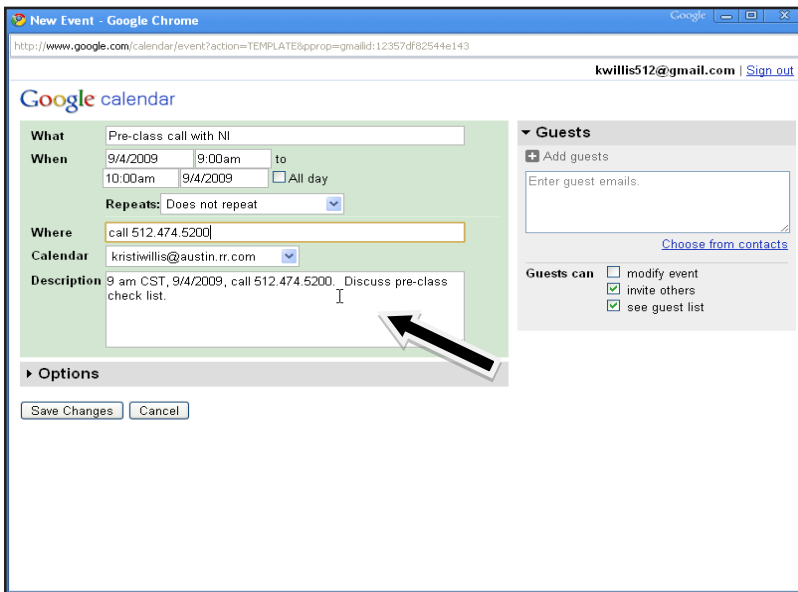
Defer It

You can easily defer actions to your Task or Calendar from the Gmail inbox. To defer an item to the Task list:

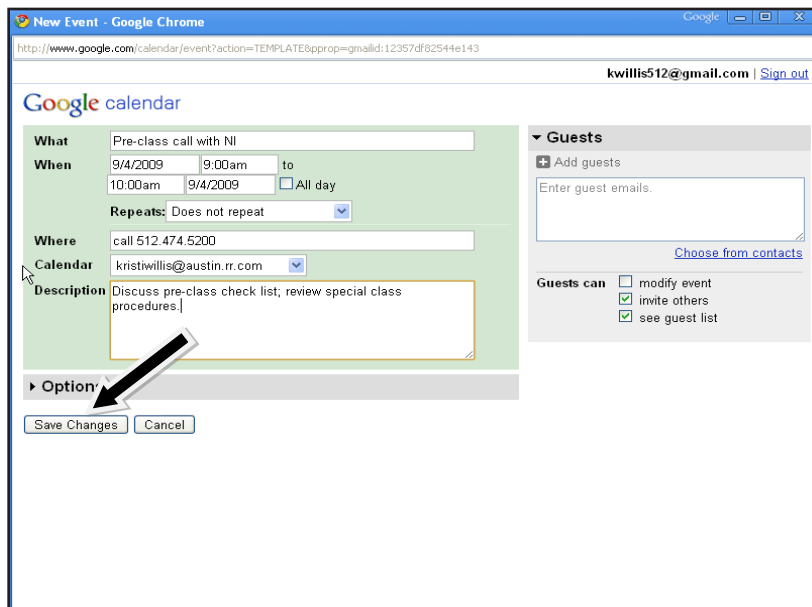
1. From the e-mail, Click on the More Actions button and choose Add to Tasks.
2. Click on your Task list and find the new task in the list.
3. Click the arrow on the right side of the task to open the edit window.
4. Select a due date if there is one and change the Move to List option to the appropriate list name (...Projects, ..Actions, etc.). You can view that e-mail from the task by clicking on the Related E-mail link.
5. Rename the subject to reflect the action that needs to be taken.
6. Click the Back to list option to return to the main Task list.
7. Return to your inbox and move the message to the appropriate labeled list. You do not want to delete the message or your link from the Task window will not work correctly.

You can also create an event from an e-mail. Unfortunately, Gmail does not create a link to the e-mail or copy the text from the e-mail to the event so you do need to copy any relevant info from the message to the event. Use these steps to create an event from an e-mail:

1. From the e-mail you want to add to the calendar, highlight the relevant text from the body of the e-mail, right-click and choose Copy from the menu.
2. Click the More Actions button and choose Create Event.
3. Right-click in the Description box and choose Paste.



4. Complete the event details as needed and remove unnecessary text from the Description text box.



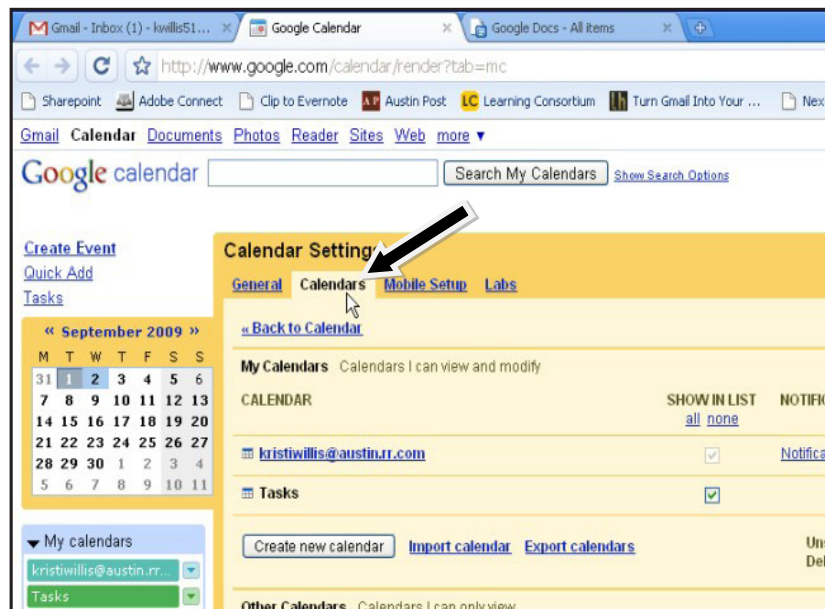
5. Click Save Changes to save the event to your calendar. Close the Create Event window.
6. Delete or move the e-mail as needed from the inbox.

Daily Warm-Up

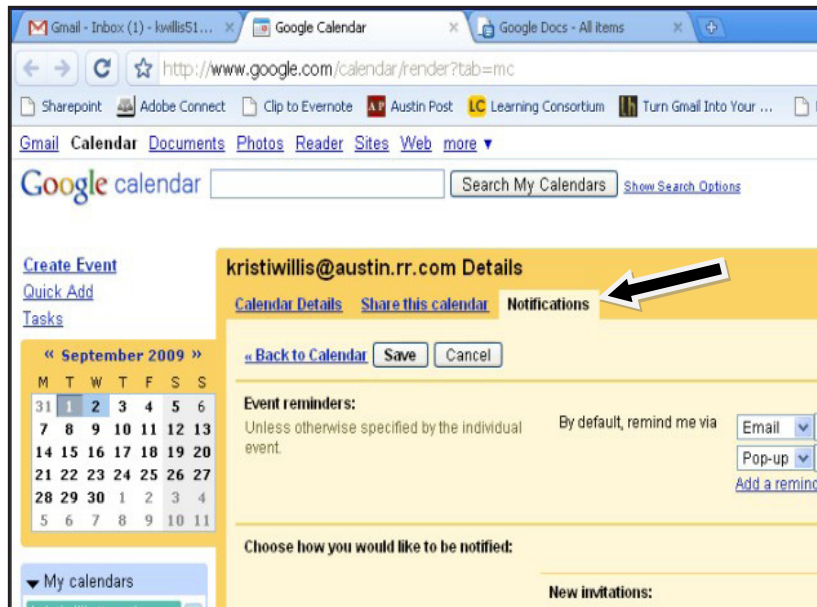
As part of the EDGE system, you learned to start your day deliberately with a quick review of what is ahead of you that day before diving into your e-mail inbox and answering messages. Google Calendar can help you with this process by e-mailing you a Daily Agenda, a snapshot of your day ahead including your calendar events and tasks that are due that day.

To set up the Daily Agenda e-mail:

1. View the Google Calendar.
2. Click the Settings option.
3. Click the Calendars tab.



4. Click the Notifications option to the right of your calendar name.



5. Check mark the Daily Agenda item under the e-mail column.
6. Click the Save button to save your changes.

Google Calendar will now e-mail you a list of your daily activities for you to review so that you can start your day deliberately.

With Gmail, the Google Calendar and Tasks, you can easily apply the EDGE system to your personal commitments so that you are as productive at home as you are at work. Now that's effective!