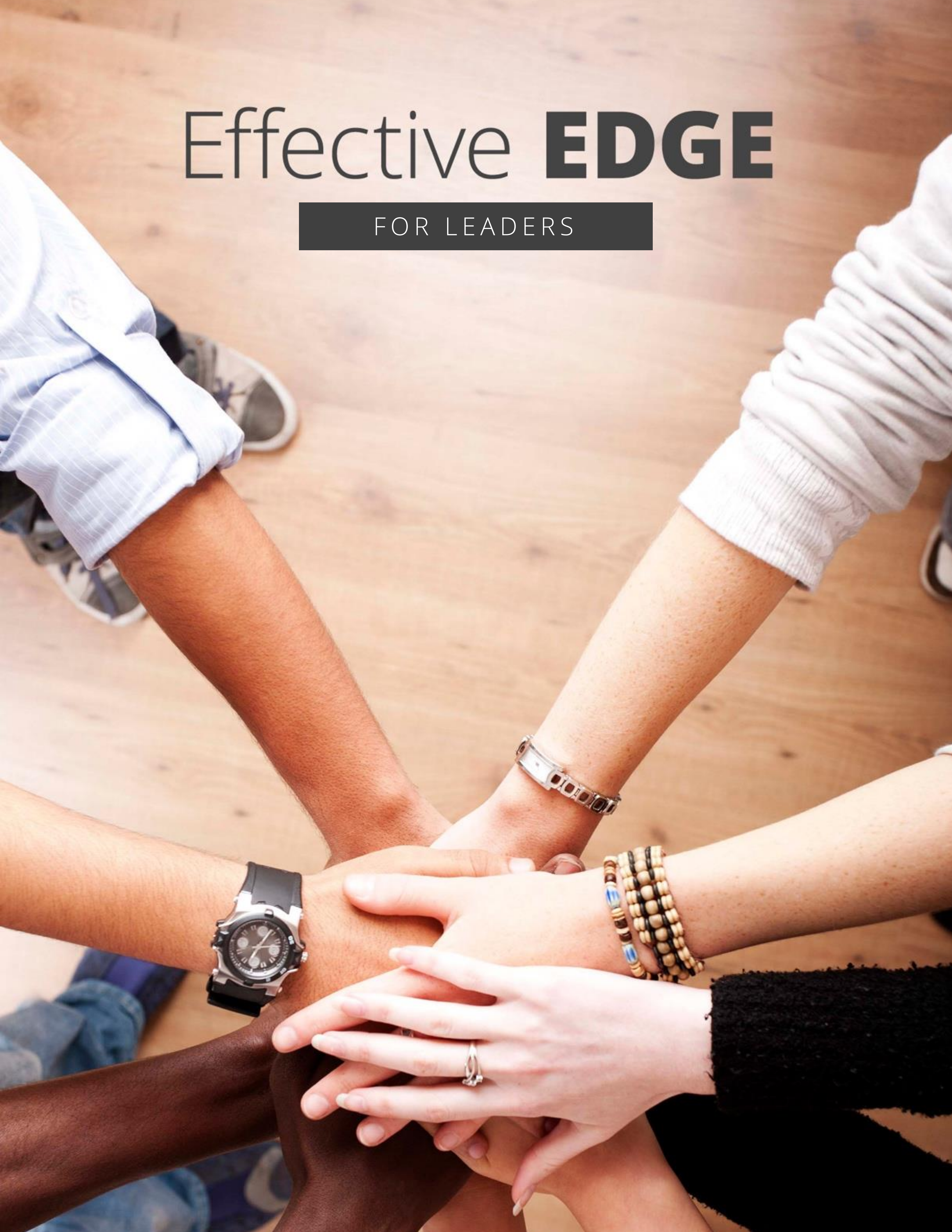
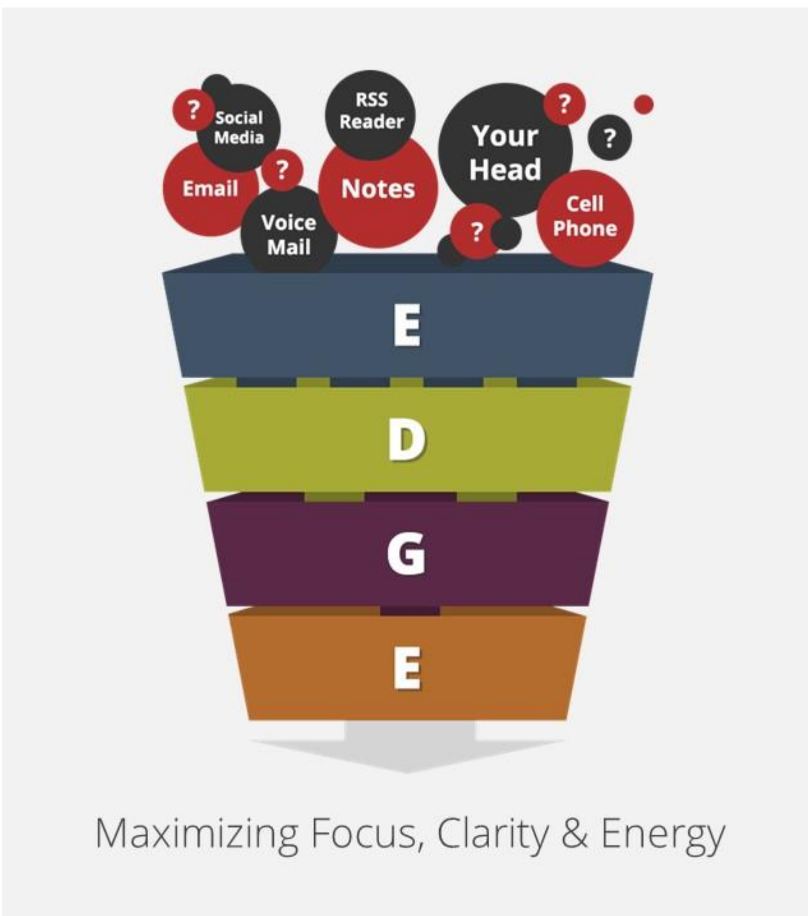
Effective **EDGE**

FOR LEADERS



"Life happens on the edges. We can't find the next place on our journey until we discover the edge between the place we are and the place we need to go. Something ends and something else can begin only along an edge. Along edges we find and feel the penetrating and incisive qualities that give definition to our life. Our interface with life is sharpened at the edge. We discover our greatest zest and our most keen desires at the edge. "

- Pilgrim Wheels: Reflections of a Cyclist Crossing America



The EDGE Model

EMPTYING
Phone - In/Out Tray
Note taking - Email

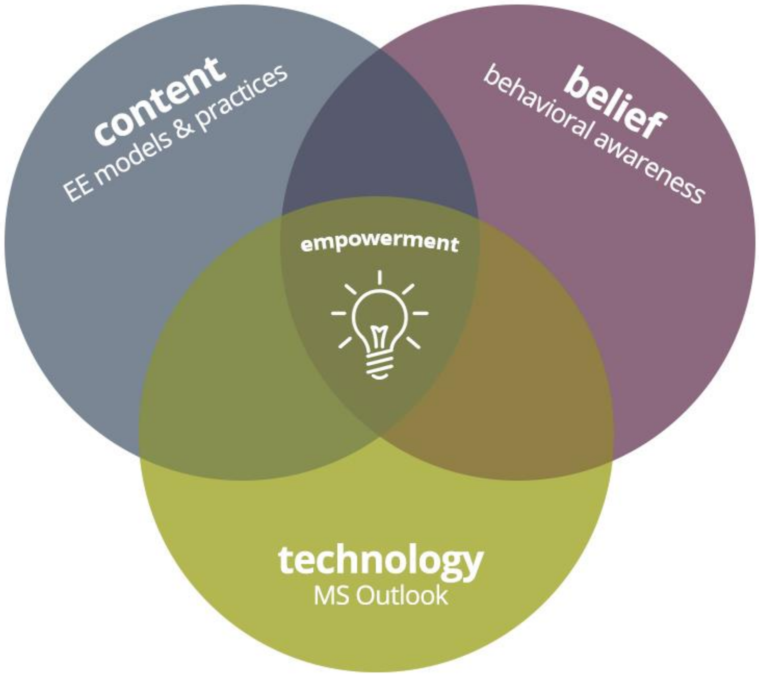
DECIDING
Using Deciding Model
(The 4 Ds)

GROUPING
Calendar & Tasks

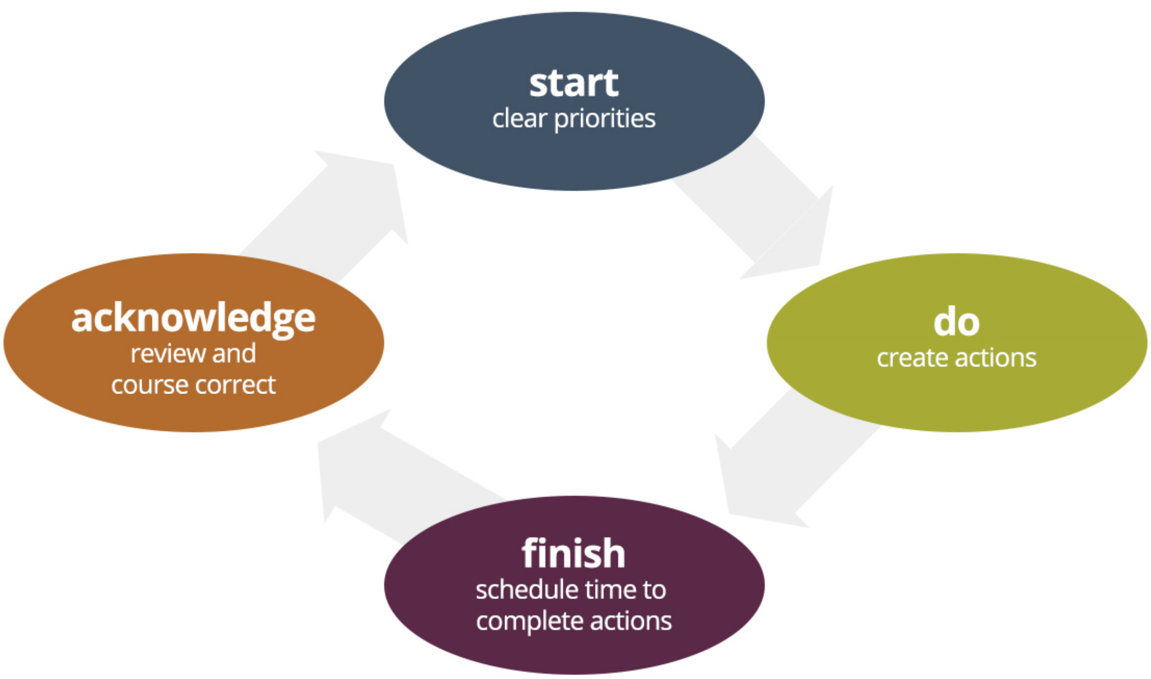
EXECUTING
Reviewing & Doing

Read the HBR Article citing until you have the SKILLS productivity tools are useless.

How We Do It



The Cycle of Performance



Removing E-mail Distractions

[Outlook 2010/2013/2016]

Click on the File tab. → Click on Options. → Click on the Mail option. → Under Message Arrival section, uncheck all 4 boxes. → Click OK to close.

Read the Telegraph article citing study about email notifications causing anxiety.

Dashboard View

1. View the Calendar.

2. Click on the HOME tab. Select the Week View Icon.

3. Click the VIEW tab. Click the TO-DO BAR button and check NORMAL. Uncheck APPOINT - MENTS and uncheck QUICK CONTACTS (if showing).

4. Click the DAILY TASK LIST button and select Normal.

5. 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 adjust to desired width.

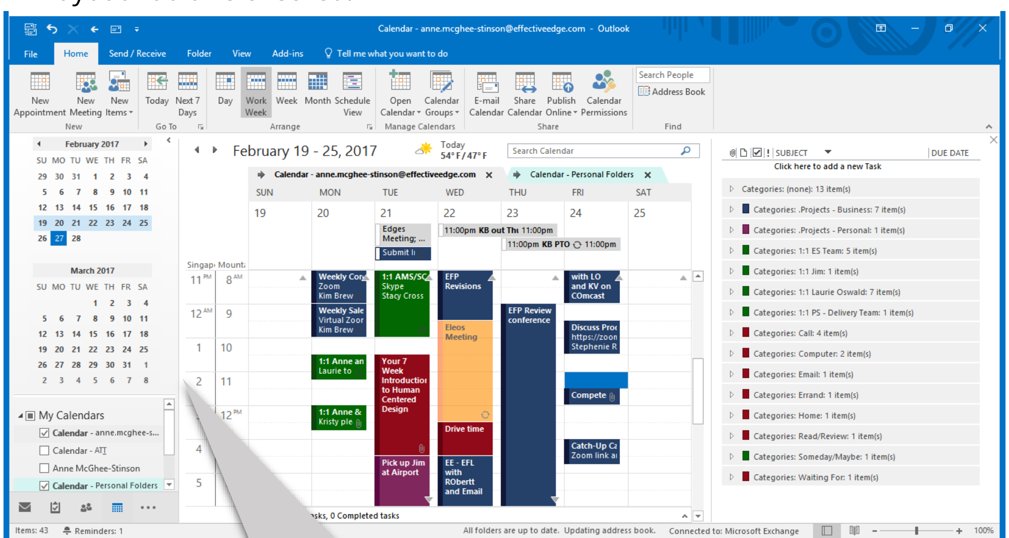
6. In the To-Do Bar panel, right click on the word TASK SUBJECT, or on the words CLICK HERE TO ADD NEW TASK. Select VIEW SETTINGS from the menu. This will open an advanced view settings dialog box.

7. Click the COLUMNS button to change the default column headings:
   a. Highlight all the columns in the SHOW THESE COLUMNS 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: ATTACHMENT, COMPLETE, ICON, PRIORITY, 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.

8. 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.

9. 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.

10. Click the OTHER SETTINGS button to get flexibility in column sizing:
    a. Uncheck the top right box AUTOMATIC COLUMN SIZING and press OK.
    b. Under Other Options uncheck Always Use Compact Layout – make sure Single Line Layout Radial is checked.



Working internationally?
Add a second-time zone
by right clicking on the

Read the Fast Company Article on workplace predictions for the next 20 years

Create a Task

Press CTRL + SHIFT + K or double-click in the Task List in the space that says 'Click to Add a New Task'

Fill in the Subject box.

Set a Due Date for the Task, if the task meets the criteria for having a due date.

Click Save and Close to save your changes to the Task.

Mind Sweep Trigger List		
Meetings that need to be set/requested	Who needs to know about what decisions?	Legal, real estate, zoning, taxes
Projects started, not completed	Significant read/review	Builders/Contractors/Suppliers
Projects that need to be started	Travel	Areas to organize/clean out
Commitments/promises to others	Research – need to find out about…	Financial
Communictions to make/get	Upcoming events	Vehicle repair/maintenance
Initiate or respond to: Phone calls Emails Letters/Memo	Administration Legal issues Insurance Personnel Policies/procedures	Waiting for… Information Delegated tasks/projects Completions critical to projects Reimbursments
Other writing to finish/submit • **Reports** • **Evaluations/reviews** • **Proposals** • **Articles** • **Promotional Materials Manuals/Instructions** • **Re-writes and edits**	Systems • **Phones** • **Computers** • **Utilities** • **Filing** • **Storage** • **Inventories** • **Supplies**	Customers • **Internal** • **External** • **Marketing** • **Promotion** • **Sales** • **Customer Service**

Ctrl Shift K will make your day!

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

Research on the benefits of mindfulness is explosive. See Article on what science is teaching us about the benefits of mindfulness practices.

Download your free Mind-Sweep trigger list here.

Setting up Categories

Recommended Categories		
Planning	**Managing**	**Actions**
.Project Plans – Business .Project Plans – Personal	1:1 ____________ (e.g. boss, directs, family) 1:1 Team (e.g. Sales Team, Staff Meeting, Project Team etc.)	Actions Calls Emails Errands Home Read/Review Someday Maybe Waiting For

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.

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.

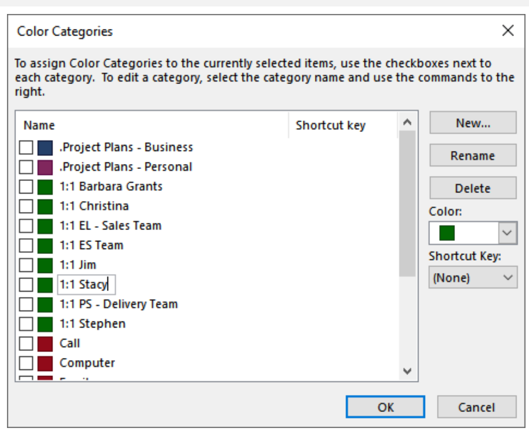
To Categorize a Task:

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.

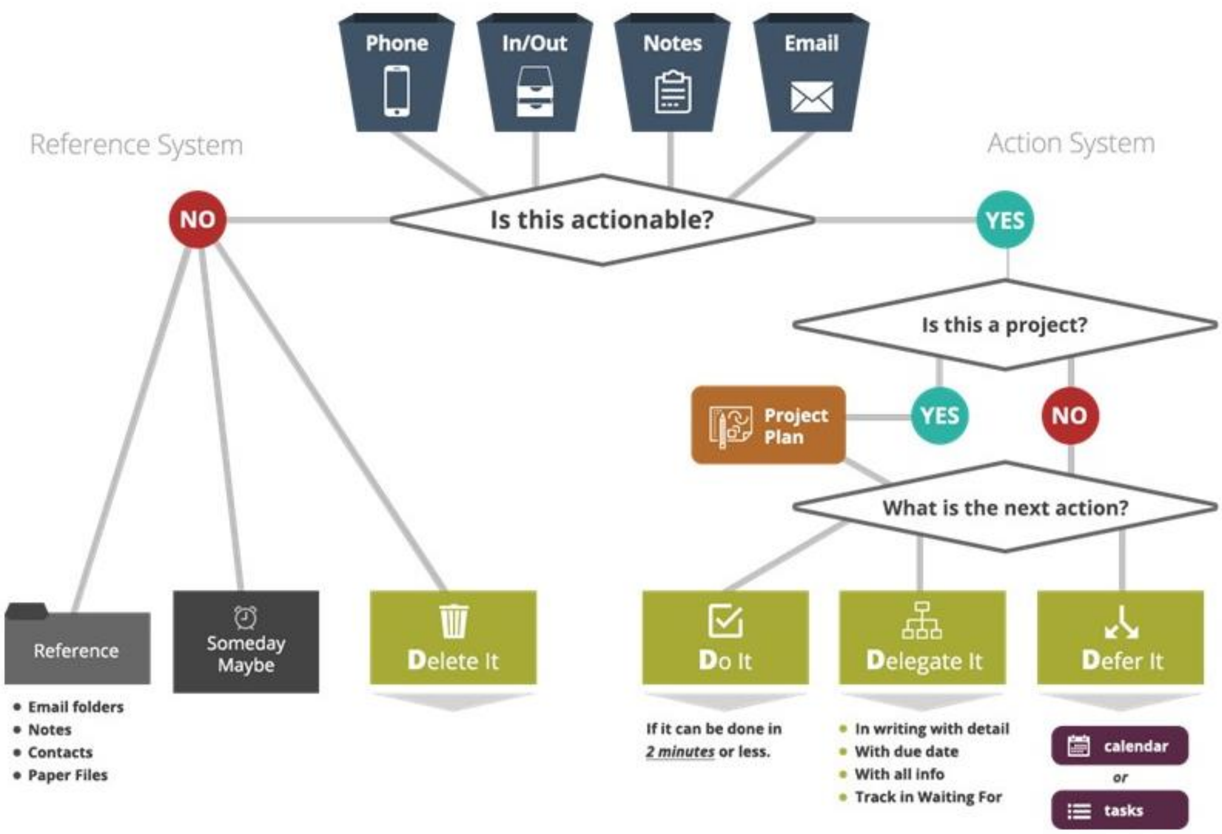
-OR-

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

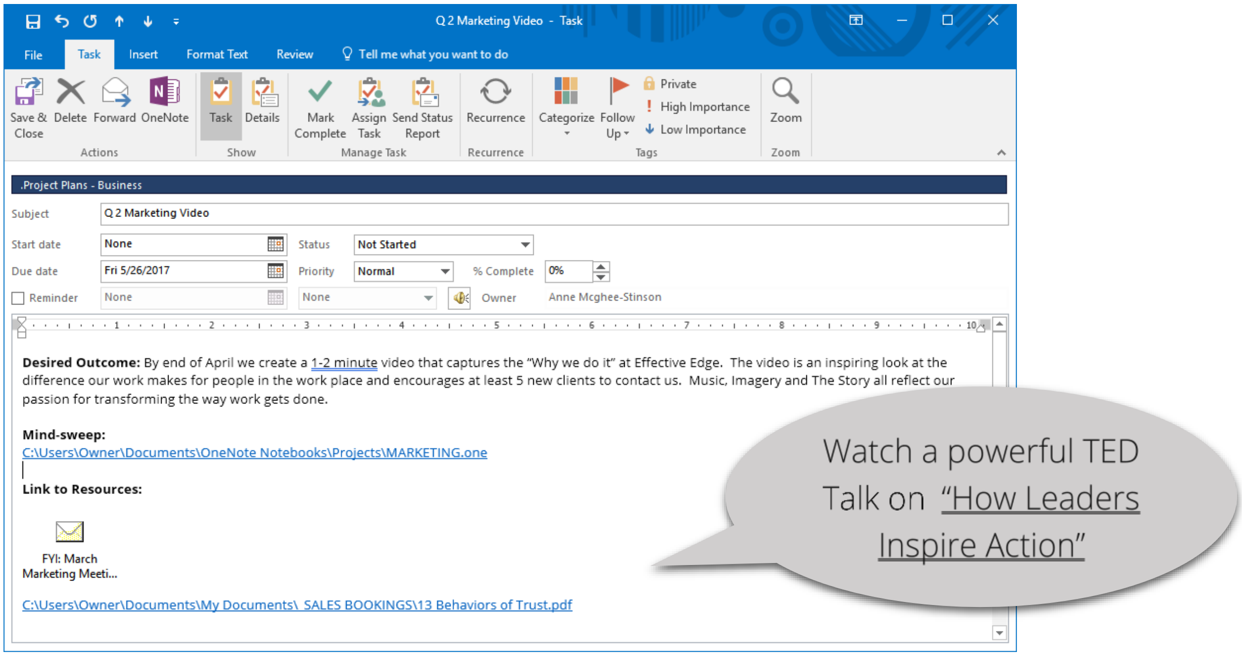
Read more information from
Fast Company on
The Cost of Switch-Tasking.



The EDGE **DECIDING** Model



Projects



Five Steps to Getting the EDGE on Projects

1. Write the name of your project in the subject line. Drop down Categories and Categorize under .Project – Business or .Project – Personal.

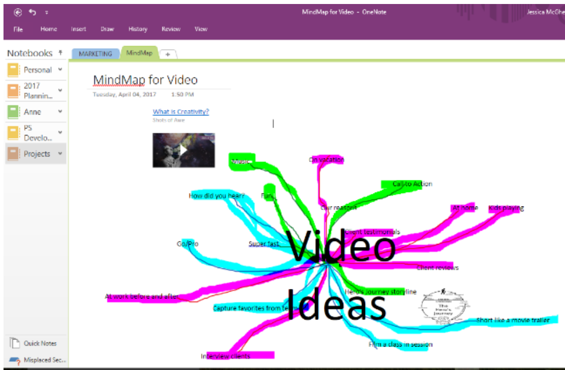
2. Write the Desired Outcome Statement – A clear statement of what the project will look like and feel like when it is accomplished.

3. When planning your project remember to perform a Project Mind Sweep – You can do this right in the body of the task or even do a Mind-Map in OneNote and then link to it from here.

4. Insert Hyperlinks to necessary resources: INSERT TAB --- Hyperlink, Attach File or Outlook Item
   - SharePoint - e.g. Project Plan for sharing with the team.
   - OneNote – e.g. Mind Sweep, Mind-Map or Project Meeting Notes
   - Documents – e.g. Budget
   - Folders – e.g. Project Folder rather than single document
   - Email – Specifications on your project came in an email.

5. Create a Next Action in a new Task Item and categorize in one of your Action Categories.
   - CTRL+SHIFT+K
   - Make sure your subject line is CLEAR, ACTIONABLE and perhaps even has the project name in the subject line to make connecting your Action with your Plan easier.

OneNote



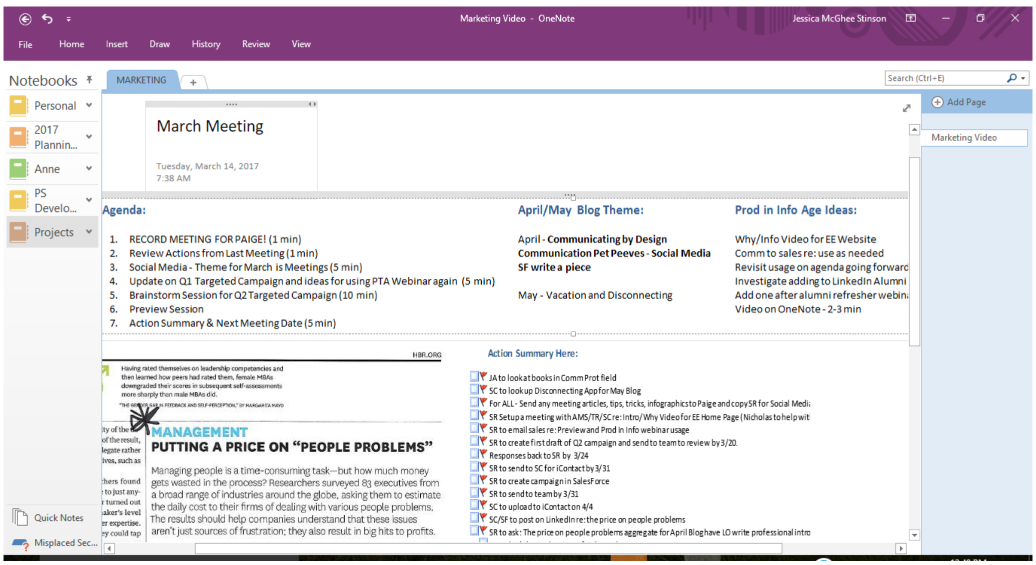
To Plan a Project in OneNote

Mind-Sweep or Mind-Map your initial thoughts around your project

DRAW feature connects related components with color.

INSERT

- File to attach a particular document
- Screen Clipping to insert a great screen shot
- Online Pictures and Online Videos so the visuals are right there
- Hyperlinks to other websites
- Audio/Video recordings



Maintaining Meeting Notes in OneNote

Select HOME Tab

- Drop down Meeting Details from the Ribbon
- Select the Meeting (Pulls from your Outlook Calendar) that you are keeping notes on.

Create Actions that automatically link to your EDGE System in Outlook

- Type the Action
- Click on the Action and Tag as To Do – This will automatically appear on your Outlook Task List in the None Category

Find your "Tagged Items" by Selecting HOME tab --- Find Tags.

Email Tips & Tricks

To View Your Inbox by Conversation [OUTLOOK 2010/2013/2016]:

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 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 Clean Up a Conversation [OUTLOOK 2010/2013/2016]:

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.

A fun look at email with Dilbert Comics

To Ignore a Conversation [OUTLOOK 2010/2013/2016]:

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 menu and select the Category from the drop-down list.

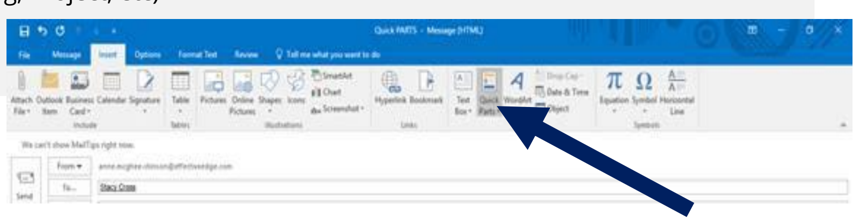
To Filter your Inbox [OUTLOOK 2010/2013/2016]:

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.

Quick Parts

Quick Parts feature saves frequently used templates so there's no need to re-type them again and again.

1. Type out a Template that you wish to use (Meeting Request, Project Plan, Report, PASS Model etc.…)
2. Highlight the Template
3. Select your "Insert" Tab
4. Drop down Quick Parts
5. Select "Save Selection to Quick Part Gallery"
6. Name your Quick Part (ie. Meeting, Project, etc)
7. Select OK
8. Use as needed to auto populate



The PASS Model	
Purpose	What is the **Purpose** of this email?
Action	What is the **Action** and by when?
Supporting Information	What **Supporting Information** do you need?
Subject Lines	Is my **Subject Line** clear?

Some companies are eliminating email altogether.
Read about it in Fast Company, BBC, and HBR.

And check out this HBR article on how
bad writing is destroying your company's productivity

Communication Protocols

	Chat/Text	Email	Collab Tool (SharePoint)	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

A Communication Protocol helps teams to know what method of communication is appropriate for various types of communication. The chart above is a simple example of a team's decisions around how they will communicate.

Read the HBR article on the costs of constantly checking email

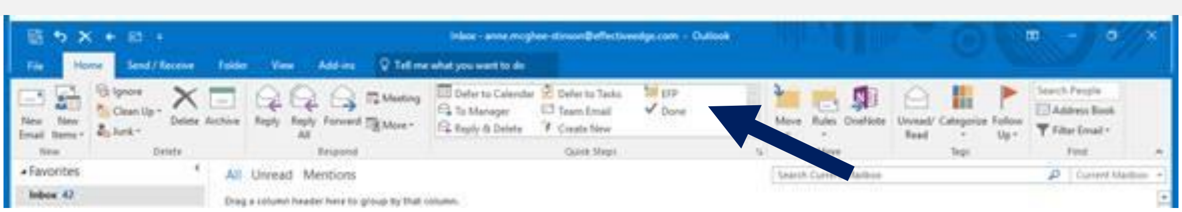
Quick Steps

To Create a Quick Step shortcut Defer to Task [OUTLOOK 2010/2013/2016]:

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.

To create a Quick Step shortcut Defer to Calendar [OUTLOOK 2010/2013/2016]:

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 Calendar.
4. Click the down arrow next to the Actions list and choose CREATE an Appointment With Attachment from the menu.
5. Click the add action button.
6. Select Delete Message from the menu.

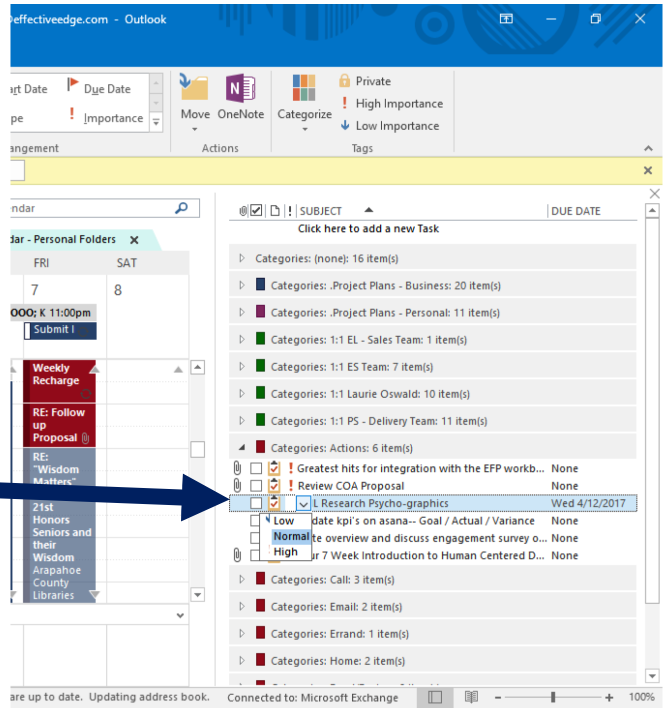


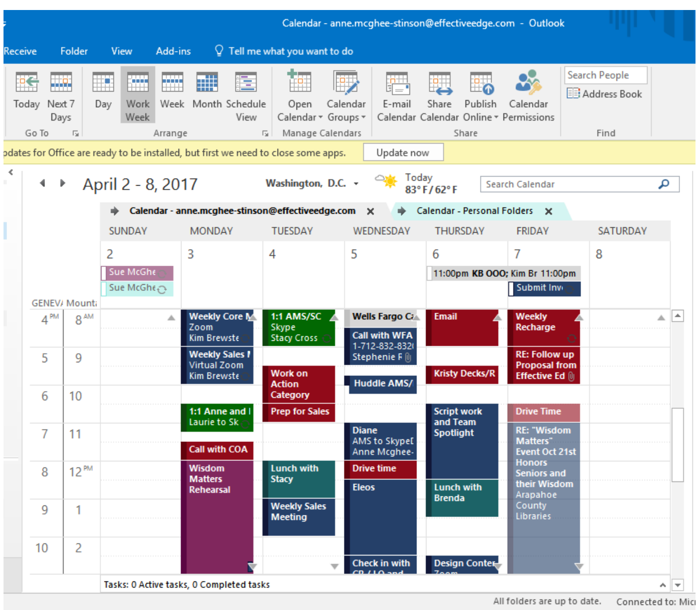
Use your Calendar to plan your time more effectively

Prioritize your Tasks

Before you can plan your time effectively, you will have to prioritize your Task List. Not everything on the Task List will make it onto the calendar.

1. View your Dashboard view (Weekly Calendar and Task List).
2. Expand each Action Category one at a time.
3. Prioritize by adding Due Date or Priority value.





Plan your week realistically

Now that your Task List is prioritized you can calendar the most important items. You know the "rhythm" of your day better than anyone, so build that rhythm into your calendar.

1. RIGHT CLICK and DRAG the MOST important items from your Task List to your calendar to schedule time to complete. OR
2. Create block of time on your calendar to complete critical items on your list.
3. Leave enough "white space" on your calendar to accommodate unforeseen events/emergencies etc..
4. Remember to calendar "prep time" in advance of meetings, presentations etc.
5. Remember to calendar "catch up time" following travel or extended absences.

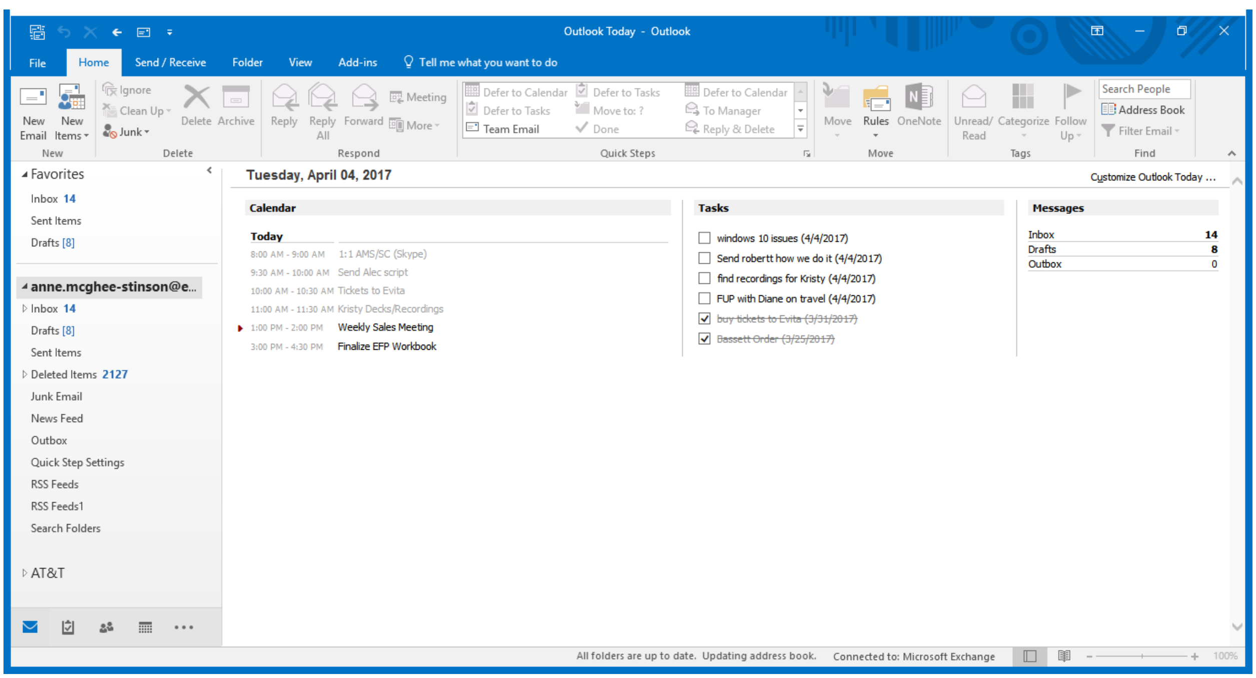
Outlook Today

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

To Set Up Outlook Today:

Now that your calendar is planned and your time prioritized…Outlook Today becomes your new default view for starting your day and it is a great place to come back to after an unexpected interruption to get re-focused on what is most important.

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.



TED TALK worth viewing:
Yves Morieux: Six rules to simplify.

Weekly Recharge – The Secret to Success	
Do a mind-sweep 5 mins	• Ctl Shft K will make your day! • Clear your mind by creating a task for each action item that you are carrying around in your head.
Empty & organize all collecting points 10 mins	• Empty all other collecting points and categorize appropriately. • Clear the V.I.N.E. (Voice Mail; Inbox; Notebooks; Email). • Add action items to your task list. • File reference items, and discard everything else.
Review your Calendar 10 mins	• Acknowledge completions, reprioritize /re-calendar uncompleted items that were not completed, and renegotiate anything that may have fallen through the cracks. • Capture any new action items in your Task List. • Review recurring appointments (e-mail processing, meeting prep, travel, exercise, lunch, etc.) • Assess how appointments are working for you and adjust as necessary.
Review your Project Category 15 mins	• What have you completed? • What next actions need to be completed in the next five to seven days to keep your Projects moving forward? • Capture these tasks and categorize or calendar as appropriate.
Review your 1:1 Team & Manager Categories 5 mins	• Acknowledge completions. • Review, plan and prioritize discussion points for upcoming 1:1 meetings.
Prioritize & Plan Action Categories 10 mins	• Review and prioritize the items in each of your Categories by expanding and reviewing the contents of each category. • Acknowledge completions. • Establish priorities using either a due date or other form of prioritization, and then schedule work time on your calendar to complete all priority items.
Ask yourself the following Questions 5 mins	• Is my calendar realistic? • Am I delegating appropriately? • Do the actions and meetings that I've scheduled on my calendar support completing my priorities? • Is my time focused on my priorities? • What story is my calendar telling me in terms of my work/life balance?

Podio created these charts to depict how famous creative people structured their days. For many of them a good part of the day is not spent on work!

Quick Keys

Ctrl + Shift + k	• New Task (works in OneNote too!)
Ctrl + Shift + m	• New Mail Message
Ctrl + Shift + a	• New Appointment
Ctrl + Shift + c	• New Contact
Ctrl + Shift + n	• New Note
Alt + s	• To save and close an Outlook item
Ctrl + a	• To hightlight all text
Shift + Delete	• Permanently delete

There is so much more to share. We've done our homework on the science behind WHY Effective EDGE is so effective. Enjoy these recent articles that may help deepen your productivity practices!

[Until you have the skills; productivity tools are useless]

[Great Companies Obsess over Productivity not Efficiency]

[Bad writing is destroying your company's productivity]

[Your brain has a delete button; here's how to use it]

[The six step process to get your brain to focus]

[How to cut your email time in half]

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