Effective EDGE

FOR PROFESSIONALS

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"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



Maximizing Focus, Clarity & Energy

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 <u>HBR Article</u> citing until you have the SKILLS productivity tools are useless.

Create Shortcut Keys in Outlook for Mac

Shortcuts enable you to create a quick email, task, note or contact from your keypad.

- 1. Click on System Preferences Icon
- 2. Click on Keyboard to Open
- 3. In the Keyboard Window

3).

4).

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Keyboard Ac Text boxes and lists only
 All controls

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- a. Click on Shortcuts Tab
- b. Click on App Shortcuts
- c. Click on All Applications
- d. Click on + sign to open the All Applications window

Keyboard



Create Shortcut Keys (Cont)

4. Drop down the All Applications Menu

5. From the All Applications List Choose Microsoft Outlook

6. In the Keyboard Shortcut Window

- a. In the Menu Title box type Task
- In the Shortcut box type CMD b. + Shift + K
- click Add button c.







Create Shortcut Keys in Outlook for Mac

Create Shortcut Keys (Cont)

Click the + sign to add the following additional Shortcuts:

a. For new email in Menu Title Type: Email

in the Shortcut box type CMD + Shift + M

b. For new appointment in Menu Title Type: Appointment

in the Shortcut box type CMD + Shift + A

c. For new note in Menu Title Type: Note

in the Shortcut box type CMD + Shift + N

d. For new contact in Menu Title Type: Contact

in the Shortcut box type CMD + Shift + C

NOTE: It is very important to type the Menu Title words EXACTLY as you see in red above. Otherwise Outlook will not recognize the Shortcut!

	Keyboard						
Application:	Microsoft Outlook ♀						
Menu Title:	Email						
	Enter the exact name of the menu command you want to add.						
Keyboard Shortcut:	企業M						
	Cancel Add						
	Keyboard						
Application:	Microsoft Outlook						
Menu Title:	Note						
	Enter the exact name of the menu command you want to add.						
Keyboard Shortcut:	∂ ೫N						

	Keyboard						
Application:	Microsoft Outlook						
Menu Title:	Contact						
	Enter the exact name of the menu command you want to add.						
Keyboard Shortcut:	企業C						
	Cancel Add						

Cancel

Add

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Removing E-mail Distractions

[Outlook for MAC 2016]



Read the <u>Telegraph article</u> citing study about email notifications causing anxiety and this Fast Company Article on <u>workplace predictions for the next 20 years</u>

Dashboard View

- 1. Open up the Task List.
- 2. In the Navigation Pane Right Click on Tasks
- 3. Click on Open in New Window
- 4. When new outlook window opens change the view to Calendar
- 5. Resize Task List and Calendar so they are side by side Calendar on the Left and Task List on the Right
- 6. To save your dashboard view when exiting Outlook, Select Outlook from the top menu and then select Quit Outlook.

9 6 6 명 수 문 Calendar Q. Starch 9 6 수 문 Searching Tasks (Selected Categories)	Q Search
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November 2019 * (•• Monday, November 18, 2019 vista, CAC 🍎 Today:	Due Date Categories ^
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2 PM	
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4.PM	



Create a Task

Click on the *Task icon at* the bottom of navigation pane to view the Task List



Enter a subject

Click SAVE and CLOSE

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				

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 <u>benefits of mindfulness practices</u>.

Download your free Mind-Sweep trigger list here.

Customize Your Task View

To Set Up Task List View:

- 1. Go to Task View.
- 2. Right click on the Column Heading Bar
- 3. Select: Categories, Completed Status, Due Date, Item Type Icon, Recurring, and Title
- 4. Select Arrange By and on the resulting drop down select Categories

This view will enable you to see what Category you are in and be able to organize and prioritize from one centralized view.

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Home Organize Tools		0
New New New Complete	Image: Nepty Repty Rep	
v robertt.young@effectivee	√ 0 47 Title Account Due Date	Categories
Tasks	✓ ✓ Categories No Due Date	
	✓ ✓ Call Dan Ballew regardi Date Completed e publishing suite No Due Date	
> On My Computer	✓ Develop new training for trait ✓ Due Date No Due Date	
 Smart Folders 	✓ send email to Lori Cavanaugi Folder No Due Date	
Project Plans Business	✓ ✓ Item Type Icon ✓ This is an action Person	
Actions	V Develop new training for trai	.Project Plans Business
Calls	✓ Develop One Hour On Demai Recurrence Type Feb 25, 2020	.Project Plans Business
- Waiting For	V I Developed a one hour on de Recurring people were able Nov 20, 2019	.Project Plans Business
🗀 1:1 Team	✓ Find out whast this is all abc Start Date No Due Date	Actions
1:1Anne	✓ Googlee t ofind out if you ca	Actions
Due Today	Read MasterClass: Become Arrange By Account Account Contaction	Actions
- Errands	✓ Resond to Aaron re: COmcas Restore to Defaults Categories Completed Status Date	Actions
None	Review Attachment: Zoom Process Guide Date Modified Pate	Actions
Overdue	✓ Send Steve the roster of participants for EDGE Class from Monc Due Date ■ Date	Actions
Read/Review	 ✓ Sign up for virtual 7 Stpe prormg ✓ Item Type Icon ■ Date 	Actions
Someday Maybe	✓ This an action item Priority a Date	Actions
	Update Sales Forrce CaabeAR: Sales Force Calendar Recurrence Pattern Recurrence Type), 2019	Actions
	View this 5 min video on How We Learn	Actions
	✓ Watch Best Year Yet for Individuals - Daisy Brand Marketing Team Start Date ■ Date	Actions
	✓ your funds will be in your account tomorrow Title), 2019	Actions
	✓ Bill Lowe at AT&T re: next steps with DirecTV pilot ✓ Ascending	Calls
	✓ Call Danny at Chaseabout my wifes IRA No Due Date	Calls
	✓ Dan Ballew regarding the latest tips and tricks in adobe publishing suite Nov 27, 2019	Calls
	✓ Dr Chang re-schedule appointment No Due Date	Calls
	✓ I Dan Ballew regarding the latest tips and tricks in adobe publishing suite No Due Date	Calls
	✓ talk to karen sampson re: her setup No Due Date	Calls
	V Tomorrow! NHRA SoCal Leadership Summit Featuring Keith Ferrazzi & Ann Rhoades No Due Date	Calls



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. From the Task view, click on the CATEGORIZE button on the ribbon.
- 2. Choose EDIT CATEGORIES
- Click the + button to add a new category. Type the category name in the text box and click on the color box to change color, if desired. Choose OK to save the category.
- 4. Checkmark the Show New Categories in Navigation Pane to have the Category appear in the Task List Navigation Pane.
- 5. Repeat these steps for each category you want to create.
- 6. When you have entered all the categories, close the dialog box to save your changes.

To Categorize a Task:

- 1. Click on the task in the Task List.
- 2. Click on the CATEGORIZE button on the ribbon on top and select the appropriate category. OR
- 3. You can also simply right click on your selected Task and choose Categorize and select your Category.

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

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View By Category

- 1. Open Smart Folders in your Task view by clicking on the drop-down arrow.
- 2. On the main title bar, click in the Search window in the upper right corner.
- 3. On the ribbon, click the Advanced button.
- 4. Where it says "Items Contains" click on the drop-down arrow on the right to select Category.
- 5. Select Category name.
- 6. Click Save Search.
- 7. This Category will now appear in your task list as Untitled. Right click on category name and select Edit Type in category name.
- 8. Click on Exchange Account Name before repeating this process.
- 9. Repeat this process for all category names:
 - a. .Project Plans Business
 - b. .Project Plans Personal
 - c. 1:1 ___
 - d. 1:1 Team
 - e. Actions
 - f. Calls
 - g. Emails
 - h. Errands
 - i. Home
 - j. Read/Review
 - k. Someday Maybe
 - I. Waiting For



- None
- C Overdue
- Read/Review
- 📋 Someday Maybe



The EDGE **DECIDING** Model



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Projects	
●●● പ ちさ昔	Big Massive Project
Task Format Text	
$\begin{array}{c c c c c c c c c c c c c c c c c c c $	Attach File Insert Hyperlink
□ Big Massive Project	Recent Files
□ ♣ Due: 11/18/2019 📺 □ ♣ Start: 11/18/2019	Cash Receipt for AmFam Lunch.docx
□ ♣ Reminder: 11/18/2019, 8:00 AM	Restaurnt Cash Receipt.docx
	Robertts FINAL PC EDGE 2019.pptx
Watch a powerful TED Talk on	Budget.xlsx
"How Leaders Inspire Action"	1

Five Steps to Getting the EDGE on Projects

1. Write the name of your project in the subject line. Change the category of the Task to .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: Keep Project Task Open and Select FORMAT from the task Menu. Select Hyperlink and then find the document(s) or web location you wish to link to:

- 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

5. Create a Next Action in a new Task Item and categorize in one of your Action Categories.

- Make a new task
- 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.



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

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

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

Communication Protocols											
	Chat/TextEmailCollab Tool (SharePoint)CallVirtual MeetingIn-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



Defer Email to Task Item

- 1. Select email. Right Click on email and select Create > Task
- 2. To categorize the message for your Task list, click the Categorize button on the ribbon and select the appropriate category name.
- 3. Change the subject line to be an actionable request with an action verb
- 4. If you'd like the email attached to the Task, drag and drop it into the task window and select Save & Close.





Defer Email to Meeting or Appointment

- 1. Select email. Right Click on email and select Create > Meeting or Appointment
- 2. If the email has an attachment you need to drag the email into the appointment
- 3. Make sure the date and time is correct and the subject line is clear for the Meeting or Appointment item then send

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> All Accounts	Robertt Young	FW: One Note	e	Mon 11/18,	/19, 9:40 AM		
	SWA.VisitorMgmtAdmin@wnc	Southwest /	Open Message		9, 8:13 AM		Pi
 robertt.young@errectiveed 	ightarrow Joneson, Jen	RE: One No	Print		9, 7:29 AM		
> E Inbox 1	Will Caban	Reschedule	Reply Reply All		9, 7:14 AM		
Drafts 8	Renee Perrin	RE: Action F	Forward		9, 6:44 AM		
>	Aaron Cohen	RR by Monc	Forward As Attac	hment	9, 7:27 PM		
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Lo Junk Email 3	Kim Brewster	Call w/LO o	Sender	•	э, 4:51 PM		
Conversation History	Anne Mcghee-Stinson	Introducing	Junk Mail	•	э, 4:19 PM		
McAfee Anti-Spam	Air India Reservations	Your flight c	Priority	•	9, 11:14 PM		
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 robertty@gmail.com 	Aaron Cohen; Anne Mcghee	-Stinson; O	View Source		; 💿 Julio Arquimb	oau; 💿 Kathirasan K;	+ 5 more
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Use your Calendar to plan your time more effectively

Prioritize your Tasks first

Before you can plan your time effectively, you will have to prioritize your Task List. Not everything on the Task List is meant to have time on the Calendar. There will be times you work off your Task List alone.

- 1. View your Task List.
- 2. Prioritize each Category by adding a priority value or a due date as appropriate.
- 3. Now you can use the Smart Folder View below to view by:
 - a. Due Today
 - b. High Priority
 - c. Overdue

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v robertt.young@effectivee	✓ ○ ↓ 4 7 Title	Due Date	Categories ^
Tasks		No Due Date	
> On My Computer	 Call Dan Ballew regarding the latest tips and tricks in adobe pu. 	. No Due Date	
	Develop new training for train the trainer - Name of the Project	No Due Date	
> Smart Folders	✓ send email to Lori Cavanaugh follwo up	No Due Date	
	✓ This is an action	No Due Date	
	 Develop new training for train the trainer 	No Due Date	.Project Plans Business
	✓ Develop One Hour On Demand Module on Email Effectiveness	Feb 25, 2020	Project Plans Business
	I Developed a one hour on demand module on Email Effectiveness pe	Nov 20, 2019	.Project Plans Business
	Find out whast this is all about	No Due Date	Actions
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	Read MasterClass: Become a Meditation Teacher	No Due Date	Actions
	Resond to Aaron re: COmcast Robertt RR: Support for Virtanya from	No Due Date	Actions
	 Review Attachment: Zoom Process Guide 	No Due Date	Actions
	\checkmark Send Steve the roster of participants for EDGE Class from Monday	No Due Date	Actions
	Sign up for virtual 7 Stpe prormg	No Due Date	Actions
	This an action item	No Due Date	Actions
	✓ Update Sales Forrce CaabeAR: Sales Force Calendar	Nov 30, 2019	Actions
	View this 5 min video on How We Learn	No Due Date	Actions
	Watch Best Year Yet for Individuals - Daisy Brand Marketing Team wit	No Due Date	Actions
	✓ your funds will be in your account tomorrow	Nov 20, 2019	Actions
	Bill Lowe at AT&T re: next steps with DirecTV pilot	No Due Date	Calls
	Call Danny at Chaseabout my wifes IRA	No Due Date	Calls
	Dan Ballew regarding the latest tips and tricks in adobe publishing s.	Nov 27, 2019	Calls
⊠ k ² 🗹 🖓	✓ Dr Chang re-schedule appointment	No Due Date	Calls
Items: 66	This fol	der is up to date. Connected to:	: robertt.young@effectiveedge.com



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. Open your calendar and then a second window with your task list view.
- 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 or 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.





Smart Day View

Perform a Mind Sweep.	•	Review Smart Folder Views to see what is due today and what is overdue.	۵	Ensure that you are prepared for any meetings (i.e., agendas, paperwork, directions, etc.)	٠	Review Task List for any key upcoming actions due.	٠	Set an intention for the day.	٠	Begin the day!
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Now that your calendar is planned and your time is prioritized...Go to the One Day View on the calendar and open your Task List. This is a great place to come back to after an unexpected interruption to get re-focused on what is most important.

- 1. Open up the Calendar View and Select the One Day View on the Ribbon.
- 2. Open up Smart Folder to view your Categories and Task List.

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 Smart Folders 	✓ send email to Lori Cavanaugi Folder No Due Date	
Project Plans Business Project Plans Personal	✓ ✓ This is an action ✓ Item Type Icon Person No Due Date	
 Project Plans Personal Actions Calls Waiting For 1:1 Team 1:1 Team Due Today Errands Home None Overdue Read/Review Someday Maybe 	✓ Develop new training for trai Priority No Due Date Regurrance Pattern No Due Date	.Project Plans Business
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	This an action item Priority e Date	Actions
	✓ Update Sales Forrce CaabeAR: Sales Force Calendar Recurrence Pattern ✓ Update Sales Forrce CaabeAR: Sales Force Calendar Recurrence Type	Actions
	✓ View this 5 min video on How We Learn Recurring Reminder Pate	Actions
	✓ Watch Best Year Yet for Individuals - Daisy Brand Marketing Team Start Date e Date	Actions
	your funds will be in your account tomorrow	Actions
	Bill Lowe at AT&T re: next steps with DirecTV pilot	Calls
	Call Danny at Chaseabout my wifes IRA No Due Date	Calls
	Dan Ballew regarding the latest tips and tricks in adobe publishing suite Nov 27, 2019	Calls

3. Review the Smart Folders "Overdue" and "Due Today." Renegotiate deadlines.

TED TALK worth viewing: Yves Morieux: <u>Six rules to simplify</u>.



Weekly Recharge – The Secret to Success		
Do a mind- sweep 5 mins	 Make a New Task 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 <u>these charts</u> to depict how famous creative people structured their days. For many of them a good part of the day is not spent on work!

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

Keeping Your **EDGE** Alive!

Visit our **Alumni Center** for Continued Learning and Support

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