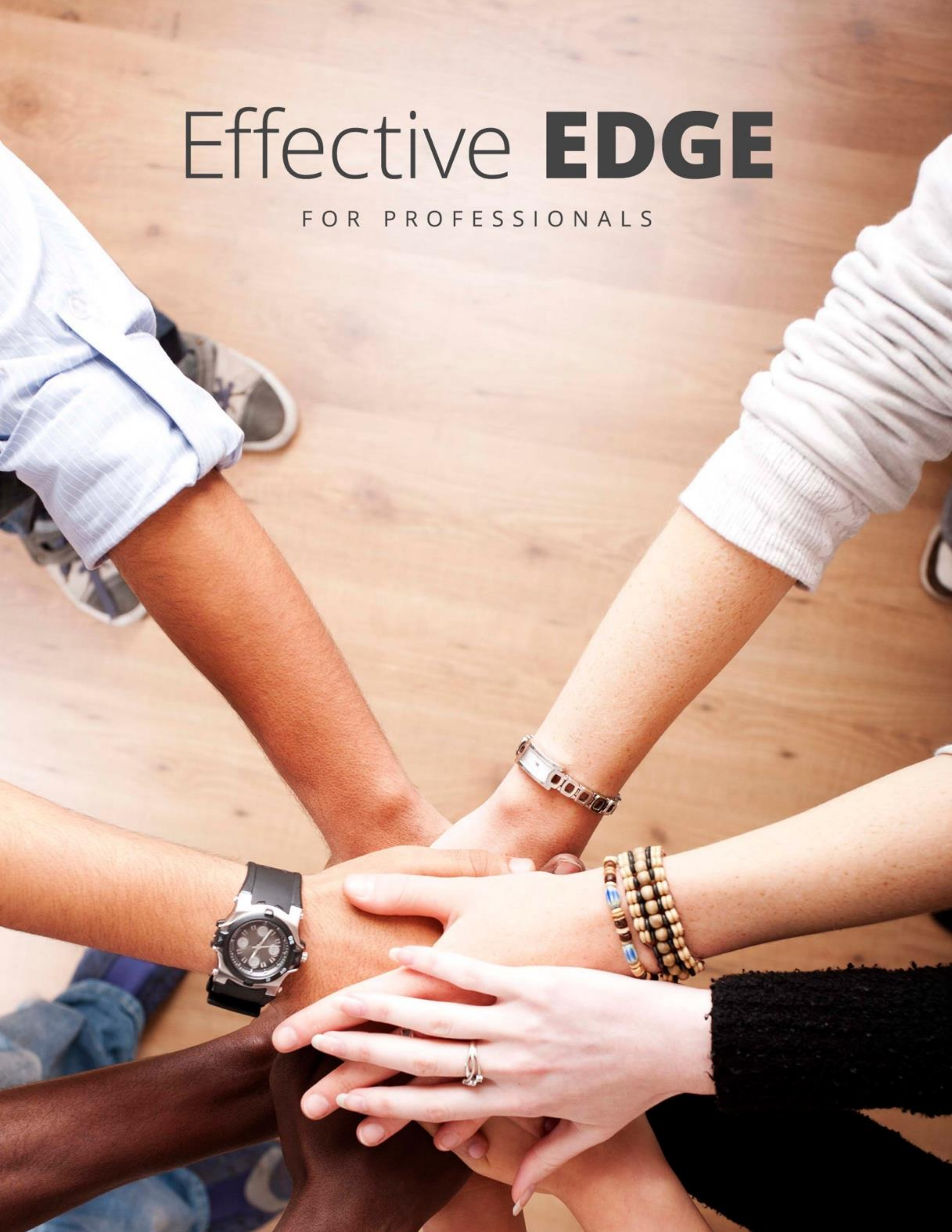
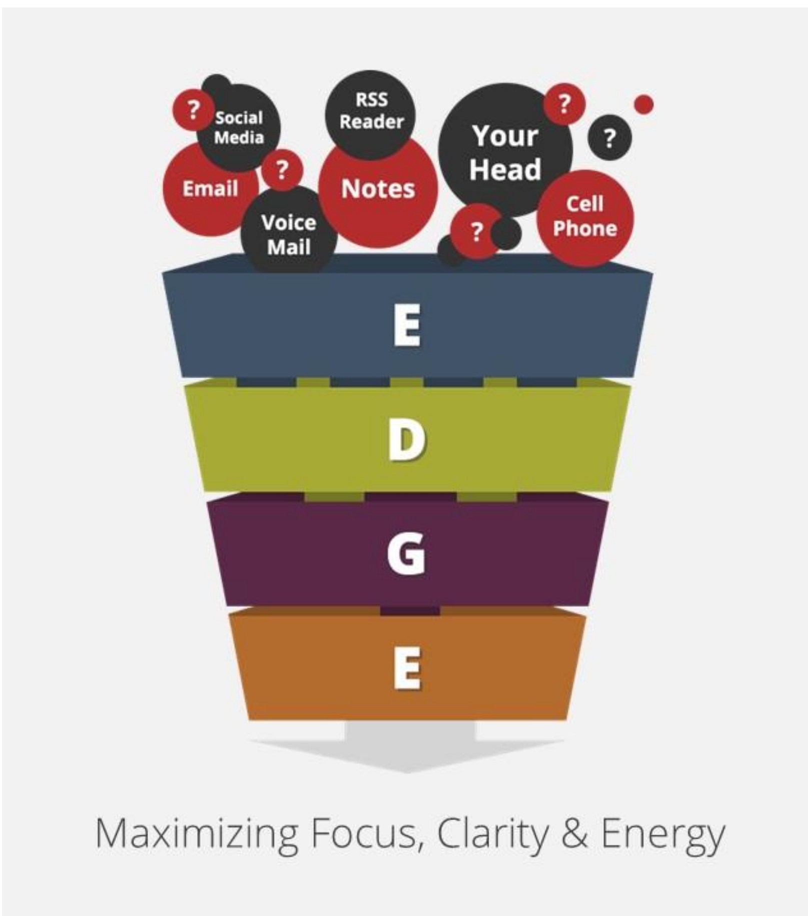
# Effective **EDGE**

FOR PROFESSIONALS



"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

**E**MPTYING
Phone - In/Out Tray
Note taking - Email

**D**ECIDING
Using Deciding Model
(The 4 Ds)

**G**ROUPING
Calendar & Tasks

**E**XECUTING
Reviewing & Doing

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

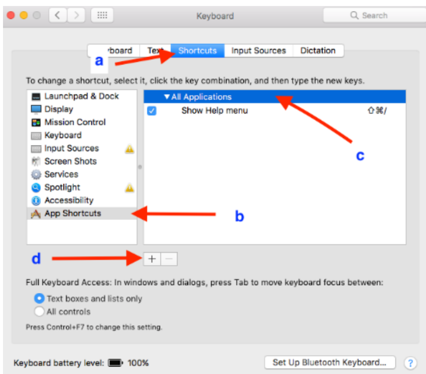
# Create Shortcut Keys in Outlook for Mac

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
    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

**2).**

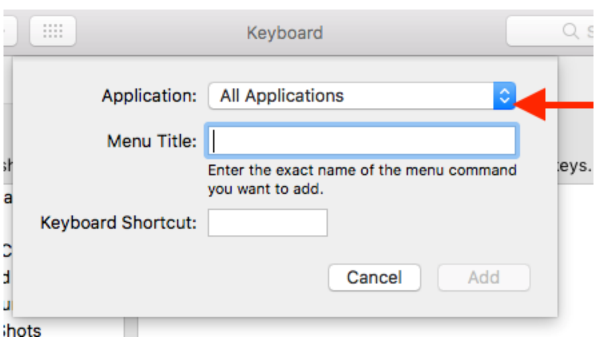

**3).**



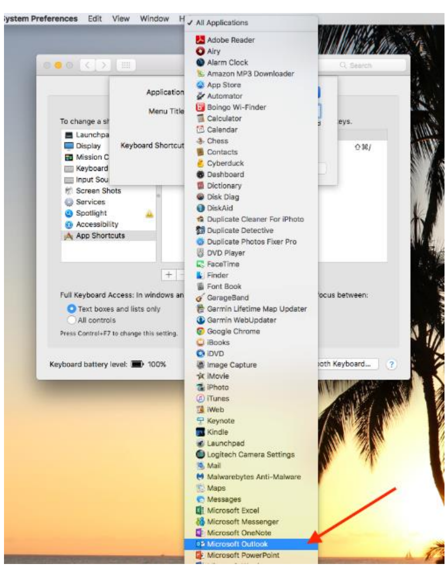

## Create Shortcut Keys (Cont)

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
    b. In the Shortcut box type CMD + Shift + K
    c. click Add button

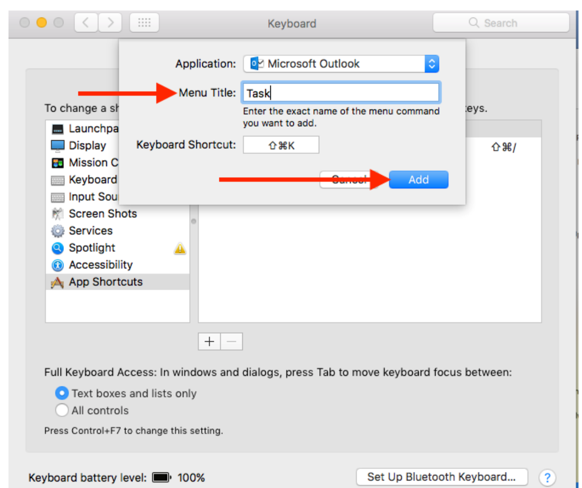
**4).**




**5).**




**6).**



# 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

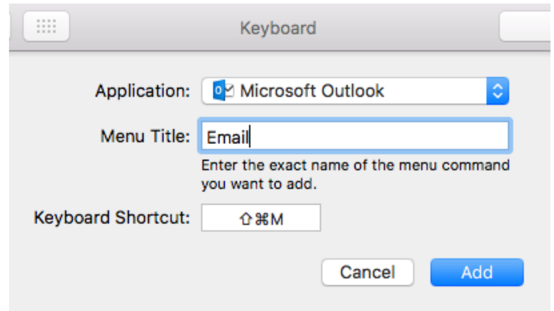
c. For new note in Menu Title Type: **Note**

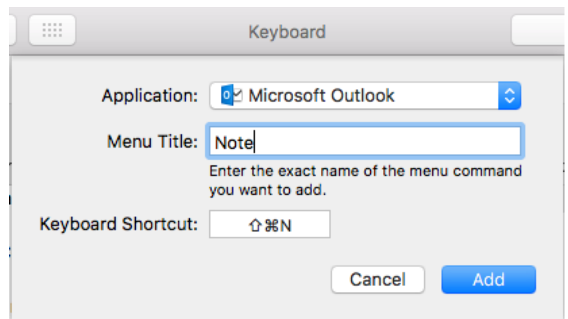
in the Shortcut box type CMD + Shift + N

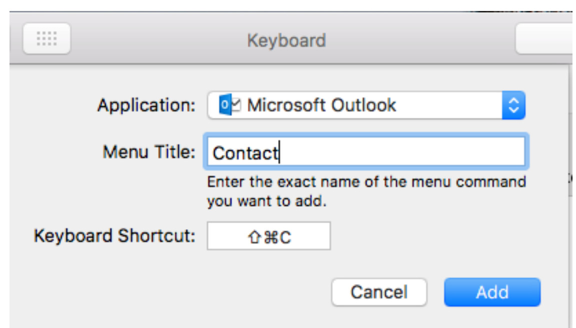
d. For new contact in Menu Title Type: **Contact**

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!**



# Removing E-mail Distractions

**[Outlook for MAC 2016]**

From the menu , **choose** *OUTLOOK, PREFERENCES*

**Click** on *Notifications* & *Sounds* option

In the Message Arrival section, **uncheck** the *DISPLAY AN ALERT ON MY DESKTOP* and *BOUNCE ICON ON DESKTOP* options

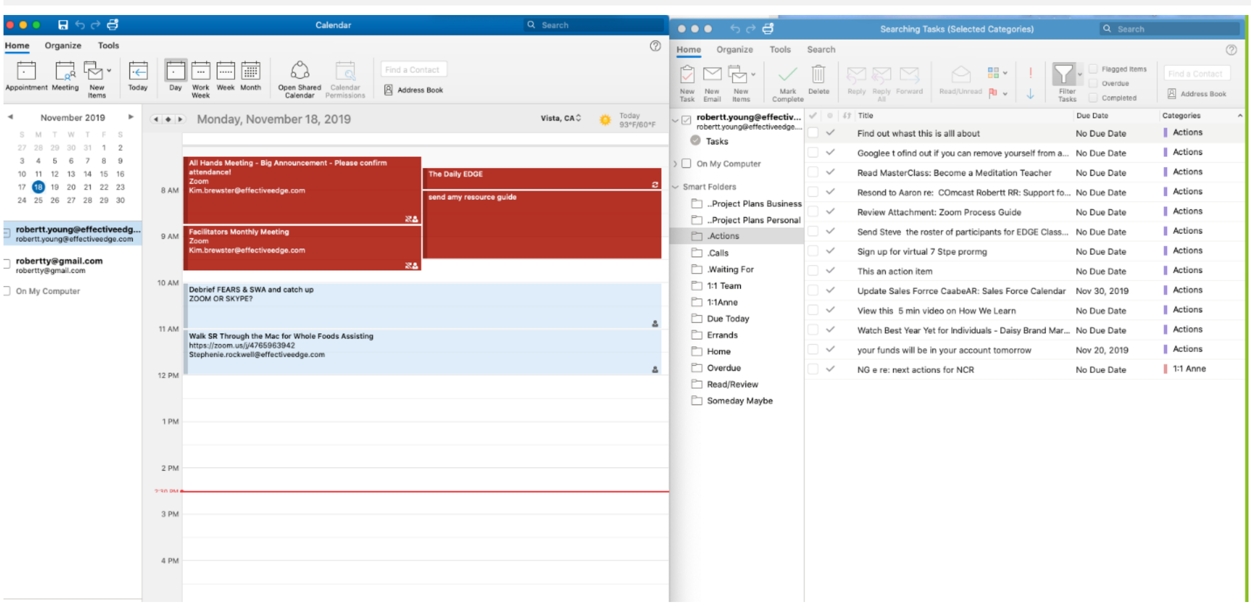
Under the Sounds section, **uncheck** the following options: *NEW MESSAGE, MESSAGE SENT, NO NEW MESSAGES,* and *WELCOME*

**Click** *CLOSE* button to save changes.

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

# 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.



# Create a Task

**Click** on the *Task icon at* the bottom of navigation pane to view the Task List → **Cmd + Shift + K** to open new task → **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:<br>Phone calls<br>Emails<br>Letters/Memo | Administration<br>Legal issues<br>Insurance<br>Personnel<br>Policies/procedures | Waiting for…<br>Information<br>Delegated tasks/projects<br>Completions critical to projects<br>Reimbursments |
| Other writing to finish/submit<br>• **Reports**<br>• **Evaluations/reviews**<br>• **Proposals**<br>• **Articles**<br>• **Promotional Materials Manuals/Instructions**<br>• **Re-writes and edits** | Systems<br>• **Phones**<br>• **Computers**<br>• **Utilities**<br>• **Filing**<br>• **Storage**<br>• **Inventories**<br>• **Supplies** | Customers<br>• **Internal**<br>• **External**<br>• **Marketing**<br>• **Promotion**<br>• **Sales**<br>• **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 benefits of mindfulness practices.

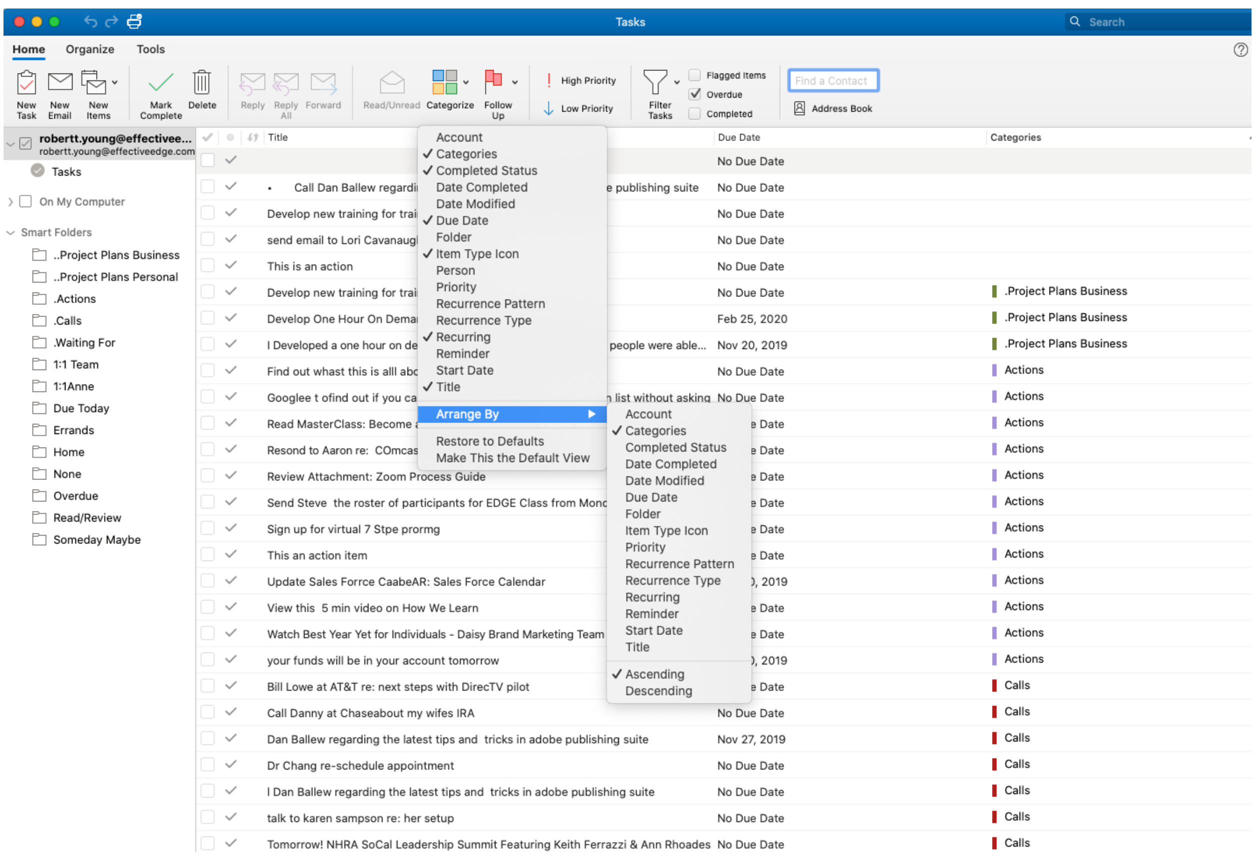
Download your free Mind-Sweep trigger list here.

# 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.



# Setting up Categories

## Recommended Categories

| Planning | Managing | Actions |
|---|---|---|
| .Project Plans – Business<br>.Project Plans – Personal | 1:1 ___________<br>(e.g. boss, directs, family)<br><br>1:1 Team<br>(e.g. Sales Team, Staff Meeting, Project Team etc.) | Actions<br>Calls<br>Emails<br>Errands<br>Home<br>Read/Review<br>Someday Maybe<br>Waiting For |

## To Set Up New Categories:

1. From the Task view, click on the CATEGORIZE button on the ribbon.
2. Choose EDIT CATEGORIES
3. 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.

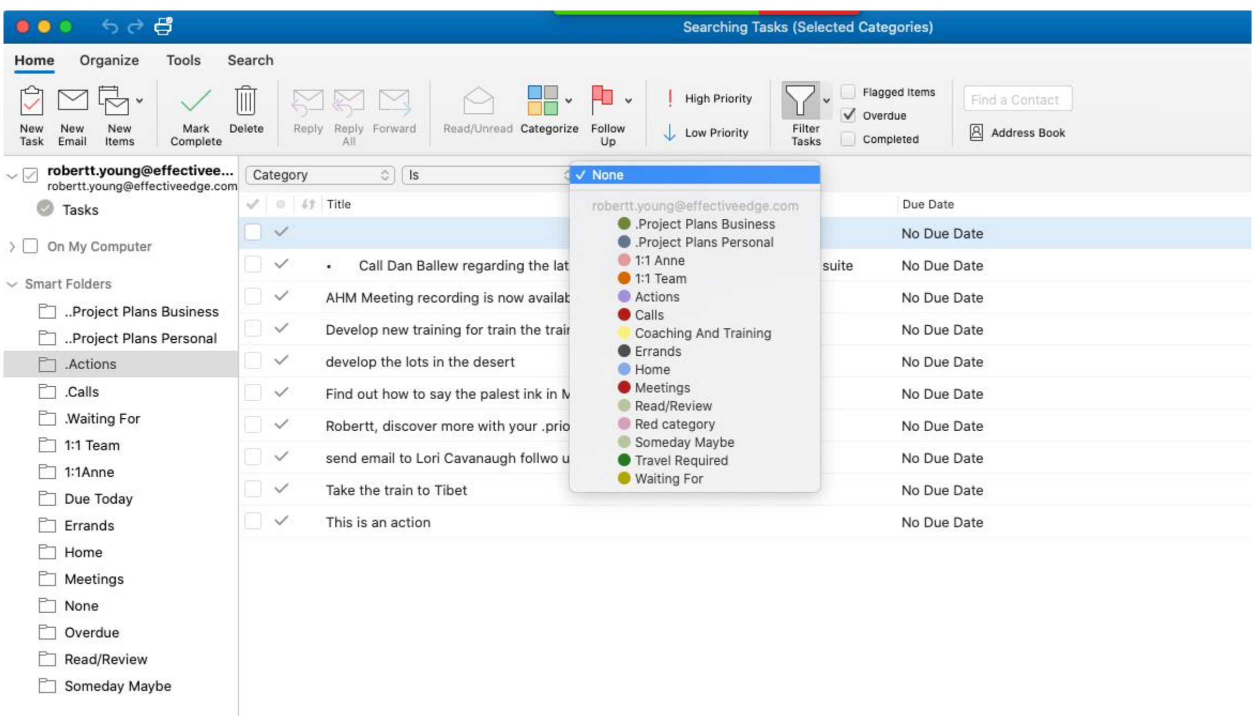
## To Categorize a Task:

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.

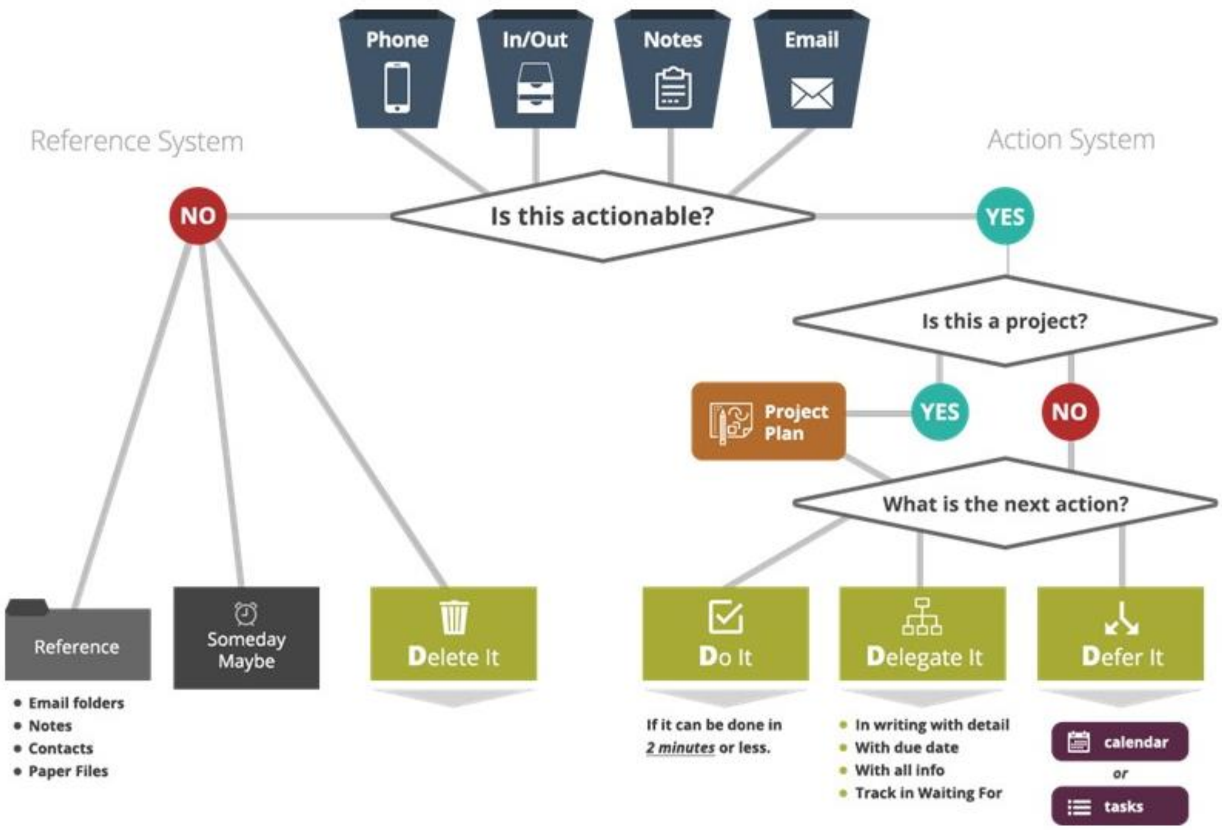
Read more information from Fast Company on The Cost of Switch-Tasking.

## View By Category

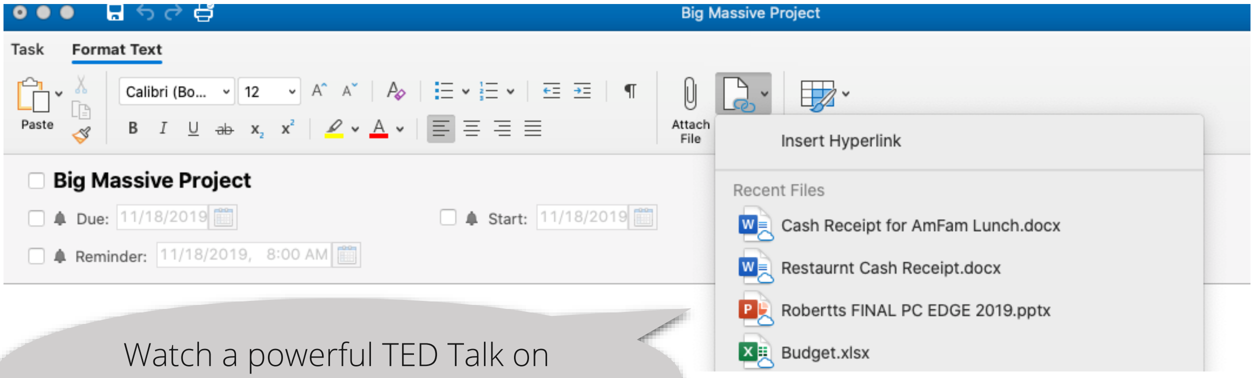
1. Open Smart Folders in your Task view by clicking on the drop-down arrow.
2. On the main title bar, click in the Search window in the upper right corner.
3. On the ribbon, click the Advanced button.
4. Where it says “Items Contains” click on the drop-down arrow on the right to select Category.
5. Select 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
    l. Waiting For



# The EDGE **DECIDING** Model



# Projects




Watch a powerful TED Talk on
"How Leaders Inspire Action"

# 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 | |
|---|---|
| **P**urpose | What is the **Purpose** of this email? |
| **A**ction | What is the **Action** and by when? |
| **S**upporting Information | What **Supporting Information** do you need? |
| **S**ubject 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

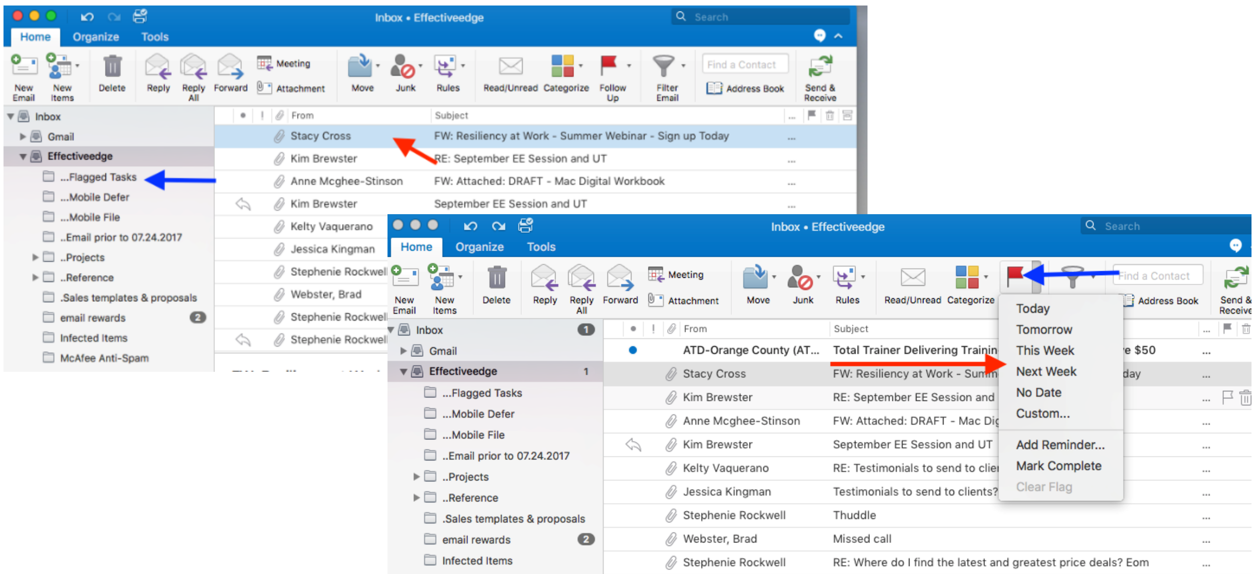
| | Chat/Text | Email | Collab Tool (SharePoint) | Call | Virtual Meeting | In-Person Meeting |
|---|---|---|---|---|---|---|
| **Quick Question** | x | | | | | |
| **Urgent Question/Issue** | | | | x | | |
| **Sharing Updates** | | x | x | | | |
| **Sharing Files** | | | x | | | |
| **Group Decision** | | | x | | x | x |
| **Heated/Difficult Discussion** | | | | x | | x |
| **Performance/Feedback** | | | | | | x |

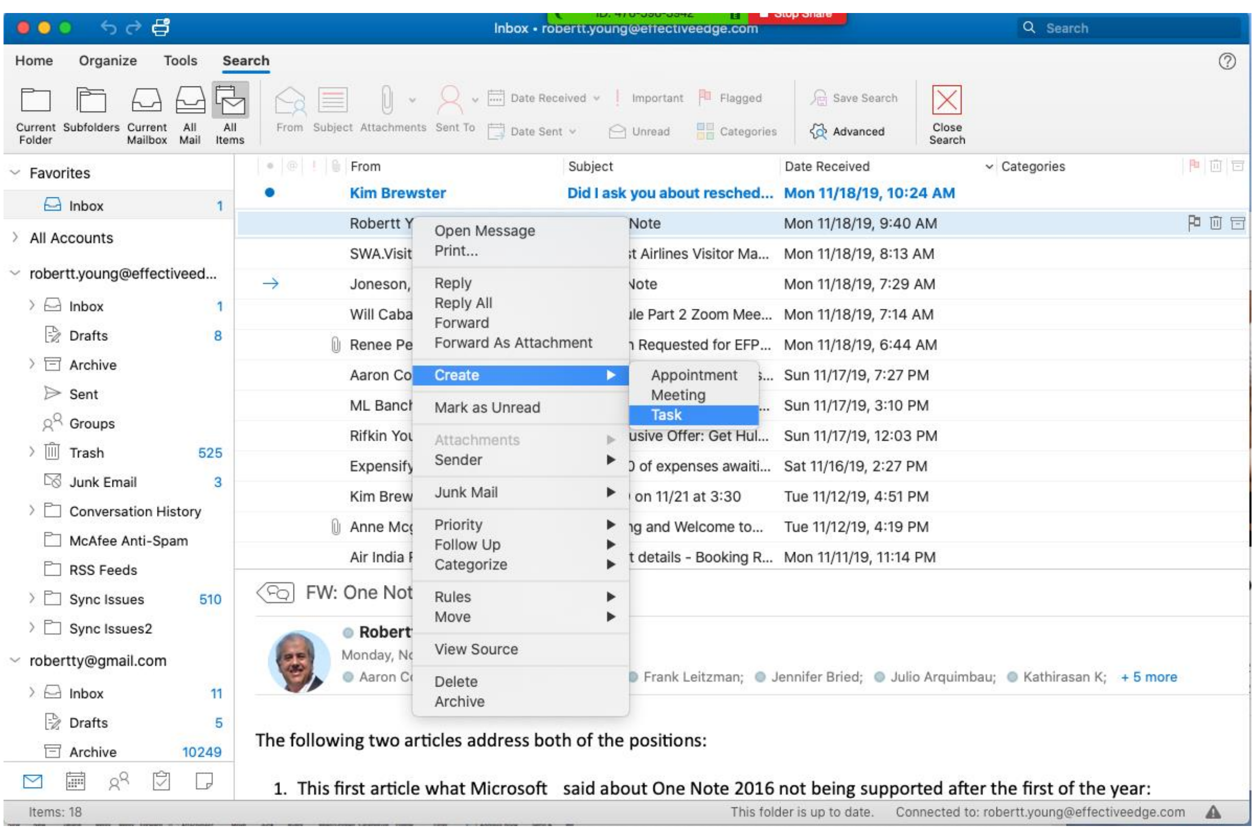
A Communication Protocol helps teams to know what method of communication is appropriate for various types of communication. The chart above is a simple example of a team's decisions around how they will communicate.


*Read the HBR article on* [the costs of constantly checking email]

# Defer Email to Task Item

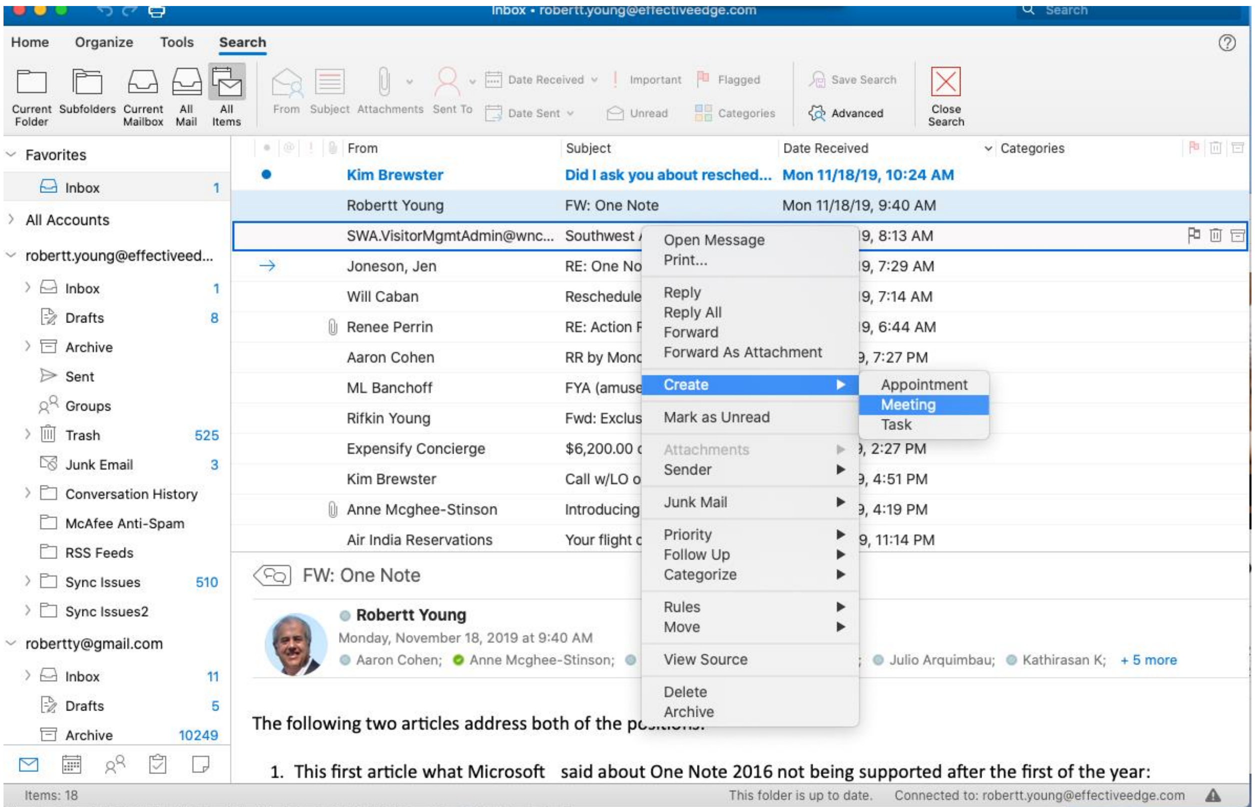
1. Select email. Right Click on email and select Create > Task
2. To categorize the message for your Task list, click the Categorize button on the ribbon and select the appropriate category name.
3. Change the subject line to be an actionable request with an action verb
4. If you'd like the email attached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

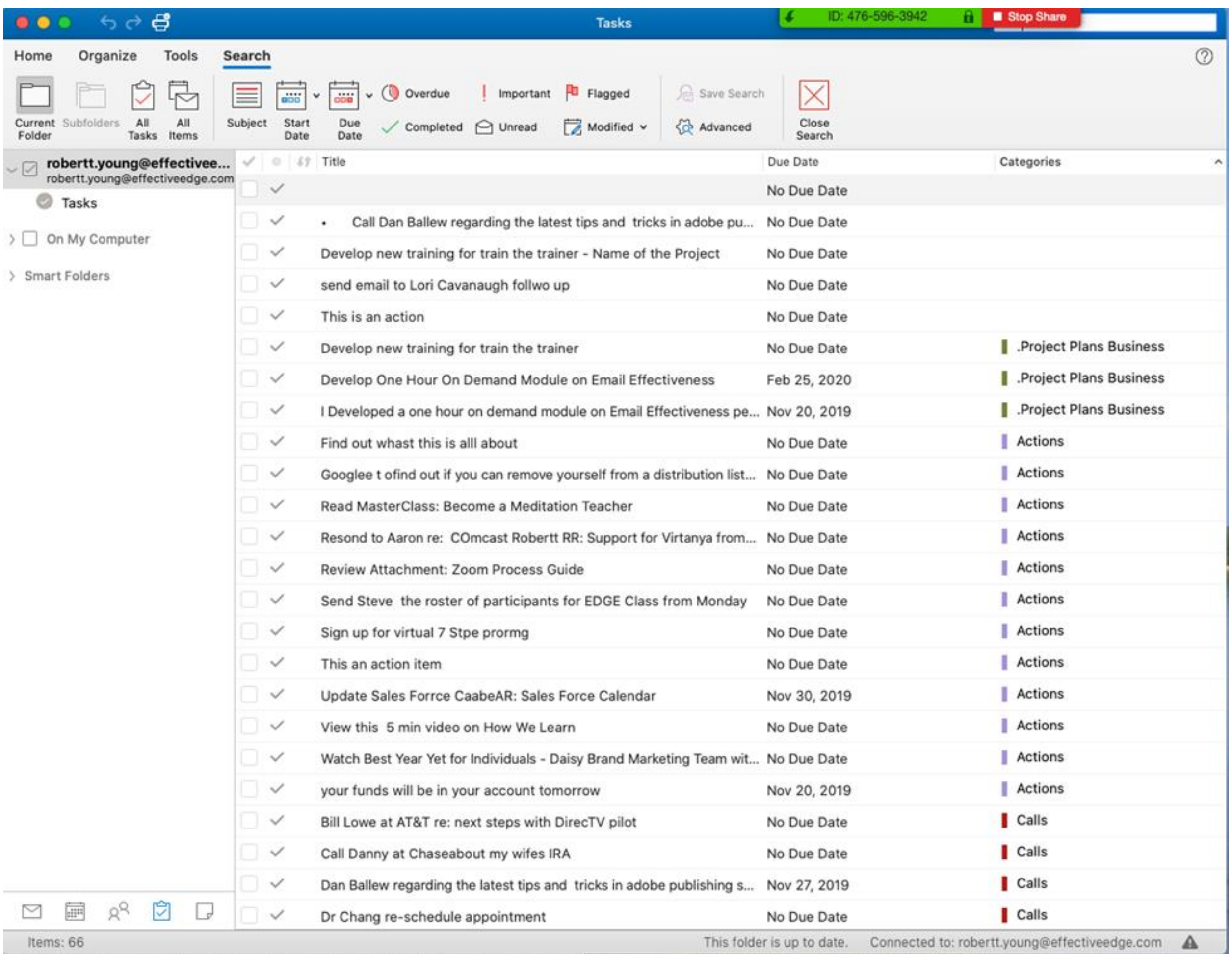


# Use your Calendar to plan your time more effectively

## 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.

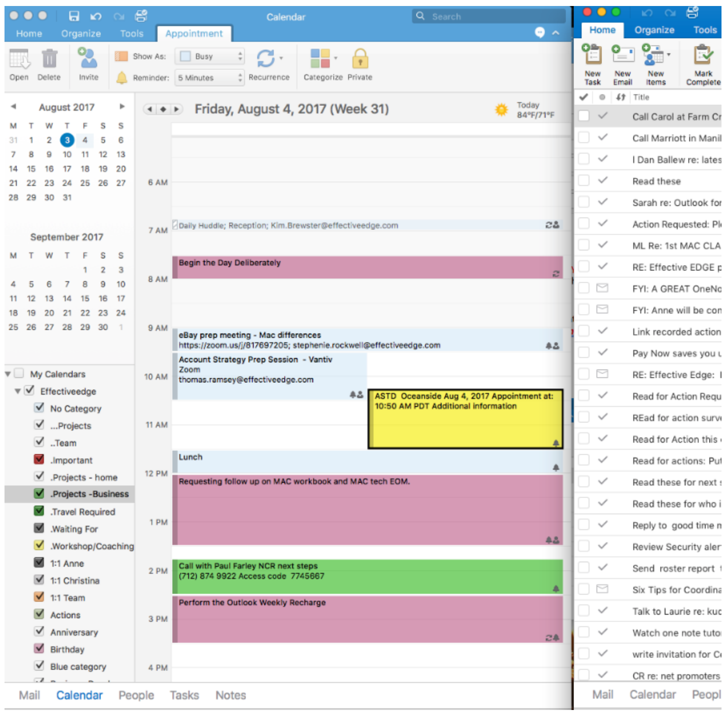
1. View your Task List.
2. Prioritize each Category by adding a priority value or a due date as appropriate.
3. Now you can use the Smart Folder View below to view by:
    a. Due Today
    b. High Priority
    c. Overdue



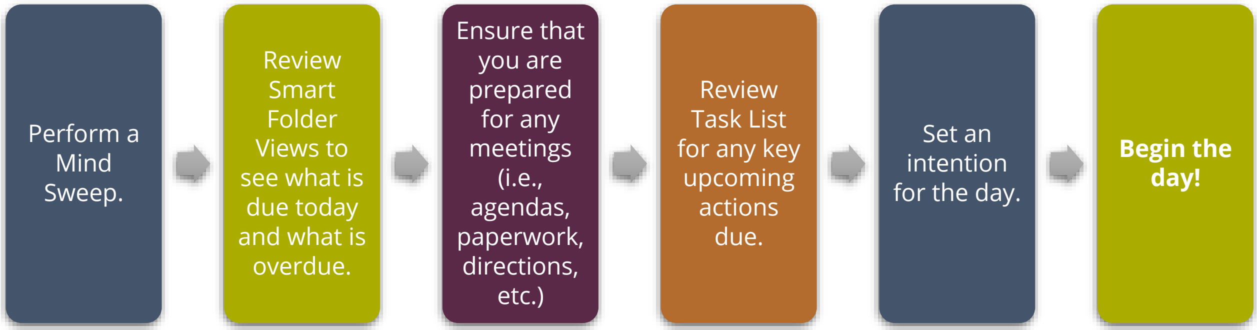
# Plan your week realistically

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.

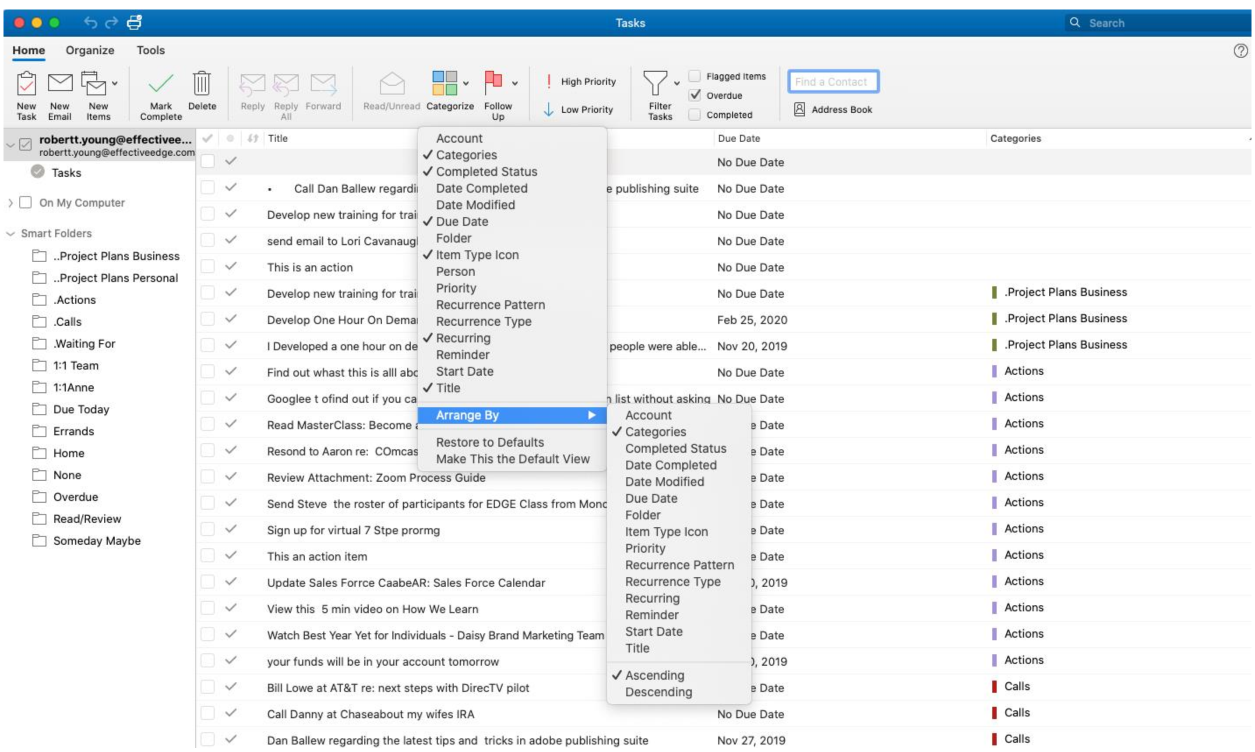


# Smart Day View




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



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

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

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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effective edge™

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|---|---|---|
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Find additional Outlook tips and tricks, free webinars, prizes and more.