



# Taming E-mail, Mastering Outlook, and Finding Focus

Presented by  
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A Leading Time Management/Smart Phone/Tablet/  
E-mail & Info Overload Training Firm  
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## Agenda of Program

- Introduction
- Handling & Managing E-mail & Info Overload
- Getting Your Key Projects and Priorities First
- Managing Tasks and Dealing w/ Interruptions
- A Discussion on Other Distractors and Finding Focus
- Tracking & Managing Deliverables from Others
- Calendar, Projects, and Tasks BEFORE E-mail
- Clearing Your Head of the Clutter
- Some Fun Additional Tips

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## Five Key Functions in MS Outlook

- E-mail
- Calendar
- Task/To Do List
- Notes/Memos
- Addresses/Contacts

***Google???***

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## Let's Talk E-mail! The Harsh REALITY

\_\_\_ HOURS

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## THE Definitive CLUTTER Buster! ***The 3-Minute, One Touch Rule***

Every piece of information (*paper, fax, e-mail, v-mail, etc.*) that you get you should touch one time.

If you can take care of this task (accomplish, reply, file, read, forward, delete, toss, etc.) *in three minutes or less, DO IT RIGHT NOW!!!*

If not, file appropriately into the Priority box or task list (**Drag & Drop!**) to be accomplished in order of priority or urgency (you decide).

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## A Great Outlook Tip for "Tasking" Your E-mails

- ☞ Use "Drag and Drop" to create a new task
- ☞ Works also for:
  - New Calendar Entries
  - Creating a New Contact
  - Creating a New Memo/Note
- ☞ Can also drag and drop from these other functions to e-mail and each other

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## Three Key E-mail Strategies

- Use your “Signatures” tool as an “Auto-Emailer”
  - Great way to automate “frequently recurring” e-mail messages
  - Allows your quality of communications to improve over time too
- Set up “Rules” to automate processes/actions
- Divide & Conquer: Work, Personal, Internet
  - If SPAM still gets through, SHIFT-DELETE!

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## Managing CC's, Forwards Replies, & “FYI”s

- When forwarding, point out specific info/actions
  - Make related deliverables clear and up front
  - Consider deleting old / unnecessary text
  - Change subject line when subject changes
- Be considerate of others – don’t overuse CC
  - “CC as a CYA”
  - Handling the “E-mail Firebomb”
- Don’t forget the old standby – a conversation!
- EOM & NRN
- Train others to use same system

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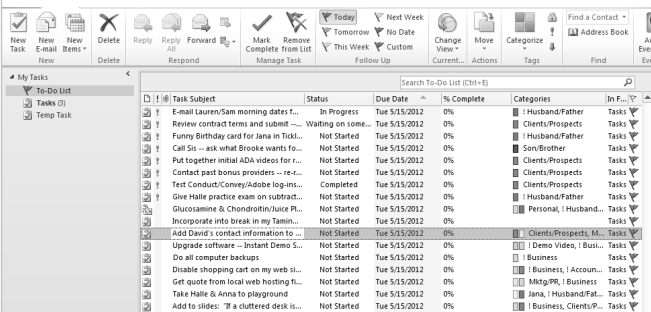
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## Tasks, Traction, and Interruptions



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## A Little Exercise

- Write out key projects and goals
  - Work and Personal
- Also, write out “bucket list”
  - List anything you’d like – possible, not sure, etc.
  - Will show odd place I keep my “work” bucket list

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## Cost of Interruptions to American Business:

**\$650 Billion/Year**

Average Time Lost Per Interruption:

**4-15 Minutes**

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## A Project Kick-Start: The “Next Step” Habit

- Never “backtrack” on a project
- Also great for interruptions
- Low-tech: The Sticky Note
- High-tech: Software/Smart Phone/Tablet
- Mid-tech: Come see me!!

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## Strategies for Other Interrupters

- Now have strategies for e-mail, in-person interruptions, and project transitions
- Let's talk telephone ...
- Let's talk text messages ...
- Let's talk social media ...
- Let's talk focus, discipline, and addiction ...

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**Addiction: a persistent, compulsive dependence on a behavior or substance.**

Source: TheFreeDictionary.com

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**Habit: a recurrent, often unconscious pattern of behavior that is acquired through frequent repetition.**

*Habits and addictions are remarkably similar*

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## Simple mantra for an effective life:

*Control your addictions, while  
aligning positive habits with  
your desired goals*

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## Making it happen:

- Identify addictions of any type
  - Make a plan for control and reduction
  - (Maybe get professional help???)
- Identify habits needed to accomplish key goals
  - Make a plan for acquiring/establishing these positive habits (21 day rule)
  - Also identify any “bad habits” that also need to be controlled
  - Consider a “Habit Flip” for *FAST* change

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## Project & Task Management Using Outlook

The screenshot shows the Outlook 'My Tasks' window. The task list includes:

Task Subject	Status	Due Date	% Complete	Categories
E-mail Lauren+Sam morning dates...	In Progress	Tue 5/15/2012	0%	Husband/Father
Review contract terms and submit...	Waiting on some...	Tue 5/15/2012	0%	Clients/Prospects
Funny Birthday card for Jana in Tick...	Not Started	Tue 5/15/2012	0%	Husband/Father
Call Sis -- ask what Brooke wants fo...	Not Started	Tue 5/15/2012	0%	Son/Brother
Put together initial ADA videos for ...	Not Started	Tue 5/15/2012	0%	Clients/Prospects
Contact past bonus providers -- re...	Not Started	Tue 5/15/2012	0%	Clients/Prospects
Test Conduit/Convey/Adobe log-ins...	Completed	Tue 5/15/2012	0%	Clients/Prospects
Give Halle practice exam on abstract...	Not Started	Tue 5/15/2012	0%	Husband/Father
Glucosamine & Chondroitin/Juice Pl...	Not Started	Tue 5/15/2012	0%	Personal, Husband...
Incorporate into break in my Train...	Not Started	Tue 5/15/2012	0%	
Add David's contact information to ...	Not Started	Tue 5/15/2012	0%	Clients/Prospects, M...
Upgrade software -- Instant Demo S...	Not Started	Tue 5/15/2012	0%	Demo Video, Busi...
Do all computer backups	Not Started	Tue 5/15/2012	0%	Business
Disable shopping cart on my web sit...	Not Started	Tue 5/15/2012	0%	Business, I Accoun...
Get quote from local web hosting fl...	Not Started	Tue 5/15/2012	0%	Mtg/PR, Business
Take Halle & Anna to playground	Not Started	Tue 5/15/2012	0%	Jana, Husband/Fat...
Add to slide: "A cluttered desk is...	Not Started	Tue 5/15/2012	0%	Business, Clients/P...

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## Outlook is GREAT for managing projects/tasks/roles!

- Feeds my “Type A” nature!
- Capture key projects/roles in categories
- Use individual tasks for “next steps”
- Favorite view is “Today's Tasks”
- Can also sort by “Category”, “Complete”
- Google Tasks not bad too!
- Capturing **Projects & Roles in Your Category List** Helps w/ Focus & Balance

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“All we have is the here and now, and that’s why procrastination feels so right. Procrastination is not the problem – it’s the solution!”

– Ellen DeGeneres

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“In doing your project, don’t wait for others; go after them and make sure it gets done.”

– William Swanson

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## Waiting On's . . .

- *Anything owed to you by anybody . . .*
- Money? Tax refund?
- Books/CD's loaned to friends/relatives
- Phone call's/faxes/e-mails with info you are waiting on.
- Develop your new personal brand – “the polite but persistent pest”
- A great urgency reduction tool

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## Assigning/Delegating Tasks in Outlook

- Very handy tool for effectively delegating tasks and deliverables
- Creates new task that is carried in task list of task requestor and task owner/manager
- When task is assigned, creates e-mail that is received by task recipient.
  - Recipient has opportunity to accept or decline
  - Additional text/information can be shared in note field

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## Recurring Tasks

- Can manage any task that repeats on a regular schedule
- Can recur daily, weekly, monthly, yearly (and more!)
- When done with “current” occurrence of task, mark “Complete”
- That then files the completed task and posts the next instance of the task

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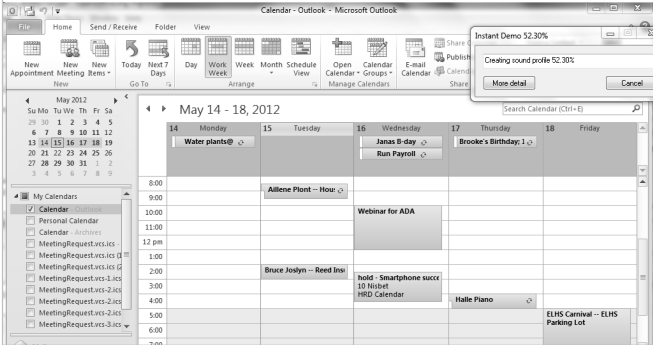
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# Calendar Management Strategies



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## A Calendar/Tickler Tip for the Guys

- Ever forgot a birthday? Or anniversary?
- NEVER do it again!
- Use the same “recurrences & alarms” strategy for meetings and appointments

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## Managing Your Calendar

- Includes **Work AND Personal** commitments
- Think about long-range tasks, projects, vacations, trainings, birthdays, anniversaries, etc. (recurrences & alarms/reminders)
- Next, think shorter range about upcoming internal/external meetings, events, phone calls
- Then, enter/review current commitments for today and this week
- Finally, make commitments with yourself (stalled Major Satisfactor/Biz Critical projects)
- *Two counter-theories for enhanced productivity/work-life balance*

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## Pause and Consider:

*What would happen to your work and life if you gave your goals, your projects, your calendar and your daily task list **PRIORITY** over your e-mail and other inputs?*

*... and your addictions?*

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## Daily Start-Up Routine

- Calendar FIRST!! (NOT E-mail!!)
- Check ahead 1-2 weeks – look for actions and “train wreck” days
- Then, look at today's calendar – how much time?
- Then, adjust task list per time available
- Next, check e-mail and other information inputs
- Finally, adjust task list one last time, then ...
- GET TO WORK!!!

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## How About Some Useful Memos/Lists?

- Priorities & Possibilities
- Staff Management Memos
- Company/Firm Archive
- Meetings Agenda Keeper
- Personal Goals/Dreams List
- Shopping Lists
- Travel/Financial/Medical Archives
- Business/Personal Trip packing list
- Golf Club Shot Selector
- Gifts??

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## Putting it All Together

- Current Projects/Roles
- “Next Step” To Dos
- Waiting On’s . . .
- All Calendars
- Memos/Lists
- Phone/Address Book

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## Contact Strategies

- More than just name, address, phone, fax
- Use as way to build stronger relationships:
  - Spouse/Kids Names
  - Directions
  - Quirky Habits/Behaviors
  - Contact Management Tracking
- “Activities” button useful for Search

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## Final Thoughts:

- Lots of info to chew on here:
  - Pick the ideas/strategies that work best for you
- Come back to your notes later to integrate more
- If an area of opportunity, consider a longer-form program in time management/personal organization
- Continue learning/practicing/perfecting your use of time
- Send me a note if you think of more!

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“Be the change you wish to see in the world.”

– Gandhi

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### Where to Get More Info:

- Randy Dean’s *Taming the E-mail Beast* (Available on Amazon.com – search “*Taming Email*”)
- David Allen’s *Getting Things Done*
- Malcolm Gladwell’s *Blink*
- Stephen Covey’s *First Things First* and *Seven Habits*
- Randy’s E-newsletter: *Timely Tips – 1 Tip a Month to Save You Time!* <http://www.randalldean.com/signup.html>  
Or just send me an e-mail ([randy@randalldean.com](mailto:randy@randalldean.com)) w/ “Timely Tips Please” in subject line – there is no cost to subscribe and you can unsubscribe anytime
- Randy’s *Taming E-mail Facebook Fan Page*: <http://www.facebook.com/TamingEmailBeast>
- Randy’s *LinkedIn Page*: <http://www.linkedin.com/in/randydean>
- **Twitter:** @timelyman

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### Other Randy Dean Programs:

- *Taming the E-mail Beast*: Key Strategies for Managing E-mail & Info Overload (1-3 hours)
- Finding an Extra Hour Every Day *Workshop*: Time Management Strategies for Busy Professionals (1/2 to full day)
- Optimizing Your Outlook: Time Management Strategies for Busy Outlook Users
- NEW! Smart Phone Success & Terrific Tablets: Getting More Productivity (and Fun!) From Your Devices
- Time Management in “The Cloud”: Using Google Apps to Manage Your Time, Life, Work, Projects, People & More
- Managing & Leading Great Staff & Team Meetings (1-2 Hrs)
- Go to [www.randalldean.com/programs.html](http://www.randalldean.com/programs.html)

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# We're Done!!!

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