Increasing Personal Productivity By Using Outlook As a Business Productivity Tool

This document provides you with an overview of how the application of a proven system of high performance workflow management using Outlook can benefit your organisation and the people who will be doing the programme.

(Noe to users of GroupWise or Lotus Notes: Apart from Outlook-related specifics, the general concepts and way of working applies to your software as well.)

Our programme is not so much about basics of Outlook – there are enough training courses on the market for that - but rather assumes that you already know the basics and are keen to use all the available functionality to use Outlook as one of your most important business tools to increase productivity.

1. Why invest in the Outlook Productivity programme?

To increase operational efficiency one needs to consider and review the mix of people, process and technology.

When we work with your organisation, we do not change your people (except for making them think and do differently about the way in which they do their work).

We do not change your technology – we help you leverage what you have already invested in.

What we bring to the mix is improved processes and a methodology to deal more effectively and efficiently with all the inputs you receive every day, from the moment they appear on your radar until you can check them off as “done”.

We help you to turn your Outlook and gadgets like BlackBerry, iPad and iPhone into high performance business tools, and not just to manage email, meetings, phone calls and text messages – like people in most other companies do.
We consistently get feedback from clients telling us that we help them to eliminate wasted productive time to the tune of 8% of payroll every year for those who do the programme. This waste come about because people are using outdated and inefficient methods of dealing with all the things coming their way.

The return on the investment you make in the Outlook Productivity programme is dependent on the remuneration of participants but is typically between 100% and 500%, while the typical payback period is 3-5 months.

On a personal level people who adopt our suggested way of working:

- Save up to 30 - 40 minutes per day.
- Communicate, delegate and follow up more efficiently.
- Are well organised and can find information fast.
- Have less stress.
- Feel less overwhelmed.
- Are more in control.
- Work with more focus on outcomes and action.

As a result they are happier – and it’s been proven that happier people are more productive people.

Two things happen when you invest in this programme:

- By eliminating wasted productivity you leverage the investment you have already made in Outlook.
- Individuals are more productive and have a better quality-of-life day at the office (and at home).

2. Scope and timing

We facilitate our in-houses Outlook Productivity workshops for a maximum of twelve people per session to ensure interactivity and personal attention.

We are based in Cape Town but travel to wherever there is a need to increase productivity – even to Dublin, Saudi Arabia and Dubai.

The timing of your workshop depends on mutual availability.

3. Methodologies and options

We suggest a combination of the following methodologies for the programme to ensure sustainability of the learning that takes place:

- Live workshop(s).
- Slightly shorter follow-up workshops after the initial workshop, should you select this option.
- 30 minute live fortnightly teleseminars/webinars with topics presented in a cyclical manner so people can “tune in” for the topic they need reinforcement on and support continuity after the workshop.
- Support services as per paragraph 3.2.
3.1 Live events

The content of the live workshop is available in Appendix A. You may choose to do either the morning session only or both morning and afternoon sessions on the same day.

**Option 1: Session 1 as per Appendix A.** During this foundational session participants begin using Outlook as a business productivity tool by implementing a time proven system of workflow management using all the available functions in Outlook. This includes key productivity principles.

Participants work on their own computers during the workshop on their live Outlook data thereby eliminating the need to find additional time after the workshop to implement the system. Preferably the computers will be live on the internal network using Wi-Fi or a network hub in the venue. This, however, is not critical for the success of the workshop.

**Option 2: Session 1 and 2 as per Appendix A.** If the full day workshop (sessions 1 and 2) is selected, participants bring their current “to do” lists or paper based diary to the second session, as well as items from their desk or “IN tray” to the second session. They then have the opportunity to enter these items in Outlook, and also implement a method of managing information for small projects using Outlook together with Xmind, a mind mapping programme that we supply, and also begin using Outlook to manage prioritised tasks.

**Option 3 (sustainability programme):** Your selection of either Option 1 or 2 above plus monthly follow-up workshops (one per month). This option not only transfers knowledge and skills but also ensures that it is fully implemented. You can choose how many sustainability sessions you would like to do.

3.2 Support after the workshop

**Support included in the fee**

3.2.1 People can “tune in” in to our generic fortnightly teleseminars/webinars offered to anyone who has attended one of our workshops.

3.2.2 Participants receive a series of implementation tips and our monthly Productivity Pit Stop Educational Newsletter “Time For A Productivity Pit Stop” with insights, tips and applicable productivity related quotes.

3.2.3 Anyone who has done the workshop is welcome to email or call us with questions.

**Excluded from the fee**

3.2.5 Anyone who has attended this workshop is welcome to join one of our public workshops in Johannesburg, Cape Town or Durban at a 50% discount if they would like a refresher session.
4. Responsibilities

The following will be for our action and account, assuming that the workshops take place at your facility.

- Expert facilitation of workshop.
- Support as described above.
- Provide programme content and material for the workshops.
  CD with:
  ii. Productivity related articles (included on CD).
  iii. Freeware mind mapping software (for individual use).
  iv. Laminated Map for Action that summarises the system.
  v. Certificate (PDF document emailed after the workshop).
- Shipping of programme material to your venue.

The following will be for your action and account.

- Venue.
- Providing and setting up of computers so that everyone can work in their own Outlook environment.
- Data projector, screen, flip chart.
- Refreshments and lunch as required.
- Any related travel and accommodation expenses.
- Should you prefer to do the workshop at an off-site venue, all related arrangements and expenses will be for your action and account.

5. Fees and Terms

Please note that all fees quoted are exclusive of VAT.

5.1 Fee structure

The fees below are valid for a single workshop. As you book more workshops, the fee decreases.

Foundational workshops:

Option 1: 5 hour workshop as per Appendix A: R18 000 for a maximum of 12 people (absolute maximum of 15 participants).

Option 2: Full day workshop as per Appendix A: R26 000 for a maximum of 12 people (absolute maximum of 15 participants).

Sustainability workshops: R9 000 per workshop of 3 hours.

Support services as listed in paragraph 3.2 are included in the fee.

5.2 Payment terms

You can choose between:
• Making a 50% deposit when you decide to go ahead, with the balance due on the day of the workshop.
• Paying in full up front when you decide to go ahead and receive a 5% courtesy discount.

I look forward to hearing from you – please complete the “Contact form for organisations on the web site and submit it.

Kind regards.

Gerrit Cloete
Appendix A

Outlook Productivity

How to use MS Outlook as a business productivity tool to manage your time, be more organised and get things done faster and easier

CONTENT

Session 1 (5 hours)

General Outlook and other Windows productivity tips

- Navigate and create new items 50% faster by using keyboard shortcuts in Outlook and Windows.
- Smarter ways to enter dates and times.
- Customise Outlook to support your way of thinking and working.
- Begin your day where it matters most – and, except in a few cases, it’s not your Inbox.
- Minimise distractions, especially when new emails arrive.
- Auto-create new Outlook items from any other source of information (Internet, Word, Outlook and more).

Productivity Principles (Integrated in content)

- Get things out of your head and into your system (Outlook) - have a calm and focused mind.
- Clarity brings power – act on what you know, not what you think you know.
- Be where you are – do not stress about things that you cannot do anything about in the moment.
- Separate action from reference – no confusion about what requires action and what does not.
- Group similar actions together - remain focused and do not get sidetracked.
- Take your regular productivity pit stops – review and stay on top of your system.
- Batch process your e-mail – dedicate times to process email rather than every time a mail arrives.

High performance workflow management

- The phases of high performance workflow management.
- Your “Map for Action”: How simple questions help you stay on top of hundreds of inputs coming your way every day.
- The value of thinking “manage my actions” vs. “manage my time”.

Applying the high performance workflow management system to your every day work and life using Outlook

- Manage your daily activities (business and personal)
  - Plan: Schedule time zones required for your work (Calendar).
  - Organise your action reminders that are day-specific and not day-specific (Calendar and Tasks).
  - Use the Calendar combined with Tasks to maintain and view your work in progress during the day on one screen (Calendar, To Do, Tasks).
  - Delegate and follow up almost effortlessly (Tasks).
  - Receive delegated work and update the delegator with one click – no email required. (Tasks).
  - Arrange meetings without sending emails and making phone calls (Calendar).
  - Quickly preview commitments for specific days (Calendar).
  - Add a second time zone to your default view - no more guessing (Calendar).
  - Use colour coding to automatically identify different types of meetings or meetings arranged by a specific person (Calendar).
  - Reminders of important activities (Calendar; Tasks; Follow-up flags).
Stay on top of your system with regular reviews (Calendar, Tasks).
Plan for and create improved life balance (Calendar, Tasks, Projects).
Manage information for smaller projects (overview) (Tasks, mind mapping).

- How to file and easily retrieve important information
  - Contact details with notes, personal details and record of all interactions (Contacts; Journal).
  - Reference information (e.g. business details, checklists, quotes) (Notes).
  - Keep track of important interactions with individuals, teams or for projects (Journal – no more pieces of paper.).
  - Keep notes of discussions in the right email reference folder for a client/colleague/friend (Discussion Notes).
  - Group contacts for ease of management and communication (Contacts).

**How to organise and process your e-mail more efficiently**
- Structuring your e-mail folders: Reference folders and Action folders, or even “just use one folder for all emails”.
- Use “Rules” to stay on top of your mail.
- How “Quick Steps” save you time (Outlook 2010).
- Using “Search Folders” to find information instantly.
- Applying the “Map for Action” methodology to your Inbox.
- Creating new items from information in your Inbox.
- Operate from an empty Inbox – your Inbox should not be your “To Do” list.

**Session 2 (2.5 - 3 hours)**

**Further implementation and application to own items**
- Bring current “things to do” to workshop and process into Outlook.
- Bring current “bits of paper” to the workshop and process into Outlook.
- Process current voicemail messages into Outlook.
- Process mind dump/brain dump done in the morning session into outcomes and next actions.
- Process own email using the high performance workflow methodology.
- 3 person teaching: Teach colleagues the methodology (small groups of 2 or 3); You learn best when you teach.
- Apply “how to manage information for small projects, including mind mapping as a planning tool”, to one of their own projects (Tasks).

**More tips and tools for everyday effectiveness and efficiency**
- Email etiquette/protocols.
- The myth of multitasking; how to handle interruptions and distractions.
- Overview of how the same system can be used to create a more productive work space on and around your desk.
- Using Outlook to manage prioritised actions.