

Effective Information Management with Outlook

Audience This course is intended for persons who want to deal with information (whether it is paper or electronic) in a more organized fashion. Students should have taken Outlook Level 1 (Outlook Level 2 recommended) or have equivalent experience with Outlook as it will be the tool used to organize email, to do items, your schedule, and contacts. Students should be able to create and send messages, create folders in Outlook, and use Tasks and Calendar.

Description The course uses a combination of lecture, hands-on practice and workshops, and practical independent exercises to teach students to organize physical and electronic information (email, tasks, and contacts). Calendar is used for managing your schedule. The Task List will be used to identify projects, and actions to achieve greater productivity. Concepts and processes taught are based on a proven methodology, which is used by successful business people worldwide.

Objectives Upon successful completion of the class, students should be able to:

- explain why information organization is important for effective time management,
- discuss the various elements of a proven methodology to create and maintain an information management system,
- develop a system to organize and manage information,
- implement the system in Outlook to organize and manage email,
- process the inbox effectively and efficiently,
- manage your schedule with Outlook Calendar, using it as a tool for scheduling meetings and events, as well as to support project action items,
- create a system for managing your contacts,
- use Tasks to manage your To Do list, as well as small projects,
- set up a review process and system for archiving historical information.

Length 1 day

I. Get Yourself Organized – An Overview

- A. Why is Organization Important?
- B. Out of Your Head and Into Your System
- C. Identifying Commitments

II. Using the Methodology to Get Organized

- A. Understanding the Methodology
- B. Capturing Input
- C. Effective Note Taking
- D. Processing Input
- E. Organizing Information into Your System
 - 1. Action Items Folders

- 2. Waiting For Folders
 - 3. Action Someday Folders
 - 4. Reference (Commitments) Folders
 - F. Organizing Your Office
- III. Processing and Organizing Email Input**
- A. Using Software to Get Organized
 - B. Efficiently Processing Your Email Inbox
 - B. Applying Flags to Promote Follow-up
 - C. Organizing Email with Search Folders
 - D. Creating Search Folders
 - E. Using Views to Quickly Locate Emails
 - F. Applying Rules and Alerts in a Reminder System
 - G. Automatic Mail Processing with Rules
- IV. Using the Calendar to Manage Schedule Information**
- A. The Calendar as a Time Management Tool
 - B. Delineating Activities with Categories
 - C. Locating Specific Activities with Views
 - D. Using Reminders to Keep Yourself on Time
 - E. Compiling Information with File Attachments
 - F. Scanning Your Schedule using Color Coding
 - G. Managing Recurring Calendar Items
- V. Using the Tasks List to Manage Actions**
- A. Tasks Lists in an Organization System
 - B. Managing Projects using the Tasks List

- C. Making Action Lists that Really Work
- D. Organizing Tasks in Folders
- E. Managing Tasks with Categories
- F. Locating Specific Tasks with Views
- G. Setting Up a Reminder System for Managing Tasks
- H. Compiling Task Information with File Attachments
- I. Managing Recurring Tasks
- J. Delegating Tasks
- K. Using Status Reports to Manage Delegated Tasks
- L. Creating an Appointment from a Task

VI. Organizing Your Contacts

- A. Using Contacts in an Organization System
- B. Organizing Contacts in Folders
- C. Delineating Contacts with Categories
- D. Efficient Contact Information Retrieval using Views
- E. Compiling Contact Information using File Attachments
- F. Sharing Contacts using vCards
- G. Maximizing Contact Form Effectiveness

VII. Reviewing and Protecting Your Information

- A. System Maintenance
- B. The Review Phase
- C. Using Technology to Review
- D. Setting up Historical Organization
- E. Protecting and Backing Up Your Data

Bibliography

Appendix A – Defining a View

Appendix B – Planning a Meeting

Appendix C – File Management