

# Outlook in practice with elements of time management

## #1 How to focus better and improve productivity with Outlook?

- Psychological basis of performance and concentration,
- saw effect,
- Outlook functionalities that free attention processes and facilitate and automate planning.

## #2 Business case – a case study in which you will check your effectiveness and experience a change to greater efficiency!

- Your task will be to develop a new agenda for the day
- This will require you to put into practice your knowledge of time management and your knowledge of team collaboration and communication
- You will plan, prioritize, focus, communicate and make decisions
- And all this will happen during the meeting, so the situation will be demanding...
- so if it happens to you, what happens to 99% of other participants - in short, the reflection that it is impossible to complete the task in such a short time and in such conditions...

- Very good! Because when the trainer shows you how to do it, applying appropriate time management principles and techniques, you will try for the second time and achieve success, you will realize how much more you can learn, how much more you can develop your effectiveness and how much time and money you can save. !
- So we derive knowledge and conclusions from experience!

## #3 Outlook's interface can be tailored to your needs!

- Adding and removing buttons, button groups to the menu (Ribbon)
- Adding the most frequently used commands to the Quick Access menu
- How to change and customize views:
  - Folder panes
  - Email lists
  - Reading panes
  - To-do bar
- How to create your own custom views (fields, columns, filters, groupings) with the ability to quickly edit data in a cell - for: Inbox, Tasks, Calendar and Contacts
- How to condition the appearance of elements (email, title, etc. ) depending on defined conditions - Conditional formatting

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## #4 E-mail in Outlook – lots of useful functions that speed up your work!

- ODP and PD to contact groups and members,
- Autocorrect message options,
- Creating footers and signatures with logos,
- **Absence** – automatic replies,
- Advanced search,
- **Quick steps** – controlled automation of activities
- Recalling sent emails,
- Delay in sending emails,
- Shared mailbox - a simple way to handle e-mails for several people, e.g. for internal customer service. or external, project, etc.
  - Good practices for operating and managing a shared mailbox
  - Advantages and disadvantages
- Creating and using email templates
- Personalized mail merge (bulk)
- Managing the mass amount of received emails:
  - thread view
  - what to do to avoid "losing" clicked emails that we have not yet responded to
  - how to use search folders to automate repetitive searches
- E-mail discussions with automatic change markers and authors' initials
- Voting – poll in e-mail with response report
- Confirmation of delivery and reading a savoir vivre
- Categorizing emails
- Creating tasks from emails
- Automatic correspondence rules – how to automate work with e-mails
- Sorting mail into folders
- (Auto)archiving



**How we take care of your needs :**

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## #5 How to optimize communication and free your head thanks to tasks in Outlook?

- How to quickly create tasks,
- How to use the quick task list in the sidebar and its advanced features to keep in mind only what needs to be done now,
- Assigning tasks to colleagues using tasks,
- Sending e-mails with time reminders to people who do not manage the tasks,
- **Check on the deadline** - how to quickly create reminders to check the status/implementation:
  - delegated tasks,
  - emails sent,
- Using priorities according to art,
- Using categories (colors) to facilitate the management of the structure of tasks and projects,
- How to use the "start date" and "end date" functions to plan tasks,
- How to use reminders to avoid distractions
- How to use, create and modify views (lists) of tasks to manage:
  - own tasks,
  - tasks assigned to others,
  - tasks assigned by others,
  - tasks assigned by specific people (e.g. supervisor),

using advanced features such as:

  - grouping tasks by contractors, date, status,
  - **status display** – task accepted for execution/not accepted,
  - sorting by start date, execution date,
  - **filtering by: status** – completed/not completed; contractors; date,
  - adding your own fields (columns) to task views .
- Customize and create task views for advanced needs

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## #6 Outlook calendar remembers for you, reminds others, saves time!

- Calendar – inviting to a meeting
- Scheduling meetings with access to the calendar of colleagues and to the calendar of resources (e.g. conference room, company car) and inviting participants
- Calendar – manually respond to invitations or automatically accept resource reservations on a first-come, first-served basis
- Track responses to invitations
- Share your calendar with colleagues
- Sharing a limited calendar preview with contractors/customers
- Accepting the sharing of someone's calendar
- Editing granted permissions to the calendar
- Powers of attorney for calendar, mail and tasks
- Using a power of attorney

## • Different calendar views/layouts:

- Compare your colleagues' calendars with your own in overlay or schedule mode
- Event list
- Categorizing meetings – using colors
- Calendar synchronization with the Jira calendar

## #7 How to create a mini-CRM in Outlook Contacts?

- Adding contacts and using contact form fields
- Creating a mail merge - or how to send personalized (e.g. by name) messages to hundreds of people in a few minutes
- Project groups
- Team collaboration management
- Contact database management
- Import and export of contact list using Excel and ".pst" files.

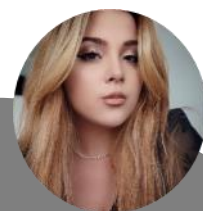
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## #8 Free yourself from the computer, cards, post-its and notes! Sync Outlook to your mobile!

- Mail and calendar in Microsoft Outlook
- Tasks in Microsoft To-Do
- Tasks in Microsoft Planner (only in closed training)

We conduct training in the following formula:

- ✓ landline
- ✓ online
- ✓ hybrid - MIX



Do you have any questions?

Please contact me

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