Productivity with MS Outlook and OneNote

FinPro Annual Conference

October 2018



Specialisations include:

- Productivity/Time Management Training
- MBTI Team Building Programs
- Personal Effectiveness Coaching
- Emotional Intelligence EQi-2.0 & EQi-360

Information Overload

- The more we know, the faster we know more.
- Knowledge volume undergoes exponential growth, doubling and redoubling over time.
 Knowledge Doubling Curve (Buckminster Fuller)

In 2010 IBM predicted that the amount of information available world-wide would double every 11 hours in the next few years!



Impact of Technology at Work

- Our technology means we can be more Productive?
- BUT...are we more effective?
 - Upsides?
 - Downsides?





Modern Workplace

Digital Transformation (Office 365) Increasingly Mobile (Laptops) Instant Communication Open/Shared Workplaces



Challenges

 To utilise the modern tools we have at our fingertips
without letting them rule us!



- MS Outlook
- MS OneNote



Microsoft Outlook

A few tips to *optimise* MS Outlook to help you be more productive



Customise your Outlook Views

Use your "Outlook Dashboard "

- No "Reading Pane"
- No "First Line Preview"
- View "Single Line Layout" (not Compact Layout)
- Use your "To Do Bar"





Normal Outlook View

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Customised Outlook Dashboard View



Normal Outlook View



Use "Single" View – Not Compact View

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To Do Bar - Tips

- The To Do Bar can be highly customised
- View your **To Do Bar** from your Inbox and Calendar Screen
- It can become your To Do List

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9!	Send Proposal to Joe for PPO/1Note in WA	Mon 8/1	0 Not Started	Geoff Prio
9!	Organise travel on Friday - reschedule meeting wit	Mon 8/1	0 Not Started	Geoff Prio
	Review Deferred To Do List items	Mon 8/1	0 Not Started	Geoff Prio
2	Settings in Office Lens	Mon 8/1	0 In Progress	Geoff Prio
	Question regarding HTML emails	Mon 8/1	0 Not Started	
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View To Do Bar from Inbox

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Manage Your Email

Tips to help you manage your email in Outlook more productively

Email – Great Servant – Poor Master



Email Overload...

- Today we are continually bombarded with emails
- Much of our work now gets "delegated" to us via email



- Inboxes are regularly "out of control"
- People often feel overwhelmed
- Important emails can often get lost...



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Turn off your Email Alert

Do you need to be notified every time an email arrives in your Inbox?

File > Options > Mail > Message arrival>

...then uncheck all the relevant boxes.

Keep Emails on your Radar

- Don't let emails go below your solution
 screen (off your radar!)
- Target ¹/₂ a screen
- Set times to Process your Mail
- Handle Emails once using the 4D's approach

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Delete

- Use this key a lot!
- We keep too much "stuff"
- Temporary "delete" folder if you like





Deposit

- Use Email Folders....
 - File emails you wish to keep
 - File emails you're finished with
- Avoid leaving opened or "dealt with" emails in your Inbox





Do it

- Don't open it and close it to come back to later!
- If you can handle there and then...Do It
- Rule of thumb 2-3 minutes if you don't have a lot of time





Defer (Do It Later)

 Drag to create a Task (Left Click and Hold the Email...drag to your Task Icon)



- Drag to create a Calendar Appointment (*in the same way*)
- Apply a Follow Up Flag



Using Follow Up Flags



Up -

Are you making the best use of Email Flags?



Use Email Follow Up Flags

- Flags important emails you need to action later
- Always Flag with a Date!
- File (Deposit) the email after you have Flagged it
- The Email will show in your
 To Do Bar/To Do List



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Use Email Follow Up Flags

Live Demonstration



Email Folders

Do you use your Email Folders well?



Using Email Folders

- Use Email Folders to Deposit (File) emails when actioned
 - Don't leave them in your Inbox
- Fewer Folders is better

 1St Level Folders Only - No Sub Folders

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Web Site

Use Favourites in Folder Pane

- Enable your "Favourites Folder"
- **Right Mouse Click on any** folder and Show in Favourites



Show In

Favorites

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Personal 6

Junk Email [1]

Deleted Items 14

Customers/Jobs

Meeting Acceptance

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Search all folders by default



Use Your Calendar as a Planner



Start Your Day in Your Calendar

- Change default settings so that Outlook starts up in your Calendar - not your Email screen.
- File > Options > Advanced > Browse and choose Calendar

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What is OneNote

Electronic Note-Taking System Part of the Microsoft Office Package





Turn to a few next to you and discuss:

• What is you current experience with OneNote?

• What do you like/dislike about it?



Why use OneNote

- Saves me valuable time
 - Type up meeting notes
 - Email direct to particpants
- I always have my notes with me!
- Can be used on Multiple Devices
- Integrates Beautifully with MS Outlook





Different Apps Available

- **OneNote 2016** Use this for your Laptop/Desktop
- OneNote for Windows 10

Doesn't have all the features of OneNote 2016. Avoid this for now.

OneNote Apps for Android or IOS

 Won't have ALL the features that OneNote 2016 has, but still worth having.



<u>Notebooks</u>

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- You can have Multiple Notebooks
- You can share a Notebook with others
- You can move information between Notebooks easily





- Organise your Sections
- Be Careful not to create too many sections
- Use "Section Groups" to organise Sections



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Merge into Another Section...
 Copy Link to Section
 New Section

Password Protect This Section...

Training Event 1

New Section Group

Section Color

Pages



- A "Page" in OneNote is Blank Canvass for you to work in
- On each "Page" you can:
 - Take Notes (Type or use a "Pen")
 - Format Text
 - Insert Date/Times etc
 - Insert Links
 - …and more



OneNote

"Live Demonstration"







I hope you have enjoyed today's session

Geoff Prior – Lingford Consulting Services

Connect with me on Linked In Subscribe to our Email Tips

