



Outlook Time Management mini-course



Welcome to Outlook Time Management, the powerful mini-course – How to Do More and Enjoy Life!



*He who every morning plans
the transaction of the day
and follows out that plan,
carries a thread that will
guide him through the maze
of the most busy life.*

—Victor Hugo



I've always loved this quote. Victor Hugo said, "He who every morning plans the transaction of the day and follows out that plan, carries a thread that will guide him through the maze of the most busy life."

I actually take that quote a little further these days. I take time every evening before I go to bed to plan for the next day. That way, I feel more comfortable that I am prepared for the day and I sleep better because I'm not worrying about something I should make sure I remember to do tomorrow. I've already prepared and I can let it go – it's out of my mind.



What is Time Management?

Time Management is actually a Myth!

There are only 24 hours each day and 7 days each week. Everyone gets the same time; you can't manage time – it will always continue moving.

What you can do is make the best of your time to get the most out of every minute of every hour of every day to get more done.

And it is my mission to help you get more out of your 24 hours each and every day!

Learning Objectives



After completing this course, you will be able to:

- Define prioritization
- Describe the benefits of the Time Matrix
- Use the Time Matrix to manage and prioritize time
- Use the Priority Pyramid to organize daily schedules and follow up in a timely manner
- Use Time Management software to prioritize and organize

I've created this course to help busy people take control of their lives. To do that, we need to learn to prioritize and then use tools to help us organize and get to our priorities each and every day – to save you time and to allow you more free time to do with it what you want, when you want!

After completing this course, you will be able to:

- Define prioritization
- Describe the benefits of the Time Management Matrix
- Use the Time Management Matrix to manage and prioritize time
- Use the Priority Pyramid in conjunction with the Time Management Matrix to organize daily schedules and follow up in a timely manner
- Use Time Management software, like Outlook, to prioritize and organize tasks

What is Prioritization?

Organizing or completing things
in the order of their importance.

What is Prioritization?

Prioritization is organizing or completing things in the order of their importance.



How many times have you been rushing into a meeting late?

Prioritization helps minimize those times. It makes us more productive. It helps us to accomplish more work, and it can increase our free time.

Time Management Activity

You Decide!

- ☐ Parents
- ☐ Spouse
- ☐ Children
- ☐ Community
- ☐ Phone
- ☐ Company President
- ☐ Co-workers
- ☐ Customers
- ☐ Email
- ☐ Government
- ☐ Television, Radio
- ☐ Neighbors
- ☐ Landlord
- ☐ Boss
- ☐ Peers
- ☐ Unknown Forces

To succeed and be happy in life, we need to first determine our priorities – our goals that we’ve set. You need to match your goals to what you value the most in your life. In order to do that, a short reflection of what you really want and what things will help you meet your life goals will help you begin to start looking at the things that control your life and what you might need to adjust in order to get rid of those things that control your time that do not align with your goals in life.

We’re going to do a short exercise.

Using the handout on this page - put a check by any one or any thing you feel is in control of your time. Take 5 minutes to complete the exercise.

If you checked anything on the list, you need to realize that ultimately only you determine how you spend your time. The degree you believe anyone else controls your time is the degree to which you’ll have to struggle to win back your time. Even if you checked “boss,” who may pile on the assignments, you determine how and when you’ll tackle them. You are in the control booth of your life.

Your time and your goals have to match your values. In reviewing this checklist, look

at any items that do not align with your values.

This reflection is the start to helping you start managing your time to allow your personal fulfillment and contentment. It will help you decide what things need to change and how you can take control of your time.

Why Prioritize?

First Things First

Prioritizing tasks ensures that you meet your most important goals first. If there's anything you don't have time for, it will be the least important item on your agenda.



Why should we prioritize?

Prioritizing tasks ensures that you meet your most important goals first. It puts a plan in place to make sure you work to the plan daily and weekly to ensure you are doing only the things that will help you reach your goals in life.

If there's anything you don't have time for, it will be the least important item on your agenda. You shouldn't spend time on those things that are not a priority in your life.

Why Prioritize?

• *Urgency*

Requires immediate attention
Time-sensitive

• *Importance*

What really makes a difference
Values, Personal Mission
High-priority Goals

First, we need to understand two key words of Prioritizing: urgency and importance.

Urgency means it requires immediate attention. It is now. Urgent things act on us, urgent things come from outside you, they press upon you, because they are time-sensitive, like a ringing phone. They might be important as well as urgent, but too often they are merely urgent.

Importance on the other hand, has to do with what really makes a difference. The important priorities come from within. These priorities come from your values, your personal mission, your organization's mission, and your high-priority goals.



“I have two kinds of problems, the urgent and the important. The urgent are not important, and the important are never urgent.”

—Dwight D. Eisenhower



Dwight D. Eisenhower said, “I have two kinds of problems, the urgent and the important. The urgent are not important, and the important are never urgent.”

Prioritize

Important and Urgent

- Approaching deadlines
- Emergency revisions
- Crisis situations

The Time Management Matrix

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	
Not Important		

So, let's take a closer look at the Eisenhower Matrix (or Time Management Matrix) and How to use it.

Prioritizing tasks by urgency and importance results in 4 quadrants with different work strategies:

Quadrant 1 consists of activities that are both urgent and important. These are the things that must be done first. For example, an important client calls you with a pressing deadline or revisions. Your child gets sick. A crucial system breaks down. A key meeting is suddenly called. If you don't go to that important meeting, there will be tough consequences, so it's a Quadrant 1 activity. Quadrant 1 is the quadrant of necessity. We **must** spend time here.

But if you only focus on Quadrant 1, it keeps getting bigger and bigger until it consumes you.

Prioritize

Important but Not Urgent

- Projects not near the deadline
- Daily tasks

The Time Management Matrix

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but Not Urgent
Not Important		

Quadrant 2 activities are not urgent, but they are important.

Quadrant 2 is where we do things that are scheduled to be done. Here we become proactive. We plan and prepare for the future. We think to prevent problems. We build relationships. We empower ourselves through learning and skill development. All the things that we know that we should do, but don't because they aren't urgent, like our daily tasks.

We call Quadrant 2 the quadrant of effectiveness. This is where effective people focus their energies. You see, Quadrant 2 won't act on you; you must act on it. We never seem to get time for Quadrant 2. Ironically, however, the more time you spend in Quadrant 2 doing preparation, planning, and prevention, the less time you will be forced to spend in Quadrant 1, managing the last minute crises.

Prioritize

Urgent but Not Important

- Phone calls
- Work emails
- Interruptions by coworkers

The Time Management Matrix

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but not Urgent
Not Important	Quadrant 3 Urgent but Not Important	

Quadrant 3 activities are urgent but not important. It includes such things as unnecessary meetings and reports, many emails and phone calls, and other people's minor issues.

Quadrant 3 is the quadrant of deception because urgent things have the appearance of importance, but most of the time they are not. It might be like the meeting that has no agenda, no purpose. It might be an unnecessary interruption in your day. It might be a knee-jerk response to that email that just showed up on screen, but doesn't really matter much. These are items that we may even be able to delegate.

Beware of Quadrant 3 – it is the culprit that bankrupts individuals and organizations.

Prioritize

Not Important and Not Urgent

- Checking social media
- Cleaning your desk
- Small talk

The Time Management Matrix

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but not Urgent
Not Important	Quadrant 3 Urgent but not Important	Quadrant 4 Not Important and Not Urgent

Quadrant 4 is neither urgent nor important.

Quadrant 4 is the quadrant of waste and excess. It's all those things that we do to escape, like checking social media, watching mindless TV, playing endless games, wasting hours on the Internet, small talk.

People who escape to Quadrant 4 are usually burned out by living in Quadrant 1 and 3 all of the time. They are addicted to urgency, and it takes a toll.

Prioritize

Above the Line

- Important
- Quadrants I & II

The Time Management Matrix

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but not Urgent
Not Important	Quadrant 3 Urgent but not Important	Quadrant 4 Not Important and Not Urgent

If you examine most people's agendas against the four quadrants, you'll find almost all of their time is spent in Quadrants 1 and 3. What happens then to Quadrant 2? It gets pushed aside.

Now what happens to Quadrant 1? It gets larger. How long can you sustain a Quadrant 1 lifestyle? What are the results?

Doesn't it soon stress you out? Doesn't it eventually burn you out? Endlessly fighting fires, moving from one crisis to the next. Gradually it takes its toll on your body and on your mind. It is not sustainable.

So where do you get time for Quadrant 2, when you're inundated by urgent, pressing matters? You stop spending so much time in Quadrants 3 and 4. You literally say no to those activities. You live above the line that separates Quadrants 1 and 2 from Quadrants 3 and 4.

It's really not that difficult to cut those wasteful and excessive activities in Quadrant 4. The real challenge is not to let Quadrant 3 rob your time.

When people start to think in Quadrant 2 ways, there will be fewer crises, more

balance, and greater vision. Moving from crisis to crisis, never getting to Quadrant 2, is like swatting flies all day long. When will you stop swatting the flies and start fixing the hole in the screen door?

We need to live above the line.

Prioritization Activity



Let's take some time to start prioritizing – determining where things in your life fit within the Time Management Matrix.

Using the Prioritization handout shown here,

Refer to your current "to do" lists and place items into the associated quadrants on the handout.

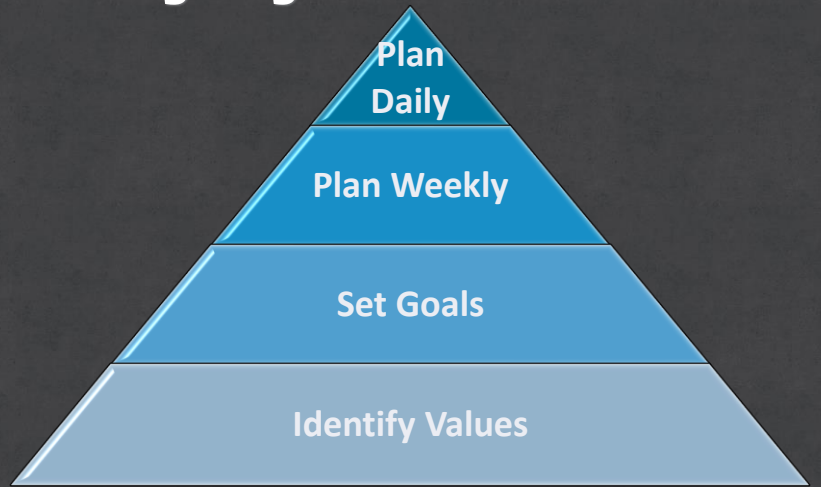
Then, with a spouse, co-worker, or friend, discuss the importance and urgency of the tasks.

Debrief each other by asking which quadrants were most populated and discuss the challenge of making time for important-but-not-urgent activities.

Use the Time Management Matrix as a tool after the class. This is something you should address on a regular basis, especially when

things start to get out of control. Always refer back to this and update it as things change in your life.

Productivity Pyramid



Now let's talk about the Productivity Pyramid.

The Pyramid covers every aspect of your life. We will be focusing on the Top 2 Tiers which can be done using any Time Management software such as Microsoft Outlook – which is where we'll focus within this course.

We will cover Daily and Weekly planning in further detail in a few minutes, but for now, here are some Goal-Setting Tips:

1. Write it Down
2. Give it a Deadline
3. Break it down into Doable Chunks
4. Commit

Weekly & Daily

- Customer follow up
- Tasks
- Emails
- Voice Mails
- Assignments

When it comes to planning and prioritizing, we think of customer follow up, tasks, emails, voice mails, and assignments.

Do these sound familiar? These are items we discussed that fall into Quadrants 1 and 2.

So how do we stay focused day to day without losing sight of the big picture?

We need to rely on a system – whatever system you come up with can work for you as long as you work the system – use it daily and weekly. Remember, a tool is only good if you use it appropriately.

Email Management

4 D's of Time Management

Delete

- Not important, Delete immediately
- Junk Mail
- Marketing Emails

Do

- If takes less than 5 minutes
- Do It Now
- File it Away

Delegate

- If someone else can or should handle it
- Forward It
- File it Away or Delete

Defer

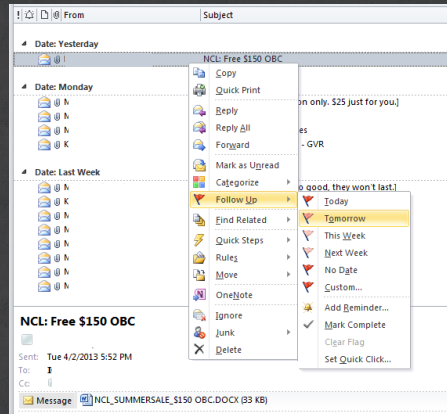
- It takes more than 5 minutes
- Flag It
- Do It Later

One of the major things that seems to take everyone's time these days is Email. So, we need to talk about it now.

To tame your Email Inbox, you should follow the 4 D's of Time Management:

- Delete It – If it is not important, you should delete it immediately. These are emails that are junk and marketing emails that are not important to you.
- Do It – If it takes less than 5 minutes, you should do it now and then file it away and move on.
- Delegate It – If someone else can or should handle the email, then forward it to them and either file it away or delete it. And,
- Defer It – This can sometimes be the hardest of the 4 D's – If it will take more than 5 minutes to take care of it, you should Flag it to take care of later. We'll discuss how to do this in a bit.

Defer It

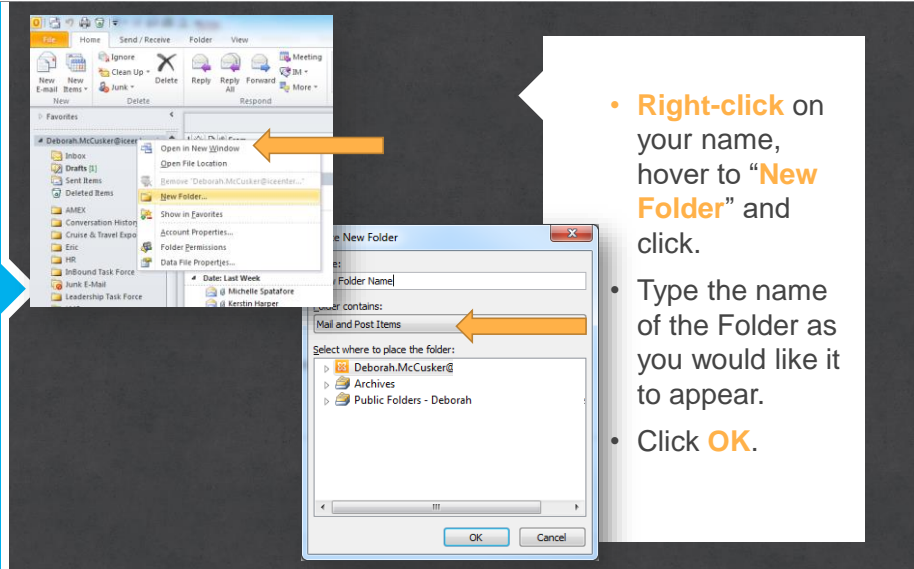


- Right-click on the email, hover to “Follow Up” and make a selection.

Let’s say we do not need to currently react to the email named “NCL: Free \$150 OBC” – to mark this email for future follow up, simply right-click, hover to “Follow Up” and make an appropriate selection. The selection options might be to follow up Tomorrow, or you can click on the “**Add Reminder**” selection and setup a reminder for a specific date and time. This is the most specific and will keep you from forgetting a “Tomorrow” follow up, which will simply show on your To Do area of Outlook.

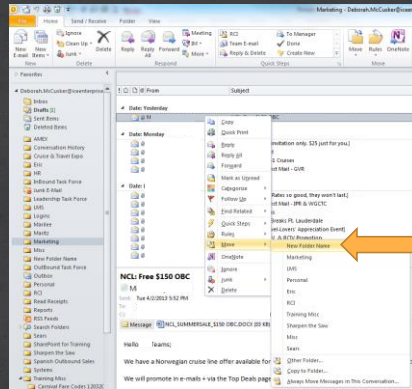
That probably took a total of 2-3 seconds. Now, you can do the same thing to any other emails that do not need immediate follow up.

Email Folder List



Many emails are informational only and do not need to be saved. At the time when you’ve read the email, you may simply Delete the email. If the email is something that needs to be saved for future reference, you can create and save the emails in Folders. The Folder List is located on the left side of the Outlook window. To create folders, think of your workflow. You may create folders based on product or brand and you may create folders that are specific to items from your direct supervisor. To Add a Folder, right-click on your name (located under the “Favorites” area in the Left Navigation Pane.) Click on the “New Folder” option and a “Create New Folder” window opens. In this window, type the name of the folder as you wish it to appear and click the “OK” button.

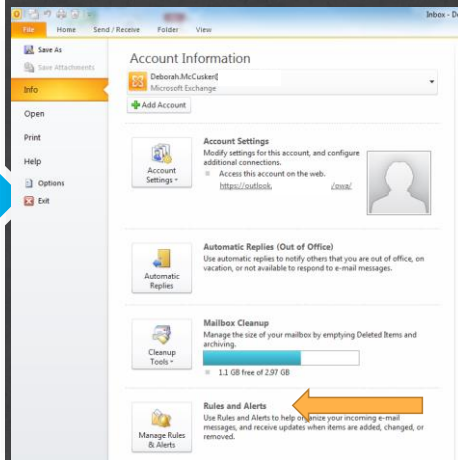
Email Folder List



- **Right-click** on the email, hover to **"Move"** and click on the Folder name where you would like to save the email.

The Folder will now be located in alphabetical order in your Folder List in the Left Navigation Pane. To move an email to the Folder for future reference, simply click and drag the email to the folder. You may also right-click on the email, hover to "Move" and click on the Folder name where you would like to save the email.

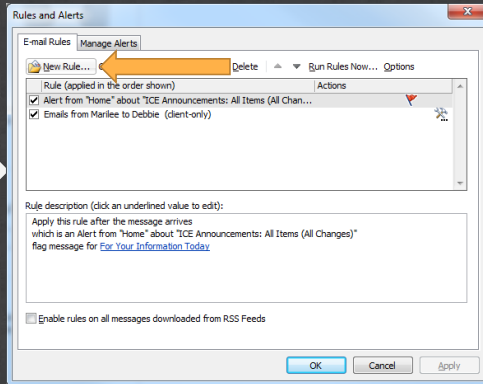
Rules and Alerts



- Click **File** and select **Manage Rules & Alerts**
- Click **"New Rule"**
- Make appropriate selections to manage emails
- Follow the Wizard to complete the Rule

Manage Rules & Alerts allows you to change email colors, flag specific messages, as well as move emails to specific folders.

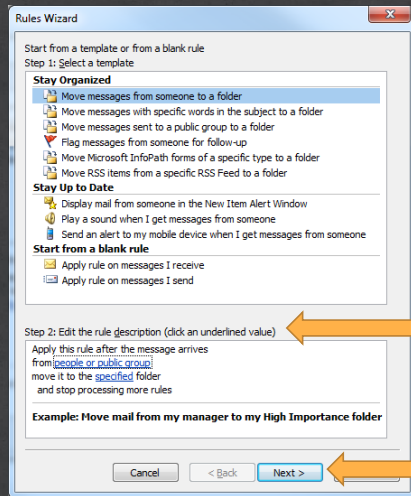
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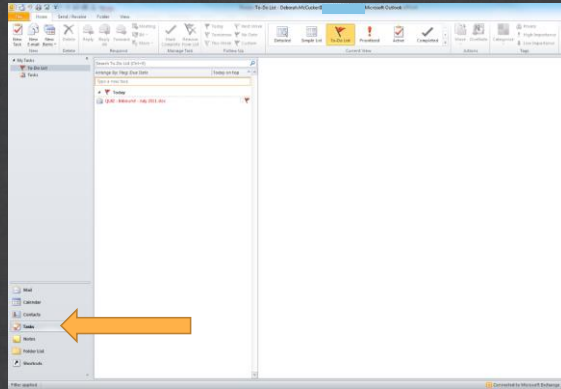
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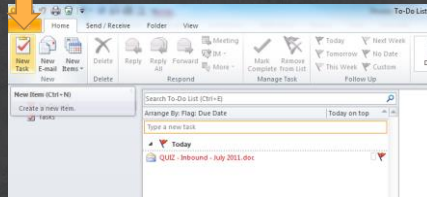
Email Task List



Outlook may also be used to schedule, track, and remind you of specific Tasks. The Tasks are separate folder located in the Left Navigation Pane of the Outlook window.

The Task area of Outlook will change the Tabs and Tab Groups located at the top of the Outlook window.

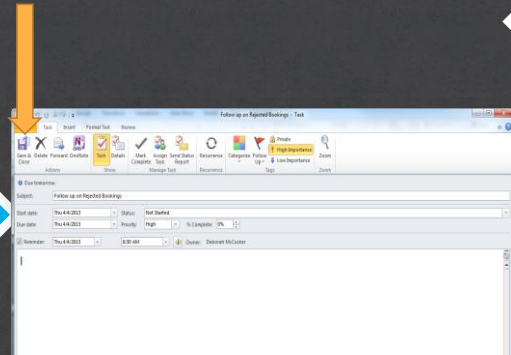
Email Task List



- Click **New Task** on the Home Tab.

To create a Task, simply double-click anywhere in the empty white space of the window OR select the “New Task” icon on the Home Tab.

Email Task List

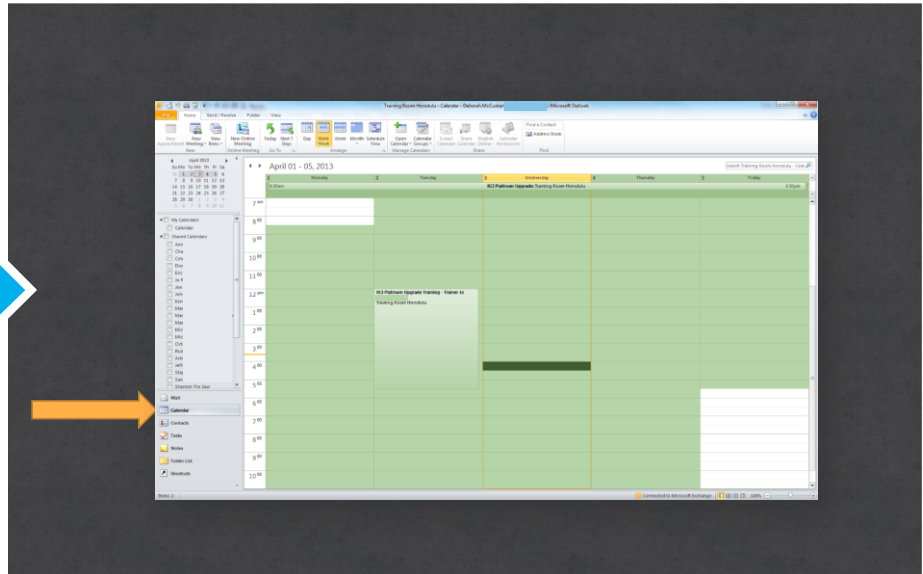


- Type the name of the Task, select the Start and End Date, Reminder time, and any other options you wish.
- Click **Save & Close** on the Task Tab.

Type the name of the Task, select the Start and End Date, Reminder Time, and any other options you wish. Click on the Save & Close button on the Task Tab.

Or, you may simply Click and Drag the Email to the Tasks Folder. A New Task will automatically open for you to edit and save accordingly.

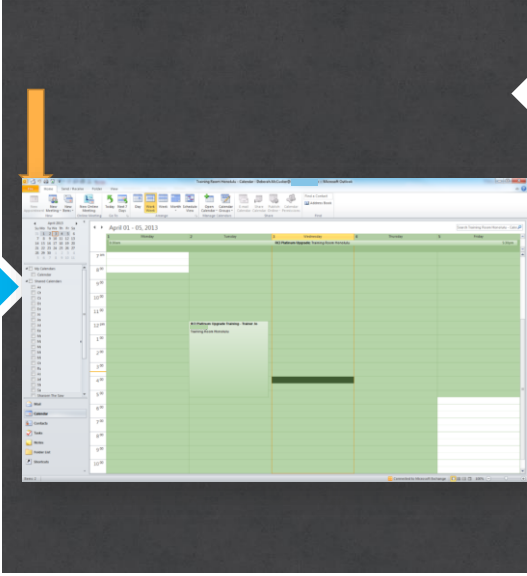
Email Calendar



The Outlook Calendar is another way to schedule tasks and assignments. To view the Calendar, simply click on “Calendar” in the Left Navigation Pane.

Many of you have probably already received Calendar Invitations for meetings, such as this one. The easiest way to schedule items on your Calendar is by Accepting a Calendar Invitation someone else has already setup. Simply click on the “Accept” button from the email.

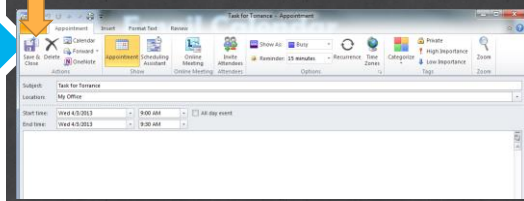
Email Calendar



- Click the **New Appointment** button on the Home Tab.

To add an appointment to your Calendar, click on the “New Appointment” button on the Home Tab.

Email Calendar



- Type the Subject, select the Start and End Dates, select the specific time period for the Appointment, Reminder, and any other options you would like.
- Click the **Save & Close** button on the Appointment Tab.

In the Appointment window, type the Subject, select the Start and End Dates, select the specific appointment time, select the Reminder, and any other options you would like. Once the appointment is completed, click on the “Save & Close” button on the Appointment Tab.

As with Tasks and Email follow up, you will want to setup a Reminder. Reminders are automated and therefore, will not be forgotten when used appropriately.

Voice Mail Management

4 D's of Time Management



And next, we must address Voice Mail Management.

Many email programs are connected to voice mail, so you may simply follow the same 4D's of Time Management. Even if you don't have voice mails turned into emails, you need to schedule time for voice mail management. Just because you missed a call and see a red light flashing on your phone doesn't mean you need to break away from your planned activity. Get to it when you've allotted time on your calendar for voice mails. Do not return calls based on First-In, First Out. Listen to all voice mails making detailed notes on each, then manage them accordingly: Delete, Defer, Delegate or Do, meaning call the person back and speak with them.

Some companies may require employees to respond to voice mails within a specified amount of time. If this is the case, it may be helpful to place an hourly reminder to spend time checking and responding to voice mails. This way, you do not feel the urge to get to them as soon as they arrive.

Even if you are not required to follow up within a certain time, you should place time

on your calendar specifically for voice mail management. Don't let it take over time you've already scheduled for those other, more important, things on your schedule.

Skills Practice Debrief

Review the tasks you categorized:

- *How did you decide which tasks are Urgent?*
- *How did you decide which tasks are Important?*
- *Are the priorities of others always the best guide?*

Let's review our Prioritization Handout again.

After you have listened to what you've learned in this course, how would you change the priorities on the list? How did you decide which tasks were Urgent? Important? Would you change any of your priorities?

Update anything that you feel may have changed based on what we've learned so far. And, don't forget, this is something that you should look at regularly during your life. Evaluate and Reevaluate at least once a year as your life changes. As things change in your life, priorities may change and to best manage your time, you need to plan according to the priorities in your life.

Summary / Q&A

- Define prioritization
- Describe the benefits of the Time Matrix
- Use the Time Matrix to manage and prioritize time
- Use the Priority Pyramid to organize daily schedules and follow up in a timely manner
- Use Time Management software to prioritize and organize

In this course, we learned the definition of prioritization, we should now be able to describe the benefits of the Time Matrix, use the Time Matrix to manage and prioritize time, use the Priority Pyramid to organize daily schedules and follow up in a timely manner, and use Time Management software to prioritize and organize your daily life.



THANK YOU!

Thank you for attending and remember to use the Time Matrix and the 4D's to become more productive.