



Outlook Productivity Tools

Intro to Microsoft

Microsoft Outlook Productivity Tools

Microsoft Outlook is a powerhouse of productivity. Although most people consider Outlook to be for email only, the truth is that there is the capacity for task management, calendar management, contact management and email management all in one place. During this course, you will watch a live demonstration of Outlook, including tools from all of the different areas available. By utilizing all that Outlook has to offer, you can greatly improve your productivity. You will then have lab time to explore and practice these tools while the instructor is there to provide guidance and answer questions.

The learning objectives for our course are:

- Discover the customized ribbon and a variety of customized views available in Outlook;
- Learn about the various tools that Outlook has to offer – including flags, rules, categories, and much more;
- Implement various tips and tricks - including the scheduling assistant, customized business cards in people/contacts, and creating tasks from emails - to be more productive every day.





Microsoft Outlook Overview

- Features and tools in Outlook email:
- Features and tools in Outlook calendar:
- Features and tools in Outlook people/contacts:
- Features and tools in Outlook tasks/Microsoft To Do:

Ribbon and Quick Access:

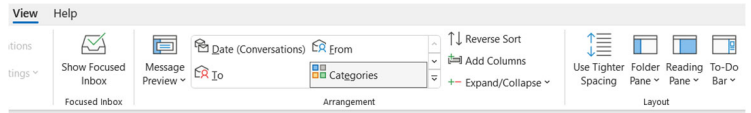
How to customize the ribbon

How to customize Quick Access

Additional Notes:



Microsoft Outlook Email Settings and Views



Outlook settings/options:

- How to access the settings/options
- Items you may want to change (i.e. default startup folder, notifications, default calendar reminder, etc.)

Outlook Email View tab:

- Change View and View Settings –
- Show as Conversations –
- Show Focused Inbox –
- Arrangement options and columns –
- Folder Pane and Reading Pane –
- To-Do Bar -

Additional Notes:



Microsoft Outlook Lab and Q & A

Overview, Settings and Email Views

Exercises:

- Try customizing your Ribbon and/or your Quick Access toolbar to be more efficient. What commands to you use frequently that would be nice to get to with one click?
- Look through your Outlook settings/options to see if there are any changes that might benefit you & let the instructor know if you have any questions.
- Turn Conversations on and off to see the difference and decide which you prefer.
- Turn the Focused Inbox on and off to see the difference and decide which you prefer.
- Try different arrangements of your inbox to see if there's something you like better than what you have.
- Try different versions of the Folder Pane and Reading Pane and pick your favorite.
- Try multiple versions of the To-Do Bar to decide what combination you like best or if you want to leave it off.



Microsoft Outlook Email Productivity Tools



Folders:

Questions to ask yourself to determine if you should organize email with folders:

- Does your inbox bother you? Is the number of emails overwhelming?
 - If yes, then folders will probably be a good solution for you
 - If no, then folders may not be the solution – you need a strong process for keeping up with unread messages, such as flags, tasks/Microsoft To-Do or some other task/to-do management
 - Are you an out-of-sight, out-of-mind person?
 - If yes, then you will want to use folders for storage and the inbox for action items
 - If no, then you could consider an Action folder
-
-

Search:

Rules:

Categories:

Automatic Replies/Out of Office:

Signatures:



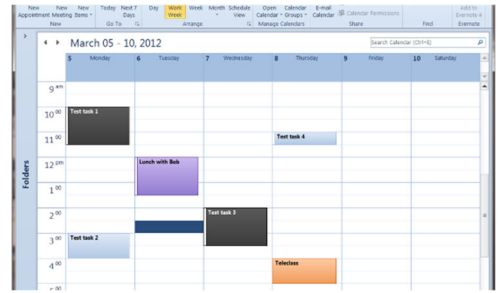
Microsoft Outlook Calendar

Accepting/Declining Invitations:

Scheduling Assistant:

Multiple Calendars:

Views:



Microsoft Outlook People/Contacts

Folders:

Contact Groups:

Business Cards:

Views:



Additional Notes:



Microsoft Outlook Tasks/Microsoft To Do



To-Do List & Folders:

Tasks:

Create Tasks from Emails:

Tasks Views:

Microsoft To Do:

Additional Notes:



Microsoft Outlook Lab and Q & A

Email Productivity Tools, Calendar, People and Tasks/Microsoft To-Do

Exercises:

- Create some email folders that may be useful & if you're not sure what you need yet, create some practice folders and delete them.
- Whether or not you are using folders, write up your process for keeping track of unread emails and emails to follow-up on.
- Look at the different options for Rules to see if you want to create some & if you're not sure yet, brainstorm what rules might be helpful in the future.
- Brainstorm how you might use Categories to keep you organized and productive & come up with a list if possible.
- Create a calendar appointment and familiarize yourself with the options. Make it a recurring appointment.
- Brainstorm what contacts folders you might need, if applicable, and create one. You can delete it later if you don't need it.
- If you have several contacts, try creating a contact group.
- Create a task and familiarize yourself with the options. Make it a recurring task.
- Create a task from an email & have the email be an attachment in the task.
- For all areas, try different views to see what you prefer.
- For all areas, try different versions of the Folder Pane and Reading Pane and pick your favorite.



3 - 5 Takeaways:

-
-
-
-
-

1 - 2 Action Steps:

-
-



Corporate Membership

Compensation

Compliance

Background Screening

Recruiting & Talent Acquisition

HR Consulting

Training

Leadership Development



Missouri

12851 Manchester Road
Suite 150
St. Louis, MO 63131

Indiana

450 E. 96th Street
Suite 500
Indianapolis, IN 46240

Florida

43 Skyline Drive
Suite 1001
Lake Mary, FL 32746

Illinois

300 Hamilton Blvd
Suite L110
Peoria, IL 61602