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BUSINESS SKILLS SERIES

effective time management

Using Microsoft® Outlook® to organize your work and personal life

LOTHAR SEIWERT
HOLGER WOELTJE

BUSINESS SKILLS SERIES

effective time management

Take charge—and create an effective balance between your work and personal life with the help of Microsoft® Outlook®. In this practical guide, two experts teach you a proven time-management system, showing you how to set and manage your priorities with custom modifications to Outlook. Sharpen your focus, combat distractions—and manage your time with complete confidence.

Get the skills to take control of your schedule

- Organize email in a systematic way and keep your inbox clean
- Schedule time for productivity—and defend it against interruptions
- Apply Outlook filters to help you manage tasks and projects
- Make time for family and fun—plan your work and private lives together
- Use Outlook with Microsoft OneNote® to capture ideas and set goals
- Learn effective time management techniques with practical examples

About the Authors

Lothar Seiwert, PhD, CSP, is an expert in time and life management. His work in the field has received numerous awards and prizes, and he is a popular speaker and author on the subject.

Holger Woeltje is an expert in the use of technology in time management. He teaches professional productivity strategies and technology tips using real life examples.

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Effective Time Management

Using Microsoft® Outlook® to Organize Your Work and Personal Life

LOTHAR SEIWERT

HOLGER WOELTJE

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Foreword

MOST PRODUCTIVITY ENTHUSIASTS in the United States have never heard of Lothar Seiwert and Holger Woeltje. That's about to change. They are rock stars in Europe, and this book will rock in the U.S.

I met Lothar through my role as the 2011–2012 U.S. President of the National Speakers Association (NSA), through which he received the Certified Speaking Professional (CSP) designation. He invited me to speak at the German Speakers Association (GSA), where I witnessed his celebrity status. He's a member of the German Speakers Hall of Fame and received the Lifetime Achievement Award from the German Training and Development Federation. His books have sold over four million copies, and his co-author, Holger, has authored seven best-selling books. Rest assured they are well qualified as authors of this new Outlook productivity guide.

Under my moniker, The Productivity Pro®, I've been presenting keynotes and seminars on increasing output and saving time at work since 1992. As a Microsoft Certified Application Specialist in Outlook (MCAS), I've provided Outlook training to corporate clients (including Microsoft!) since the 1990s. Bottom line: There is simply no better tool out there for managing and integrating your email, tasks, notes, contacts, journal, and calendar. But many people simply don't know how to get the most out of Outlook. I'd estimate most people use about 15–25% of its capabilities. Most training consists of "here's your inbox; have fun!" Seiwert and Woeltje take the mystery out of all those settings, filters, checkboxes, and menu options, and give you a customized Outlook experience for the way you manage your time and work.

Outlook actually *is* your work, as all those messages represent something you need to do. But many people are paralyzed by the sheer volume of messages or don't have a systematic way of pulling action from email. So most people leave messages in their inboxes to languish and get buried by the onslaught of new incoming emails.

A single email could actually require you to:

1. Think about the end result of what you'd like to accomplish with the task. Who needs to be involved? Who should own it? What steps are required?
2. Reply to the email or send an acknowledgment with a promised deadline.
3. Convert the email into a task or appointment.
4. Do the required task offline.
5. Respond with the requested information.
6. Set follow-up reminders for pending action or promised deliverables.
7. Store the supporting information.

So many pieces involved in one little email! This book shows you, with many practical case studies, screenshots, step-by-step instructions, and relevant examples, how to complete these processes very quickly—although the offline work will still take some time. You'll discover a brand-new system for organizing your time and to-do's in a more productive, effective way.

How many hours do you spend in your email inbox each day? This book will show you how Outlook can help you to become more productive, so get ready for that figure to go down! If you let yourself be chained down by your email instead of letting it help you manage your life, you're never likely to get much done. Seiwert and Woeltje are about to set you free!

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Author, What to Do When There's Too Much to Do:
Reduce Tasks, Increase Results, and
Save 90 Minutes a Day *(Berrett-Koehler, 2012)*
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A very big thanks goes to all of the ***participants*** from our keynotes, workshops, and seminars who implemented what we taught them. Whom we have the honor to support on their journeys to reaching their goals, overcoming challenges, and making their workdays easier. Who help us with their questions to adjust our methods and teaching to the ever-changing business and technology world. Who give us back so much with their feedback and sharing their personal success stories a few months or even years later. Hearing or reading about and sometimes even seeing in person how they've been able to improve their work results, achieve a balanced life again, and gain more time for their families and friends is the most precious reward for us we can imagine.

And, finally, thanks a lot to you, dear ***reader***, for helping us to make this book a success. We hope you'll enjoy it and gain a lot from the tips, tricks, and strategies you'll find on the following pages. Now it's your turn to read this content, really think deeply about it, apply it to your work and personal life, and implement the techniques one at a time to harvest some big results!

—Lothar Seiwert and ***Holger Woeltje***, September 2011

Introduction

ARE TOO MANY EMAIL messages, urgent deadlines, and stressful meetings driving you nuts? Is time running out on you? Do you sometimes feel like you didn't get anything important done at the end of the day, because all the urgent, small stuff kept you so busy you didn't even start the things that really matter in the long run?

It doesn't have to be that way. In today's modern world, characterized by complexity, information overload, and way too many distractions, Microsoft Outlook can help you to focus and prioritize, to separate the wheat from the chaff. But if no one ever showed you how to use Outlook in a really productive way, it can cause even more trouble: Reminders that pop up on your screen and distract you while you're in the middle of something else, desktop alerts for new email messages that keep constantly nagging you, and a task list with 357 overdue red entries—no wonder Outlook puts you in a bad mood as soon as you look at it! It's finally time to change that! You'll learn a proven time management system tweaked for use with Outlook. It'll help you to focus on what matters most and gain more time for important things while only requiring you to invest a little time each day for planning.

The authors of this book are two highly experienced time management experts from Germany, the largest national economy in Europe. They help executives all over the world to become more successful and will show you how to systemize and organize your complex everyday life, too. How to turn from being Re-active into Pro-active using rigorous task planning and weekly planning. And how to create daily plans that still work even when the unexpected occurs.

This book will show you, very concretely and with many practical examples, how Outlook perfectly supports you in implementing an effective time management system of this kind. Outlook offers many practical functions that help you keep things in perspective and save a lot of time during your hectic workday—as long as you use these functions wisely and set the right priorities. It's up to you to make use of this now—just invest half an hour each day in reading, understanding, and applying this knowledge for the next few weeks, and you'll greatly benefit from it sooner than you could have imagined!

Who This Book Is For

This book is for all Outlook users who want to improve their time management skills and want to use Outlook in an easier, faster, more productive way to organize their email, tasks, and appointments. It won't show you every available Outlook function, just the ones you need to achieve this goal as quickly and as easily as possible.

It'll still require some work to get there, but we'll skip things such as managing contact entries or changing your email signature. We'll also skip geeky stuff like the developer ribbon, the Forms Designer for customized Outlook forms, and configuring Microsoft Exchange servers—complex things that software developers and IT administrators use, but most Outlook users will never need at all. We'll still cover advanced functions such as customizing your Outlook views, filtering entries, and even adding custom fields, but these functions will be easy to learn and will help you a lot in focusing on certain projects and tasks you need to take care of today.

Assumptions

To understand and use this book, you already should know Microsoft Outlook on a basic level. Having used it for a few weeks is enough. You should also be familiar with your computer's operating system (such as Windows XP, Windows Vista, or Windows 7) on a basic level, and know how to click a menu, close a dialog box by clicking OK or Cancel, and recognize clickable buttons. If you are totally new to computers, Windows, or Outlook, and have never used it before, we recommend getting an additional book for beginners first, to take your first steps.

But if you have already used Outlook for a few weeks; know how to enter an appointment in your calendar; and can write, send, and reply to an email message, we'll guide you from there. Because many Outlook users have never used tasks before or stopped using them because they had no working system for using them, we'll even cover using Outlook tasks from the beginning.

Also, if you are a very experienced Outlook user or professional developer who has used Outlook for years and knows every single button and command by heart, you'll still benefit from this book because it shows you a system for organizing your work in a more effective way. You might also discover some new ways to use the Outlook functions you already know for implementing this system.

Again, this is *not* a technical Outlook manual explaining every function available, *but* a time management guide for everyone with basic Outlook knowledge. It'll show you the best and proven time management strategies and tactics to better organize your work and private life, focus on your goals and most important tasks to achieve what matters most to you, and use Outlook for your weekly and daily planning.

Half of this book is about time management, and half of it is about using Microsoft Office Outlook 2003, Outlook 2007, or Outlook 2010 to implement what you've just learned. So it's not an Outlook manual, but you'll still learn some very handy technical tips and tricks along the way, such as turning off distracting email alerts; coloring appointments in your calendar; filtering views to quickly switch between all tasks due today, all tasks for a specific project due anytime during the next three months, or all appointments grouped by location.

How This Book Is Organized

In Chapter 1, "How Not to Drown in the Email Flood," you'll discover how to stop being distracted by new email messages, how to improve your email writing style, how to keep your inbox clean and process messages much more efficiently, and how to file them, get the important ones done in time, and also keep track of things you can't do right away but will have to take care of in a few weeks or months.

In Chapter 2, "How to Work More Effectively with Tasks and Priorities," we show you how to set priorities, figure out what's most important, and use the Outlook task list in a genuinely effective way to keep track of everything you have to do. We'll also show you how to set filters to focus on specific things you want to see, such as all 14 tasks for today instead of all 921 for the next few months.

In Chapter 3, "How to Gain More Time for What's Essential with an Effective Week Planner," you'll find a system that helps you balance the different areas of your life better, regularly reserving some time for your family, yourself, your health, strategic decisions, and your most valuable projects, even when lots of urgent things are getting in your way. You'll learn how to use Outlook categories, group your task view by topic, and use weekly planning in Outlook to gain more time for what's most important after you've figured out what that is (for which you will need to read Chapter 2 first).

Chapter 4, “How to Make Your Daily Planning Work in Real Life,” helps you to plan your day with Outlook and implement your weekly planning as well as your priorities from Chapters 2 and 3. You’ll also discover how to display your appointments by city instead of by date (for example, to find out when you’ll be in Miami or Los Angeles next time), how to automatically highlight tasks that meet certain criteria with a different color, and how to prepare your daily plans so they still work even when the unexpected occurs.

Chapter 5, “How to Schedule Meetings So They Are Convenient, Effective, and Fun,” takes care of improving your meeting culture: how to organize meetings more efficiently, how to prepare a good meeting, how to find the right times with Outlook and prepare your calendar to help others find suitable times more easily, and how Microsoft SharePoint can help you avoid duplicate or outdated documents for meetings and quickly find the right ones.

Chapter 6, “How to Use OneNote for Writing Goals, Jotting Down Ideas, and Keeping Notes,” introduces you to Microsoft OneNote, a great companion to complement Outlook for notes, meeting minutes, goals, small projects, and big ideas. You’ll discover how to use OneNote, keep track of your notes, set goals, link the steps for achieving a goal to Outlook tasks, and file email messages or meeting agendas from Outlook to OneNote to take additional, more detailed notes there.

Chapter 7, “How to Truly Benefit from This Book,” shows you how to successfully implement everything you’ve learned in the other chapters, and how to set up an action plan to take a few minutes each day or half an hour a few days a week to achieve your first results very soon and realize big improvements after two to five months.

We recommend that you approach this book chronologically, chapter by chapter. When you have the whole picture and understand how the system explained in this book works, you can always use the index at the end of the book to quickly refer to any special function or concept if you need to look it up again. You could also start with Chapter 2, Chapter 5, or Chapter 6 instead of Chapter 1. You can always switch the order and go back later, as long as you read Chapters 2, 3, and 4 in a row and read Chapter 7 only after you’ve read everything else first. Still, we recommend starting with Chapter 1, going chronologically chapter by chapter, and finishing with Chapter 7.

Additional Video Lessons Online

You'll find a complimentary video course online:

- Get a comprehensive overview of what you've learned in this book.
- Discover additional tips and tricks.
- See how to implement the system from this book in full-color Outlook screen-capture videos.

These video lessons are free for all readers of this book. They'll show you how to better organize your task list, your calendar, and your inbox and how to use the system from this book in Outlook. They also include some additional tips and tricks.

To claim your complimentary video course now, just go to

> *www.technoproductivity.com/outlook-2007* (videos for Outlook 2007; most of the things shown also work with Outlook 2003)

or

> *www.technoproductivity.com/outlook-2010* (videos for Outlook 2010)

How to Get Support & Provide Feedback

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CHAPTER 1

How Not to Drown in the Email Flood

IN THIS CHAPTER, YOU WILL

- Disable new email notification.
- Create an appointment or a task from an email message.
- Create a new contact entry for the sender of an email message.
- Create tasks and appointments from individual parts of a longer email message.
- Insert multiple email messages into existing tasks and appointments.
- Set up new folders.
- Create your own search folders.

"You've Got Junk...!"

THESE DAYS, office workers spend an average of two hours per day processing email. Despite the enormous advantages this type of communication provides, many of us consider it a monster that leads to distraction, misunderstanding, stress, and even more problems down the road. You will spend much of your time in Microsoft Outlook working with email, which is enough of a reason to devote the first chapter to tactics and methods for solving mail problems. You will learn how Outlook supports you, and we will share tips and tricks to help you efficiently handle electronic mail.

ROBIN'S EVERYDAY FRUSTRATIONS DURING THE PROCESSING OF EMAIL

Actually, Robin Wood wanted to be done with his monthly report for his manager an hour ago, but… well, the little desktop alert window keeps popping up to announce a new message again and again. Each time he thinks, "This might be important!" but so far it hasn't been, not today, not yet. "Hmm, now that I've got the message open anyway, I might as well answer really quick." No sooner thought than done. Fifteen minutes later, he finds himself back in front of his report. "Wait a minute…where was I?" It takes him a moment to get the hang of those numbers again…

A little while later, a new message is announced. "Not again!" Robin grumbles. Yesterday an especially favorable offer for a smartphone that could also be used privately was sent to all employees. Since then, this is the 18th message in which somebody has sent order information or an inquiry not just to the originator of the offer but also to all other recipients of the original message by inadvertently hitting Reply All, thus adding to the other senseless junk in their inboxes. "Well, at least it's kind of interesting to see who's ordering the phone, and what questions they are asking, even though I've already owned it for three weeks now and don't really have to decide whether to get it or not…" So he reads the entire message before deleting it.

Just before lunch, he is finally done with the report. Before heading off to the cafeteria, he quickly goes through his latest messages. His team leader is politely reminding him that she had asked him to revise a document concerning the trade show preparation and to send it back to her two weeks ago. Time is running short. "Ooops, drat!" He had totally forgotten about that. He scrolls about 310 messages down, and there it is: the request for a review two weeks ago, which he hadn't been able to work on right away—after all, back then he still had 10 days to do it. And then, unfortunately, he had completely overlooked it sitting there in his crowded inbox. He'll take care of it right after lunch, even if there are other pressing issues.…

The most ubiquitous and worst problems with email have the following causes:

- **Constant interruptions** You frequently want to respond right away when noticing a new message. Maybe out of curiosity, or maybe because it represents a welcome distraction from such boring tasks as crunching endless columns of numbers. Or maybe you just feel like you have to do right by everyone and answer immediately.
- **Sending junk to others** How often do you get messages that are only slightly relevant to your work or have nothing to do with it at all and don't require any kind of answer or response from you? How often do you put an additional three people on the recipient line just in case they might be interested? Once in a while, this triggers a veritable "answer marathon."
- **Unclear formulation** Certain issues might be as clear as day to the sender, but they may not be as obvious to the recipient and don't become clear in the message body either. For example: "Would be nice if we could still integrate Feature XY—but maybe that's too complex." Is that an idea, a question about whether something is possible, an indirect comment that the person responsible isn't qualified to do it, a suggestion that it should be left out, or a kind plea to integrate the feature?
- **The emotional factor** In comparison to other forms of communication, email seems to be virtually preprogrammed for misunderstandings. It's hard to get an undertone or tongue-in-cheek meaning across, you can't see the facial expressions or gestures of your counterpart, and you are delivering a relatively long monologue without the option of immediately inquiring about or responding to ambiguities or other problems. Have you ever spent two hours writing an angry answer to an email message that resulted in an escalation of the discussion? Or decided to discard an angry answer instead of sending it after spending an hour writing it?
- **Answering without thinking first** Sometimes we switch to response mode, because it just seems so much quicker that way. But we end up investigating issues or triggering discussions that are actually irrelevant. Or we provoke multiple inquiries or superfluous (re)work, because in our rush to answer we forget to include certain information.
- **Insufficient order leading to the data graveyard** Did you ever forget to answer an important message or at the crucial moment discover that you were unable to locate essential information? Some people have more than 500 or even thousands of messages in their inbox. Even though the search function or a good memory ("Didn't Lisa Miller send a request concerning project XY a couple of weeks ago?") can help in 90 percent of the cases, the remaining 10 percent of open questions and pending issues are buried under a mountain of junk.

Let’s Get Started and Change This!

The following steps will help you manage your daily email flood:

- Don’t allow yourself to get distracted. Answer consciously, and think about your answers first instead of responding immediately to each message.
- Send the message only to recipients who really need it.
- Write in a recipient-oriented fashion. Make sure your communication is clear and unambiguous.
- Create a system for processing incoming email. Keep track of follow-up activities so they are available when required. Know where to find saved information quickly and reliably. With a bit of practice and a few weeks of getting used to the system, pretty soon you won’t forget things any longer.
- Use a system to keep your inbox in order. Keep no more than 30 messages in your inbox—and you will always keep track.

In this chapter, you will find time-tested tips and methods to do this and learn how Outlook can support you perfectly.

It's Not the Email Messages, It’s How We Handle Them

Now that we’ve named the problems that prevent us from working effectively, let’s find their causes. What is our part in the problems? Are we causing them or making them worse? If we can’t prevent or eliminate them, we must accept them and change our way of handling them.

Don’t Let Yourself Get Distracted

Let’s start with the distractions: Do you really need to check email constantly and answer right away without finishing other tasks in peace? Or could it just be a bad or debilitating habit? Or maybe it’s a subconscious attempt to dodge the task at hand? What would be the worst thing that could happen if you simply ignored the inbox for the next two hours? Usually the answer is “Nothing.” On the contrary: you might just be able to finally finish that monthly report—and you would no longer have that queasy feeling in your stomach.

But what if your manager needs an answer right away and now she's going to get it two hours late? Well, if you don't always answer every message within 3 minutes (and who can do that on a continuous basis?), your manager should realize that the issue can either wait or that she has to call you on the phone to get an answer.

"Educate" Pushy Senders

In urgent cases, a phone call is the better choice anyway: an immediate dialogue that allows both of you to answer directly, instead of a series of alternating email monologues with wait times in between. Unless your job is to respond quickly to inquiries via live chat or email as part of a support or customer service team, it's absurd to expect immediate answers to email messages. Therefore, if somebody is pushy or complains, ask him or her politely to just give you a call next time, if it's urgent. You could use the argument that a phone call would also let the inquirer find out whether you are even available at that time.

> Your company might have specific policies as to the time frame in which to answer email messages, or you can set that time frame yourself and let your email contacts know what it is, such as 48 hours at most. But make sure to adhere to this time frame. Take note of the following:
>
> - Turn on your out-of-office notification if you are taking a few days off or won't be able to answer messages within the promised time frame.
> - Think of all eventualities. It's best to grant a representative (a colleague or assistant, for example) access to your inbox, in case you suddenly get sick. Make sure to let certain contacts know this, if you are expecting confidential email messages.

Disable New Email Notification

Turn off the notification for newly arrived messages. It will only distract you; worst case, it might motivate you to interrupt and postpone an important but unpleasant task yet again. Even if you only take two to four minutes to answer a message "in between," it will enormously slow down tasks that require your full concentration over an extended period. For each interruption of more than a few seconds, you will have to invest a few minutes more to reach full concentration again and get back to working at the same speed as before.

If you are expecting an urgent and important message that is of the highest priority because you require it to continue your work, you might want to ask the sender to follow up after the time-sensitive message has been sent, for example with a phone call or text message (called *SMS* in some parts of Europe). This is a better option than letting yourself get interrupted by every newsletter or junk mail message for the next five hours, or checking every two minutes to see whether the message has come in yet, because you will always find another subject in your inbox that will distract you. You could also agree with the sender on a time when the message should arrive. This way you will not need to check beforehand.

How to disable the visual and/or acoustic new email notification

1. Microsoft Outlook 2010: Click **Options** on the **File** tab to display the **Outlook Options** dialog box, as shown in Figure 1-1.

   Microsoft Office Outlook 2007/Microsoft Office Outlook 2003: On the **Tools** menu, select **Options**.

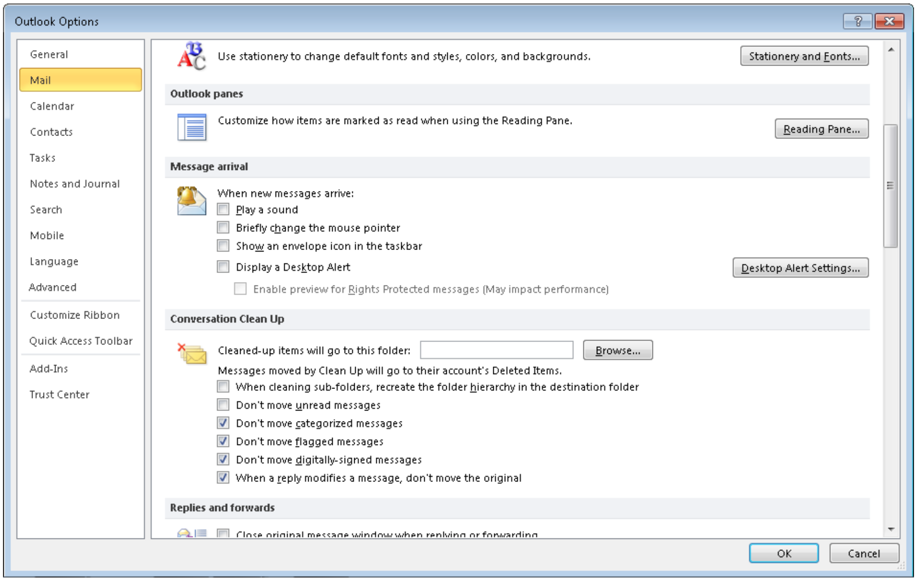
2. Outlook 2010: In the left pane of the **Outlook Options** dialog box, click **Mail**.

   Outlook 2007/Outlook 2003: On the **Settings** tab, click **Email Options**.

3. Outlook 2010: Clear all check boxes in the **Message Arrival** pane.

   Outlook 2007/Outlook 2003: In the **Email Options** dialog box, click **Advanced Email Options**. Clear all check boxes in the **Upon arrival of new items in the Inbox** pane (or at least clear **Show Desktop Notifications** and **Play a Sound**).

4. Close all dialog boxes by clicking **OK**.


Outlook Options
General
Mail
Calendar
Contacts
Tasks
Notes and Journal
Search
Mobile
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center
Stationery and Fonts...
Reading Pane...
Desktop Alert Settings...
Browse...
OK
Cancel

Use stationery to change default fonts and styles, colors, and backgrounds.

Outlook panes

Customize how items are marked as read when using the Reading Pane.

Message arrival

When new messages arrive:
☐ Play a sound
☐ Briefly change the mouse pointer
☐ Show an envelope icon in the taskbar
☐ Display a Desktop Alert
  ☐ Enable preview for Rights Protected messages (May impact performance)

Conversation Clean Up

Cleaned-up items will go to this folder:
Messages moved by Clean Up will go to their account's Deleted Items.
☐ When cleaning sub-folders, recreate the folder hierarchy in the destination folder
☐ Don't move unread messages
☑ Don't move categorized messages
☑ Don't move flagged messages
☑ Don't move digitally-signed messages
☑ When a reply modifies a message, don't move the original

Replies and forwards

☐ Close original message window when replying or forwarding

FIGURE 1-1 Don't let yourself get distracted by each new message—turn off notifications.

How to disable the automatic downloading of new messages

If you want to finally work through all the existing messages in your inbox without receiving new ones, as long as you are not explicitly calling them up via Send/Receive All Folders or Send/Receive, you can avoid receiving new messages altogether.

- In Outlook 2010, click **Send/Receive Groups** in the **Send & Receive** group on the **Send/Receive** tab, and then select **Disable Scheduled Send/Receive**.

In Outlook 2007/Outlook 2003, do the following:

1. On the **Tools** menu, click **Options**.
2. On the **Mail Setup** or **Email Setup** tab, click the **Send/Receive** button, and in the **Transfer Groups** dialog box, under **Settings for group “All Accounts”** and under **In Offline Mode**, clear the **Automatic Transfer Every x Minutes** check box. If you have set up several groups, you need to perform this step for each group.
3. Close all dialog boxes by clicking **Close** or **OK**.

Process Email Messages in Blocks

Think about how often you really need to check your inbox for new messages. Most people intuitively check it much too often. Wouldn’t it be enough to devote one hour twice a day, 40 minutes three times a day, or 30 minutes four times a day to handling email? (You will find more information about the advantages of organizing blocks of tasks for processing in Chapter 4, “How to Make Your Daily Planning Work in Real Life.”)

WHAT IS A BLOCK?

In the context of time management, a *block* is a specific amount of time you set aside to bundle together a lot of small tasks for processing all at once—for example, you could schedule yourself to take care of all of your email and return calls from 1 P.M. until 2 P.M. By doing so, you won’t be constantly interrupted while doing larger tasks, taking a small break and then making a call, then another one.... More importantly, you’ll be able to focus on the big and important tasks instead of always thinking “Oh, I’ve got to squeeze in nine calls somewhere”—you’ll have a whole hour from 1 P.M. until 2 P.M. to take care of that.

The creation of blocks is especially helpful when processing email messages. Unimportant messages can be answered faster or deleted immediately. “Ten more messages after this one. Yikes, I still have other things on my plate, but this one isn’t even important. So I’ll keep it short and hurry up.” (You'll learn more about the DANF System for processing email messages in the section “Keep Your Inbox in Order” later in this chapter.)

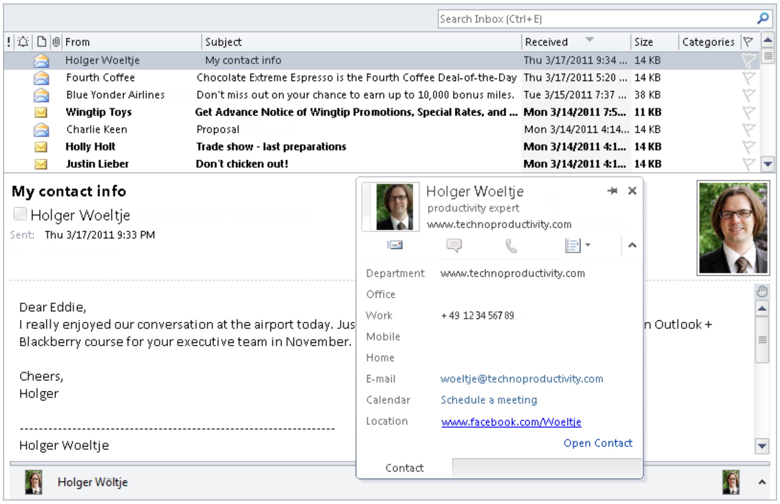
Sometimes hours of waiting time until your next email block starts, added to your normal response time, can even lead to fewer incoming messages, because your colleagues may find it quicker to research certain information by themselves, instead of sending a message to you.

Break Your Response Pattern

This next tip may initially take a bit of time, but you will recover the invested time elsewhere. Before answering an email, pause for three seconds and listen to yourself. Evaluate your emotional state to determine whether you can answer neutrally. If you are angry, irritated, scared, very nervous, or a little confused, wait a while before you answer, if at all possible. Ask yourself: “Why is this inquiry in my inbox, who sent it, what happens if I send a short reply now; is email truly the right answer medium?”

Most of the time, you will reply in a similar way as before—just a little more deliberately. Once in a while, however, you will discover that these questions lead to a noticeable improvement. Sometimes even a mail marathon, which could drag on for hours and over several email messages, can be prevented with a two-minute phone conversation.

If you want to call the sender (or a recipient) of an email, but he or she has not added a signature with a phone number, you don’t need to switch to your contacts to retrieve the required information. Simply right-click the person's address in the preview window (or in the open message) in the From, To, Cc, or Bcc field. If your *Contacts* folder contains phone numbers for this person, they will be displayed in the shortcut menu, as shown in Figure 1-2. (Depending on your Outlook version and system settings, you may need to click Business Card or Look Up Outlook Contact first.)



Search Inbox (Ctrl+E)

From	Subject	Received	Size	Categories
Holger Woeltje	My contact info	Thu 3/17/2011 9:34 ...	14 KB	
Fourth Coffee	Chocolate Extreme Espresso is the Fourth Coffee Deal-of-the-Day	Thu 3/17/2011 5:20 ...	14 KB	
Blue Yonder Airlines	Don't miss out on your chance to earn up to 10,000 bonus miles.	Tue 3/15/2011 7:37 ...	38 KB	
Wingtip Toys	**Get Advance Notice of Wingtip Promotions, Special Rates, and ...**	**Mon 3/14/2011 7:5...**	**11 KB**	
Charlie Keen	Proposal	Mon 3/14/2011 4:14...	14 KB	
Holly Holt	**Trade show - last preparations**	**Mon 3/14/2011 4:1...**	**14 KB**	
Justin Lieber	**Don't chicken out!**	**Mon 3/14/2011 4:1...**	**14 KB**	

My contact info

Holger Woeltje

Sent: Thu 3/17/2011 9:33 PM

Dear Eddie,
I really enjoyed our conversation at the airport today. Jus ... n Outlook +
Blackberry course for your executive team in November.

Cheers,
Holger

Holger Woeltje

Holger Woeltje
productivity expert
www.technoproductivity.com

Department	www.technoproductivity.com
Office	
Work	+49 1234 567 89
Mobile	
Home	
E-mail	woeltje@technoproductivity.com
Calendar	Schedule a meeting
Location	www.facebook.com/Woeltje

Open Contact

Contact

Holger Wöltje

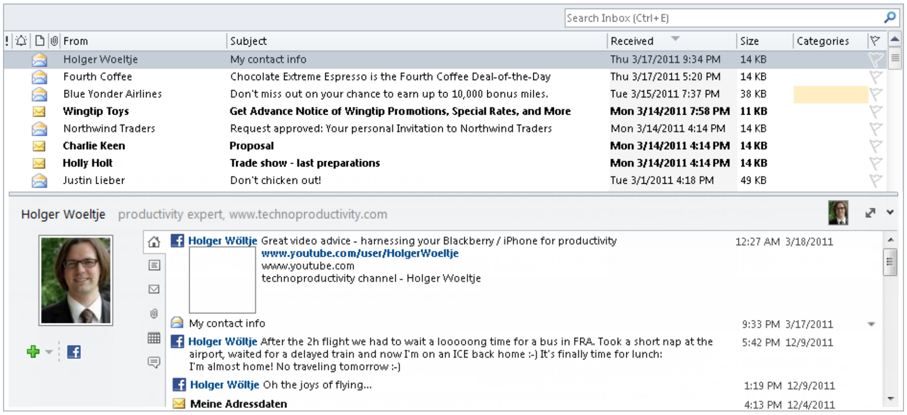
FIGURE 1-2 In the shortcut menu, you can select the business card or the phone number or open all saved contact data for the contact.

View Current Sender Information with a Mouse-Click: The Outlook 2010 Social Connector

Outlook 2010 shows you current information about the sender and the recipients of the active message directly below the message in the so-called Social Connector (see Figure 1-3), so you don't have to do a search. In Outlook 2003 and Outlook 2007, this personal contact area is not available out of the box, but Microsoft provides it as a free download called the Outlook Social Connector for upgrading those earlier versions of Outlook.

If you are looking at an email message in the reading pane or (by double-clicking it) in its own window, Outlook displays a miniature photo of the sender in the lower-left corner of the reading pane, assuming that such a photo exists in your data (otherwise an empty silhouette is displayed), and the sender name next to it (see Figure 1-2 shown earlier). On the right border, the photos/silhouettes of all the other mail recipients are displayed, and to the right of them you'll see a small upward-pointing arrow. If you point to one of these photos without clicking it, Outlook shows the name of that person and (if it exists in your contacts) his or her job title and company name. You can click the arrow head or a photo to view an enlarged version of the Social Connector.

After you have clicked a person's picture or name, you can select that person's available data to the right of his or her photo. For example, Outlook can find the contact's upcoming meetings, email messages you have received from the contact, or only email attachments from that contact. Clicking the respective item opens it directly.



!	From	Subject	Received	Size	Categories
	Holger Woeltje	My contact info	Thu 3/17/2011 9:34 PM	14 KB	
	Fourth Coffee	Chocolate Extreme Espresso is the Fourth Coffee Deal-of-the-Day	Thu 3/17/2011 5:20 PM	14 KB	
	Blue Yonder Airlines	Don't miss out on your chance to earn up to 10,000 bonus miles.	Tue 3/15/2011 7:37 PM	38 KB	
	Wingtip Toys	**Get Advance Notice of Wingtip Promotions, Special Rates, and More**	**Mon 3/14/2011 7:58 PM**	**11 KB**	
	Northwind Traders	Request approved: Your personal Invitation to Northwind Traders	Mon 3/14/2011 4:14 PM	14 KB	
	Charlie Keen	**Proposal**	**Mon 3/14/2011 4:14 PM**	**14 KB**	
	Holly Holt	**Trade show - last preparations**	**Mon 3/14/2011 4:14 PM**	**14 KB**	
	Justin Lieber	Don't chicken out!	Tue 3/1/2011 4:18 PM	49 KB	

Holger Woeltje productivity expert, www.technoproductivity.com

Holger Wöltje Great video advice - harnessing your Blackberry / iPhone for productivity 12:27 AM 3/18/2011
www.youtube.com/user/HolgerWoeltje
www.youtube.com
technoproductivity channel - Holger Woeltje

My contact info 9:33 PM 3/17/2011

Holger Wöltje After the 2h flight we had to wait a looooong time for a bus in FRA. Took a short nap at the airport, waited for a delayed train and now I'm on an ICE back home :-) It's finally time for lunch: I'm almost home! No traveling tomorrow :-) 5:42 PM 12/9/2011

Holger Wöltje Oh the joys of flying... 1:19 PM 12/9/2011

Meine Adressdaten 4:13 PM 12/4/2011

FIGURE 1-3 Current information is always at hand with the Social Connector in Outlook 2010.

You can also view RSS feeds and status updates from the social networks of this person and add this person to your own social networks by using the Add command below the person's photo. For example, you may find a new client via his email address at LinkedIn, add him to your LinkedIn contacts, and from there import his company, mailing address, and phone number into Outlook. If your business partners are using the status entries on social networks, you can also see who has become a new parent, or who is on vacation or a business trip in a different time zone and can therefore only be reached in the evening. Of course, this only works if all parties involved are revealing this kind of (personal) information publicly and are continuing to maintain their social network pages. Make sure to set an information limit for yourself that makes sense. What do you want to know about which person? Otherwise you won't get any work done due to all the Facebook and Twitter updates you are receiving, and you may not be able to pull yourself away from the computer during your time off, either…

AVOID UNNECESSARY MESSAGES WITH THE TEAM FUNCTIONS OF OUTLOOK AND SHAREPOINT

Instead of conducting all communication via email, it can be helpful to save defined reports (such as project status reports, agendas, and meeting logs) at central locations at predetermined times. You can do this by using a Microsoft SharePoint site on your organization's intranet.

You can find out more about the team functions of Outlook and SharePoint in Chapter 5, “How to Schedule Meetings So They Are Convenient, Effective, and Fun.”

When a colleague sends you an email message requesting the telephone number of a contact, the simplest and quickest thing would seem to be to answer him right away with the requested number. However, this is not necessarily the best solution.

If you frequently find yourself in this kind of situation, you should ask yourself why. Maybe there is no central address management. If you create and maintain a public contacts folder or address list on a SharePoint site with data about your contacts for the team, you will save time and get interrupted less often, because the people who would normally send you email messages can just look for the answer themselves and find it quickly.

Keep Your Inbox in Order

The first step on the way to an empty—or at least orderly—inbox is to build blocks of email messages, which allows you to work more productively already. The second step is the consequent and disciplined use of a system to process the messages in the block.

The minimum number of remaining messages you end up with in your inbox at the end of an email block or work day will vary. Depending on the type of business you are in, your way of working, and your position and corporate culture, 20 messages might already be a great result. Other users in certain working environments may get down to five or even no remaining messages. As long as you have no more than 20 to 30 messages in your inbox, you can retain an overview and quickly find what you need. And, last but not least, it will just make you feel calmer, which is much better than the stress of having a “mountain of data” with 2584 messages, giving you a guilty conscience because it’s so hard to find things in there.

Process Your Email Block with the DANF System

Maybe you remember the old saying about how to reduce the amount of papers on your desk: “Pick up each piece of paper only once.” This is also a good guideline regarding email. Many messages can be processed when you read them for the first time; others may require two or three steps. Therefore, when you start with your email block, go through all messages one after the other and evaluate them according to the following aspects and questions (Delete, Act Now, File – or the *DANF System*, for short):

- **Delete it** Being able to delete incoming messages saves the most time. Delete as many as possible as quickly as possible. The first question you should ask yourself is: Can I delete this mail without hesitation? Frequently, a quick look at the sender and the subject line is enough to make this decision.
- **Act Now** Work on important and urgent messages immediately when you start working your email block. Do the same for small issues that only take three to four minutes to process. If you leave these messages for later, they may pile up endlessly and it’ll take more than an hour to catch up after two days. Planning a future deadline, creating a task for taking care of small issues, or looking at them multiple times in a list of “small stuff still pending” will end up costing you more time and energy than taking care of them immediately. After all, you don't need to interrupt a different task, because your current task is taking care of your email block. Therefore, hurry up and get rid of them—doing so will take you one step closer to an (almost) empty inbox.
- **File for later** If it looks like processing the message will take more than five minutes, and it doesn’t require immediate attention, file it into your folder structure. But make sure you save it in such a way that you can take care of it the next time you click it—and that you will find it again when you need it. (You can learn more about folder structures in “Create and Use Your Own Folder Structure” later in this chapter.)

When you are effectively dealing with the message flood, the Delete key is your best friend and most important ally! It's also there to assist you on your BlackBerry.

You can also use the four priority levels of the Eisenhower diagram (see Chapter 2, “How to Work More Effectively with Tasks and Priorities”) for messages you are not working on immediately. Check whether there are three appropriate folders that work for you (delete quadrant 4 or D messages right away). You can process these folders at predetermined times or in the context of your email block after you have completely processed all newly received messages. Plan for taking care of very important and urgent Priority-1/A/quadrant 1 messages by making an appointment with yourself in your calendar if you are unable to work on them immediately.

If you aren't sure whether you can delete a message right away:

- Ask yourself whether it requires a response, follow-up activity, or simple answer on your part (and whether it is really necessary).
- If not: Ask yourself whether you will need this message later on to look up information contained within it, and whether you would find this message again using your search criteria.
- If not: Delete the message.

Make sure you adhere to your company's policies regarding archiving and storage of email messages. Maybe you are not allowed to permanently delete some (or, in extreme cases, all) of the messages this book is telling you to delete. In this case, create a folder called *Compost*, *Garbage Archive*, or something similar, into which you can move the messages whenever we recommend deleting.

File Email Messages Accordingly

To keep your inbox organized, follow these three guidelines.

- The required follow-up activity is clear or this message contains information that pertains to a specific appointment or deadline: Convert the mail into a task or appointment.
- The message requires an answer at a specific time in the future or further processing steps: Save the message in your folder structure and flag it for future processing (see the section "Flag the Messages You Still Need to Work On" later in this chapter).
- No answer or other follow-up activity is required of you, but you want to save the message for look-up later on: File it in your folder structure.

Convert Email Messages into Tasks and Appointments

Sometimes an email message is nothing more than a task (or several) that you need to perform. Others represent appointments (these also include flight or hotel confirmations) or additional information about an appointment (such as an agenda or driving directions).

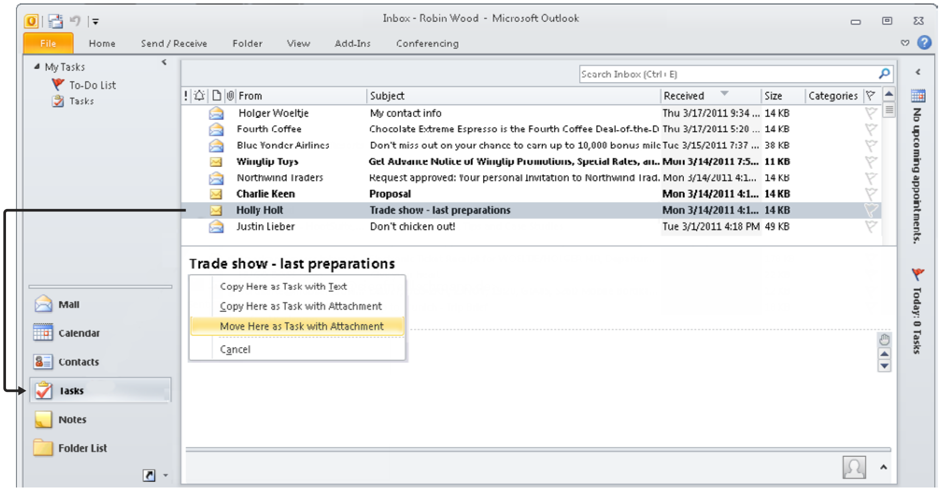
If you are sending such messages yourself, it may be more practical to use a meeting request (to set up or update appointments, see Chapter 5) or use the Outlook functions for assigning a task to others. If you do it that way, the recipient just has to click one button to save the message in his task list or calendar.

> Be careful when using the feature to assign a task to someone else: Creating and delegating an Outlook task can seem authoritarian or presumptuous to clients, colleagues, and managers in other departments or companies. If you are not sure how your task delegation (for example, sending required data) will be received, it's better to write a regular email message.

If you receive such a message as a plain email message, you should convert it into a task or appointment so that you can find it again quickly when you need it.

How to create an appointment or a task from an email message

1. Right-click the message in your inbox and keep the mouse button pressed.
2. Drag the message to the **Tasks** or **Calendar** group button at the bottom of the navigation pane, and release the mouse button.
3. In the shortcut menu that is now displayed, click on the action you want: for example, select **Move Here as Task with Attachment** (see Figure 1-4). This automatically removes the email message from your inbox.


Inbox - Robin Wood - Microsoft Outlook
File
Home
Send / Receive
Folder
View
Add-Ins
Conferencing
My Tasks
To-Do List
Tasks
Search Inbox (Ctrl+E)
Mail
Calendar
Contacts
Tasks
Notes
Folder List
No upcoming appointments.
Today: 0 Tasks

From	Subject	Received	Size	Categories
Holger Woeltje	My contact info	Thu 3/17/2011 9:34 ...	14 KB	
Fourth Coffee	Chocolate Extreme Espresso is the Fourth Coffee Deal-of-the-D	Thu 3/17/2011 5:20 ...	14 KB	
Blue Yonder Airlines	Don't miss out on your chance to earn up to 10,000 bonus mile	Tue 3/15/2011 7:37 ...	38 KB	
Wingtip Toys	**Get Advance Notice of Wingtip Promotions, Special Rates, an...**	**Mon 3/14/2011 7:5...**	**11 KB**	
Northwind Traders	Request approved: Your personal invitation to Northwind Trad.	Mon 3/14/2011 4:1...	14 KB	
Charlie Keen	**Proposal**	**Mon 3/14/2011 4:1...**	**14 KB**	
Holly Holt	**Trade show - last preparations**	**Mon 3/14/2011 4:1...**	**14 KB**	
Justin Lieber	Don't chicken out!	Tue 3/1/2011 4:18 PM	49 KB	

Trade show - last preparations

Copy Here as Task with Text
Copy Here as Task with Attachment
Move Here as Task with Attachment
Cancel

FIGURE 1-4 Move email messages by dragging them into the task list.

We recommend that you copy or move the email message as a task with attachment (instead of "with text"). Copying as a task with text inserts the entire content of the email message (including headers, such as the sender) as text into the note pane of the task. Inserting an email message as a task with attachment has the disadvantage that you can't read the text immediately but need to double-click the inserted letter icon instead. However, this method allows you to attach several messages at the same time, represented in a compact fashion. You can keep the original message with all its pictures and attachments (which are removed if you do a copy as text). After double-clicking the attachment, you can also use the **Reply**, **Forward**, and **Reply All** functions in exactly the same way as if you had opened the message in your inbox—or as if you had put the message into a follow-up file and given it a date, a priority and, if necessary, a reminder. It will later show up in your tasks. More about this in the next chapters.

4. Outlook opens a new task form and automatically uses the email message subject. Complete the entry by adding a due date and define a reminder if necessary.
5. Save and close the new task by clicking the appropriate button.

How to quickly create a new contact entry for the sender of an email message

1. While keeping the left mouse button pressed, simply drag the entire email message onto the **Contacts** group button at the bottom of the navigation pane (in this case, you want to copy the text).

   Outlook creates a new contact. It automatically uses the sender's address and name from the message, and the entire text of the original mail is displayed in the note box.
2. Select the entire text except for the signature.
3. Press Delete to delete the text, so that only the signature is left.
4. Select the company name (by double-clicking it if it's just one word, triple-clicking it to select the entire row, or just clicking in front of the first word and dragging over the whole company name until you reach the end of the name).
5. Click the selected text and drag the company name onto the **Company** text box.
6. Repeat steps 4 and 5 for all other relevant data, such as phone numbers.
7. After you have transferred the data (and deleted any superfluous data), save and close the new contact by clicking the corresponding button.

Create an entry in your Outlook contacts for each contact that might be relevant for you. After you have practiced this process a few times, it only takes a few seconds to create a new contact from an email message with a signature. The advantages of entering the contacts are:

- If the phone number or email address has been updated, you can always find the current data in your contacts (unlike in older messages that have the wrong number).
- You no longer need to search through dozens of messages if the sender does not continue to send the address data he sent in the first mail.
- The contact data will also be available in printed address lists and for your iPhone or BlackBerry, if you need it while you are traveling.
- You can provide your colleagues with the contact data by placing it into a public or shared folder.

How to create tasks and appointments from individual parts of a longer email message

If an email message contains multiple paragraphs, each of which represents an individual task or appointment, do the following:

1. Select the respective sections.
2. Release the mouse button, point to the selected text, and click it again.
3. Drag the selection to the corresponding group button in the navigation pane—**Tasks** or **Calendar**—and release the mouse button.

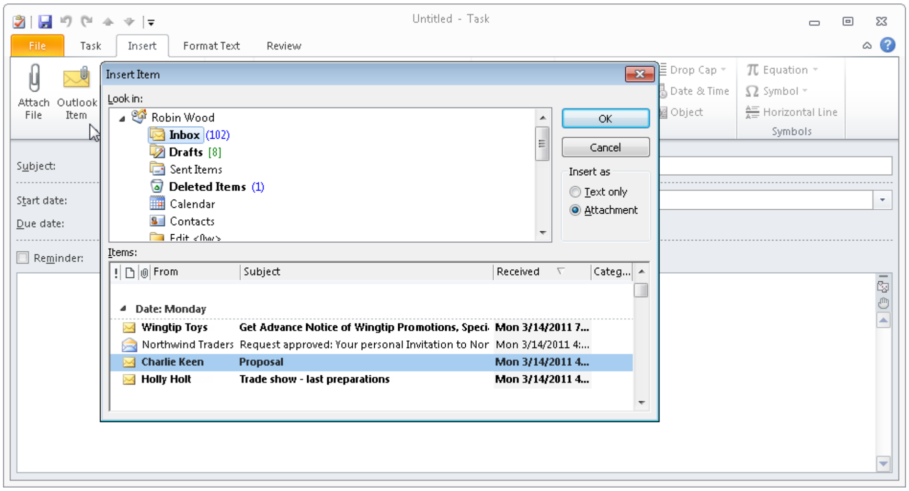
   Outlook opens a new appointment/task form and enters the selected text into the note field of the new entry.
4. Add a meaningful subject line and further information, if necessary.
5. Save and close the new task or appointment by clicking the corresponding button.

How to insert multiple email messages into existing tasks and appointments

You can also append individual or multiple messages (as well as appointments, tasks, contacts, and notes) to already-entered appointments, tasks, and contacts. You might want to do this with a message that contains access data for a phone conference and two messages with the new documents to be discussed there.

1. Open the entry by double-clicking the appointment in the calendar.
2. Outlook 2010/Outlook 2007: In the appointment form, select the **Insert** tab, and in the **Include** group select the **Outlook Item** command (see Figure 1-5).

   Outlook 2003: On the **Insert** menu, select the **Item** command.


Untitled - Task
File
Task
Insert
Format Text
Review
Attach File
Outlook Item
Drop Cap
Date & Time
Object
Equation
Symbol
Horizontal Line
Symbols
Subject:
Start date:
Due date:
Reminder:
Insert Item
Look in:
Robin Wood
Inbox (102)
Drafts [8]
Sent Items
Deleted Items (1)
Calendar
Contacts
Edit <0w>
OK
Cancel
Insert as
○ Text only
● Attachment
Items:

!	From	Subject	Received	Categ...
	Date: Monday			
	Wingtip Toys	**Get Advance Notice of Wingtip Promotions, Speci**	**Mon 3/14/2011 7...**	
	Northwind Traders	Request approved: Your personal Invitation to Nor	Mon 3/14/2011 4:...	
	Charlie Keen	**Proposal**	**Mon 3/14/2011 4...**	
	Holly Holt	**Trade show - last preparations**	**Mon 3/14/2011 4...**	

FIGURE 1-5 Insert email messages into appointments and tasks to view the data where it belongs.

3. In the **Insert Item** dialog box, select the corresponding folder in the **Look in** box and then select the message you want in the **Items** box.
4. Click **OK** to insert the message.
5. Save and close the changed appointment.

How to use a flag to mark an email message as a task in Outlook 2010/Outlook 2007

1. Right-click in the column with the flag (**flag status**).
2. Use the shortcut menu to assign a due date (**Today**, **Tomorrow**, and so on).

This automatically transfers the email message as a task into your To-Do List (see Chapter 2) and thus into the Task List (see Chapter 3, “How to Gain More Time for What's Essential with an Effective Week Planner,” and Chapter 4). By using the shortcut menu, you can also flag the message as taken care of, delete the flag, or add a reminder (an “alarm,” which in Outlook 2010/Outlook 2007 is also displayed when you move the message from your inbox into a different folder).

With the Set Quick Click command in the shortcut menu, you can specify the function of the flag when the column is clicked (for instance, setting the due date to Tomorrow or Today). After you have done this, only a single click in the flag column will then be enough to mark the message as a task that is due tomorrow. Another click marks the email (and therefore the corresponding task) as completed. The flags will even carry over to your BlackBerry: If you use BlackBerry OS 5 (introduced in 2009 with the BlackBerry Bold 9700) or higher versions, you can also flag your messages on the BlackBerry. Flags set there will also appear in Outlook and vice versa.

This method has the following advantages compared to dragging an email message onto the Tasks group button (as described earlier in this section):

- When you switch to your tasks, Outlook shows the original email message directly in your To-Do list. If you mark the email as completed in any email folder, you are also marking the task as completed—and if you check off the message as completed in the To-Do list in the Tasks view, you are also marking the email message in your inbox (and any other folder) as completed. If you delete the email from the To-Do list or the email list, it also gets deleted from the other location.
- Without any additional steps, you can now sort or filter your task list by the Icon field (see Chapter 2) to display the email messages always at the bottom or not at all in certain views, or maybe only the messages but no “regular” tasks.

The drag-and-drop method of converting email messages into tasks, which already existed in previous versions of Outlook, still has three crucial advantages:

- If you want to delete the message from your inbox to retain a better overview of your email but will need to respond to it later on, it will still be available as an attachment. (When you use the flagging method, the task is removed as well whenever you delete the email message. If you copy or move it into a task, however, you can decide whether to keep the message, and you can later independently delete the task that contains the email copy.)
- You are keeping all items that need to be taken care of later in one location: your task folder. If a few months down the road you are looking at an email message about a project and need to work on it, or you want to update presentation slides, get back in touch with someone over the phone, or need to order new printer cartridges, everything is there in your task folder. However, if you mark the email message with a flag, it becomes a different data source that does not display in certain Outlook views. Depending on the panes the user has displayed, this can lead to confusion in Outlook 2007/Outlook 2010. (We will spare you the technical details here, because they are version specific and quite complicated to explain.

In short: the drag-and-drop approach works better if you need to work intensively with email messages that require follow-up, especially if you need to adjust the subject line once in a while or add further information to the note field.)

- When using the drag-and-drop method, you can, if necessary, add further and more extensive comments as well as additional email messages and data attachments in the note field of the task without changing the original message (as you might want to do, for example, when delegating).

In the end, it's up to you whether you prefer to use the time-tested drag-and-drop method for email messages even in the newer versions of Outlook or instead flag messages to convert them—it depends on how you work and how complex the tasks resulting from your email messages are. (Do you ever change the subject lines of messages that are flagged as tasks, or do you write subject lines that are so unambiguous to begin with that this is not necessary? Do you flag a lot of messages as tasks, and do you want to display them in several views separately? Do you use a BlackBerry with BlackBerry OS 5 or higher that will also show flags and synchronize them with Outlook?)

Create and Use Your Own Folder Structure

It takes approximately two hours to design and set up a meaningful folder structure for messages and to file the saved messages in the correct locations within them. Experience shows that it works best to use no more than seven main folders (in addition to *Inbox*, *Drafts*, and the other default Outlook folders). For each main folder, you can create subfolders. You should also try to keep your structure to no more then seven subfolders per level, so that you can later orientate yourself quickly and confidently.

The setup that works best for you depends on your area of work and your personal thinking style—each person's brain is wired differently. For example, if you are managing five large projects, you may want to create one main folder per project, thus sorting your messages by topic. Some users may prefer to sort by time, with folders such as *Completed*, *Reply by Tonight*, *Process This Week*, *Process This Month*, *Waiting for Reply*, and *Follow Up by End of Week*. You can also come up with a combination. For some teams, it may even make sense to have all team members use the same folder structure. There is no fixed rule that can be applied to every situation. Do what works best for you.

Try to find a structure that works for you. For example, get together with a colleague who has a similar working style as you—two heads put together sometimes come up with better ideas. Or you might ask someone who has already successfully cleaned up his or her inbox with a folder structure, to share experiences and give you tips.

The following lists some example criteria for how you can divide your folder structure:

- Persons/contacts (colleagues, clients, suppliers)
- Topics/areas of expertise
- Projects/products
- Priority (see Chapter 2)
- Locations (countries, cities, company locations, plants)
- Product numbers, reference numbers, customer numbers
- Deadlines (Must be completed by tonight, By this weekend, This month)

It might initially take you a little while to get used to this new structure. However, if after three to at most five weeks, you still find your structure to be cumbersome or unclear, and you continue to have a difficult time assigning or finding messages, you should revise your structure, taking your experiences into consideration.

How to set up new folders

1. In the folder list, right-click the desired parent folder you want (for example, the name of your inbox or **Personal Folders**) and then select **New Folder** in the shortcut menu. Alternatively, you can press the Ctrl+Shift+E key combination and then select where the new folder should be inserted.
2. In the **Create New Folder** dialog box, type an appropriate name into the **Name** box.
3. If necessary, change the entry in the **Folder contains items of type** list box to **Email and Provision**, if the dialog box was not opened from email view.
4. Close the dialog box by clicking **OK** to create the new folder.

TIP

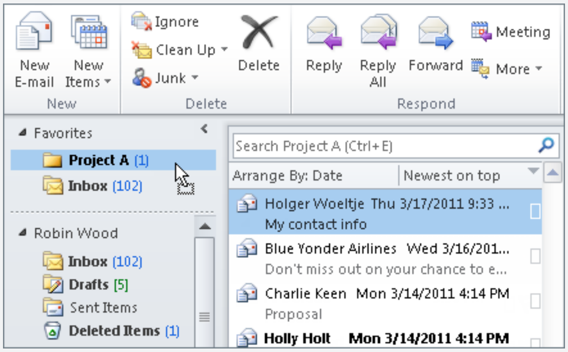
How to move messages into the correct folder

1. In your inbox (or any other folder), click the message you want to move.
2. Drag the message onto the target folder and release the mouse button to drop the message into the folder.

If you want to copy (not move) the message, right-click it and select the corresponding command in the shortcut menu after dragging. You can also press and hold Shift or Ctrl while clicking to select several messages simultaneously, and then move/copy them in one go by right-clicking and dragging the selection. If you want to move an entire folder within your folder structure (not just messages), simply click the folder and drag it into another folder or back onto the main level (into Personal Folders or your Microsoft Exchange Mailbox).

FAVORITES—QUICK ACCESS FOR YOUR MOST IMPORTANT FOLDERS

Use your *Favorites* folder to access your most frequently used folders quickly, without having to click through several folder levels each time (see Figure 1-6). Simply drag a folder or subfolder into the Favorites section. Because you can't see the parent folder levels in your Favorites section, it makes sense to add some form of identification to the folder names, either in front of or behind the name, such as *Technical data (product D)*. Just like all other folders, your *Favorites* folder can be opened by clicking it, or it can serve as a target for moving messages with the drag-and-drop method.


New E-mail
New Items
New
Ignore
Clean Up
Junk
Delete
Delete
Reply
Reply All
Forward
Meeting
More
Respond
Favorites
Project A (1)
Inbox (102)
Robin Wood
Inbox (102)
Drafts [5]
Sent Items
Deleted Items (1)
Search Project A (Ctrl+E)
Arrange By: Date
Newest on top

Holger Woeltje Thu 3/17/2011 9:33 ...
My contact info

Blue Yonder Airlines Wed 3/16/201...
Don't miss out on your chance to e...

Charlie Keen Mon 3/14/2011 4:14 PM
Proposal

Holly Holt Mon 3/14/2011 4:14 PM

FIGURE 1-6 Use the *Favorites* folder for fast navigation.

How to customize message sorting for individual folders

Within the folders, you can sort and group the messages according to different criteria; for example, you can sort one folder by subject and another by sender, while all remaining folders are sorted by date. (You will learn more about sorting, grouping, and customizing views in Chapter 4.)

Click a column header to sort the items according to your chosen criterion. Clicking the column header again reverts the sort order, as shown in Figure 1-7.

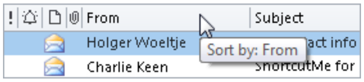


FIGURE 1-7 Change the view of the items contained in the folder quickly and easily.

Flag the Messages You Still Need to Work On

To make sure that you don’t overlook any required follow-up activities for email messages you haven't marked as completed yet, you can either create a task with a copy of the message as an attachment, as described earlier, or flag the message as pending (for example, if it’s not worth creating an extra task for it, because the email needs to be taken care of very soon). Outlook supports you with message flagging—adding small colorful categories or flags to mark the messages. Messages that need to be taken care of later can also be converted into tasks, as described earlier, and you can use color flagging to group them and have certain messages always at the top of the respective folders (for example, important basic information in project folders).

Right-click in the Categories column to assign a category to an email by using the shortcut menu (or to remove previously set categories). By clicking in the Categories column, you can set or remove a category you have specified for quick clicking (set this to the category that you use most often). In Chapter 3, we will examine categories and examples for category systems in more detail.

Because one message can have multiple categories assigned to it (and a red flag for the due date), you can now use different colors at the same time to quickly find your message again by searching in the appropriate category. This is an improvement from the colored flags in Outlook 2003. In Outlook 2010/Outlook 2007, you can now, for example, have a red flag for “Due today” and also a blue square for “Product specs” at the same time.

How to assign a colored flag to a message in Outlook 2003

1. Select the message in the message list.
2. Click the **Flag Status** column (the flag icon) to assign the default flag to the message, or right-click the column, select the **Flag for Follow-up** command, and then confirm it by clicking **OK**.

   After you have processed a flagged message, you can use the shortcut menu to mark it as completed.

   You can also use the shortcut menu to remove the flag completely, or use the appropriate commands to select a different color for flagging, as shown in Figure 1-8. In the submenu of the Set Default Flag command, you can change the default color (which you can assign by clicking the flag column).

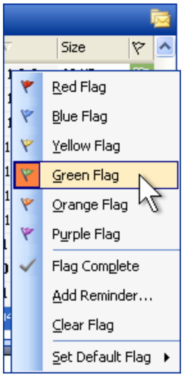


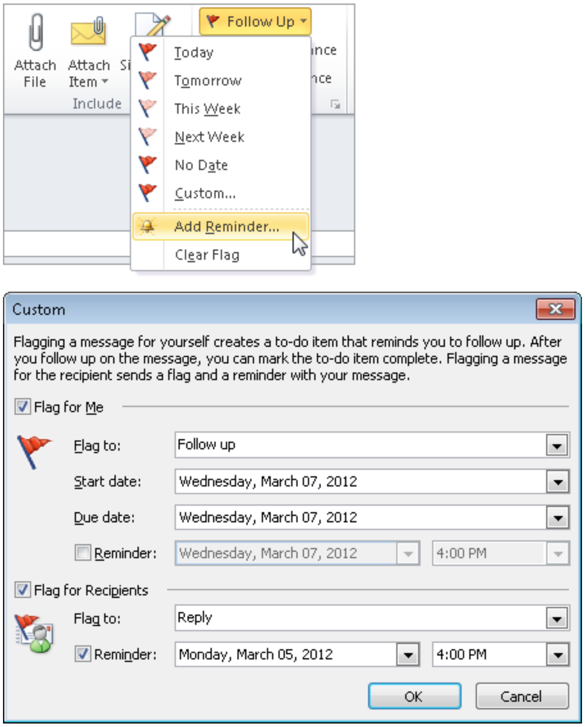
FIGURE 1-8 The shortcut menu contains options for colorful flagging of messages in Outlook 2003.

By the way, starting with BlackBerry OS 5, you can use different colored flags for message flagging on your BlackBerry. It gets completely and mutually synchronized with Outlook 2003 and can even display alarms.

Try to develop a system for yourself with up to six colors. For example, red could mean “Important and must be taken care of as quickly as possible,” green tasks can wait until the end of the week, and blue tasks can wait until the end of the month. Yellow might mean that it is theoretically due by the end of the week, but that it's just something that’s nice to have and could be deleted if you don’t have time, and you only look at purple items if you have some extra time, but otherwise they will be deleted at the end of the month.

Don't Force Alarms on Yourself: The Reminder Functions of Outlook 2007 and Outlook 2010

In previous versions of Outlook, you were also able to flag email messages for follow-up and add a reminder to open a message window at a certain preset time. However, the older versions of Outlook show reminders only if the message is located in the *Inbox* folder at the time of the reminder. With Outlook 2010/Outlook 2007, you (or the recipient of your message) will also receive a reminder if the message is located in a different folder. You can now also set a flag with an alarm individually for yourself and a different alarm (or no alarm) separately for the recipients, as shown in Figure 1-9. For example, if you have sent an email message to Robin Wood, you can set a reminder to yourself for two weeks later, and politely check in with him if he hasn't sent you a reply yet—without an automatic reminder appearing in his Outlook Inbox.



Custom

Flagging a message for yourself creates a to-do item that reminds you to follow up. After you follow up on the message, you can mark the to-do item complete. Flagging a message for the recipient sends a flag and a reminder with your message.

☑ Flag for Me
Flag to: Follow up
Start date: Wednesday, March 07, 2012
Due date: Wednesday, March 07, 2012
☐ Reminder: Wednesday, March 07, 2012 4:00 PM

☑ Flag for Recipients
Flag to: Reply
☑ Reminder: Monday, March 05, 2012 4:00 PM

OK Cancel

FIGURE 1-9 Flag an email message separately for yourself and the recipient to follow up with a reminder.

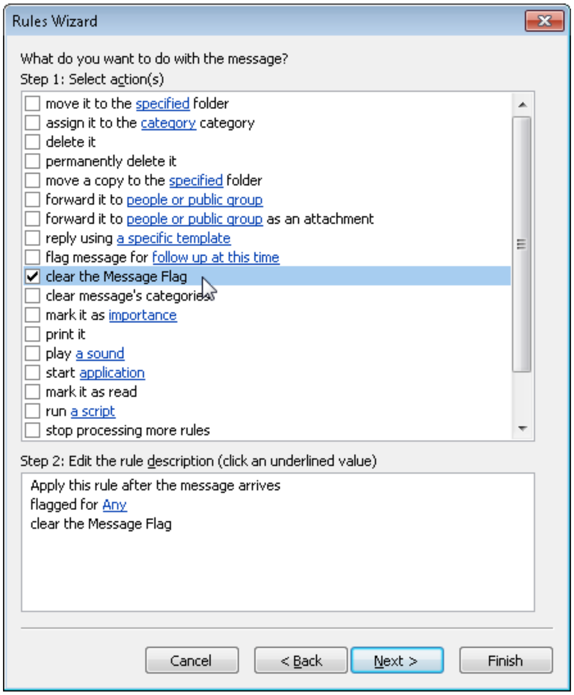
When writing an email message, on the Message tab, in the Tags group (Outlook 2010) or Options group (Outlook 2007), click Follow Up, and in the drop-down menu, click Add Reminder (Outlook 2010) or Flag For Recipients (Outlook 2007). You can now flag the message for yourself and the recipients separately so that Outlook displays a reminder at the set time. If you flag the message for yourself, it is automatically flagged as a task and is displayed in your To-Do List as well as in the task list.

Before you get all gung-ho about using this function for each message you send, please think twice. Imagine that you add a reminder to each message to your manager, who will now have unwelcome reminder windows popping up on her screen at inconvenient times, possibly even accompanied by an annoying sound.

In any case, this new separate flagging remains practical and discreet, if you flag a message just to yourself as a task while you write it—for example, to check a week later whether a reply with the requested data has arrived, or whether you need to follow up on it.

If you come to clear agreements with your team and take a reasonable approach when dealing with follow-ups and reminders for recipients, this function can be more useful than disruptive. For example, you could add a task flag for yourself for tomorrow to take care of important data for trade show preparation (so you will remember to work on it tomorrow), and you can set a reminder for Wednesday of the following week for a colleague who appreciates getting reminders and is out of the office until Monday. This way you both have a task or a reminder, so you will both remember to prepare yourselves in time for the team meeting on Friday.

If some senders begin bombarding you with “alarm messages” that open an unwanted reminder window, you have a means to defend yourself: the Rules Wizard, as shown in Figure 1-10 (see “How to set up and change rules with the Rules Wizard,” later in this chapter). Create a new rule (Create Rule Without Template, Apply Rule To Incoming Messages, or Check Messages Upon Arrival) that removes message flagging for incoming messages. (See Figure 1-10: while creating a rule from a blank rule for messages you receive, select Flagged With Action, click the blue underlined text Action, and click OK to confirm the Any Action template; in the next step, select the Clear The Message Flag action. If necessary, define an exception as the last step—for example, if the sender is a colleague on your team who uses flagging for other recipients in a reasonable fashion.)



Rules Wizard

What do you want to do with the message?

Step 1: Select action(s)

- ☐ move it to the specified folder
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or public group
- ☐ forward it to people or public group as an attachment
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☑ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ start application
- ☐ mark it as read
- ☐ run a script
- ☐ stop processing more rules

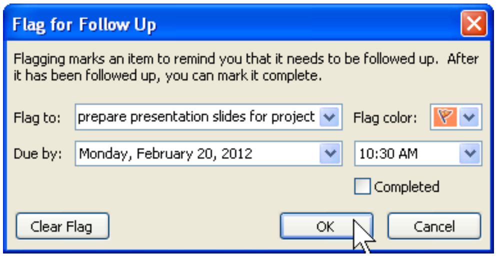
Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
flagged for Any
clear the Message Flag

FIGURE 1-10 Use the Rules Wizard to defend yourself against sender-controlled reminders in your Outlook inbox.

How to add short notes and reminders to a message in Outlook 2003

1. In the shortcut menu of the **Flag Status** column of the message (see Figure 1-8, earlier in this chapter), select **Add Reminder**.
2. In the **Flag for Follow Up** dialog box (see Figure 1-11), assign a due date and time for an alarm, so that Outlook will remind you at that time.



Flag for Follow Up

Flagging marks an item to remind you that it needs to be followed up. After it has been followed up, you can mark it complete.

Flag to: prepare presentation slides for project

Flag color:

Due by: Monday, February 20, 2012 10:30 AM

☐ Completed

FIGURE 1-11 If necessary, add a note in the header area of the email message to identify it.

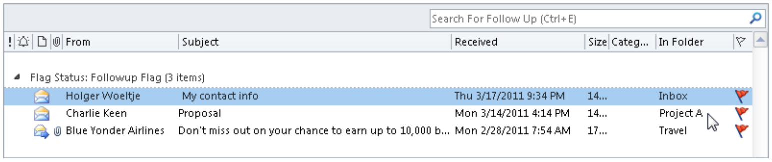
3. In the **Flag to** text box, you can enter any text you want. It will be displayed in the preview and, when you open the message, in grey or yellow below the info bar in the message header.
4. Close the **Flag for Follow Up** dialog box by clicking **OK**.

Unlike in Outlook 2010/Outlook 2007, in Outlook 2003 the reminder will open a window only if the message is located in the inbox at the time of the reminder. Therefore, only use this function for messages that you can't assign to a folder and thus have to keep in the inbox. Or you may want to avoid the reminder function altogether and instead copy or move messages into appointments or tasks to which you then add a reminder (see the section "Convert Email Messages into Tasks and Appointments" earlier in this chapter).

Keep All Items That Are Flagged for Processing in a Single View

With the help of search folders, you can search your complete mailbox (all folders in your Exchange account) or a complete personal folder file with all subfolders for email messages that have certain criteria, as shown in Figure 1-12. For example, you can see all messages that are flagged for processing in one view—even though they are located in different folders for different projects. After you have set up a search folder, you can open it with one click of the mouse, just like a regular email folder.

The search folder itself does not contain any messages, just links to them—you always see the messages that match the criteria in all searched folders. For example, if you open (in a search folder for messages that are flagged for follow up) a message that is located in the *Project C - Inquiries* folder, perform the still-pending processing step, and then mark it as completed, the message is removed from the search folder. However, it remains in the *Project C - Inquiries* folder, but it now has the Completed status. If you had deleted the message in the search folder, it would also have been removed from *Project C - Inquiries*. Therefore, even when working from the search folder, you are always working with the original message.



Flag Status: Followup Flag (3 items)

From	Subject	Received	Size	Categ...	In Folder
Holger Woeltje	My contact info	Thu 3/17/2011 9:34 PM	14...		Inbox
Charlie Keen	Proposal	Mon 3/14/2011 4:14 PM	14...		Project A
Blue Yonder Airlines	Don't miss out on your chance to earn up to 10,000 b...	Mon 2/28/2011 7:54 AM	17...		Travel

FIGURE 1-12 Use search folders to keep an eye on the folders containing email messages that still need to be processed.

How to create your own search folders

1. In the folder list (to the left of the navigation pane), right-click **Search Folders** (below the last folder in your mailbox in Outlook 2007, but sorted alphabetically with the other folders in Outlook 2010) and then select **New Search Folder** in the shortcut menu.
2. In the **New Search Folder** dialog box, in the **Select a search folder** list, select one of the predefined search criteria. For example, select **Categorized email** (under **Organize messages**) or **Messages flagged for follow-up** to get a result similar to what's shown in Figure 1-12.
3. In the **Search mail in** list, you can select the personal or public folder you want to search.
4. Close the **New Search Folder** dialog box by clicking **OK** to set up the new search folder. The folder will then be filled with the appropriate messages.

Now you can open your search folder like any other email folder by clicking it. If you don't see it in the folder list, you need to expand the search folder list. Click the small triangle or the plus sign next to Search Folders in the navigation pane. (To later close the list, click the minus-sign or click the triangle again.)

You can further refine your search—for instance, to display only messages from a certain sender that also have a red category or flag. To do so, in the Select A Search Folder list, select the Create A Custom Search Folder entry and then specify the desired criteria with the Choose button. (This works similar to the creation of filters for work views; more about this in Chapter 3). You can customize and rename your newly created search folder with the commands in the shortcut menu and add it to your Favorites (see Figure 1-6, shown earlier).

Let Outlook Presort Your Inbox for You

With its automatic filter functions, Outlook does some of the email processing for you. For example, you need the Movie Newsletter when you want to select a movie to watch—not on Thursday morning, when it arrives in your inbox and you have something else to do. By using the correct rule, you can make sure it gets automatically moved into the appropriate folder as soon as it arrives. You no longer need to move it manually, and you don't see it unless you feel like going to the movie theater and you open your *Private events/Movie news* folder.

How to set up rules directly from a message

It is quite simple to set up a rule directly from a message to which the rule applies:

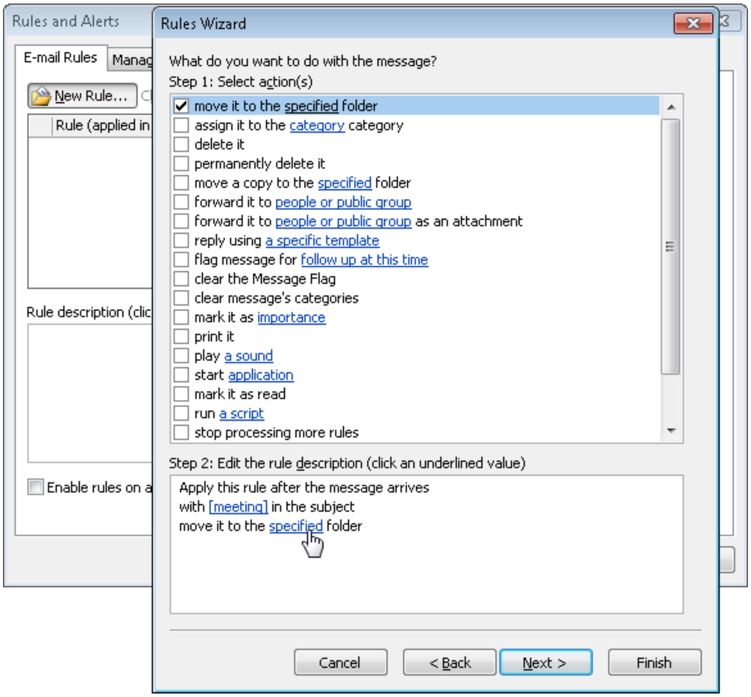
1. Right-click the message on which the rule should be based, and in the shortcut menu, click **Rules/Create Rule** (in Outlook 2010) or (in Outlook 2007/Outlook 2003) click **Create Rule** directly.
2. Outlook will open a dialog box that provides a preselection based on the clicked message, containing the subject, sender, or recipient you may want to filter for. If you agree with these settings, select the action you want to execute in the **Execute the following** group box.
3. Close the **Create Rule** dialog box by clicking **OK** to apply the rule, or click the **Advanced Options** button to make further adjustments. Outlook opens the Rules Wizard and offers you a large number of options that are already adjusted to the selected message.

How to set up and change rules with the Rules Wizard

If you want to set up a rule and don’t happen to have the right kind of message to use as a template, or if you want to change an existing rule, open an email folder and do the following:

1. Outlook 2010: On the **Home** tab, in the **Move** group, click **Rules/Manage Rules and Alerts**.

   In Outlook 2007/Outlook 2003: On the **Tools** menu, click **Rules Wizard** or **Rules and Alerts**.
2. In the dialog box that now opens, you will see all the rules that have been defined so far (see Figure 1-13). You can add new rules that will change the process order, delete rules, and change or copy existing rules, to use them as a basis for creating new rules.



What do you want to do with the message?
Step 1: Select action(s)

- ☑ move it to the specified folder
- ☐ assign it to the category category
- ☐ delete it
- ☐ permanently delete it
- ☐ move a copy to the specified folder
- ☐ forward it to people or public group
- ☐ forward it to people or public group as an attachment
- ☐ reply using a specific template
- ☐ flag message for follow up at this time
- ☐ clear the Message Flag
- ☐ clear message's categories
- ☐ mark it as importance
- ☐ print it
- ☐ play a sound
- ☐ start application
- ☐ mark it as read
- ☐ run a script
- ☐ stop processing more rules

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
with [meeting] in the subject
move it to the specified folder

FIGURE 1-13 Define rules for automatic presorting of your inbox.

The Rules Wizard is quite self-explanatory as it leads you through the rule setup. Basically you just enable the individual actions or conditions (as shown in Figure 1-13) as you go through the individual steps. In the description box, you specify the details about the selected condition/actions by clicking the blue underlined terms.

With the Rules Wizard, you can automatically flag messages from your managers in color and move messages, for example, with the words *Project B* and *FYI* in the subject line into the *Project B – read* folder. For each message you send to your colleague Robin Wood, you can move a copy with *ToDo* in the subject line into the *Check back by end of week* folder. Take 15 minutes to look at your inbox, look at all the available options in the Rules Wizard, and think about which other rules will make your workday easier.

Using rules too hastily can lead to lost or overlooked messages. Take your time and think twice before defining a rule that deletes messages automatically or moves them unread into a folder that you don't check regularly.

Think Before You Communicate

If you keep a few guidelines for writing better messages in mind, you help others, because your messages can be processed better and more quickly. On the other hand, if you compose and send each message at lightning speed without thinking, you end up losing the most time by trying to win time. It pays to invest a little bit more time into choosing your words wisely. In the end, you will find yourself coming up with more concrete and to-the-point answers, which lead to fewer inquiries and thus to noticeable time savings on both sides.

Make Your Text Easier to Understand: Always Adjust It to the Recipients

When you are writing a message, try to put yourself in the position of the recipient:

- Is this message relevant to the recipient? Is he required to respond, or are you just providing important information for him? Are you sure he needs to be on the recipient list? Keep the number of recipients as large as necessary, but as small as possible. Nobody is happy about 30 additional email messages per day that "might just possibly interest her someday under certain circumstances."
- What is clear to you, but not clear to the recipient? Where do you need to explain backgrounds or circumstances?
- Did you add all the required information? For example, if you ask a colleague to contact "Mr. Smith," make sure to add the corresponding contact data.
- What kind of style does the recipient prefer? Will you receive an incomplete response if the message is longer than 10 lines? Or will he send you several inquiries if you don't send him a comprehensive message with all the details?
- Be careful with HTML formatting: Too much colored text and too many blinking backgrounds will distract more than they help. It'll also look strange if you play with font styles and sizes too much (especially on mobile devices).

Keep Your Phrasing Short, Precise, and Crystal Clear

Try to keep your text as short and clear as possible, and use blank lines between paragraphs as a design element. This will save time on the recipient's side and increases the chance that your most important points won't get lost in the text. Keep in mind: The longer your email text, the higher the probability that it won't be read entirely or that something will be misunderstood. If you are about to explain complicated or unexpected circumstances, announce briefly what the next section will be about ("first the heading, then the article"). Some recipients reply to messages by paragraph—especially because more and more people tend to read and answer a third of their email messages on smartphones—and thus might assume a different intent on your part.

State your expectations clearly. For example, include *FYI* in the subject line or indicate whether you are expecting a response, and when. (Please make sure you are polite, though.) Instead of "I wonder if this will work this way. Maybe we can do it differently," write the following: "I suggest that we do the following: … What do you think?" Instead of writing "Wouldn't it be nice to eventually find out what's going on?", formulate clearly what you are referring to. If you need results, make sure the recipient knows what exactly you need and in which format; if necessary, give him an example. Using a sentence such as "Please send me a status report every Friday by noon; see attached template (one page only, please)" not only avoids 20 superfluous pages and some wasted hours for the other people, it also saves you from receiving a lot more data or answers and questions than you need.

There is nothing wrong with adding *ToDo:* in front of each item, or maybe *Please answer*:, or *FYI*:, as long as you don't come across as bossy. Avoid (or explain) abbreviations if you are not sure that the recipient knows them. (Oh, by the way: *FYI* means "for your information (only)"—so the recipient will know that you do not expect him to answer.)

If you are dealing with two completely different topics, it's best to write two separate email messages. This way the recipient can reply to one and save the other as information.

Use Well-Written Subject Lines to Make Everyone's Life Easier

Always add a short but very clear subject. This helps the recipient assess the content, importance, and urgency of your message before opening it, and helps to find it again more easily when searching for it later. This will pay off for you as well—recipients will answer faster and the response will fit your needs better.

To write a good subject line:

1. Start with the due date.
2. Continue with the project/customer/topic.
3. Add some keywords that summarize the topic.
4. Finish with what the recipient should do (take action? just send a short answer? just read or file the message and discuss the topic with you during the next meeting?).

Depending on your work situation, it might be useful to change the order. For example, consider whether it is better to put the due date first or last. For people who travel a lot on airplanes or spend a few days at a summit/conference, so they can only check their email twice a day, it's great to have the due date first. That way they can tell immediately if some messages require a response on the same day while others can be rescheduled for next week. But if most messages need to be answered during the next 24 hours, and none of them is more urgent than any other, the end of the subject line is a better place to put the due date.

You Try It

1. Check your response to email messages: How often do you check for new messages? Do you really need to do it that often? Disable the notification about incoming messages, if you don't have to answer everything right away.
2. Make an appointment for yourself to create your own folder structure to clean up your inbox, and file the first messages immediately. Depending on how full your inbox is, you might want to make a second appointment for yourself to go through all the remaining messages and delete or file them as necessary.
3. Find three messages in your inbox that are nothing but tasks or appointments (or do this exercise when the next appropriate message arrives) and convert them to tasks/appointments accordingly. Find an email message that includes the contact data of a person as a signature that might become relevant for you and that you haven't entered yet. Use this email message to set up a new contact by using the drag-and-drop method, and continue to do the same for all relevant new contact data.
4. Mark all messages that you can't (or don't want to) process immediately, but need to take care of by tomorrow at noon, with a red flag as their flag status.

   If you are working with Outlook 2003: Create a search folder that lists all flagged messages. Before noon tomorrow, take the time to open this search folder and process those messages. Then mark the ones that are due at noon the next day with a red flag, and so on.

   Alternatively, if you are working with a different version of Outlook, use the Categorize function to automatically color-code the messages from at least three senders from who you frequently receive important messages. Create a search folder to show all messages with the same color code (category), no matter which folder they are filed in.

5. Wait half a day and don't check for newly arrived email messages during that time. (If this is not possible right now, wait until after the next long meeting or do it on Monday morning.) Write down how many new email messages you have received. Use a stopwatch as you process all those messages, one by one, as quickly as possible according to the DANF System. (Measure the time again after you have used the DANF System for two weeks and have gotten used to it.) Determine a value for your mail processing by block—such as three times a day for 30 minutes—and, if possible, set fixed times in which you process your inbox by block (instead of whenever a new message arrives).
6. Check the messages in your inbox: Which subject lines leave you in the dark as far as content and importance, and are unclear about what response is expected of you? How would you have phrased the subject to make these aspects clearer? Then look through your *Sent Items* folder and check the subject lines of the messages you sent in the past month to see how you handled such issues.
7. Repeat step 6, but this time check the message body for style, (un)ambiguous phrasing, clear formulation of the expected response, and length of the text. Keep your conclusions in mind when writing future messages. You may even want to write a short summary about what you will change, and print it out.

CHAPTER 5

How to Schedule Meetings So They Are Convenient, Effective, and Fun

IN THIS CHAPTER, YOU WILL

- Send meeting requests with Outlook.
- Use the calendar overlay.
- Optimize your calendar.
- Prepare meetings more effectively.

"A Total Chaos Squad!"

IF YOU frequently need to plan meetings with colleagues whose schedules are very full and who are hard to reach, the Scheduling Assistant in Microsoft Outlook can be a big help. However, if you are too rash, Outlook meeting requests can become a curse rather than a blessing. This chapter gives you tips on how to quickly and effectively prepare meetings with Outlook and Microsoft SharePoint, and exchange data and documents for review as a team—to save you and your colleagues precious time and achieve better results.

How much time and money do you waste in unnecessary, badly prepared, or ill-structured meetings? Just add up hourly rates and loss of productivity for time spent getting very little done. Do you frequently look for information, but can't reach the colleague who could supply it, which means that you have to wait hours or until the next day?

ROBIN AND THE FANTASTIC FIVE

Today Robin Wood made it to the meeting room right on time at 9:00 A.M. He's totally out of breath and hasn't had any breakfast, but that's okay, because his assistant Melissa always makes sure there's fresh coffee and tasty cookies. Except for Melissa, Robin, and Robin's manager Charlie, nobody else has arrived yet. So he has some time to eat something and catch his breath. Charlie leaves at 9:04 to take care of some things before the others will arrive. At 9:08 Justin shows up. At 9:17 Boris Scholl from the board of directors arrives. At 9:21 Charlie returns and the meeting starts—but without Robin's colleague, Holly, who arrives at 9:30 sharp, looking rather puzzled: She's almost always on time, but this meeting had been moved so many times that she had forgotten to note the latest change from 9:30 to 9:00 in her calendar.

After a bit of back and forth, everyone finally agrees to an agenda. All participants skim through the documents they need to read as a basis for discussion for this meeting. Then Justin reads a few questions and their possible answers, so all delegates can raise their hands for their favorite option. Before counting the votes for each question, each person gets two minutes to think about which option he or she will vote for. The meeting finally really gets going at 10:12 , but at 10:30 Boris Scholl needs to leave for his next appointment, and at 10:50 Robin needs to run to catch his flight, even though not all agenda items have been addressed.

Two hours later, Robin has landed punctually. He is happy to realize that after lunch he still has 45 minutes left before his appointment, and the 3G network coverage is great. This gives him a chance to take care of a few email messages and phone calls. His colleague, Holly, had sent him an email message before the meeting, with an urgent request for him to call one of her customers—unfortunately, she didn't include the phone number. The customer info is not saved in Robin's contacts, so he quickly calls Holly. However, she is in the middle of a presentation and won't be available until Robin is sitting in his own customer meeting, which will last until evening....

The Problem: Way Too Many Inconvenient Meeting Requests and Insufficient Preparation

Some of the most common problems in this area of cooperation have the following causes:

- Too many meetings that take too long and leave too little time for other things.
- Meeting requests that are scheduled at very inconvenient times because they are squeezed in too late, when all other times are already taken for the next few days.
- It takes a lot of back and forth until you finally come up with a meeting date and time that works for everybody. Some people don’t keep their calendar up to date, and others just put in a fake appointment from 5:00 A.M. until 11:00 P.M. each day to block their calendar for any requests (but because they have to be at some of the meetings, they end up receiving requests for the most inappropriate times possible…).
- Unclear meeting goals, or very different meeting expectations.
- No preparation or inadequate preparation, and lots of aimless chatter without a time limit.
- Too many participants, some of whom the topic doesn't concern and who therefore have nothing to contribute and only waste their time by being there.
- Missing, obsolete, overly comprehensive, or unread documents.
- No access to data required by everyone in the team, such as the contacts maintained by another colleague.

Let’s Get Started and Change This!

To meet these challenges successfully, you might find the following strategies helpful:

- Use the shared calendars of your colleagues to look for convenient times, and thus automate as much of the meeting planning as possible.
- Optimize your own calendar to help colleagues when they are trying to set up meetings and to receive more reasonable meeting requests yourself.
- Plan meetings more consciously—as few meetings as possible with as few participants as possible.
- Set up more efficient, more effective, and shorter meetings by preparing them well.

- Provide an agenda, contact data, preparation materials, and other information beforehand at a central location.
- Set up a system to control what is under review or being edited, to avoid having several people change the same document simultaneously.

Technical Requirements for Using This Chapter

Outlook can be installed in single-user mode with a local data file, or your data can be stored on a Microsoft Exchange server. Using an Exchange server has several advantages, such as access to shared calendars from colleagues and instant wireless synchronization with your smartphone even when your computer is turned off. Some of the functions described in this chapter are available only if you use an Exchange server. Even if you are a freelancer working from a home office on your own, you can rent an Exchange mailbox and user account from various service providers for a monthly fee. If you later choose to hire a virtual assistant for a few hours each day, you can just book a second account with your provider for a small additional fee so that your assistant can manage your inbox for you and will always know when you'll be available for client meetings and conference calls. If you have a small business with fewer than 10 people who need to share their calendar and other data with each other, in most cases it'll also be cheaper and easier to use a hosted Exchange solution from a third party instead of setting up your own Exchange server in your office.

Meeting Requests with Outlook—Basic Rules and Tips

On the next few pages, you will first learn some of the basics for planning meetings in Outlook. Then you will find out how to optimize your calendar to make it easier for your colleagues to propose meetings at convenient times and at the same time leave enough free space for your own planning.

Find Free Times and Evaluate Replies

There are many advantages to planning meetings with Outlook:

- You can directly access the shared calendars of others and see when everyone has time, so the chance of picking the wrong time for an appointment decreases significantly.
- Microsoft Outlook 2010 supports using multiple Exchange accounts with one Outlook client profile. If your company's security guidelines permit, you can use mailboxes from different companies at the same time (for example, if you are a corporate consultant who spends a lot of time at the customer's office, you can use the mailbox of your own company as well as your mailbox on your customer's server). You can now easily display the calendars of colleagues and clients alongside your own or below each other and therefore avoid creating appointment chaos.
- All participants automatically receive an invitation that already contains buttons for accepting or declining the appointment and for suggesting an alternative time.
- From this email invitation, the participants can access their own calendars to see what they have going on before and after.
- If the participants accept the invitation, the appointment is automatically added to their calendar.
- As a meeting organizer, you can have Outlook evaluate the replies automatically and see who has replied already and how—directly from your calendar by just double-clicking the appointment.
- Outlook now monitors the appointment for you (the organizer) and, if you want, sends an update to all participants if changes are made.

All these advantages (with the exception of access to the calendars of others to look for free times) are available to you even without an Exchange server. You can send meeting requests to external contacts for fast answers, receive automated calendar entries when you accept a meeting, and manage the replies—for example, for a conference call you just set up with a customer.

- Everybody in the team must know the basic functions. Start with at least a short introduction by an experienced colleague or, even better, with a training course or seminar for planning as a team and how to use Outlook. Make sure that new colleagues also get a short introduction.
- Everybody must start using the functions at the same time (but this can be limited to individual groups within the team who use group planning among themselves).

HOW TO MAKE THIS ALL WORK

If you introduce Outlook meeting planning to your team and set up delegate access, access to folders of colleagues, and the use of shared data via SharePoint or public folders with Outlook, there are four basic requirements. Make sure they are met so that everything runs smoothly.

- Someone needs to take care of the technical maintenance of the Exchange server, grant access rights, and support users who encounter technical problems. This needs to be done by your IT department or a third-party specialist if you are a small business.
- Everybody in the team must really use and constantly update his or her Outlook calendar. Planning as a team loses its value, fails, or leads to a huge amount of problems if 4 of 10 colleagues enter none or only half of their appointments and note updates only weeks later.

We recommend that you agree on a transition time, such as a seminar followed by an “Outlook-only due date” three weeks later (at the latest). From that date on, everyone has to enter all of his or her external appointments during business hours in his or her Outlook calendar. It’s best to also set a few basic rules (for example, key times, such as setting up meetings only between 9:00 A.M. and 11:30 A.M. if possible, restricting the maximum duration to two hours per meeting, and similar rules).

How to create a meeting request

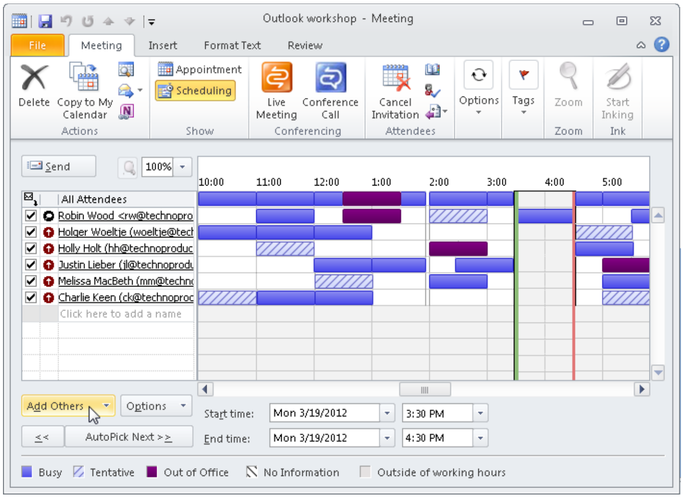
1. Press Ctrl+Shift+Q or create a normal appointment and click the **Invite Attendees** button on the associated **Appointment** form.
2. In the **To** field (just like with an email message), type the names of the attendees you want or click the **To** button to select your recipients from the Address Book. Alternatively, you can switch from the open Appointment form to the **Scheduling Assistant** (in Outlook 2010/Microsoft Office Outlook 2007 by clicking **Scheduling Assistant**/**Scheduling** in the **Show** group on the **Appointment** tab; in Microsoft Office Outlook 2003, by just clicking the **Scheduling** tab). When you are there, click **Add Attendees/Add Others** to open the Address Book.
3. Add all of the participants from the Address Book by clicking the name and then **Required**, **Optional**, or **Resources**.

NOTE

Required means that this participant really needs to be there. *Optional* means that this meeting is possible without this person attending, so she can spend her time in better ways, but if she wants to attend anyway she is welcome. *Resources* means that you are adding, for example, the calendar for a meeting room, a company car, or a specific device, such as a digital projector.

In the Scheduling Assistant (see Figure 5-1), you will now see the times that are still available in the calendars of the other attendees (assuming you have the appropriate access rights). A dark grey bar in the All Attendees row means that nobody else has entered a conflicting appointment. The light grey background between the green and red vertical lines shows the time currently set for your new meeting. (You can find more information about the colored bars and how they are used later in this chapter, in "Take Advantage of the Show As Field to Flag Your Appointments.")

4. In the schedule, click any time to select a different time, move the selected area by dragging the green/red vertical line marking the current beginning/ending time, or click the **AutoPick Next**>> button so that Outlook can find the next free time slot for all participants (or use the small **<<** button to the left of **AutoPick Next>>** to select the next free time slot before the currently selected time). You can also specify a date and time by directly entering values into the **Start time** and **End time** fields (labeled **Meeting start time** and **Meeting end time** in Outlook 2003).


Outlook workshop - Meeting
File
Meeting
Insert
Format Text
Review
Delete
Copy to My Calendar
Actions
Appointment
Scheduling
Show
Live Meeting
Conference Call
Conferencing
Cancel Invitation
Attendees
Options
Tags
Zoom
Zoom
Start Inking
Ink
Send
100%
10:00
11:00
12:00
1:00
2:00
3:00
4:00
5:00
Add Others
Options
<<
AutoPick Next >>
Busy
Tentative
Out of Office
No Information
Outside of working hours

All Attendees
☑ Robin Wood <rw@technopro
☑ Holger Woeltje (woeltje@tech
☑ Holly Holt (hh@technoproduc
☑ Justin Lieber (jl@technoprodu
☑ Melissa MacBeth (mm@techn
☑ Charlie Keen (ck@technoproc
Click here to add a name

Start time: Mon 3/19/2012 3:30 PM
End time: Mon 3/19/2012 4:30 PM

FIGURE 5-1 When selecting a time that works for everybody, make sure to leave a bit of time before and after other appointments, if possible.

5. If necessary, switch back to the Appointment view (in Outlook 2010/Outlook 2007, by clicking the **Appointment** button in the **Show** group on the **Appointment** tab (which is relabeled as **Meeting** after you have added attendees); in Outlook 2003, by just clicking the **Appointment** tab) to insert the subject line, a greeting in the note field, and any other information you want to send along with the meeting request. By clicking the **Attach File** button in the **Include** group on the **Insert** tab (Outlook 2010/Outlook 2007) or **File** on the **Insert** menu (Outlook 2003), you can attach documents that need to be edited or read before the meeting starts, an agenda, directions to a location, and so on, which Outlook will send as an attachment to the invitation.

6. After you have entered everything, send the meeting request to the desired participants by clicking the **Send** button (located on the left side next to the subject line in Outlook 2010/Outlook 2007 and just below the **File** menu in Outlook 2003).

7. Close the **Meeting Request** form by clicking the close button (the small x in the upper-right corner) or by choosing **Close** from the **File** menu. You can also use Alt+F4 to close the **Meeting Request** form.

If you want to open the Meeting Request form again later on, you can find the meeting as an appointment in your calendar (double-click to open it). In Outlook 2010, you'll also find the People Pane in the lower part of the meeting request after it is opened in its own window (see Figures 5-2 and 5-3). The People Pane contains miniature photos of the participants (if the photos exist in your Outlook contacts, otherwise it'll show empty silhouettes). Click the small arrow in the lower-right corner to see larger pictures with the names below them and find out who has already accepted, declined, or tentatively accepted the invitation and who hasn't replied yet (click the corresponding option on the left; see Figure 5-2). If you click one of the photos, Outlook 2010 will show you further information about this person, his or her social media status on LinkedIn or Facebook, your next meetings with him or her, and email messages from this person (see Figure 5-3; click one of the displayed meetings/email messages to open it in its own window).

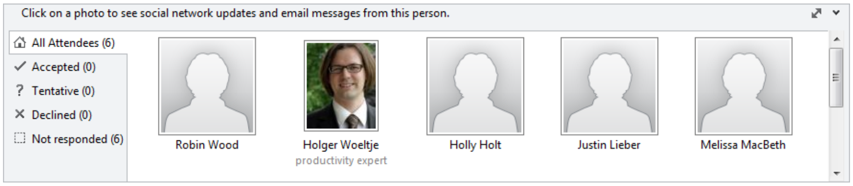
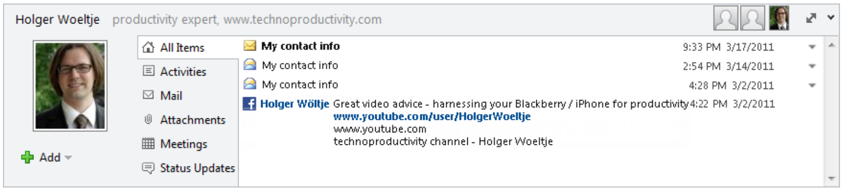

Click on a photo to see social network updates and email messages from this person.
All Attendees (6)
✓ Accepted (0)
? Tentative (0)
✕ Declined (0)
☐ Not responded (6)
Robin Wood
Holger Woeltje
productivity expert
Holly Holt
Justin Lieber
Melissa MacBeth

FIGURE 5-2 Open a saved meeting and use the People Pane of Outlook 2010 to find out who has already accepted or not replied yet.


Holger Woeltje
productivity expert, www.technoproductivity.com
All Items
Activities
Mail
Attachments
Meetings
Status Updates
Add

My contact info 9:33 PM 3/17/2011
My contact info 2:54 PM 3/14/2011
My contact info 4:28 PM 3/2/2011
Holger Wöltje Great video advice - harnessing your Blackberry / iPhone for productivity 4:22 PM 3/2/2011
www.youtube.com/user/HolgerWoeltje
www.youtube.com
technoproductivity channel - Holger Woeltje

FIGURE 5-3 You can also click the picture or the name of a participant in the People Pane to display more information about this person, such as additional meetings.

Create Meeting Requests from a More Flexible View

If you only want to invite two, three, or four participants, the screen provides enough space to display calendars side by side (available as of Outlook 2003). This is helpful for comparing the shared calendars of others directly to your own work week or day view. This way you can tell much faster that, for example, on Monday (which you had in mind originally) there is just one hour available, but on Thursday morning everybody is available, and Thursday works better because it avoids packing every day with appointments. Unlike the method that uses the Scheduling Assistant in the Appointment form, as shown earlier, this kind of planning takes advantage of more available space. Depending on your screen resolution and the number of attendees, you can read more of the subject of other appointments without pointing to every single one. Above all, you can clearly display all Wednesdays in August side by side or the next two Wednesdays and Fridays without the days in between.

How to create meeting requests from a more flexible view

1. Switch to your calendar and, if necessary, hide the **To-Do** bar or the **TaskPad** to gain more space (Outlook 2010/Outlook 2007: press Alt+F2, Outlook 2003: in the **View** menu, choose **TaskPad** to hide/unhide your **TaskPad**).
2. To the left of the navigation area in the **Other Calendars** section, select the check boxes of the calendars you want to show (see Figure 5-4).

   If you can't find a colleague's calendar, add it in Outlook 2010 by clicking **Open Calendar** in the **Manage Calendars** group on the **Home** tab. In Outlook 2007/Outlook 2003, click **Open A Shared Calendar** in the navigation area on the left. In the dialog box that appears, type the name of the colleague or select it after clicking the **Name** button in the address book, and then close all dialog boxes by clicking **OK** to open his or her calendar.
3. Switch to Day view: In Outlook 2010, click the **Day** button in the **Arrange** group on the **Home** tab. In Outlook 2007, click the **Day** tab, and in Outlook 2003 click the **Day** button.
4. In the date navigator (the small calendar in the upper-left corner of Figure 5-4), click the first day you want to see, such as next Tuesday.
5. In the date navigator, click any additional days you want to show while keeping the Ctrl key pressed to add more days (or deselect them by clicking again). The selected days will be displayed with a dark background in the date navigator and are shown next to each other in the Day view for all selected calendars. (If you select every Friday in February, it looks like "a Week view with four Fridays." This view is very convenient if someone asks for a meeting on any Friday because he'll only be in your town or only be available on a particular day of the week.)
6. Right-click the date and time you want in one of the calendars (such as **Wednesday, 11:30 A.M.**).
7. In the shortcut menu, click **New Meeting Request** to invite all people whose calendars you have selected, or **New Meeting Request for <Name>** to select one specific person.
8. Now you can plan the meeting as explained previously in "How to create a meeting request."
9. Afterward, hide those calendars you no longer need to see on the screen by clearing the corresponding check boxes in the **Other Calendars** section.

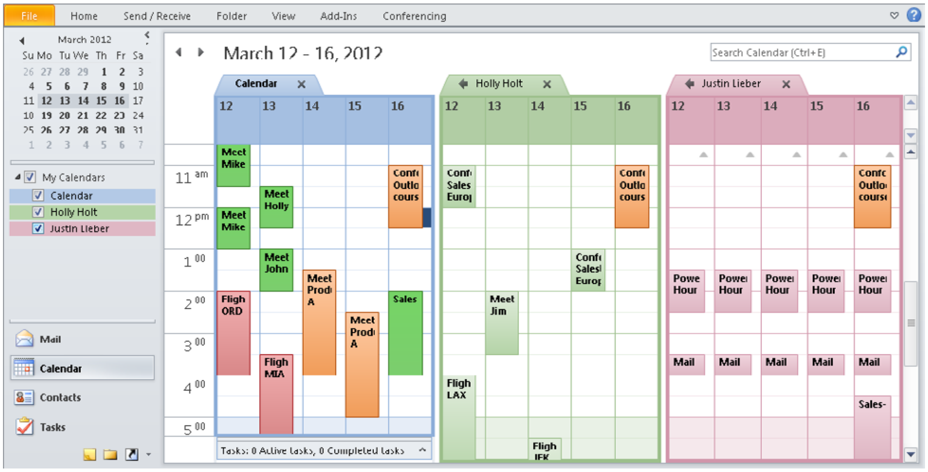

File
Home
Send / Receive
Folder
View
Add-Ins
Conferencing
March 2012
March 12 - 16, 2012
Search Calendar (Ctrl+E)
My Calendars
Calendar
Holly Holt
Justin Lieber
Mail
Calendar
Contacts
Tasks
Meet Mike
Meet Holly
Meet John
Meet Prod A
Flight ORD
Flight MIA
Sales
Conf Outlo cours
Conf Sales Europ
Meet Jim
Flight LAX
Flight JFK
Power Hour
Mail
Sales-
Tasks: 0 Active tasks, 0 Completed tasks

FIGURE 5-4 In the date navigator, select the days you want from the displayed calendars; for example, to quickly find an appointment in the next four days or on all Thursdays in March.

"Meeting request" suggests that the appointment is a meeting (which you will attend in person in an onsite conference room). However, you can also use meeting requests for all other types of appointments that involve at least one other person. For example, you can use meeting requests for a time-consuming phone call, a customer visit, a date to go jogging, or for planning the preparation of a trade show presentation with team members.

Stay on Top of It: Calendar Overlay

If you like the idea of displaying multiple calendars next to each other in Day/Week/Month view, which allows you to easily compare the calendars of two or three people (at the most—more wouldn't fit well), read the subject and duration of appointments, and find available meeting times, you will simply love the extension of this view in Outlook 2010/Outlook 2007. As described previously, you can show (or hide) the calendars you want to display simultaneously with just one click. In Outlook 2010, as soon as the calendars are displayed next to each other, click the Overlay button in the Arrangement group on the View tab; in Outlook 2007, go to the View menu and click View In Overlay Mode. (In Outlook 2010, you can get back by clicking the button again; in Outlook 2007, you can do so by going to View/View In Side-by-Side Mode.)

Outlook now “squeezes” all overlapping appointments next to each other. The smaller the appointment bars get, the more people (or rooms or resources) are already booked at that time. For example, if you are displaying five different calendars simultaneously, you won’t be able to read anything for crowded time slots, but you will know this: “Where there is a light background visible, the time is still available in every person’s calendar.” As long as you don’t overlay too many calendars at once, you can still read the subjects and will quickly see where your colleague will be while you are in a meeting, or who of the five sales representatives for whom you are scheduling appointments will be available for a customer visit during the target time. If everyone has filled in the Location field for his or her appointments, you can even see where the previous or next appointment takes place (shown below the subject line).

Above the weekday names, tabs with the names of the people (or calendars) are displayed (see Figure 5-5). The appointments for the tab on top of the other tabs have opaque color with full contrast; the appointments of the other calendars are partially transparent. Click the name on a tab to bring it to the top. With the small arrows to the left of the names, you can undock calendars and display them individually next to the other overlaid calendars (by clicking the right arrow) or put them back overlaid with the other calendars (by clicking the left arrow). This way you can overlay the calendars of four colleagues and show yours individually next to them to have more space and be able to read the appointments more easily.

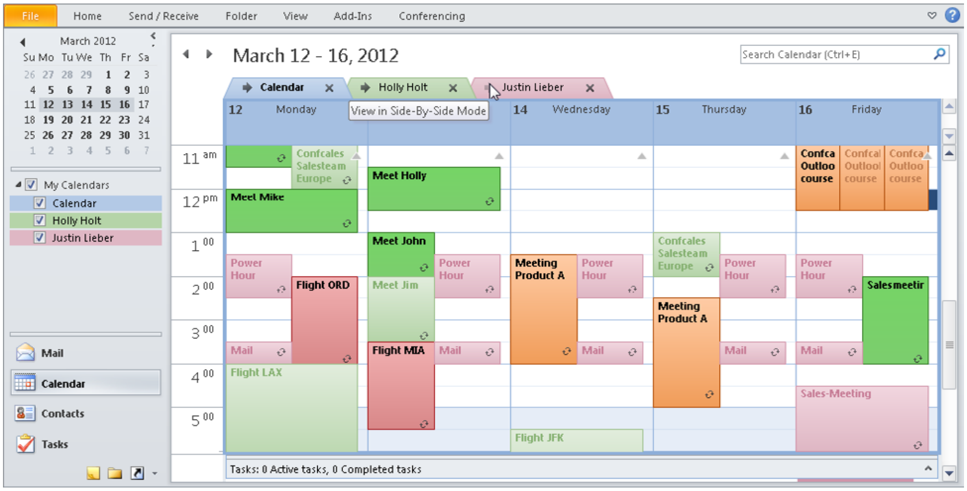

File
Home
Send / Receive
Folder
View
Add-Ins
Conferencing
March 2012
My Calendars
Calendar
Holly Holt
Justin Lieber
Mail
Calendar
Contacts
Tasks
March 12 - 16, 2012
Search Calendar (Ctrl+E)
Calendar
Holly Holt
Justin Lieber
View in Side-By-Side Mode
12 Monday
14 Wednesday
15 Thursday
16 Friday
11 am
12 pm
1 00
2 00
3 00
4 00
5 00
Confcales Salesteam Europe
Meet Mike
Meet Holly
Meet John
Meet Jim
Power Hour
Flight ORD
Flight MIA
Mail
Flight LAX
Meeting Product A
Flight JFK
Confca Outloo course
Salesmeetir
Sales-Meeting
Tasks: 0 Active tasks, 0 Completed tasks

FIGURE 5-5 Overlaid calendars help you find open time slots in Outlook 2010/Outlook 2007. For example, 11:00 A.M. till 1:00 P.M. is still free in everyone’s calendar on Wednesday and Thursday here.

THE SCHEDULE VIEW

Outlook 2010 provides an additional handy view for shared calendars: the Schedule view (see Figure 5-6). This view shows large bars, similar to those in the Scheduling Assistant. The Schedule view, however, gives you much more space to display the individual appointments, and you receive more details per person (for instance, each person gets his/her own color and you can read the appointment subjects very well). You can open the Schedule view by clicking the Schedule View button in the Arrangement group on the View tab.

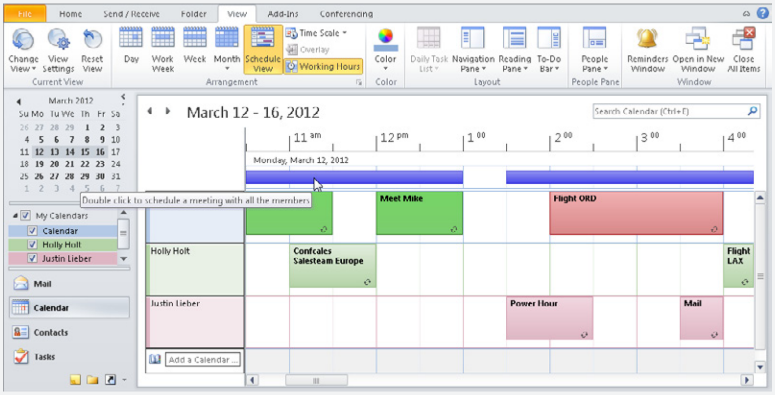

File
Home
Send / Receive
Folder
View
Add-Ins
Conferencing
Change View
View Settings
Reset View
Current View
Day
Work Week
Week
Month
Schedule View
Time Scale
Overlay
Working Hours
Arrangement
Color
Daily Task List
Navigation Pane
Reading Pane
To-Do Bar
Layout
People Pane
Reminders Window
Open in New Window
Close All Items
Window
March 2012
March 12 - 16, 2012
Search Calendar (Ctrl+E)
11 am
12 pm
1 00
2 00
3 00
4 00
Monday, March 12, 2012
Double click to schedule a meeting with all the members
My Calendars
Calendar
Holly Holt
Justin Lieber
Mail
Calendar
Contacts
Tasks
Meet Mike
Flight ORD
Holly Holt
Confcalls Salesteam Europe
Flight LAX
Justin Lieber
Power Hour
Mail
Add a Calendar

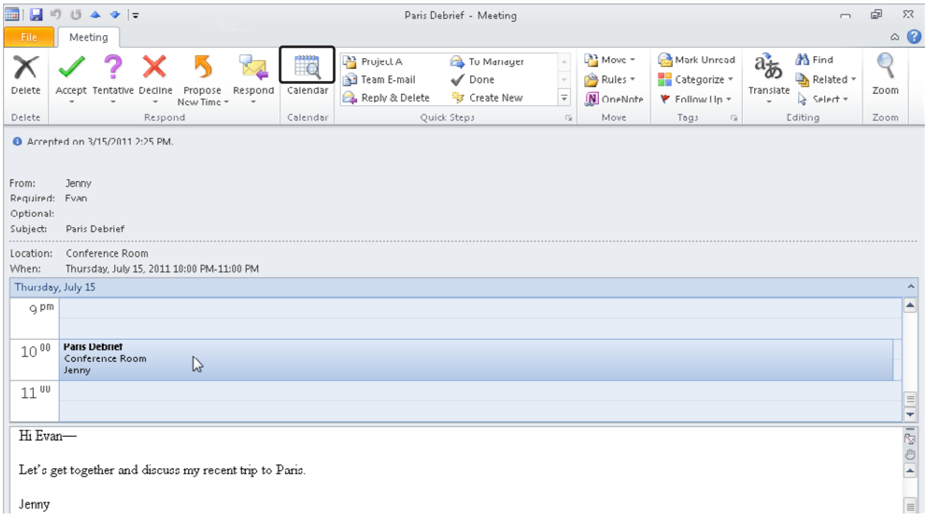
FIGURE 5-6 The Schedule view in Outlook 2010 provides you with an overview of the hours of a specific day in the calendars of multiple colleagues, whereas the overlaid calendar works well for displaying several days within one week.

How to answer meeting requests

A meeting request first shows up in your inbox as an email message. Instead of an envelope icon, you will see a calendar page with two very small heads in it's lower-right corner—replies to meeting requests also have their own icons showing whether the invitee accepted, declined, or proposed a new time.

1. Double-click the meeting request to open it. (You can also use the email preview in the reading pane and directly accept or decline from there by using the buttons.)
2. In the **Message** form (the new window that opens after you double-click the request), you'll find the **Accept**, **Decline**, and **Propose New Time** buttons: in Outlook 2010/Outlook 2007, these are on the **Meeting** tab, in the **Respond** group; in Outlook 2003, they are directly below the menu bar (you can see these in Figure 5-7, a little later in this section).

3. If you already know that you want to accept or decline, you can skip to step 7. Otherwise continue with step 4.
4. Click the **Calendar** button. Outlook 2010 will have already displayed your calendar for the hours before and after the requested time (see Figure 5-7) even without this step. When you click the **Calendar** button, Outlook opens a new window with your calendar in Day view, showing all appointments on the day of the meeting request. The proposed time has a blue background. That day has a dark background in the date navigator, and today is framed in red. (To see the rest of the week or find an alternative appointment, you can, for example, select other days in the date navigator, display additional days, or switch to the work week in the calendar view.)


Paris Debrief - Meeting
File
Meeting
Delete
Accept
Tentative
Decline
Propose New Time
Respond
Calendar
Project A
Team E-mail
Reply & Delete
To Manager
Done
Create New
Move
Rules
OneNote
Mark Unread
Categorize
Follow Up
Translate
Find
Related
Select
Zoom
Delete
Respond
Calendar
Quick Steps
Move
Tags
Editing
Zoom

Accepted on 3/15/2011 2:25 PM.

From: Jenny
Required: Evan
Optional:
Subject: Paris Debrief

Location: Conference Room
When: Thursday, July 15, 2011 10:00 PM-11:00 PM

Thursday, July 15
9 pm
10 00 Paris Debrief
Conference Room
Jenny
11 00

Hi Evan—

Let's get together and discuss my recent trip to Paris.

Jenny

FIGURE 5-7 Use the Calendar button to check directly from a meeting request how this appointment fits in with your other appointments. Even without clicking this button, Outlook 2010 will already show one hour before and after the requested time, to show a preview of any scheduling conflicts.

5. If necessary, you can move other appointments to make room for the meeting or add buffer times before and after. Click the right border of the appointment you want to move (or on the upper border to change the duration), and drag it to the new timeslot.
6. Close the calendar window by clicking the close button (the small x) in the upper-right corner of the window's title bar.
7. Click one of the reply buttons (such as **Accept**).

8. Outlook now offers you three options: **Send the response now**, **Don’t send a response**, or **Edit the response before sending** (for instance, to add a note).

   Even if you don’t have any particular reason to reply, it is best to always choose **Send The Response now** (the response is automatically sent to the meeting organizer, so he or she will know if you accepted or declined). If you decline or if you only accept tentatively, we recommend that you choose **Edit the response before sending** and add one or two explanatory sentences.

ACCEPTING TENTATIVELY AND PROPOSING A NEW TIME

You can choose Tentative or Propose New Time, for example if you aren’t sure if you can keep the requested afternoon appointment or need to leave for another appointment halfway through, but the morning would work much better for you. Leave everything else to the person who called the meeting: Maybe others have proposed the morning as well or aren’t available in the afternoon, and therefore you will get an appointment update with your meeting moved to the morning hours. If the afternoon appointment works for all other participants except you, it may stay at that time in spite of your tentative acceptance. If you accept tentatively, you should write one or two sentences to the colleague who sent the request, to explain why it’s inconvenient for you and what changes would make it fit your schedule better, so he or she can respond accordingly.

IMPORTANT

Only accept tentatively if there is a realistic chance that you can still take part—otherwise, it’s best to decline right away. When it really makes sense, use the Tentative reply option. Tentative means that you don’t know for sure whether you will be able to keep the appointment or that you reserve the option of canceling due to a more pressing appointment. By doing this, you signal to your colleagues that the appointment is not convenient for you and that you might not be able to make it, unless an alternative time can be found. At the same time, you block the appointment in your calendar and will be reminded of it.

9. Outlook now deletes the meeting request from your inbox, sends the reply to the meeting organizer, and enters the meeting as an appointment at the right date and time in your calendar (if you haven’t declined).

If you look for the request later on, you will now find it in your calendar. You can edit it there just like any other appointment entry. When you open the associated Appointment form by double-clicking the appointment, Outlook informs you in a line below the menu bar or ribbon when you accepted this meeting ("Accepted on…"; see Figure 5-7).

How to check and change the status of a meeting you called

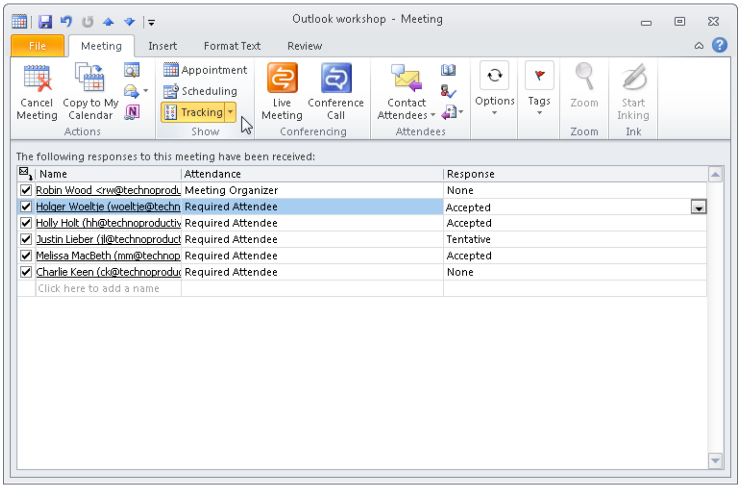
In Outlook 2010, you can use the People Pane as explained earlier in "How to create a meeting request." For Outlook 2007/Outlook 2003, you can install the Outlook Social Connector to display the People Pane. If you don't want to install it or if you don't like the People Pane and prefer to have it turned off, you can do the following:

1. Double-click the meeting in your calendar to open it in a separate window.
2. In Outlook 2010/Outlook 2007, click the **Tracking** button in the **Show** group on the **Meeting** tab. In Outlook 2003, simply click the **Tracking** tab.

   You can now see who has replied so far (see Figure 5-8); who accepted, declined or replied as tentative; and if you had chosen this person's presence as required or optional. You can also change the reply status manually by clicking it (for example, if someone answered by phone or you called him because you haven't received an email message yet but need a decision right now).

   With the **Scheduling** button (on the **Meeting** tab, in the **Show** group), you can check your colleagues' calendars (as shown earlier during the creation of the meeting request) and change the appointment, for instance if you notice that the appointment time was inconvenient for most of the participants after the first responses arrived.
3. By clicking the **Send Update** button (in the Appointment view, by choosing **Appointment** from the **Show** group on the **Meeting** tab in Outlook 2010/Outlook 2007 or simply clicking the **Appointment** tab in Outlook 2003), you inform everybody of the new date (the meeting will automatically be updated in their calendars), even if you keep the **Appointment** form open on your computer. As soon as you close the form after having changed the appointment data or, for example, move or delete the appointment in the week view of your calendar, Outlook automatically offers to send an update to all participants.

   Only the meeting organizer—the person who initially created the meeting request and invited other attendees—should update the meeting data. If you update anything for a meeting that somebody else invited you to, your changes will get lost as soon as he sends an update. So even if you edit the appointment from your own calendar and add some notes to prepare for the meeting, as soon as the meeting organizer sends an update, your changes will be lost. If you want to add notes for the other attendees or change the agenda, you have to write a separate email message to all the attendees or ask the meeting organizer to update the meeting. If you simply edit the meeting in your calendar, the other attendees will not see your edits unless you are the meeting organizer and send an update.


Outlook workshop - Meeting
File
Meeting
Insert
Format Text
Review
Cancel Meeting
Copy to My Calendar
Actions
Appointment
Scheduling
Tracking
Show
Live Meeting
Conference Call
Conferencing
Contact Attendees
Attendees
Options
Tags
Zoom
Zoom
Start Inking
Ink

The following responses to this meeting have been received:

	Name	Attendance	Response
☑	Robin Wood <rw@technoprodu	Meeting Organizer	None
☑	Holger Woeltje (woeltje@techn	Required Attendee	Accepted
☑	Holly Holt (hh@technoproductiv	Required Attendee	Accepted
☑	Justin Lieber (jl@technoproduct	Required Attendee	Tentative
☑	Melissa MacBeth (mm@technop	Required Attendee	Accepted
☑	Charlie Keen (ck@technoproduc	Required Attendee	None
	Click here to add a name		

FIGURE 5-8 Use the Tracking button to find out which participants have already accepted or declined.

Use Meeting Requests Sparingly

How well you can optimize and manage your meetings depends on the other team members and various other factors that are different for each team. On the following pages, we will give you the most important general tips to help you to plan better and more effective meetings—if most (preferably all) of your team members follow these simple rules.

Meetings Are Expensive

Think about what a meeting actually costs you and your team:

- Almost always a meeting takes much more time than its actual duration. Let's assume you have been invited to a 30-minute meeting:
  - You need to interrupt your current work and will need more time to get back to your original level of concentration and performance afterwards.
  - With some tasks that take an hour or more, such an interruption would interfere to such an extent that you can't start them within 30 minutes before the meeting (you might even have to postpone them for another day). Therefore, an inconveniently scheduled meeting can create 30 minutes of idle time that you spend unproductively or with some unimportant odds and ends, just waiting for the meeting to begin because you can't continue working on your projects productively with so little time left before you have to leave for the meeting.
  - Getting to and back from the meeting location also takes time. If you are lucky, it's only a four-minute walk from your office in each direction, plus three minutes (times two) to pack up your materials in the office and the meeting room. This adds up to 10 minutes for each direction and 20 minutes total expenditure. Walking to a different building or driving/traveling to a different location takes even more time.
- A meeting costs time for all participants:
  - If 10 participants sit together for two hours, the net cost is 20 hours of effort (add the time spent per participant for the commute, and the gross cost gets much higher).
  - If two attendees arrive with a 10-minute delay, and 18 other people have to wait for them, your team just wasted 10 minutes for 18 people = 180 minutes = 3 hours of productive time. Delays tend to get worse if you choose to wait until everyone has arrived: Some people will get used to the delay and plan to arrive 10 minutes late, to avoid wasting their time waiting for others. If one of them is then delayed for 5 minutes, this will add up to 15 minutes....
  - Being unprepared or off topic is just as bad: If two participants take 15 minutes of time each to explain issues that are just as irrelevant to the other eight as their presence for this topic is, 8 × 15 = 120 minutes = 2 hours of time have been wasted.

- A meeting costs money: Calculate how high your personnel costs and ancillary labor costs for this time are—and how much revenue a colleague could have generated during this time. Add to that travel expenses, costs for the meeting room if you choose an external location, and more.

THE BEST MEETINGS ARE THE ONES THAT DON'T TAKE PLACE

As you can see, a meeting is frequently more expensive and time consuming than it initially seems. Sometimes, however, it's well worth that time because good meetings can help to create a stronger bond between team members, resolve conflicts, establish common strategies, spark synergy effects to come up with new ideas and product improvements, support each other, and gather many different ideas and improve them immediately with the expertise of multiple specialists from different areas.

Sometimes you need many people and a lot of room for discussion to come to a decision. Some information is best passed on in a personal conversation or in a presentation to a group. This is especially the case if a topic raises many questions, if the answers to those questions are relevant to everyone in the room, or if several people have information to pass on. (For example, you could have a three-hour meeting to prepare for a trade show to share details about one day's agenda that includes several presentations, technical information with a Q&A session about the crucial advantages of the three most important products, reminders of company policies and tips for talking to the press, and a report about the experiences from the last trade show.)

In all these cases, a well-prepared and well-run meeting can be incredibly productive and save a lot of time (see "Prepare Meetings Effectively," later in this chapter). In many cases, however, it's the exact opposite. Therefore, you should triple-check that there is no alternative before you call a meeting. Maybe you don't need one after all.

Don't overwhelm others with meeting requests simply because Outlook enables you to plan meetings more quickly and easily than ever. Avoid as many meetings as possible.

Think about the following before sending out a meeting request:

- Is the meeting worth the invested time and money? Don’t call an $800 meeting to solve a $450 problem.
- Is the meeting really necessary?
    - If it’s about decision-making: Are you sure that the responsible manager, a group of up to three experts, or a representative on the team’s behalf can't make this decision (and maybe do so better and faster than the whole team)?
    - Does the presence of more people (more experience, a larger idea pool) significantly improve the quality of the results you are trying to reach, and does the improvement justify the additional effort as opposed to the effort of one or two people?
    - Can you clarify the issues at hand more effectively and more quickly via several individual phone calls, instead of calling a meeting?
    - Can you combine two or three small meetings with the same group of participants? The net time stays the same (or becomes less, because you can be late only once and issues are targeted as a group). The gross time drops significantly, because you only need to go to and return from one meeting.
    - When it comes to passing on information: Could you simply distribute the information in writing? We can read much more quickly than we can listen, and while reading we can skip parts we already know. Also, everybody can read the information whenever he or she has time to do so, rather than having to spend time sitting in a meeting, which would be better used doing something else.
      If writing is too time-consuming and the participants travel a lot, there is now an additional but so far rarely used alternative: Get a headset for your PC and voice-record the information. This is very quick and easy. The people you want to inform can then use their smartphones or MP3 players during long driving times to listen to your recordings. (The problem: You can’t take notes while sitting behind the wheel. But if you travel a lot by car, just get a digital voice recorder or use your smartphone for voice notes.)

NOTE Recurring weekly meetings are common time sinks that are scheduled “just in case there might be something we need to talk about.” And when all attendees have gathered together, you’ll find something you might as well talk about to fill the time. Beware of recurring meetings unless they are really useful and required or have a specific reason. However, well-prepared, meaningful weekly meetings can propel a well-attuned team forward—as with action groups in which six colleagues who are constantly traveling hold conference calls to keep each other up to date about the previous week and next week’s planning at the beginning of each week.

- Which participants are really required? Whose time would you waste, because their presence is not necessary? (To avoid making those people feel excluded, you can also invite them as optional participants and leave it up to them whether they want to come. Let them know that they are welcome, if they want to find out what's going on and take part in decisions.)
- For example, are there four of eight participants who only need to be there for two of the six agenda items? Put these items at the beginning, so those participants can leave after the first 30 minutes, and let the other participants know.
- If you are convinced that a meeting makes sense, you should still consider the following: Can the participants save travel time, because a conference call might be just as good as an in-person meeting for the topics you have to discuss? Or go a step further and take advantage of Microsoft Office Live Meeting to show your colleagues’ Microsoft PowerPoint presentations, take votes with automatic count, and share applications among each other (for example, to edit documents together or explain how a new software version is used). In Outlook, a conference call or a Live Meeting can be planned just like an onsite meeting (you can add the dial-in number and access code to the text of the meeting request).

ONLINE COLLABORATION AND MEETINGS WITH LIVE MEETING

Sometimes the possibilities of a conference call aren't enough, but an onsite meeting is still too expensive and time-consuming—for example, flying from Canada to Australia to show a PowerPoint presentation followed by a one-hour Microsoft Excel budget planning session. When you work together at your computers during a Live Meeting, some of the social and communicative aspects of a "real onsite meeting" will be missing, but in some cases a Live Meeting can be even better.

Here are some of the most important functions of Live Meeting:

- You can work together from any location—with, for example, one person waiting in an airport lounge in New York, another one sitting in his office in Munich, and a third in her hotel room in London. All you need is an Internet connection and a phone or a headset to use Voice Over IP to hear and talk to the other attendees.
- You can show PowerPoint presentations, send the screen content of any application to everybody, and grant individual users control of one of your applications, so they can show things or just edit something in an Excel spreadsheet on your computer.
- You can plan Live Meetings directly from Outlook—whether you are planning the budget for next month with two colleagues or presenting your new software to 1,000 prospective customers worldwide. You can, for example, appoint multiple moderators who immediately answer individual questions via text chat in the background while the speaker continues his presentation.
- You can record the entire Live Meeting (video and audio) to watch it again later, evaluate it, or show it to people who could not participate.

For additional information about Live Meeting, go to http://office.microsoft.com.

There are also further options for online collaboration, such as the Broadcast Slideshow function (in the Start Slide Show group on the Slideshow tab) in PowerPoint 2010 or Windows Live Messenger.

Optimize Your Calendar to Make Meeting Requests Easy

In this section, we will briefly cover how you can simplify successful meeting planning by uncluttering your calendar, and how to decrease the number of meeting requests you receive for inconvenient times.

Keep Your Calendar Well Organized

If you have entered hardly any appointments and also have no appointments with yourself (see Chapter 3, "How To Gain More Time for What's Essential with an Effective Week Planner")—in other words, if you have these times marked as "free"—you seem to be constantly available. You therefore don't need to wonder why colleagues constantly put meeting requests for inconvenient times into your calendar.

On the other hand, if every working day of your calendar is completely packed with appointments from 7:00 A.M. until 10:00 P.M. (and maybe some of them even partially overlap), you don't need to be surprised about receiving meeting requests that don't suit you—after all, your colleagues don't have a choice.

IS IT A GOOD IDEA TO BLOCK ALL THE TIME IN YOUR CALENDAR FOR EACH DAY?

As just explained, filling the calendar completely usually doesn't prevent inconvenient requests from your managers or colleagues, but in some companies this tactic is common practice as a "last defense" against too many requests from colleagues lower in the company hierarchy—decline everything, because there is "just no time left," or generally prohibit lower-ranking colleagues from making requests at occupied times. This method, however, has two disadvantages: First of all, it makes it more difficult for you to use your Outlook calendar in a reasonable fashion (or may even prevent yourself from doing it). Secondly, it also blocks necessary and important meetings. It's best to generally clarify things once and for all (for instance, restricting access to your calendar to your assistant and your executive team only), or as a manager just decline those meeting requests you don't consider necessary in a polite and brief way, even if the time is open. It takes planning, discipline, and an adjustment period to reduce the amount of meetings in teams suffering from "meeting addiction."

You can control the times for incoming meeting requests to a certain degree by blocking out your most important times of the day (even if you just block them to be undisturbed for an important task) and leaving sufficiently large chunks of time open (at the times that work for your colleagues). Make it easy for others to find the times that work for you—most people choose the path of least resistance when looking for the right time for a meeting. The next step is to suggest different timeslots for meetings that conflict with other appointments or to just decline those requests if possible.

SET CORE MEETING TIMES!

It’s best to set up core meeting times for your team: Agree on timeslots everyone should keep free as long as possible, unless you are planning a meeting—for example, 9:30 A.M. to 11:30 A.M. Try to plan meetings during this time whenever possible (or in a shorter time window within this period). This works best if most of the other team members start planning the other times consistently as well—for example, by keeping 9:30 A.M. open, but planning a customer appointment, lunch break, or Productivity Hour (see Chapter 4, “How to Make Your Daily Planning Work in Real Life”) for 8:30 until 9:30 A.M. and entering your email block for 11:30 A.M. (and just go ahead and make it a recurring appointment for each work day). If someone then wants to plan a meeting, many time slots are already taken, but the designated time between 9:30 A.M. and 11:30 A.M. is still open for (almost) everyone; it will only take a few weeks of adjustment until meetings start to take place during these times whenever possible. And if everyone arrives and leaves on time, you will be able to stick to that timeslot more and more easily (more about this later in this chapter, in “Prepare Meetings Effectively”).

Keep your calendar well organized, if you aren’t already doing so consistently for your own planning:

- Immediately enter each appointment (whether with customers, your dentist, or a flight from New York to Chicago).
- Only enter appointments into your calendar if they are true appointments—“Call Mike back about delivery date by Thursday, or better today” does not belong in your calendar as an appointment on Tuesday from 9:00 A.M. to 9:30 A.M. (unless you have agreed to a phone call with Mike for that time). This entry belongs in your task list (set the due date and, if necessary, a reminder; see Chapter 2, “How to Work More Effectively with Tasks and Priorities”).

- Only enter appointments with yourself for your most important tasks as part of your weekly planning (see Chapter 3). Block time slots for these tasks (also to defend them against meeting requests), but at the same time keep enough space open by only blocking very few specific timeslots.
- If your calendar has lots of free time available, or if you would otherwise always procrastinate it: Consistently enter recurring appointments for your block building (see Chapter 4 and the right side of Justin Lieber's calendar in Figure 5-4, earlier in this chapter). Only cancel these recurring appointments in special cases.
- Feel free to plan further tasks as appointments with yourself as part of your daily planning process (see Chapter 4) and break your colleagues of the habit of calling a meeting at the last minute by declining, if you can (unless there really is a cogent reason for calling a meeting so late).

Take Advantage of the Show As Field to Flag Your Appointments

The Show As field is located in the Options group on the Appointment tab in Outlook 2010/Outlook 2007 (see Figure 5-9). In Outlook 2003, you can find the Show Time As field right below the Start Time and End Time fields if you opened the appointment in its own window by double-clicking it. In the Day/Week view, you can also edit the field from the shortcut menu by right-clicking the specific appointment.

This field usually contains the default value Busy. Change it to help your colleagues find convenient times, and take note of it in the calendars of colleagues when creating meeting requests (these are the colored bars in the Scheduling Assistant, as shown earlier in Figure 5-1).

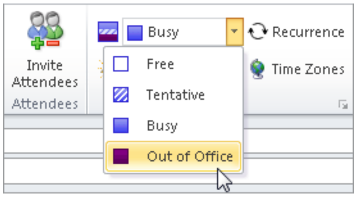


FIGURE 5-9 Appointments can be easily flagged with colors.

You have four options for setting this field:

- **Busy** This shows your coworkers that you already have this appointment filled, so this timeslot is taken, but you can open it up for another request if absolutely necessary.

- **Out of Office** You are not in the office. Decide with your colleagues what this actually means for your team to find a common code that everybody uses, such as one of these possibilities:
    - You are far away on a business trip and can't get back to the office that same day to attend a meeting.
    - You are not in the building—for example, visiting a customer—but you could be back in the office in an hour to attend a meeting.
    - You can't even be reached by phone during this time. (This is common in a situation where everybody is constantly traveling and you usually plan conference calls.)
    - You may not actually be out of the office, but you absolutely cannot move this appointment (while you set other outside appointments only to Busy and might be able to free them up, depending on the meeting).
- **Tentative** Reach an agreement as to whether this means "the appointment is very uncertain and the time slot will most likely open up again" or "if you have no other option but putting a meeting in one of my booked time slots, please take the tentative ones first; the other ones are more important."
- **Free** These times are not occupied. This is useful for certain appointments that last the whole day, such as a holiday that you want to remember.

How to use all-day appointments

If you will be out of the office for more than one day and therefore not available for meetings (on vacation, for example), enter an appointment for it:

1. Double-click the appointment to open it in its own window, and select the **All day event** check box (next to the start time). The options for choosing a time as a start time and end time are now disabled.
2. Now select the first day in the **Start time** field and the last day in the **End time** field (it's still labeled *time*, but you can only set a date).
3. Set the **Show as** field to **Out of Office** for your vacation. The all-day appointment will now "float" above the other appointments in the Day/Week view (see Figure 5-10). It marks you as **Out of Office** for the entire time, but leaves all time slots open for appointment entries. (This way you can show that you are out of the office for a trade show, for example, but you still have all the timeslots open for appointments you want to set during the trade show.)

4. Close the **Appointment** form by clicking the x in the upper-right corner, and click **Yes** to save the changes when Outlook asks you to confirm.

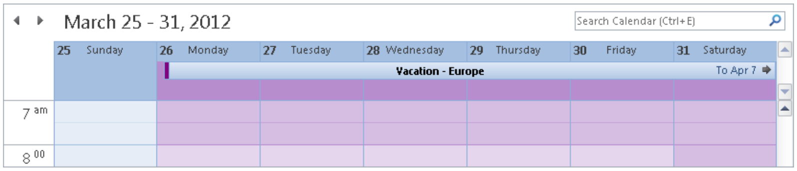


FIGURE 5-10 All-day appointments can mark several days as Out Of Office (the bar with "Vacation - Europe" on it) and leave you a complete overview, because they are displayed above the other entries in your Day/Week view.

In other situations, you can set the Show As field to Free (for example, if you just want to note in your calendar on which days a trade show takes place, when certain streets will be blocked in the city due to festivities, or when your kids will be on school break, so you can plan accordingly without having to mark the entire time as if you are out of the office. If you set an appointment to All Day, Outlook automatically sets the Show As field to Free—make sure you set your vacation to Out Of Office, though.

Flag Personal Appointments As Private

To prevent your colleagues from having access to your appointments, your children's vacations, your spouse's vacation, and your other personal appointments in your shared calendar, mark them as private.

In Outlook 2003, simply select the Private check box in the lower-right corner of the Appointment form. In Outlook 2010, click Private in the Tags group on the Appointment tab (the small lock icon). In Outlook 2007, in the Options group on the Appointment tab, also click the Private button (the small lock symbol). If the small lock icon has an orange-brown background (if you're not pointing to it), the appointment is flagged as private.

If you point to Private in Outlook 2010/Outlook 2007, it may look like the option is already selected. If you take a closer look, however, you will notice that the background color is slightly lighter when the option has not been selected yet. Especially at the beginning, it's easy to get confused here—you should therefore make it a habit to point to Categorize (to point away from Private) to see if an appointment has been flagged as private.

In the Day/Week/Month view of your calendar, it's even easier: Just right-click an appointment as usual and select Private from the shortcut menu. Outlook 2010/Outlook 2007 displays private appointments with a lock icon in the lower-right corner. Outlook 2003 shows a key icon in the upper-right corner.

Your colleagues can now see that this time is blocked, but they can't read the subject or any other content of the appointment entry; they'll only see Private Appointment as the subject.

For your own control, you see a small lock or key icon in the appointment entry in the Day/Week view of your calendar. Select the Private option for all of your private appointments—even if it would be okay for your colleagues to see the subject. Otherwise you might forget it for confidential appointments, or provoke curious questions if you for once try to hide an appointment from the others. You can also mark confidential business appointments as private (for instance, a surprise party for a colleague's 20th service anniversary with the company).

It's best to clarify with your colleagues that appointments marked as Private don't necessarily have to be time off but are just confidential appointments, regardless of whether they are confidential business appointments or real private appointments.

Private appointments are protected from the eyes of other users you have shared your calendar with. However, if you give a colleague the user name and password for your Exchange account, so that he or she has complete access while you are gone, Outlook assumes it's you. Whoever logs in with your data will see all your entries, so keep your password confidential!

Prepare Meetings Effectively

If all participants take time beforehand to prepare for the meeting and are ready to make decisions, you will save everyone a lot of time and conduct goal-oriented, to-the-point, effective meetings. If everyone takes 10 minutes to prepare, it often saves 20 minutes of meeting time—for all participants. Preparation is especially important for the person who runs the meeting and, if applicable, the moderator.

Improve Efficiency by Preparing and Running Your Meeting Wisely

Create an agenda for each meeting as soon as it is scheduled:

- Set a clear timeframe for each item, and limit the speaking and discussion time.
- Clearly identify the goals: What do you want to achieve with this meeting? Which information should be passed on or gathered (how, to whom, by whom), which questions should be answered, which ideas developed, which decisions made?
- For each item, assign someone to be responsible for the item.
- Limit the number of participants. Five to seven people is optimal. Too many participants can make a meeting unproductive—unless the objective is to inform a large group of people and answer their questions, or to get the opinion of many different experts, departments, or individuals about a topic.
- Start with the most important topics. Place the topics with the lowest priority at the end, assign them less time, and end the meeting on time. If you constantly run overtime, you will end up using 20 minutes for a topic you could have covered in 8 minutes, had you given yourself a time limit.
- If certain participants are only required for two of seven items, put these items on top of the agenda and let those participants leave afterward.
- Make sure all participants receive the required material well beforehand.

Plan sufficient breaks—meetings can really benefit from breaks:

- After approximately 45 to 60 minutes, it feels good to move and get some fresh air. People become more productive afterward. After two hours at the latest, most people can no longer concentrate on listening.
- In the breaks, the participants can talk about issues that are related to the meeting but may not concern everyone.
- Conversation in a break atmosphere can lead to new ideas.
- Especially during negotiations, the most important advances are often made during or after the breaks.
- Set an appropriate duration for the break. Ten to fifteen minutes has been proven to be optimal.

You can attach the agenda to the meeting request (just like attaching files to “regular email messages”). Attendees just have to open the meeting in their calendar by double-clicking it to access the agenda. However, using a SharePoint meeting workspace for the agenda (see the next section in this chapter) has many advantages compared to this method.

The following tips can help you run your meeting more effectively:

- Designate a meeting leader. If necessary, also select a moderator for difficult topics/groups, someone who is not involved in the content of the meeting itself but has a “referee function” (introduce new participants and the topic; limit the speaking time per participant to three minutes max, for example, and stick to it; and at the end summarize and clarify the results).
- Start and end the meeting on time. If you wait for latecomers once, you will soon always be waiting—each time a little longer. If you allow the meetings to run overtime, you are well on your way to meetings that never end.
- If you are not making any progress with a topic, let the meeting leader decide after a specified amount of time whether you will cast votes about continuing, make at least some partial decisions, or postpone the topic to another day (including everything that needs to be prepared, clarified, and decided). A small break can help cool down heated tempers and allow everyone to think more clearly again.
- At the end, collect feedback from everyone. How did they like the meeting and the style in which it was led? Are there ideas for improvement? The first few times you may get silly or insignificant answers, but soon they will become more useful.
- Keep meeting minutes that mainly summarize results. Distribute it soon, preferably still during the meeting or at the end of it for everyone. Typing the notes in Microsoft Word or Microsoft OneNote and showing them during the meeting all the time (on a digital projector) is best to make sure that everything is represented correctly and that nobody can later argue that certain decisions weren’t made or were meant differently. Assign persons who will be following up on each item, and clearly specify what they have to do as well as a due date.

Use Meeting Workspaces to Prepare Meetings

In the last pages of this chapter, we will briefly introduce you to Microsoft SharePoint. If you are working with Windows Server 2003/Windows Server 2008 in your network, you can use Microsoft SharePoint Foundation (Windows SharePoint Services), which is part of the basic package. Even if you don't use this kind of server in your company, you can still rent these services from third-party providers, for example, to use SharePoint sites on the Internet together with virtual assistants, your advertising agency, and your customers. You can also take advantage of SharePoint Online, which is part of Microsoft Office 365 (cloud-based Office applications from Microsoft Online Services, available for a small monthly fee per user). If you are not sure whether these functions are available to you or how to set up a new SharePoint site, ask your system administrator for advice and, if necessary, request a user account for SharePoint.

What can project/meeting workspaces in SharePoint do for you? You can attach any documents necessary for meeting preparation, as well as an agenda, directly to the meeting request or send them via email, without needing to use SharePoint. But this old-fashioned method (without SharePoint) has several disadvantages:

- If the agenda (or other documents) changes—which is frequently the case, because with a meeting request you are practically sending a proposal that will be amended by the other participants—the participants need to look for the newest version in your email messages, or each time a new version arrives delete the file attached to the appointment and replace it with the latest one. According to Murphy's Law, someone will always use an outdated version when he needs the data shortly before the meeting.
- Another drawback can be illustrated with an example: Suppose Melissa sends the agenda together with some documents. Both Robin and Boris individually think of a few additions and changes that each of them notes during the day and then sends to Melissa in the evening. She now has two different "new" versions of the files with different changes—partially in the same sections of the document, so she can't merge them manually with copy and paste. The situation requires a lot of work and further requests for clarification—it would have been better if first one person had edited the file while the other (knowing that the edit was taking place) had waited and then reviewed the updated file.

- Even if you don't have to deal with such simultaneous changes that end up causing conflicts, some meetings and topics can trigger a flood of email messages with additional attached documents and suggestions for changes, followed by comments from the individual attendees through email and their dismissal via yet more email. It gets even more complicated if you try to get a collective opinion about an issue: One person sends the question to all, everybody answers to all recipients. You end up having to gather the email messages from the last few days to get a cross-section of opinion. Because a simple email message with “Yes” or “No” or one of four options may seem a bit too blunt, most people add a few lines that aren’t really necessary and make evaluation more difficult.

The Advantages of Meeting Workspaces

SharePoint can help by allowing you to create central team sites in your company’s intranet. These sites can be set up directly from a meeting request and later retrieved from there. If you use SharePoint in such a way to prepare a meeting, the website you have created is called a “meeting workspace.” The advantages of such workspaces include the following:

- All data is stored at a central location, just like on a bulletin board. You no longer need to sort and manage hundreds of email messages with data for the next 20 meetings; instead you can find all data for each meeting in one location, and it's always up to date.
- You can also store all relevant documents at this central location. There are functions allowing you to lock a document if it is being edited. This way others will know that they cannot edit it at the same time and, if necessary, they can ask you to free it up again.
- Meeting workspaces are very easy to work with and quite intuitive. With just a few clicks you can create, for example, surveys or discussions, just like in a forum, which will spare you a flood of email and that can later be evaluated, looked through, and summarized much more easily than individual messages in the inbox.
- You can get notified immediately (or at certain intervals) about what’s relevant to you, without being flooded by mail about other changes: For example, Robin only takes a brief look at the latest documents shortly before the meeting to prepare himself. They already contain many changes, but he’s not interested in the change history—only the results count. Charlie is informed about all the changes in the documents and the discussion items he is responsible for once a day in an email summary. Holly gets immediately notified about any changes to her agenda item, but not about other updates, and so on.

You can set up the meeting workspace with a few clicks directly from the meeting request in Outlook 2003, Outlook 2007, and Outlook 2010 and later open it from the appointment you have created with the meeting request. If you are working with an older version of Outlook or other programs, you can open the link from your invitation email message in your browser and still access the data. Because the data is stored online, you can access it from any other computer, for example if you don't have your own computer with you (assuming you have noted the link and that the other computer is connected to the Internet or the company intranet that contains the site).

> Anyone who wants to open a meeting workspace (SharePoint site) needs an appropriate user name and password. Individual users can have different rights, for example only for reading the elements; for reading, changing, and adding elements; for redesigning the workspace; or for inviting new users and administering user rights. You can therefore grant Read or even Write access to information in the workspace to customers or certain partner companies who can't access your other network resources. To do so, the site must be accessible from outside your company. Ask your system administrator how this is handled in your company, if and how sites can be accessed from the outside (such as via the Internet or special external intranet access), and who can grant user rights where, and how.

Automatically Get Notified About the Changes Relevant to You

To keep you informed of what has changed without your constantly having to perform manual comparisons, the meeting workspace automatically sends you email updates. Maybe you don't care if certain agenda items, address lists, and things like that have been changed before the meeting, but the changes to other elements are very interesting and important to you. To avoid receiving too many change notifications that don't matter to you, you can manually set the notifications for each item and individually specify what you want to be notified about and how often.

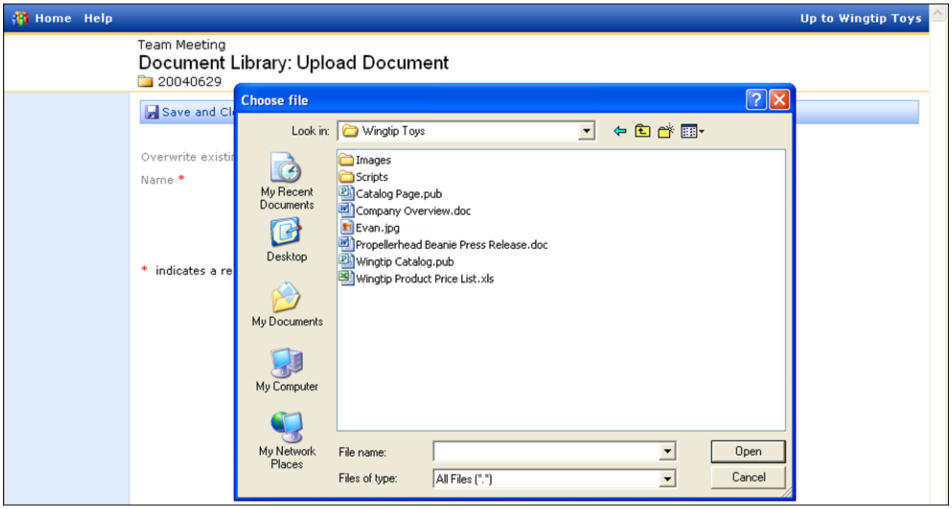
Take Advantage of Document Libraries

If several colleagues are supposed to review the same document before a meeting, according to Murphy's Law nothing will happen for a whole week and then everything will happen at the same time: One colleague inserts new slogans and photos, another the latest numbers and data, and a third the new concept, but each of them make their insertions into their own copy of the old file. Now you have three new files, and in each one of them the data of the other colleagues is obsolete, so that actually none of them is up to date. This creates more work, additional email, and a week later at the meeting, you will end up with a lot of confusion and trouble finding the most current file, into which somebody has laboriously entered all the changes by hand....

Here's the solution: Add a document library for managing shared files to your workspace (see Figure 5-11). The following functions make document libraries especially useful:

- The ability to Discuss documents with comments just like in an online forum (instead of having separate email messages to everyone, the contributions are gathered where they belong, and only those people who are interested in them are notified)
- The ability to check documents out (lock them) and check them in again (so the file can only be edited by one person at a time)
- The ability to create and view a version history, which lets you track checked-in changes and (if configured) allows you to restore older versions of each document

You can access these functions via the menu attached to a document's entry in the workspace. When you have checked out a document, your colleagues can see that it is being edited. After you have selected Check Out, the option changes to Check In.



Team Meeting
Document Library: Upload Document
20040629

Look in: Wingtip Toys

Images
Scripts
Catalog Page.pub
Company Overview.doc
Evan.jpg
Propellerhead Beanie Press Release.doc
Wingtip Catalog.pub
Wingtip Product Price List.xls

File name:
Files of type: All Files (*.*)

FIGURE 5-11 Use document libraries to track changes made by several people, thus avoiding chaos.

When checking in, you have the following choices:

- Reject the changes and undo the checkout.
- Confirm the document changes done so far (so your colleagues can download the updates), but leave the document checked out for editing.
- Confirm the changes and share the document again (report as checked in).

You can also add a comment that will explain later on in the history what kinds of changes you made.

Discover the Advantages of the Other SharePoint Web Parts

There are many additional Web Parts you can take advantage of. The most practical and most important are:

- **Contacts** Contact lists with address data, for example of external contacts, which you import from the Outlook Address Book and can embed as a contacts folder in Outlook.
- **General** You can use the general discussion Web Part to add a forum for discussing topics.
- **Surveys** These include automatic evaluation and graphical results display, for example, for voting before the meeting starts to already have results at the meeting. There are various question types to select from (such as selection list, Yes/No, and evaluation scale), and you can specify whether the names of participants should be visible and whether they can vote multiple times or just once.

You Try It

1. Create a meeting request, for example for your next meeting or a planned phone call. Look for free times in the calendars of the participating colleagues.
2. Ask a colleague to send you a meeting request, look up the time in your calendar, and accept it or propose a different time.
3. Check your meetings for the next month: Which ones can you group into one, cancel, or replace with a conference call or a Live Meeting? Act accordingly.
4. Together with your team, agree on core times for meetings, come up with a fixed meaning for the Out Of Office status, and look for ways to optimize meetings in the future (such as maximum duration time, agenda, or meeting workspace).

5. Enter your vacations as all-day appointments and as (Show As) Out Of Office. For the next two weeks, set Show As for all appointments to the correct value and flag all private appointments as such. As soon as possible, adjust all other future appointments that are already entered, and from now on handle all new appointments in this manner.
6. If you are working with Outlook 2010/Outlook 2007, display the appointments for yourself and two colleagues overlaid in the Week view, and look for an open appointment. Then place your calendar to the right of the overlaid calendars of your colleagues.
7. Enter five private appointments into the calendar (for example, jogging, yoga, or Outlook exercises) and flag them as private.

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