



Become a Microsoft Outlook Cracker-Jack

MANAGING YOUR WORKFLOW
AND KEEPING YOUR INBOX EMPTY

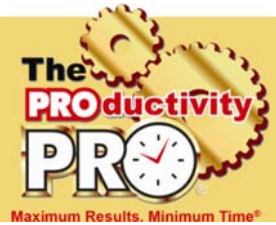
**LAURA
STACK**
The Productivity Pro®

Session 5 with
Laura Stack,
MBA, CSP, CPAE



LAURA STACK, MBA, CSP, CPAE

Speaker ⌚ Author ⌚ Consultant



President and CEO

Laura Stack, MBA, CSP, CPAE, is best known by her moniker “The Productivity Pro®.” Laura is an award-winning keynote speaker, bestselling author, and noted authority on employee and team productivity. She is the president of The Productivity Pro, Inc., a boutique consulting firm dedicated to helping leaders increase workplace performance in high-stress environments. Laura is a past President of the National Speakers Association.

Keynoter

For over 25 years, Laura’s keynote speeches and seminars have helped associations and Fortune 1000 corporations improve output, increase speed in execution, and save time in the office. She is a high-energy, high-content speaker, who educates, entertains, and motivates professionals to deliver bottom-line results. Laura is a member of the prestigious *CPAE Speaker Hall of Fame*, which has fewer than 200 members worldwide) and holds the Certified Speaking Professional (CSP) designation.

Author

Laura is the bestselling author of seven books published by Random House, Wiley, and Berrett-Koehler, including her newest, *Doing the Right Things Right: How the Effective Executive Spends Time* (Jan. 2016). Laura’s books have been published in more than 20 foreign editions, and she is a featured columnist for the *American Business Journal*, LinkedIn, *Time Management*, and *Productive* magazines. Laura has produced more than 50 online training programs.

Recognized Productivity Expert

Laura has been featured nationally on the CBS Early Show, CNN, NPR, Bloomberg, the New York Times, USA Today, the Wall Street Journal, Entrepreneur, and Forbes magazine. Laura has been a spokesperson for Fellowes, Microsoft, 3M, Skillssoft, Office Depot, Day-Timer, and Xerox. Her client list includes top Fortune 500 companies, including Starbucks, Wal-Mart, Aramark, Bank of America, GM, Wells Fargo, and Time Warner, plus government agencies such as the Internal Revenue Service, the United States Air Force Academy, the Census Bureau, the U.S. Senate, and the Department of Defense.



Clients include

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IBM	Time Warner
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Lockheed	Denver Broncos

Spokesperson

Microsoft	Xerox
3M	Day-Timer
QVC	Office Depot

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Celebration

“What did I do since the first session to get better (IMPROVEMENT)?”

AH-HA!

“What has changed for me since attending this session today?” (AWARENESS)

Goal Setting

“Here’s what am I going to DO to ensure that real change actually does take place in my life (BEHAVIOR CHANGE).”

Homework

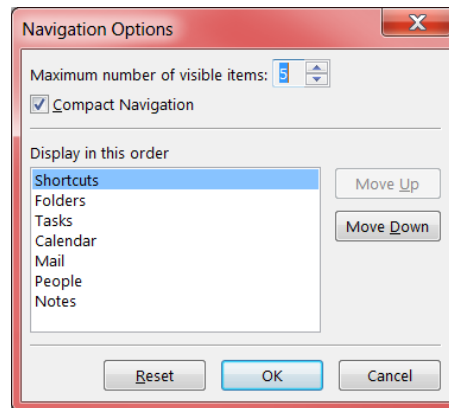
“Here are the specific things I will complete before the end of the year.” (ACTION)

1. Turn off your email alerts
2. Create signatures as templates
3. Use the Clean Up button on your Inbox
4. Program your QuickSteps
5. Save Your QuickParts
6. Practice the Top Twelve Tips
7. Complete/review previous workbooks.
8. Empty your Inbox before 2017! Keep your new behaviors going until it’s a habit!

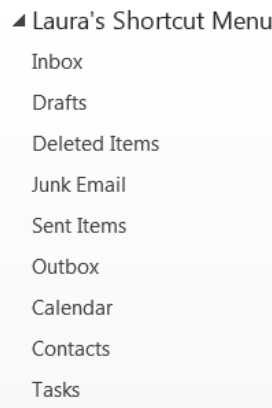
Time Savers

A. Create Your Own Custom Menu Using Shortcuts. If you have Office365, you might see folders randomly pop up in your Folder List that you don't want to see, such as "Conversation History" or "Clutter" or "LinkedIn," etc. I don't like having to scroll down a large list of items or even see them. So you can create a customized folder list using Shortcuts and use it as your main folder list instead.

1. Click the View tab.
2. In the Layout group, click Folder Pane.
3. From the dropdown, click Options...
4. Click on Shortcuts and click the Move Up button to make first in the list:

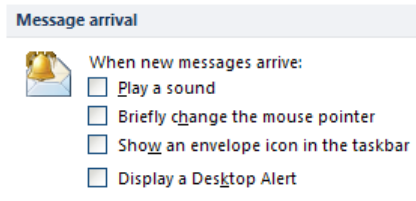


5. Right-click on Shortcuts and select Rename Group. Type in (Your Name) Shortcut Menu.
6. Right-click again and select New Shortcut.
7. One at a time, select the folders you frequently use and want to see. Here are the ones I use and recommend:



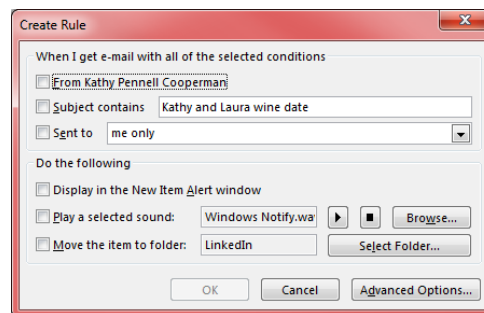
B. Turn Off the Automatic Email Notification Options.

1. Select the File tab.
2. Select Options.
3. Under the “Message arrival” section, uncheck all four boxes.



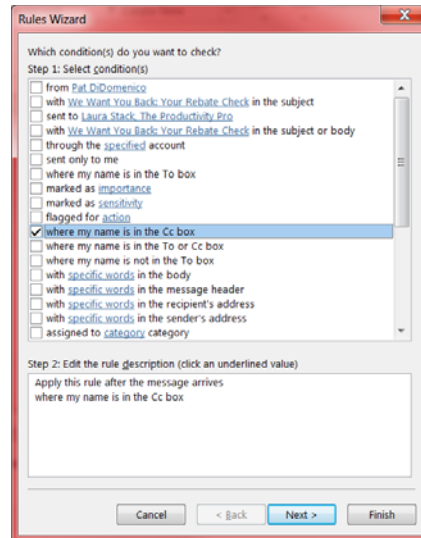
C. Now, Create a RULE to Play a Sound for “Important” People. Rules help you manage your e-mail messages by performing actions on messages that match a specific set of conditions. After you create a rule, Outlook applies the rule when a message arrives in your Inbox or when you send a message.

1. Right-click on an email from a person for whom you’d like to create a rule.
2. Select Rules and then Create Rule... from the submenu.
3. Check the “From (person’s name)” box.
4. Under Do the following, check the “Play a selected sound” box.
5. Click OK



D. Create a Rule to Move CC Messages to a Folder.

1. In the Create Rule dialog box above, click the Advanced Options button.
2. Check the box “where my name is in the Cc box,” and click Next.
3. Then check the box “move it to a specified folder.”
4. In Step 2, click the word specified at the bottom of the box.
5. Click the New... button and create a CC folder under your main folder level.
6. Click Next.
7. Click Finish.



E. Use the New Item Shortcut Dropdown. Wherever you are in Outlook, whatever you're doing, you can click the New Items button in the New group and automatically start a new appointment, meeting, task, etc. Shaving off clicks saves time!

F. Insert Quick Parts as “Building Blocks” for Replies.

1. Reply to or start an email as usual.
2. With your cursor in the text portion of the email, click the Insert tab.
3. In the Text group, click the Quick Parts button.
4. Select the text you wish to use.
5. To save a Quick Part, highlight the text in the email before clicking Quick Parts.
6. Select “Save Selection to Quick Part Gallery” from the menu.
7. Give the Quick Part a name for use again.



G. Create Signatures to Use as Templates/Letters for Common Emails.

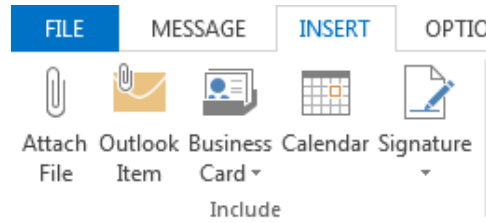
1. Select the File tab and then Options.
2. Click Mail.
3. Select the Signatures button under “Create or modify signatures for messages.”



Create or modify signatures for messages.

Signatures...

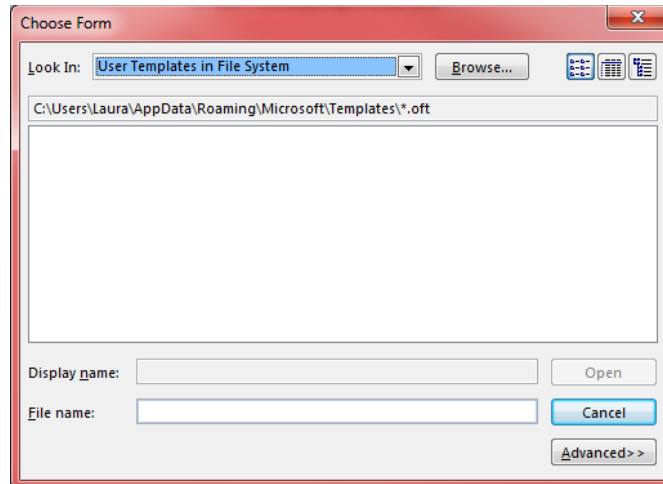
4. Click "New."
5. Type a name for your new letter/template.
6. Paste in your letter.
7. Click OK.
8. To use your template/letter, reply to the email as you normally would.
9. Click the Insert tab.
10. Click the Signature button from the Include group.



11. Select the name of your new signature.
12. Complete the rest of your email and Send as usual.

H. Use an Outlook Template for Letters. Rather than saving your letter templates in Word and copying/pasting them into Outlook, save them as an Outlook template and use them when creating messages. Save them in a shared folder, so the entire office can use the same versions.

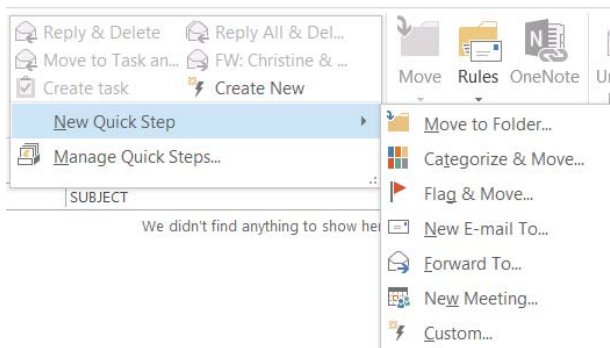
1. Start an email as usual.
2. Paste your template/letter into the email message text.
3. From the File tab, select Save As.
4. Under Save as Type dropdown menu.
5. Select Outlook Template (*.oft). Outlook will save the template in the default Outlook template directory, which is C:\Documents and Settings\your name\Application Data\Microsoft\Templates*.oft. If you have a shared folder or SharePoint with your team, change the path to save the document.
6. Give the file a name.
7. Click Save. (You do not actually need to send the Outlook email.)
8. To use the template, click the New Items button in the New Group.
9. Select More Items.
10. Select Choose Form...
11. In the Choose Form dialog box, click the Look in: drop-down arrow, and then click User Templates in File System.
12. Select your template.
13. Click Open. Your template will appear.



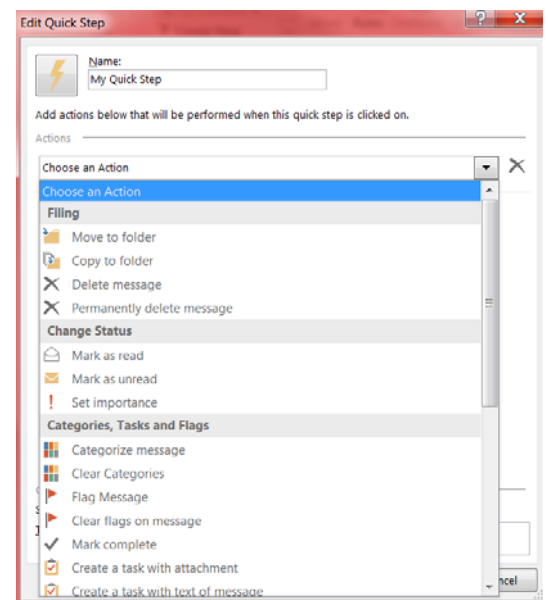
14. Fill in the TO and subject fields and any blanks as necessary to complete the letter.
15. Send as usual.

I. Create QuickSteps to Perform Multiple Actions at Once. One of my favorite time savers! You can execute multiple actions with one button!

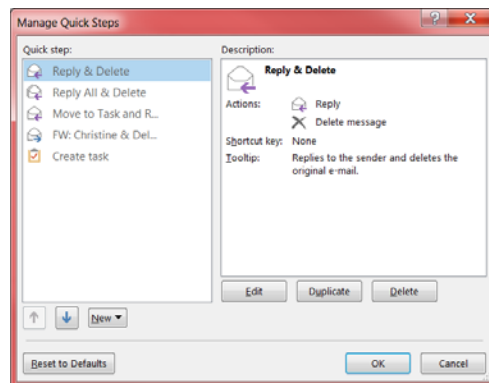
1. To create a Quick Step using standard commands, click the down arrow in the bottom of the scroll bar in the Quick Steps group.
2. Select New Quick Step.
3. Select the type of Quick Step you desire.



4. Click Custom to build your own Quick Step.
5. Give your Quick Step a name.
6. Click the Choose an Action drop down pick and select your choice.
7. Click the Add Action button to build your series.
8. Optional: choose a Shortcut button and the Tool Tip hover text.

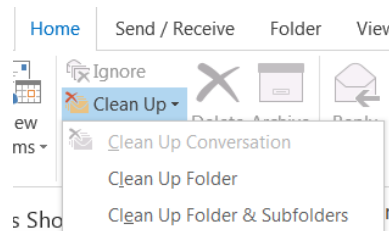


J. Manage Your Quick Steps. From the down arrow in the lower right-hand corner of the Quick Steps group, select Manage Quick Steps.

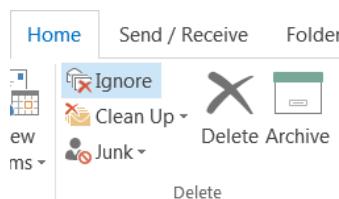


K. Use the Clean Up Button. The Clean Up button will remove ALL redundant emails in the selected folder and/or subfolders. So if people keep hitting “Reply All” on a group message, it will delete any messages containing a response from someone else. If there is just a single character different, the message will not be deleted and stays in the inbox.

1. Go to the Folder you want to clean up (usually the Inbox).
2. In the Delete group, click the Clean Up button.
3. Select “Clean Up Folder” from the menu. Duplicate messages go to Deleted Items.



L. Use the Ignore Command to Automatically Delete Future Responses to Email Strings. While on an email you do not want to receive future responses, click the Ignore button in the Delete group. Further replies will go to Deleted Items based on the Subject of the string.



M. Use Outlook Shortcuts.

To do this	Press
Switch to Mail	CTRL+1
Switch to Calendar	CTRL+2
Switch to Contacts	CTRL+3
Switch to Tasks	CTRL+4
Switch to Notes	CTRL+5
Switch to Shortcuts	CTRL+7
Next item (with item open)	CTRL+COMMA
Switch between the Folder List and the main Outlook window	CTRL+SHIFT+TAB
Move among the Outlook window, the Navigation Pane, and the Reading Pane	TAB

To Create this	Press
Appointment	CTRL+SHIFT+A
Contact	CTRL+SHIFT+C
Distribution list	CTRL+SHIFT+L
Folder	CTRL+SHIFT+E
Journal entry	CTRL+SHIFT+J
Meeting request	CTRL+SHIFT+Q
Message	CTRL+SHIFT+M
Note	CTRL+SHIFT+N
Search Folder	CTRL+SHIFT+P
Task	CTRL+SHIFT+K

To format text	Press
Switch case (with text selected)	SHIFT+F3
Add bold	CTRL+B
Add bullets	CTRL+SHIFT+L
Add italics	CTRL+I
Increase indent	CTRL+T
Decrease indent	CTRL+SHIFT+T

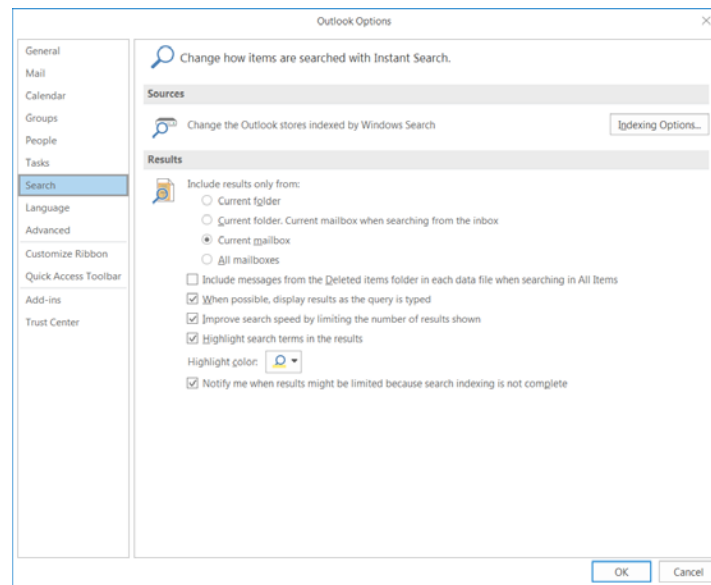
Left align	CTRL+L
Center	CTRL+E
Underline	CTRL+U
Increase font size	CTRL+]
Decrease font size	CTRL+[
Cut	CTRL+X or SHIFT+DELETE
Copy	CTRL+C or CTRL+INSERT
Paste	CTRL+V or SHIFT+INSERT
Clear formatting	CTRL+SHIFT+Z or CTRL+SPACEBAR

To do this in an email	Press
Reply to a message	CTRL+R
Reply all to a message	CTRL+SHIFT+R
Check for new mail	CTRL+M or F9
Compose a new message	CTRL+N
Open a received message	CTRL+O
Convert an HTML or RTF message to plain text	CTRL+SHIFT+O
Remove hyperlinks	CTRL+F9
Mark as read	CTRL+Q

To do this	Press
Save	CTRL+S or SHIFT+F12
Save and Close, Send	ALT+S
Undo	CTRL+Z or ALT+BACKSPACE
Delete	CTRL+D
Print	CTRL+P
Check spelling	F7
Flag for follow-up	CTRL+SHIFT+G
Forward	CTRL+F

N. Change Your Search Option to Include Current Mailbox. When you search for something in Sent Items or Tasks, etc., I find it fastest to not have to click on any particular folder to search it, but rather to search for ANY and ALL items related to the search term. That way, you can pull up all emails/tasks/calendar items at one time.

1. Click on the File tab, select Options, and then select Search.
2. Under the Results heading, under “Include results only from,” click “Current mailbox.”



O. Set Outlook to Automatically Open the Next Email After Deleting One. That way, you can pull up all emails/tasks/calendar items at one time.

1. Click on the File tab, select Options, and then select Mail.
2. At the VERY bottom of that page, Under the Other Heading, click the dropdown next to “After moving or deleting an open item:”
3. Select “open the next item” from the dropdown.

Other

- Show Paste Options button when content is pasted into a message
 - Show Next and Previous links in the message headers when reading messages
 - Don't automatically expand conversations when using the keyboard to change messages
- After moving or deleting an open item: open the next item ▼

Educational Resources by Laura Stack

Screenshots of Microsoft Outlook Tips and Tricks: www.TheProductivityPro.com/Laura

200+ Microsoft Outlook online training videos: www.TheProductivityPro.com/Outlook. Use coupon "Outlook20" for an additional \$20 off!

What to Do When There's Too Much to Do book site: www.TheProductivityPro.com/whattodo

Execution IS the Strategy book site: www.ExecutionIsTheStrategy.com

SuperCompetent book site: www.SuperCompetentBook.com

Doing the Right Things Right book site: www.3TLeadership.com

Laura's YouTube channel: www.youtube.com/theproductivitypro

Subscribe to our weekly one-minute personal productivity video training series "The Productivity Minute": www.theproductivityminute.com/

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Laura Stack keynotes: www.TheProductivityPro.com/keynotes

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I would welcome the opportunity to come to your organization to give a seminar or speak at an upcoming meeting! Please reach out to me anytime at Laura@TheProductivityPro.com.