Barrington Consulting

Productivity & Effectiveness with Outlook

Gary P. Cox
Lean Six Sigma MBB

canadian 2019 Lean Summit

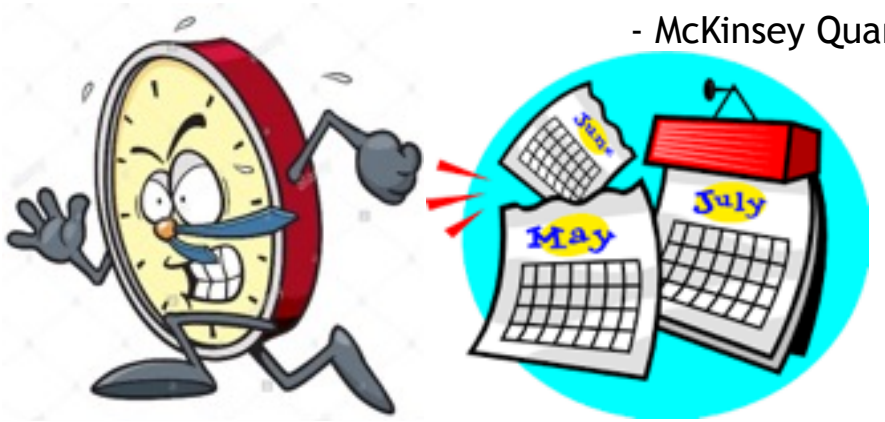
PROBLEM AWARENESS

Productivity is tied to time management

"Time management isn't just a personal productivity issue…

…Time management is an organizational issue whose root causes are deeply embedded in corporate structures and cultures."

- McKinsey Quarterly, January 2013

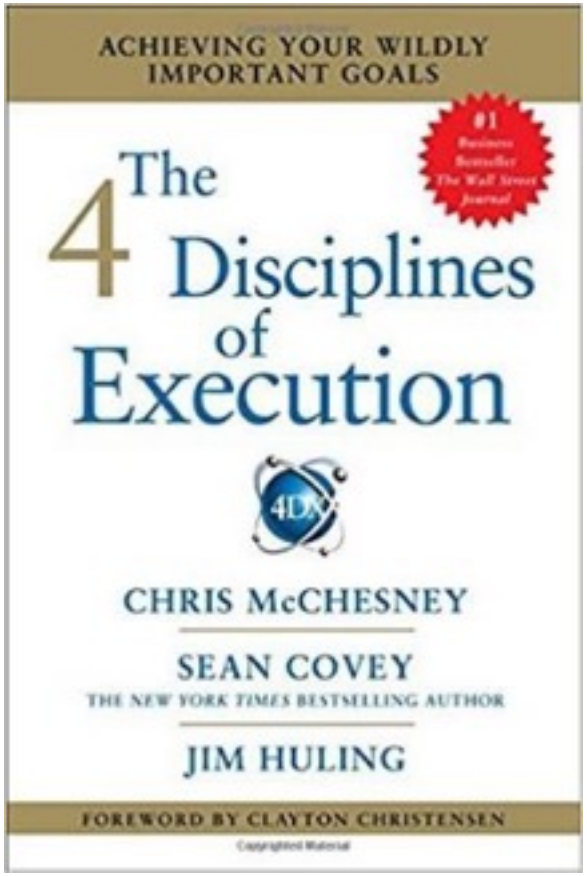


Statements of truth or fiction

- Busy = productive and effective
- People take pride in being heroically overworked
- There is an expectation that you will find a way to get the work done
- **You** are expected to figure out how to be more productive

4 Disciplines of Execution
"The Execution Gap"

- Only 49%* reported they spend the *majority* of their time working on their top goals.
- Only 51%* reported they know *specifically* what they must do to help the organization reach its goals



Barrington Consulting

*Landmark Study by the Harris Polling Group

Problem statement

As businesses strive to improve customer and employee experiences, **workload and expectations on employees increase, but time to get the work completed does not** –

What is the impact?

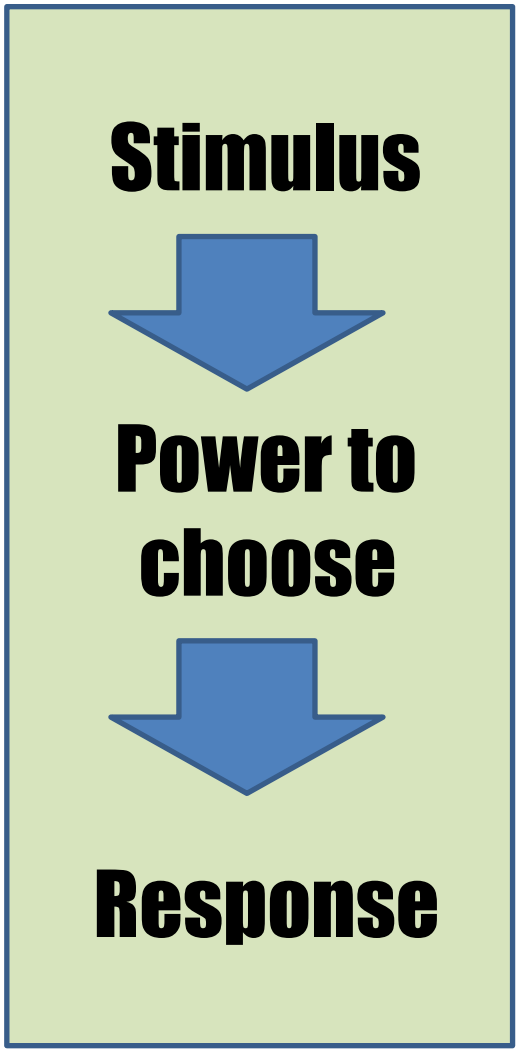
OBJECTIVES

Effectiveness & Efficiency

Increase your productivity and effectiveness mindset by showing you how to work smarter

Enhance your efficiency by teaching you to identify waste in how you currently work

Show you how you can effectively use Outlook as a tool (Emails, Tasks and Calendar)



To help make the connections

Two key Lean Six Sigma tools:

- Critical to Success Tree (CT Tree)
- TIMWOODS for waste identification

YOUR OBJECTIVES

Your objectives

Know your roles

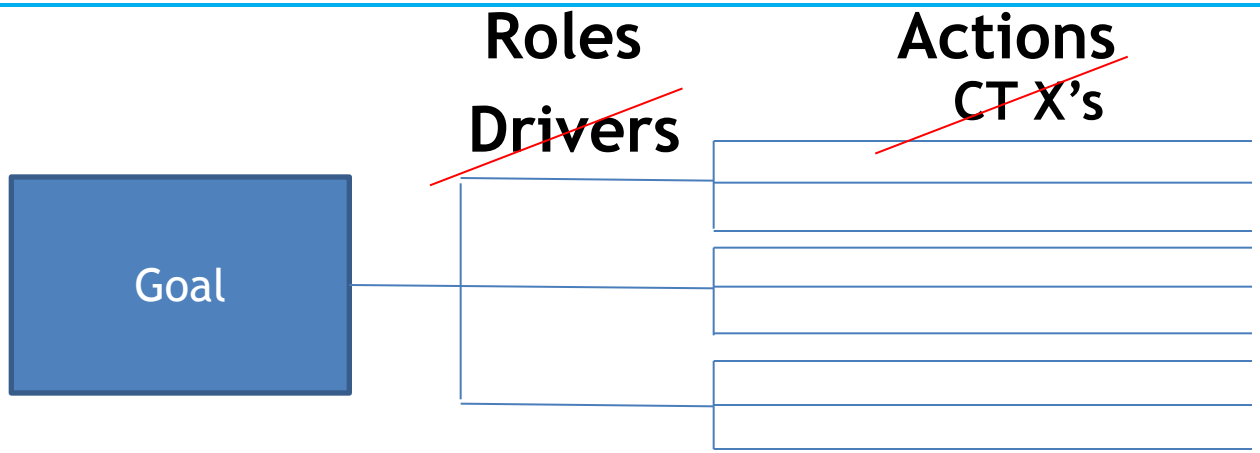
- What roles do you have?

Examples:

- Team leader
- Project coordinator
- Parent / son / daughter
- Coach
- Director
- Manager

Make a list of your roles…

Critical to Success Tree (CT Tree)



Term	Definition
CT Tree	A tool to help us link goals to drivers and key activities
Goal	Measurable objective or desired outcome
Drivers	Themes or roles through which we achieve the goal
CT X's	These are specific activities that define the success in our driver

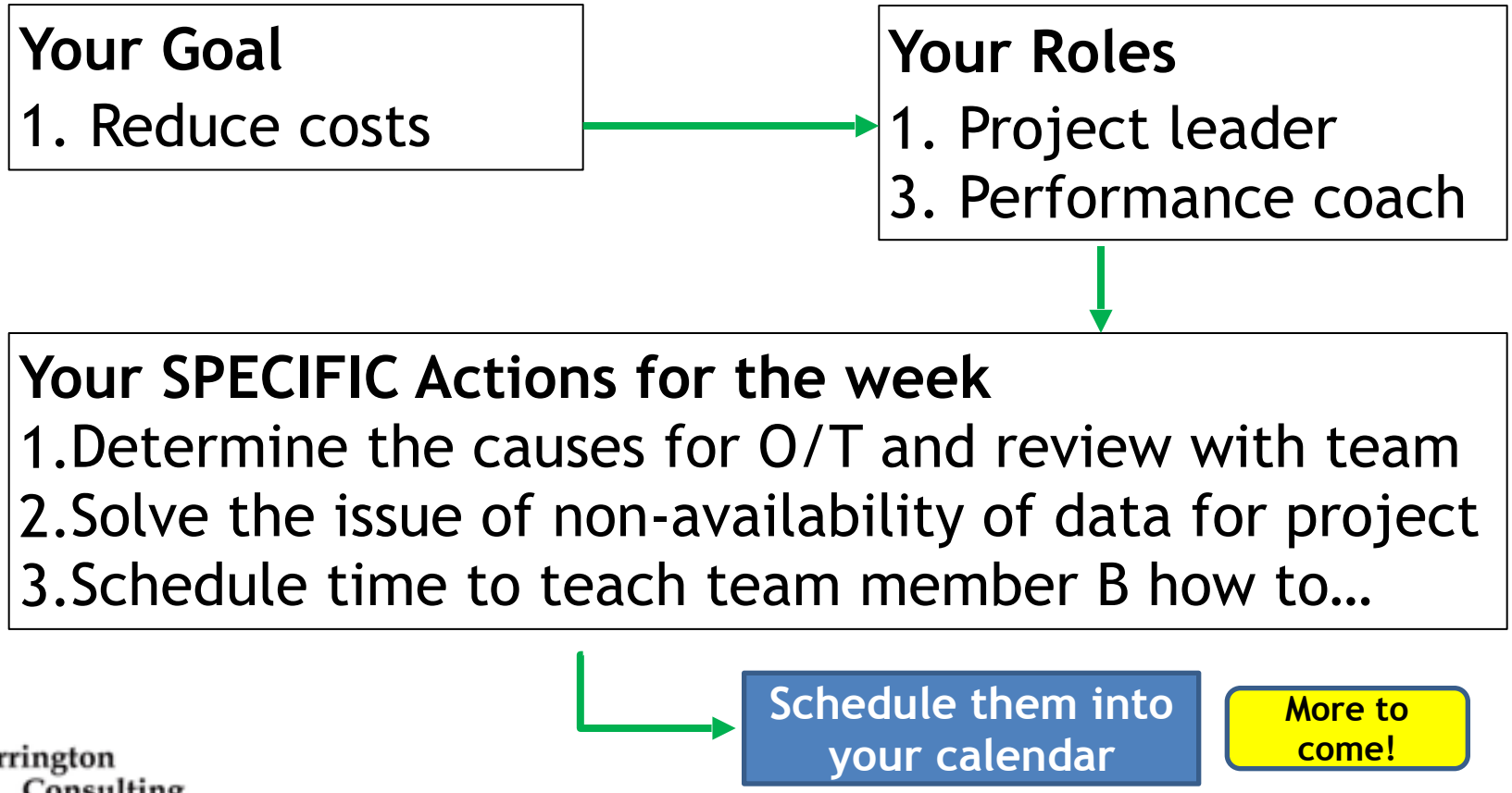
Goals – Roles

- How do your objectives connect to your roles?
- How do they connect to the Organizational Goals?

Why is this important?

Goals – Roles – Procedures

- What specific activities can you do **this week** within EACH of your roles to further your goals?



TIME MANAGEMENT

Essential time management mindset

- Manage your behavior (response to stimulus)
- Be aware of what gets "dropped" after you determine what specific activities you are doing each day/week
- Build in time to deal with the urgent in your working day/week (don't overbook!)

REMEMBER! With everything you say "YES" to, you say "NO" to something else! Manage your response.

WASTE

Waste examples in deskwork TIMWOODS

- **Transportation** – Moving your emails, moving work between people/departments or groups
- **Inventory** – Buildup of emails in your inbox, work on your desk, long 'To-do' lists
- **Motion/Movement** – Reaching or searching for stuff
- **Waiting** – Unable to move forward until someone else does or approves something, waiting for email responses
- **Over Production** –Unnecessarily emails on the same subject, cc's!, Unnecessary printing or photocopies
- **Over Processing –** Touching the same document or email several times
- **Defects** – Producing 'finished work' and having to rework it
- **Skills** – Not fully using your talents or expertise in your work, or not having needed skills to master your work

Remove unproductive activities

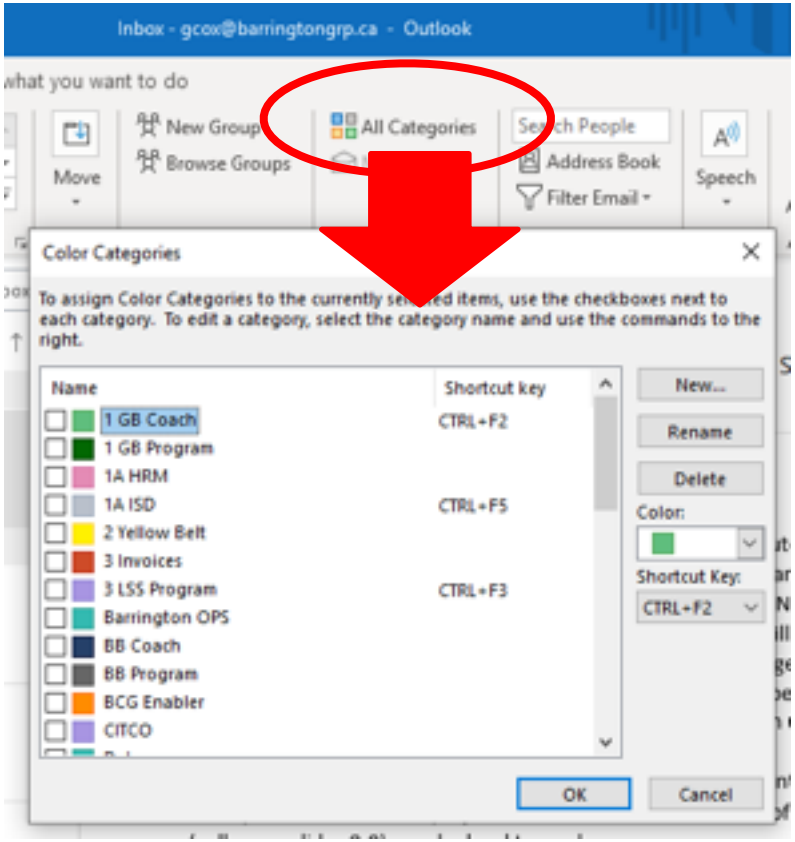
- Become conscious of the waste in your work
- Plan how you will reduce the unproductive activities in your area of responsibility
- Communicate to others in your circle of influence how they are impacting your effectiveness (or lack of it)

OUTLOOK AS A TOOL

CATEGORIES

Why use Categories?

- Easily organize emails, appointments, and tasks with personalized groupings
- Easily search emails by using one or many categories
- Easily track and manage time and tasks devoted to each category
  - E.g., by client, project, area of work



Tag emails with as many categories as you need

Barrington Consulting

What Categories should I use?

It depends on…

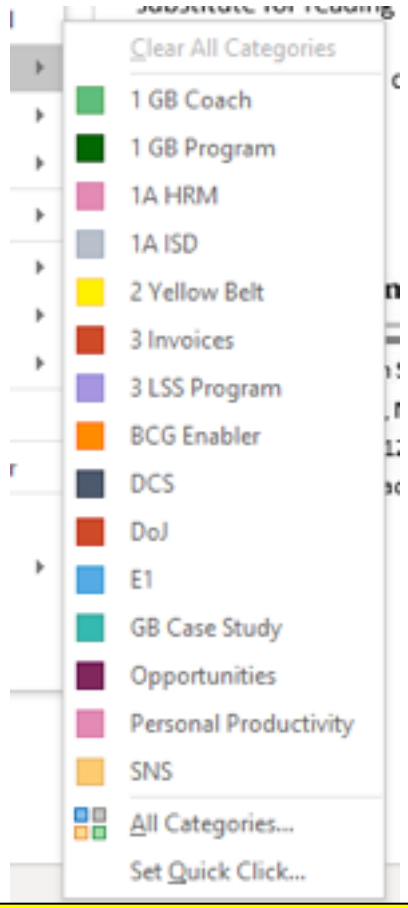
- The type of emails you receive and the work you do (request for input, information, to-do's, etc.)
- Your search behaviour history (categorize themes on what you search for)
- The volume of emails you receive on any given topic

- Some Examples:
  - Gary: **Roles** (e.g., Coach, Entrepreneur, Husband) and **Goals** (e.g., Productivity, Opportunities)
  - Robert: **Projects** (e.g., Access-A-Bus, Performance Excellence Training), **Internal** (Business development, internal projects), **Personal** (Family, friends, receipts)
  - By **location** (e.g., answering emails at home, work, by phone)
  - By **client**
  - By **objectives** (e.g., "increase revenue by 10% by the end of this year")

How do I organize categories?

- Categories are listed in alphabetical order. Symbols and other precursors are an easy way to sort categories.
  - Numbers (1 to 9)
  - .Projects
  - @Clients
  - BCG-Internal
  - c Career
  - p Personal
  - z Other/Junk (I still want to keep but want it at the bottom of the list)

- Multiple categories can be used on an email
  - BCG-Business development + c L6S
  - BCG-Internal + c Engineering



Create a system that works for you!

Barrington Consulting

Sounds tedious…

- What sounds more time-consuming, assigning categories or…
  - Searching through hundreds of folders?
  - Searching through thousands of emails in your inbox?
  - Sending emails to your colleagues to re-send that document?

- Shortcut keys can be used for assigning categories (ctrl + F1-F12)

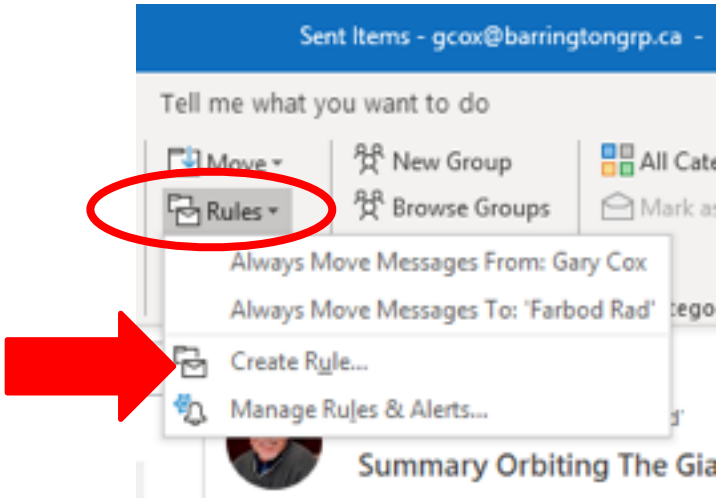
- Rules can also be setup for categori

Barrington Consulting

RULES

Rules

- Rules are all about **automation**:
  - Automatically assign emails to specific categories
  - Send your emails to specific folders
  - Automatically forward emails to colleagues
  - Auto-respond to emails (e.g., out of office)



A quick Lean Six Sigma lesson:

Takt Time

- Takt Time is a Lean term meaning *the beat or rhythm at which a process must operate in order to meet customer demand.*

Takt Time = Available time / Customer Demand

EXAMPLE:

Emails -

If you receive 30 emails a day and you have scheduled one hour to do your emails, you must maintain a *Takt Time* of 2 minutes per email to complete all 30 in an hour.

Available time: 60 minutes

Demand: 30 emails

60/30 = 2 minutes/email

What benefits could there be to scheduling time to do your emails?

EMAIL MANAGEMENT

Get a fresh start (declare email bankruptcy)

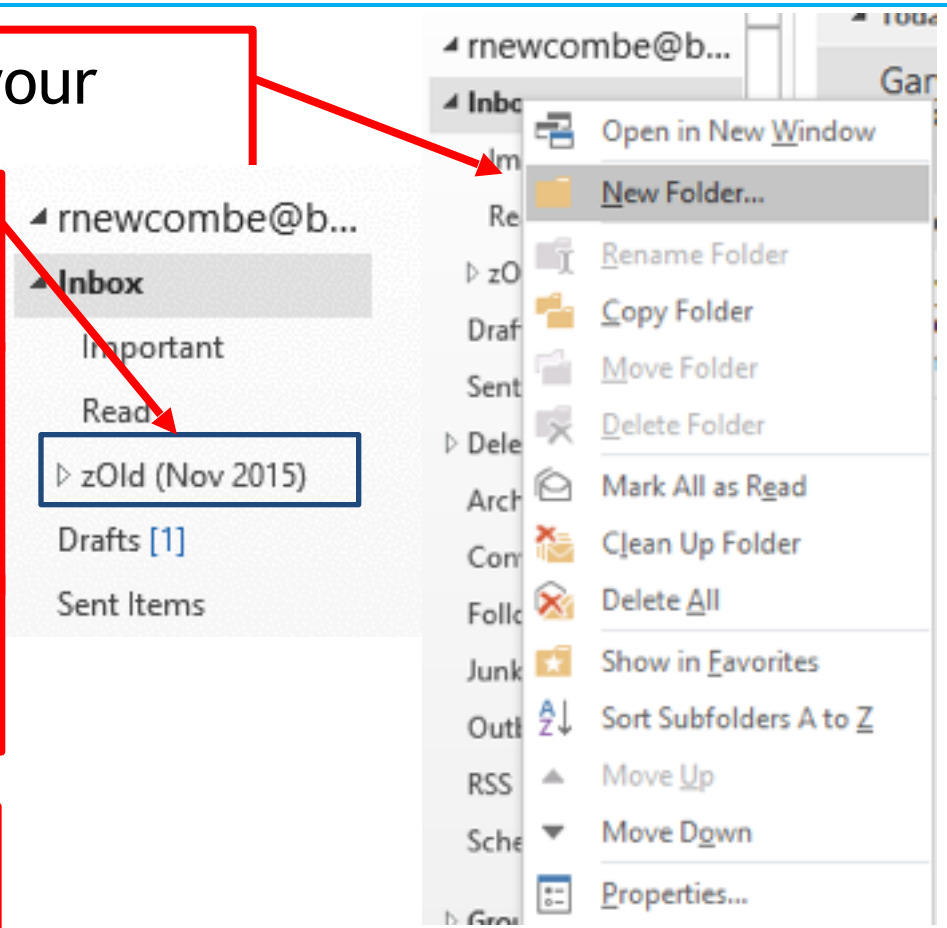
1. Create a new folder in your inbox

2. Label it with today's date

3. Move all inbox emails to new folder with today's date

4. Move current folders under new folder

5. Create another folder for every new, read email and call it "Read Emails"



Email management

- Five recommended practices:
  1. Clear your inbox every day
  2. **Use the 5D approach**
  3. Use a “one touch” mindset
  4. Schedule time to check e-mails a few times each day
  5. Use filters and rules and colour-coded categories

EMAIL MANAGEMENT: 5 D'S

Email management

The 5 D's (one touch emails)

1. Delete it
2. Designate it
3. Delegate it
4. Do it
5. Defer it

Not Actionable

Actionable

1. Delete it

- Is this message important for a project that I'm currently working on? If no, DELETE.
- Can I easily get this information from somewhere else? If yes, DELETE.
- Will I require any of this information within the next 6-12 months? If no, DELETE.
- Am I required to keep this information on file? If no, DELETE. If yes, create a "Legal" category and keep those when you purge/archive your email. *Although you may want a better spot to keep these emails rather than in an email folder.*

2. Designate it

- Assign the email to a **category** (or multiple categories)
- If it's not actionable right now, but you may want to review it in the future, create a "someday/maybe" category
- Drag it to the "Read" folder

3. Delegate it

- You have team members who can/should handle it.
- Someone else better suited to deal with it.
- If yes to either, forward the email.
- *Categorize as “delegated” and move to the “Read” folder.

**If it’s important and/or time-sensitive, drag the forwarded email into your calendar or task list and set a reminder date for yourself to ensure follow up occurred*

4. Do it

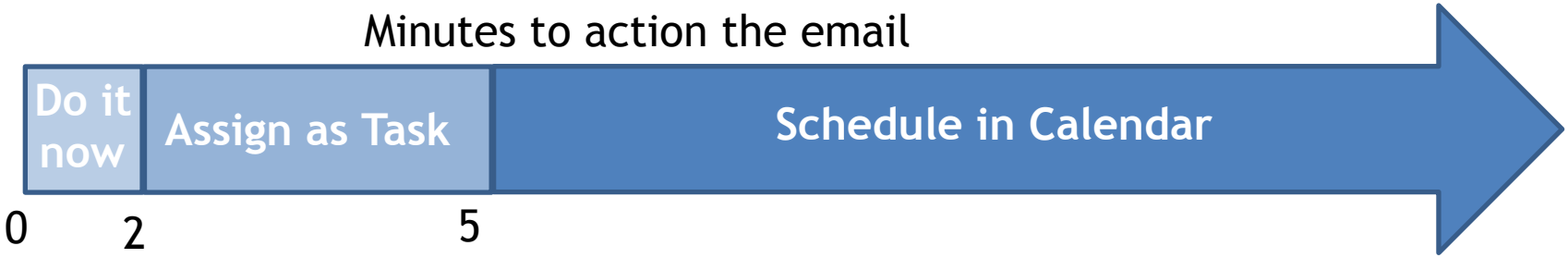
- Can the email be actioned in two minutes or less? If yes, **do it!** This may include:
  - Quick replies
  - Sending links and attachments
  - Forwarding it on
  - Booking a meeting
- Once it's done, categorize it, and move it to the "Read" folder

5. Defer it

- If you are not doing it now, defer it.
- If it will take less than 5 minutes, add it as a task or put it in the calendar. *More in **task management***.
- If it will take more than 5 minutes, schedule it during a specific time in your calendar. *More in **calendar management***.
- Categorize it and move it to the “Read” folder

5D Summary

- Everything gets categorizes unless it is deleted
- Everything gets moved to the “Read” folder once it has been read and categorized (unless it is deleted)



Email protocols and etiquette

Establish personal and team email protocols, like…

- Turn off the email alerts (all alerts) on your PC & phone
- Use the subject line carefully; re-title if needed
- Include contact information in your signature
- Keep to one clear topic & action per email
- Do not expect an email reply same day; if it is urgent you should phone or text
- Use your vacation as a vacation; know the value of the "out-of-office" rule *(more to come…)*
- Agree on codes or abbreviations for actions and follow-up

More team protocols can be established

Vacations (how to handle emails)

- Your vacation is time to “sharpen the saw”; use it to do so
- Use an “Out-of-Office” auto-reply that identifies who the sender can reach in your absence, if the matter is urgent
- State in your auto-reply “NOTE: If you wish to follow up with me upon my return on XXXXXX please do so”
- If you are in a leadership role, allow development of others by giving them authority to make decisions in your absence
- Create a rule to forward specific emails to your designate
- Ensure any key people you deal with are advised how

Vacations

Upon your return:

- Create a category ‘Vacation emails’
- Assign all inbox emails to the category “Vacation emails”
- Move all emails out of your inbox
- Create a search folder for ‘Vacation emails’ in the event you need to reference them in the future
- Ask your delegate if there are any specific matters you need to be aware of or follow up on
- Get on with moving forward

FILING EMAILS

Filing emails

Most people fall into one of two groups for storing emails:

1. **Inbox (5000):** Hundreds or thousands of emails to scroll through in their inbox; some read, some not read, some may be flagged or prioritized…
2. **Folders:** Folders, sub-folders, and sub-sub-folders are used to organize email.

- *What happens when an email fits in more than one folder?*
- *Or doesn't fit in any folder?*

With every email, be committed to handle it only once (Remember 5Ds)

Filing email with Categories

- Everything goes to one folder (e.g., “Read”)
- Creating Search folders allow filing by any combination of categories:
  - Subject/Project
  - Project/Client
  - Project/Project
  - Subject/Attachment/Link

Benefits

- What benefits do you see in this approach to email management?
  - Eliminates multiple folders, misfiling of emails or unnecessary searching as you can associate more than one category to an email
  - Saves you time and organizes your emails in a logical way

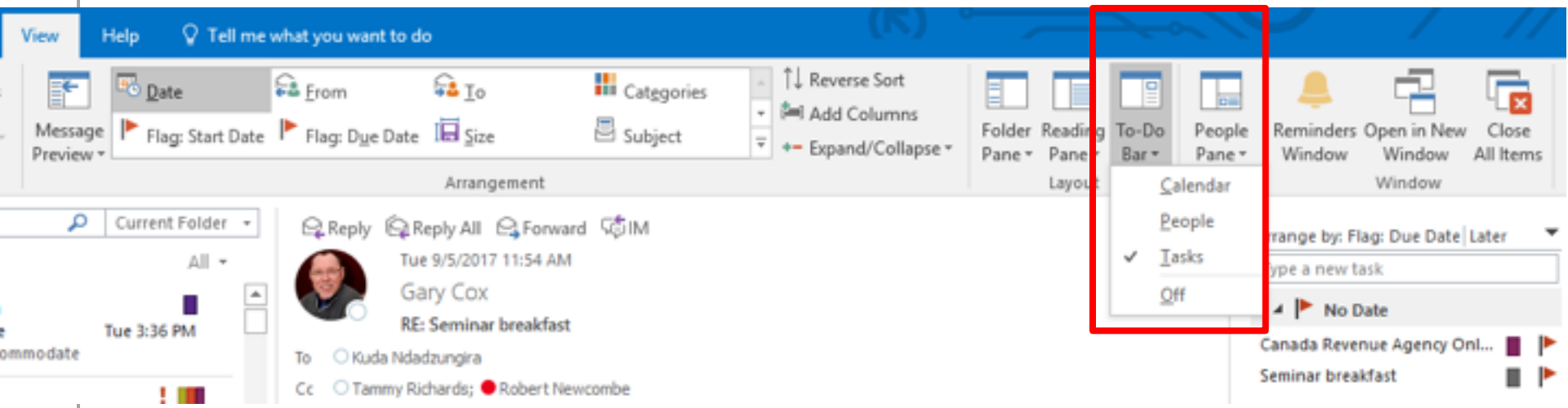
TASK LIST MANAGEMENT

Overview of Task Lists

- What do you put on a task list?
  - Tasks that take less than 5 minutes (otherwise it should be scheduled in the calendar)
  - Tasks that don't need to be done **at** a specific time (they may have a time due but don't require an appointment)

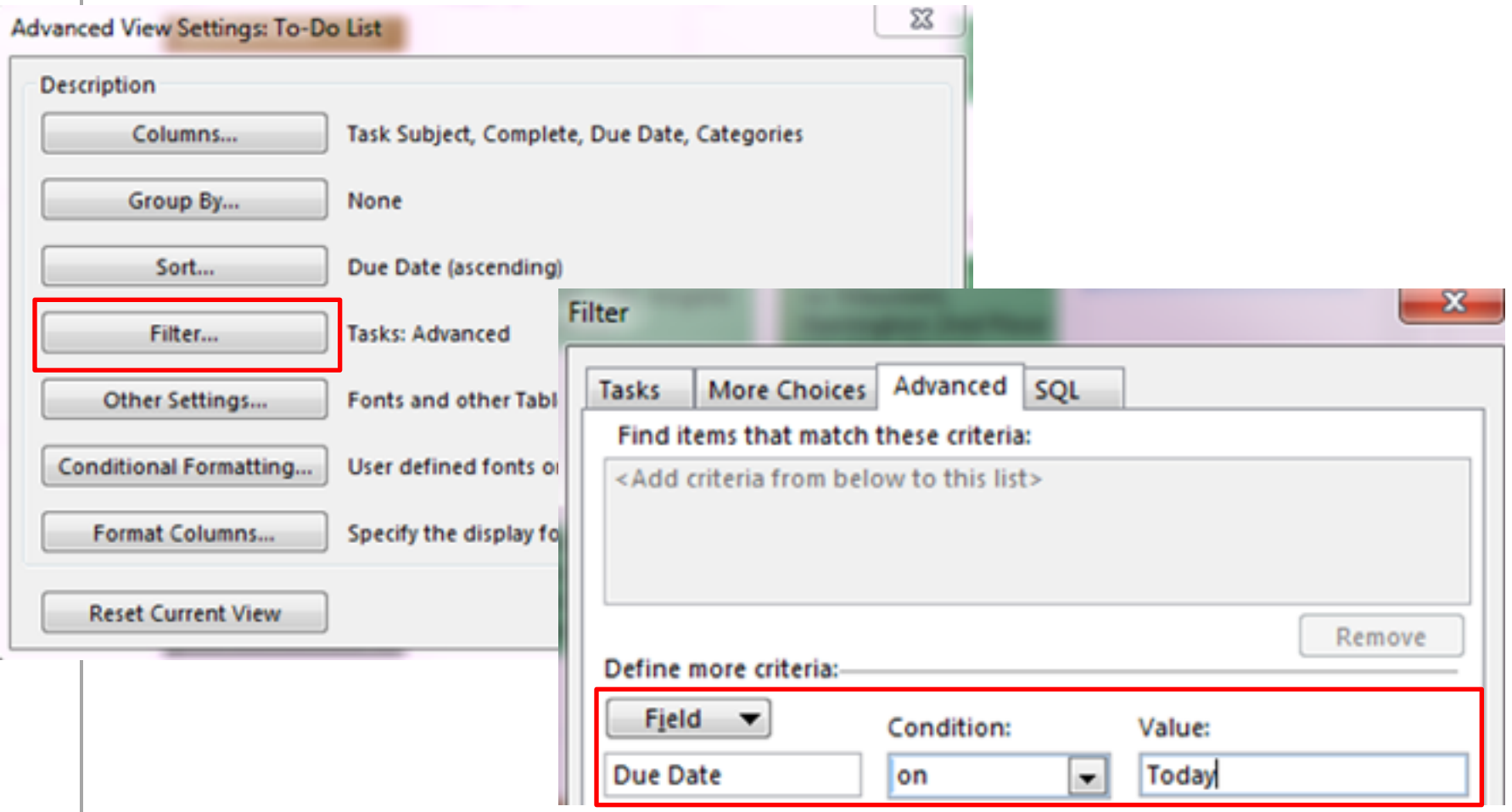
Task examples; Congratulate an employee on their anniversary of employment, write a 'thank you note', follow up on an email/call, book a meeting date for the project team…

Creating a Task – From Scratch



- Add a task list to your main view
- Filter tasks so only those due “Today” are visible

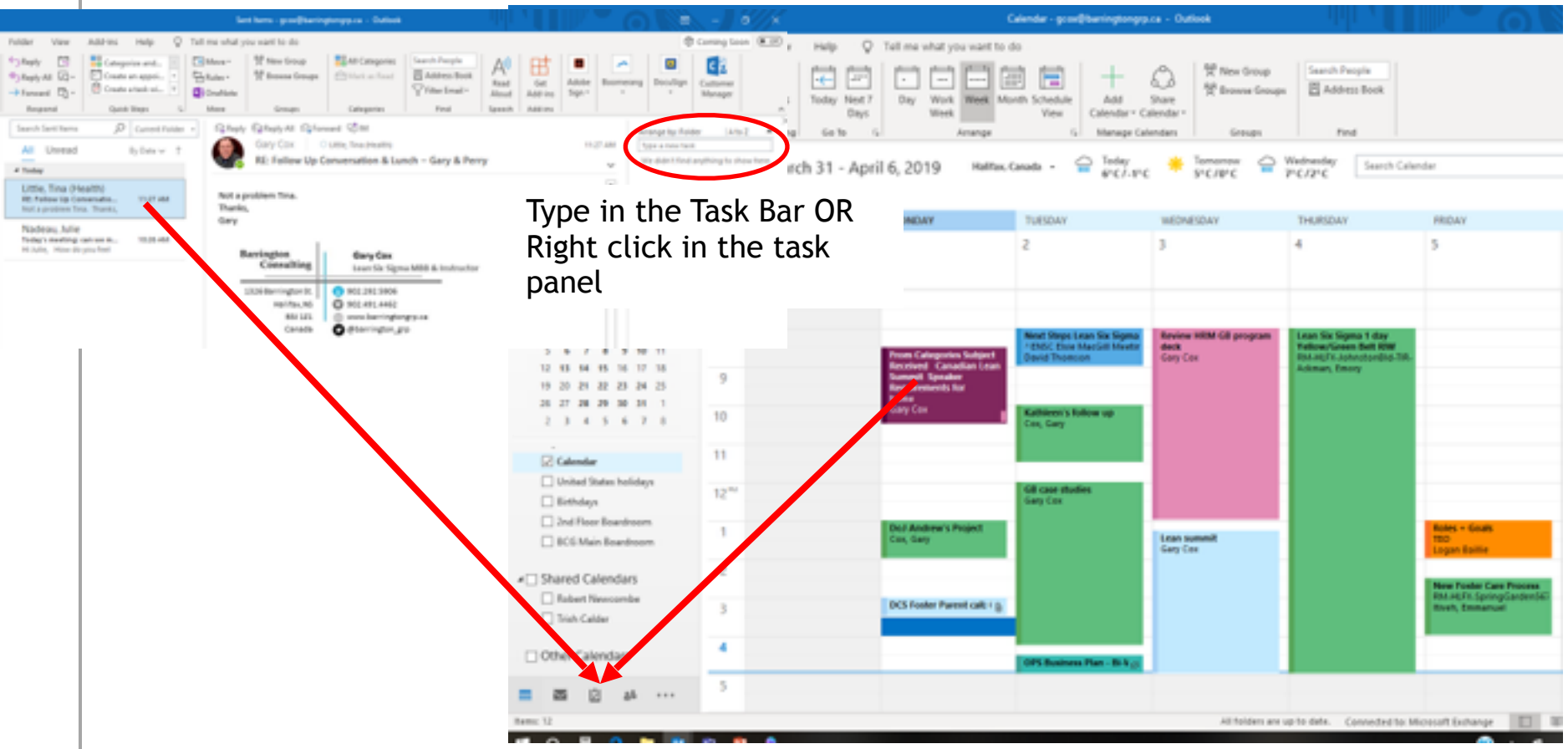
Viewing Your "Today" Tasks



Creating a Task

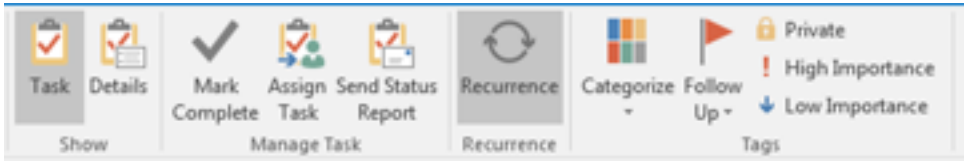
- Create a New Task in the Task Bar
- Drag an email to the Task List
- Create a task for a specific meeting by dragging the calendar meeting to the Task Icon

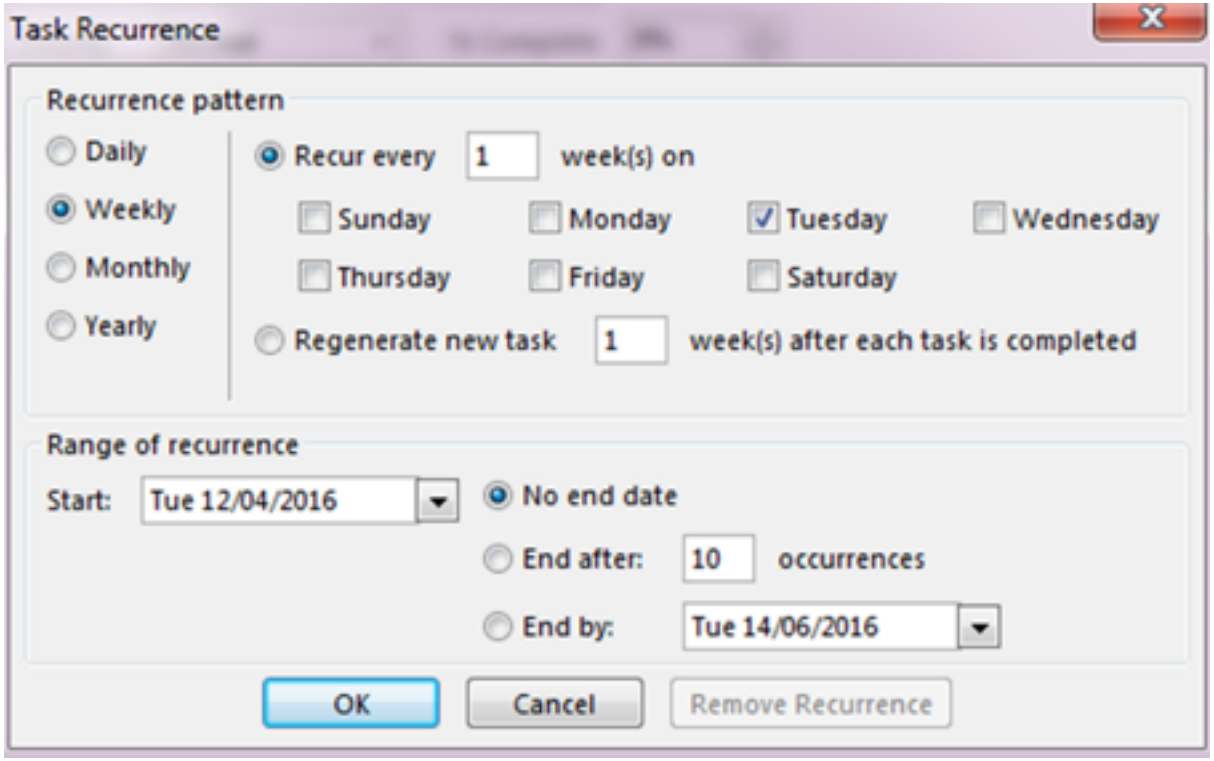
Creating a Task



- Drag a meeting or email to the Task icon

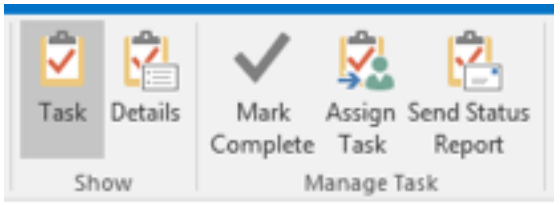
Recurring Tasks

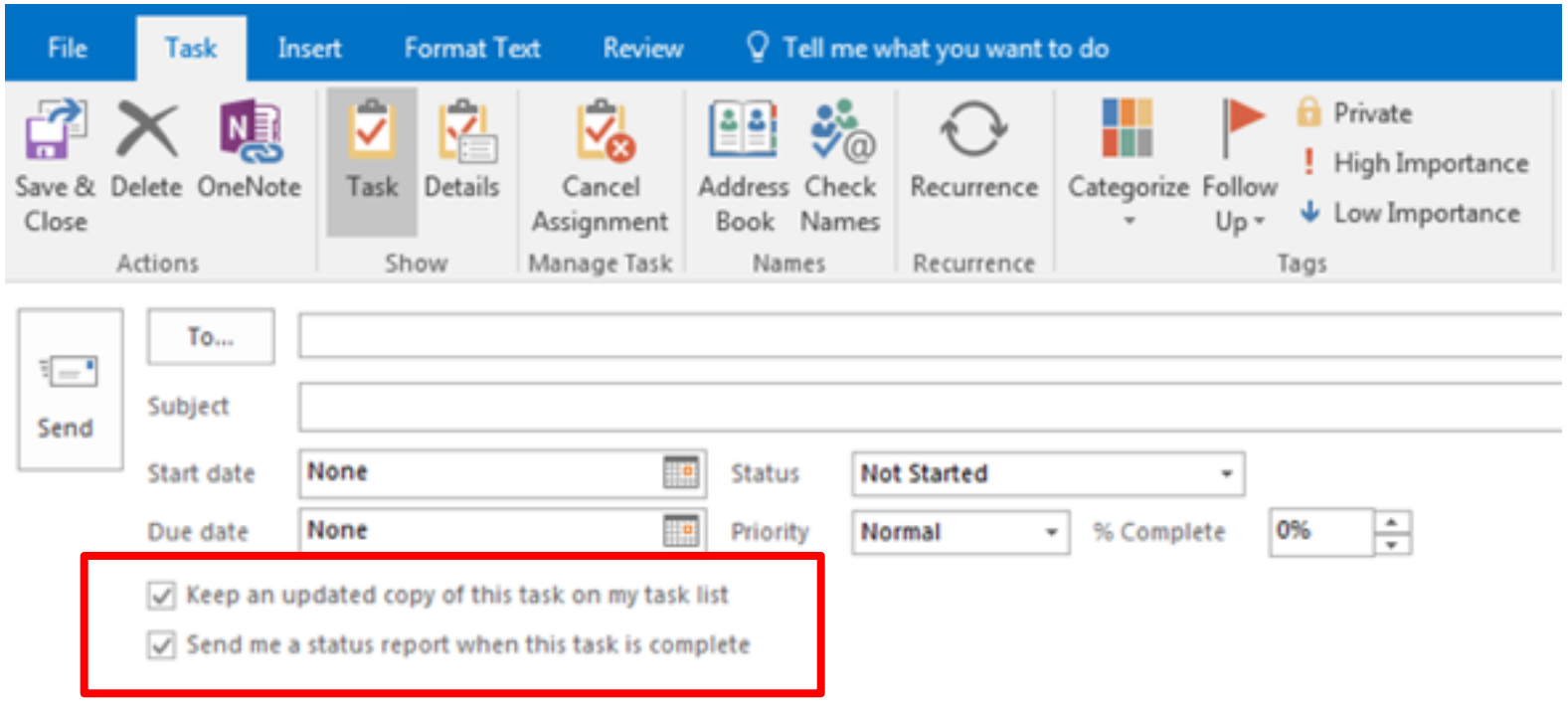




- Examples:
  - Annual employee anniversary reminder
  - Weekly/monthly activities (that don't need an appointment time)

Assigning Tasks





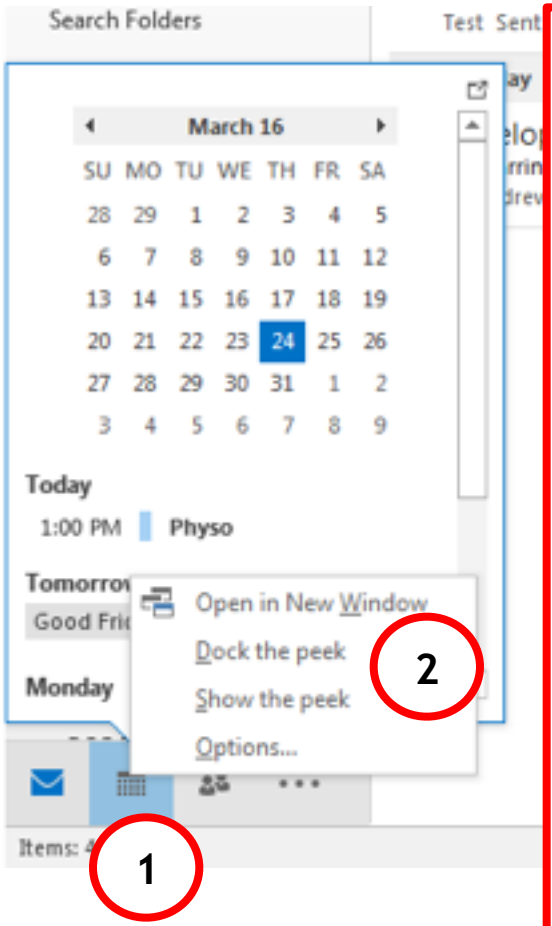
- You can automatically be notified as actions are taken and/or when the task is completed.

Benefits of using Tasks

- What benefits do you see in this approach to using To-Do task lists, in which only tasks due today are displayed?
  - Keeps you focused on the things YOU have decided are important (or if a task has been assigned, it is important to your team leader)
  - Saves you time as it helps manage your emails

CALENDAR MANAGEMENT

Master Your Outlook Calendar



Did you know?

From your main screen you can open up a new window for your calendar:

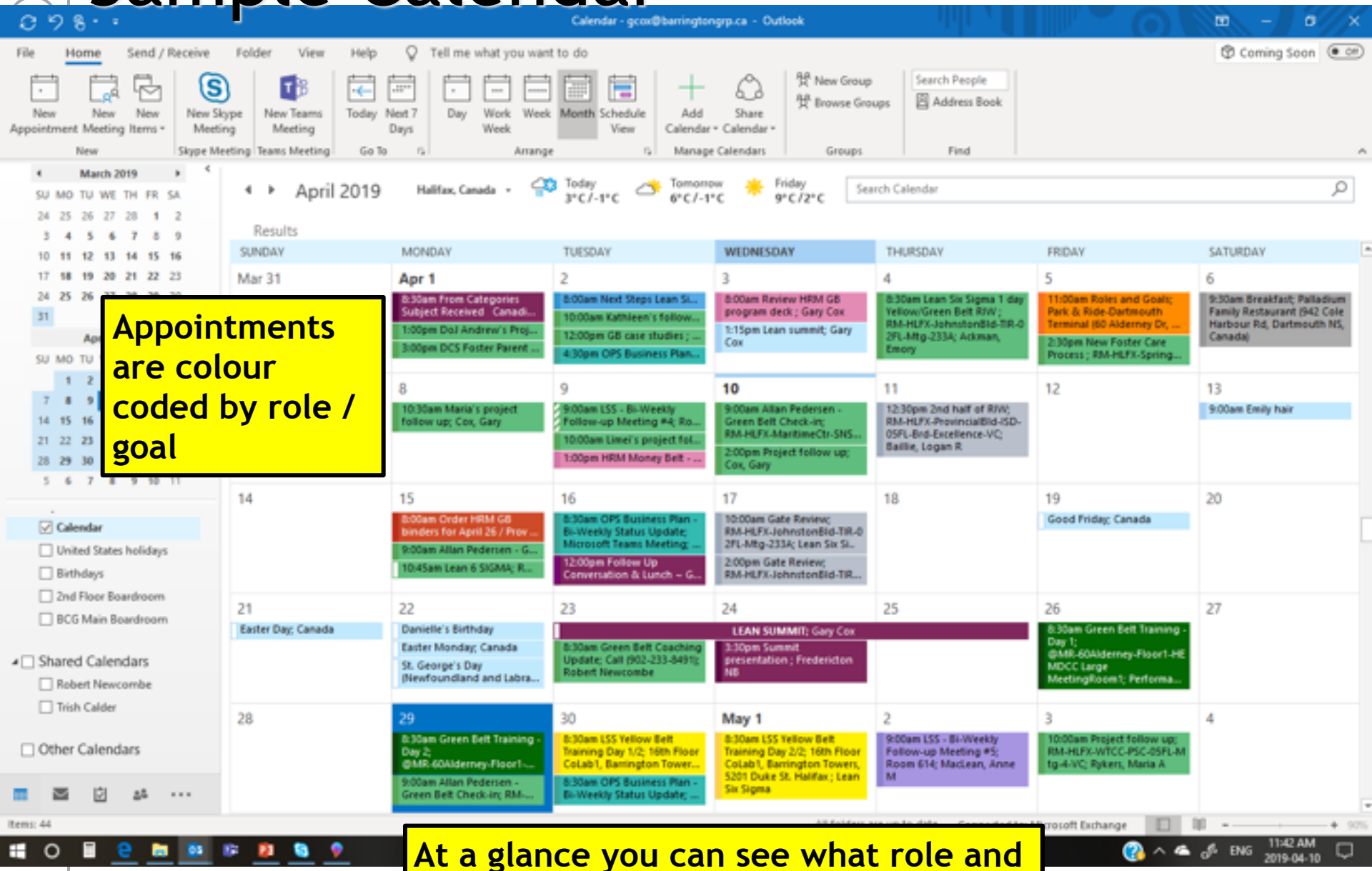
1. Right-click the Calendar
2. Click ‘Open in New Window’

This allows you to have both your Inbox and your Calendar open at the same time. (Ideal if you have an extended desktop; 2 monitors) – Your calendar can always be visible.

Your Outlook Calendar

- Know your roles
- Use blocks of time for tasks, emails and assignments
- Plan when you will address e-mails, read or prepare reports, etc. (things that shouldn't be ignored)
- Choose a few SPECIFIC activities per week to accomplish that contribute to your goals
- Schedule those tasks and activities
- Commit to doing them knowing the costs of not following through

Sample Calendar



OneNote

OneNote has many similar features: Categories, tagging, integration with Outlook calendar and emails

Personal Productivity Videos*

1. Introduction (13 minutes) http://youtu.be/HYef5BSs7yg
2. Improving Productivity (18 minutes) http://youtu.be/RFwcoDpW0WM
3. TIMWOODS Theory (13 minutes) http://youtu.be/E0EYboqeJ_U
4. 6D's of email management (22 minutes) http://youtu.be/cO6hLkKTlJk
5. Email Management - Norms - (7 minutes) http://youtu.be/oY_PlF4KFdI
6. Email filing (Categories) (13 minutes) http://youtu.be/SmDPnX_qocg
7. Managing Your Outlook Calendar (23 minutes) http://youtu.be/8vuk0_QM79w
8. Q and A's Final Thoughts (3 minutes) http://youtu.be/fQJpz-2REs

"Gary Cox, along with a team of wonderful creative support, have produced these videos which will take viewers through some concepts and processes that when put into place, can help make us more effective people - at work and at home. Gary has encapsulated years of experience and practice in the area of Time Management and Personal Productivity to develop this video content for us."
~ Ian Kerr, General Manager Process Engineering

Barrington Consulting

Feedback

or

Questions?

Thank You!