**Summer Workshop Outlook**

0:00  
Kick it over to Abby to begin our summer workshop on Outlook.

0:10  
Yeah, great.

0:11  
Thank you so much for the introduction wise.

0:15  
Once again, I'm Abby.

0:18  
If you weren't at the last training, nice to meet you and let me just share the screen.

0:34  
OK, awesome.

0:42  
OK, OK, so today's training will be on Microsoft Outlook.

0:53  
Most if not all of you are probably pretty familiar with.

0:57  
With Outlook, it's probably the main thing you use to send and receive emails, so I don't want to bore you, but hopefully today I'll cover some tips and tricks you might not know about.

1:09  
As as always, feel free to interrupt me, ask questions or questions in the chat, and we'll also have time for questions at the end.

1:18  
So without further ado, let's get into it.

1:27  
So our agenda today will be first covering the four DS for emailing.

1:34  
Second, we'll go into basics of writing an e-mail and best practices.

1:39  
Then we'll talk about organization and time management and resources in Outlook you can use for that.

1:45  
And then we'll go over some more tips and tricks that Outlook has.

1:55  
OK, the four DS of emails, does anyone have any ideas of what these might be?

2:04  
Is 1 direct directions.

2:06  
It is not, but that could be 1.

2:08  
You could add five delivery.

2:12  
It is not but good, good guess it's so Abby, I'm just going to say you can put answers in the chat and I'll watch the chat.

2:21  
So if anyone wants to put answers in the chat, prefer that please, please no.

2:24  
I'm I'm going to be watching and sharing to clarify.

2:28  
It's it's for it's what you should do when you get an e-mail.

2:31  
Four different things you can do.

2:40  
I can start with the first one.

2:42  
First one, delete it very simple.

2:46  
You can just delete the e-mail.

2:48  
Usually it's not best practice to delete an e-mail.

2:52  
We recommend creating archive folder so you have it, but if it's spam or something deleting it it's probably the best best option.

3:06  
Second thing you can do.

3:08  
Did you have a?

3:08  
Is it downloaded?

3:10  
No, without you could download an e-mail.

3:18  
Second one I have is stupid.

3:21  
Usually if it only takes like 5 minutes to do and you're not in an imminent meeting, just do it and get it out of the way.

3:34  
Defer it.

3:37  
I would say this one is probably the most common.

3:39  
You receive an e-mail and you need to do something with it or it gives you some type of information, but you don't have the time right now or it's going to take a little while.

3:49  
Put it in your to do folder, which when I talk about folders, I will talk about creating A to do folder and do it later.

4:00  
And the fourth one, which as interns probably won't want to do much is delegate it.

4:06  
So that's essentially when you have to forward an e-mail to another person if they're maybe not on the e-mail chain and they should be forwarded to them and either just say FYI or maybe give instructions of what they should do or questions they might be able to answer.

4:25  
But everyone gave other good options of things that you can do that that become AC as well.

4:30  
So maybe we need to expand this slide.

4:36  
All right, writing an e-mail, Who here has written an e-mail?

4:41  
Good should be, should be all of you.

4:46  
So what does anyone?

4:48  
What is the first line in an e-mail referring to the person?

4:55  
Exactly the two line, which is the person who you send the e-mail to and you want to do the work.

5:05  
CC stands for Carbon Copy and that is anyone you want to be involved in the chain but may not have to directly respond BCC.

5:16  
We don't typically use much here, but it if you want to for some reason protect recipients emails from each other or you don't want someone to receive direct replies, you can fly and copy them.

5:37  
A lot of times we will send emails to groups in the actuarial department to groups we send emails to a lot, or product team request or program OPS or PTR and Product development actuarial.

5:51  
So this is just a group of many emails instead of typing out each individual one.

6:00  
Next important thing, maybe the most important is the subject line.

6:05  
So when I get an e-mail, I should be able to tell what the e-mail is and what I need to do with it just from the subject line to make it descriptive but also concise.

6:17  
Don't want to be a paragraph as your subject line.

6:24  
Another tip is to always answer the question 1st and then put any details afterward.

6:33  
Another rule of thumb is only use bullets if you're listing less than three things.

6:43  
If you're listing three things or more, should you?

6:46  
You should use numbers to avoid confusion, and if someone's replying back then they can reply back using the numbers that you used.

6:57  
And finally, you'll want a signature, which if you haven't set up yet, I will show you how to set up in the next slide.

7:06  
So your signature should show you who you are.

7:09  
Show them who you are and what you work for, who you work for.

7:14  
And as always, make sure to review your e-mail so you don't make any blatant mistakes, especially when sending to a large audience.

7:28  
OK, I'm actually gonna change screens and go to my e-mail.

7:38  
Bear with me, I hope this works.

7:44  
OK great, can everyone see my e-mail?

7:56  
OK so creating a signature is pretty simple.

8:01  
You are going to want to go to this settings little gear and for reference, this is the new version of Outlook.

8:11  
I know some people still have the old version that you're encouraged to convert to the new newest version.

8:20  
Then you're going to want to make sure that you are on the accounts tab and then go to signatures and also feel afraid to follow along with this if you too.

8:37  
And then you're going to want to click new signature.

8:40  
I'm not going to do that since I already have one.

8:44  
You can name it whatever you want.

8:45  
I just have my initials, me, whatever you want.

8:52  
And then you're going to use, you're going to just basically say your name, your position, your e-mail.

9:02  
Those are the three most important things.

9:04  
I also have my phone number.

9:07  
No one's ever really needed that, but just in case.

9:11  
And then savesure.com and the logo and I will show you where to find these logos in the slide.

9:26  
Bobby, can I interrupt and just ask everybody?

9:28  
Has anyone set up their signature yet?

9:29  
Who has set up their signature Killin?

9:38  
I'm going to scroll through.

9:39  
Anyone else?

9:42  
OK, so this is really important.

9:43  
This is a great way to make all your emails look much more effective.

9:49  
Yeah, I can.

9:50  
I can even pause for a bit if if people want to make sure they can just get to this page.

9:58  
And as you can see I do my name in a different colour.

10:07  
It's probably best practice to use seed sure colors.

10:11  
So mine is really the best screen.

10:16  
So not probably not best to make it like bright pink or something.

10:25  
And then also down here I have it set for my new messages and my replies.

10:32  
You can also have no signature for your replies, or a different signature for your replies that may be shorter, but I just have the same one.

10:45  
And then when you create a new e-mail, it will automatically come on, so you don't even need to worry about it.

11:03  
And this link, which you'll have access to the PowerPoint, so you'll be able to access this link, take us to where you can download the little sea shore logo that I have in mind.

11:32  
I already have them.

12:11  
I mean it's worth saying and I just put the brand portal into the chat for anyone that wants to bookmark it.

12:17  
This is also where you would find other kinds of templates, right?

12:23  
Not just the logos.

12:26  
Yeah, I've never, I've never used it for anything besides logos.

12:30  
But as you can see, there's a lot of different things you can access here.

12:36  
If you wouldn't mind me adding on to your presentation, if you could Scroll down just a little bit, it has your colors.

12:43  
This is really helpful.

12:43  
If you're building a presentation, you can make sure you're coming in and getting the hex codes for the right colors.

12:48  
Branding takes that very, very seriously and it will make your presentations more effective.

12:52  
But even further down, you'll see there are templates for even further down, even further down, even for, well, there's here's examples of photos you could use for your presentations.

13:06  
And then even further down, icons and branded templates for Excel, PowerPoint.

13:12  
We're going to go over this in our marketing workshop as well.

13:15  
But it doesn't hurt for you all to know these are here if you want to grab them.

13:21  
And the Swag store and the Swag store.

13:26  
Yeah, thanks, Swag.

13:27  
I've actually never scrolled all the way down.

13:30  
Oh, it's my it's my pleasure.

13:35  
But for the e-mail signature could be the first one.

13:41  
So it's and whichever 1 you like best say I wanted to do this one just download it and then import it into your e-mail.

13:59  
OK, Does anyone have any questions on the signature?

14:10  
OK.

14:12  
Now we'll quickly go over an example of an e-mail which everyone has written an e-mail before, but these are just the parts of the e-mail that I was talking about before.

14:22  
So we have in this e-mail is specific to actuarial.

14:27  
So if you don't understand what is being said in this e-mail, don't worry about it.

14:34  
So the subject of the e-mail, this was for Louisiana.

14:38  
So I said LA, the product and I say exactly what it is.

14:43  
So it's a race for filing the version number.

14:47  
So whoever gets this knows exactly what the contents of it are, what contents of it is when I send it.

14:56  
And then you can see I sent it to a group and then CC the group and some other people who might need to be looped in on this e-mail.

15:08  
And usually I start my emails with hi, hello, good afternoon, good morning.

15:13  
You don't need to make it too complicated.

15:16  
And since it's a group, I just say all.

15:22  
And then the very first line of the e-mail is the purpose.

15:26  
Please find this document.

15:31  
And then also I only have two things listed, so I don't number them.

15:38  
And then at the end I usually say for most of my emails, please reach out with any questions or concerns.

15:46  
Usually say thank you or I will just use thanks as my sign off.

15:52  
You can use thanks best doesn't need to be too, too complicated.

15:59  
And then I wrote my name again.

16:03  
You could also just say thanks and then have your signature at the bottom.

16:21  
It's like Wyeth has a question in the chat.

16:23  
What are the best sign offs?

16:24  
How does everyone feel about Cheers?

16:27  
Cheers.

16:27  
Are we allowed to use cheers as non British people?

16:34  
Does anyone have a great sign off that's not best or thanks?

16:39  
How do you sign your emails?

16:40  
I usually do best.

16:44  
I don't Sincerely.

16:47  
Sincerely is a good one.

16:48  
I use thank you.

16:49  
I spell out.

16:50  
I do thank you.

16:51  
Sometimes I do.

16:51  
Thank you.

16:52  
Thank you.

16:52  
Thanks.

16:54  
I've seen people do Cheers.

16:57  
I have seen two people do Cheers.

16:58  
I used to work for a global company.

16:59  
They did Cheers.

17:01  
I do.

17:02  
I do feel it's it's, you know, it's nice.

17:09  
Yeah.

17:09  
I guess I would take into account who I'm sending it to for sure.

17:17  
Great.

17:24  
OK, organization and time management.

17:32  
So task prioritization.

17:35  
So I'm going to give an example.

17:36  
Say that your manager tells you, sends you a project.

17:43  
It's a pretty long project and it's not due tomorrow.

17:47  
It's due in a couple weeks and then immediately after that you get an e-mail from the state of Florida and they have an objection on your latest rate review.

18:02  
This case also does apply to pretty much actuarial and it's due tomorrow.

18:12  
Which would be the higher priority?

18:16  
2nd, of course, talk to your manager about it, but things from the state objections are usually first priority, especially if they're due next time.

18:32  
So here's sort of an order of how you should prioritize things.

18:38  
So first regulators, any objections market conducts, then upper management, so executives, VPS.

18:50  
So if Brooks, com, Terry anything like that and then everything else your manager Co workers.

19:02  
Of course the order also here is not going to be the same every time.

19:07  
But if your insurer ask for manager and they'll they'll be happy to to help.

19:17  
Any questions on this?

19:25  
OK, now I'm going to show you how to create folders in Outlook.

19:33  
So go to my Outlook folders are a great way to organize your emails.

19:40  
They've definitely helped me just keep track of everything.

19:43  
So first you're going to rightclickyouremailsoabbydokkazasa@ctr.com and then you're just going to say create new folder and if I name it, can't save it so new folder.

20:01  
And then if I want a folder within that folder and right click on that and say create new cell folder.

20:08  
So say I want a folder for choose.

20:13  
And then that folder is nested within the new server.

20:17  
So this can be personalized.

20:19  
You can do whatever you want.

20:21  
As I mentioned earlier, I have A to do folder, so anything I need to complete I put in there so I have any requests.

20:35  
And then you can also pin folders.

20:38  
So I've pinned a project I'm working on.

20:40  
I pinned summer training so that they're always right here.

20:46  
And as you get more emails, you'll probably create more and more folders because you'll have multiple emails from different from different people and different like I have.

20:58  
I have a folder for every state and the products from the state etcetera.

21:26  
OK, as I mentioned you can right click a folder to pin it to your favorites.

21:30  
So I had my project I was working on short term rentals and summer training pinned.

21:38  
You can also hover over an e-mail and right click the flag to flag it with higher urgency.

21:45  
So.

21:53  
Say I wanted to flag, say this e-mail had something I needed to do in it.

21:59  
I could flag it and say I needed it tomorrow, flag it and say do tomorrow and then it would appear in here.

22:15  
So if you click this upper right, left, most upper right icon calendar, you got your To Do List.

22:29  
And if you go to your flagged emails, it pulls up every e-mail it ever flagged.

22:43  
And once I do it, I can check it off Marcus.

22:52  
So that's a good tool for aligning or to do lists with your emails.

22:58  
Personally, I should probably take advantage of of that.

23:26  
Next I'm going to talk about just some basics of layout.

23:34  
So this is pretty much personalization, but just what works best for you.

23:43  
Everything here should be in view.

23:47  
Some things to note your you'll want your folders on the left, so your favorites are up here.

23:55  
Everything else, so you want to be you want to show your folders also in the layout.

24:06  
Your reading pane you can have on the right or the bottom.

24:09  
I think the bottom is a little weird, but if you like it that way before it, another thing that's important, at least I think so, is to have your density be compact.

24:28  
If you make it roomy messages, the emails appear really big.

24:33  
You like it that way, that's fine.

24:35  
I like them a little more condensed.

24:43  
And then whenever you open your to do bar for your calendar, it'll appear all right.

25:00  
OK, now we'll talk briefly about conversations because usually it's not just one e-mail, it's a chain of emails again, So I don't know if this is automatically turned on, but you'll want to make sure it's turned on going to view messages, conversations.

25:31  
And then you want to group into conversations because showing each from each message separately makes it pretty messy.

25:42  
And so if you're trying to find something specific in a conversation, it'll be easier and you don't have to look up all the replies or etcetera.

25:52  
And the first message will always be at the top.

26:03  
Another tip is categories.

26:09  
So again you can right click a message.

26:14  
So say I want to categorize this e-mail.

26:21  
You can go to categorize and then manage categories.

26:30  
And I don't personally use this right now, but it would probably make things a lot more organized.

26:38  
I could edit this category, say I want it to be called emails from.

26:46  
I'm just going to say, and you can make whatever color.

26:53  
And if you want to be really fancy, you can create a keyboard shortcut so that whenever you get that e-mail, it will flag it as blue.

27:20  
OK, the next this slide is pretty important.

27:26  
So I'm going to show you how to set up an appointment and how to respond to when people send you invites because you're definitely going to get a lot of invites as an intern.

27:44  
OK, so right here.

27:48  
See I have a meeting meeting invite from Joy and she wants to meet at 2:00 PM today.

27:54  
So it says no complex.

27:57  
So it automatically matches it with my calendar and it tells me I have nothing yet to.

28:01  
So looks like, yeah, I can go.

28:04  
So I'm just going to simply press accept.

28:16  
You could also also, when you get an e-mail, you could also say decline.

28:25  
But of course there should be a valid reason for declining an invite.

28:29  
And you can also propose a new time.

28:31  
I had e-mail set up to show you how to do that.

28:37  
They disappeared.

28:44  
So let me show you how to schedule an event on your calendar.

28:50  
So you're just going to go to your calendar tab on the left and then go to go ahead.

28:59  
So name it whatever you want and then invite.

29:05  
So say I want to invite my manager.

29:08  
Say I want to invite and it's connected to my Zoom, so it'll automatically create the Zoom meeting.

29:15  
So I want to invite.

29:19  
OK.

29:22  
Now what's really nice about this is it automatically suggests times that everyone you invite is free.

29:30  
So I guess none of us are, there's no time for the rest of today that none of us, that any of us are free or all three of us are free.

29:40  
So it's suggesting tomorrow at 2:30 or Monday.

29:45  
And you can also look further into it by going to the scheduling assistant.

29:50  
And then you can see my calendar, Mario's calendar, baby's calendar.

29:54  
So you can see.

29:55  
Yeah, tomorrow at 2:30, looks like we're all free.

30:06  
Awesome.

30:07  
Does anyone have any questions on this?

30:11  
Bobby?

30:11  
I've raised my hand.

30:12  
Yes.

30:13  
Curious to hear from Pioneers.

30:17  
How many of you use Outlook, used Outlook prior to this internship, like at school.

30:26  
Is it the sort of preferred system?

30:30  
Some people aren't raising their hands.

30:32  
So you know, I think learning Outlook if you've never used it before is, is kind of daunting.

30:37  
And these are really important tips.

30:39  
I, for example, use classic Outlook.

30:41  
I didn't realize that the scheduling assistant was right there in the meeting in New Outlook, and that might be reason enough to go over.

30:51  
And I have to say, scheduling assistant, if you don't know how to use this, this is a really important one.

30:57  
Being able to schedule with people without having to ask them what time they're available.

31:02  
I run into people throughout my day who I think still don't know how to use this feature.

31:09  
Abby, I don't know about you and I think that starting out learning how to use it and knowing how to use it in order to access other people's schedules is really critical.

31:19  
So great addition to the training.

31:22  
Abby, yes, follow up on light question, like you said with the scheduling assistant, we just know when it's convenient forward first to me, but would you recommend we should rather reconfirm or be clarify with the other person if they, oh, from then on terms they're OK with the timing.

31:42  
I I like to do that.

31:44  
I like to look at their calendar 1st and then maybe depends on like the urgency of the meeting and like who who it is and if we're in person or not.

31:53  
But maybe I'll reach out on scenes and say, hey, does two 2:00 work for you tomorrow?

31:58  
And yeah, I guess it's a case by case.

32:03  
Over the course of this new workshops, I've seen that city small conference and other conferences in different branch offices have been added to the Zoom meeting.

32:12  
How do we do that?

32:13  
Yeah, great question.

32:15  
I was actually just going to go into that.

32:17  
So you can add a room.

32:19  
So the rooms that are important here are the running room, which is the room right over there, small conference, which is where you guys all sit, and then large conferences, which is where we are now.

32:31  
So if we wanted to schedule a meeting in the running room, he would just add it there.

32:36  
And that has its own calendar as well.

32:38  
So like today, you can see that the running room was booked.

32:42  
It was free from 12:00 to 1.

32:45  
So it's sort of acting as like another person.

32:47  
Yes.

32:47  
So it also automatically books the offense.

32:51  
Yes.

32:52  
And it'll appear on the iPad.

32:54  
Yes, I've seen.

32:54  
That's perfect.

32:56  
Yeah.

32:56  
I think it's similar for the other offices, but correct, you can go into.

33:04  
Well, when you're adding folks, I don't know if you did you show this, you can browse all rooms.

33:08  
Yeah, and you can even search by location.

33:13  
And sometimes, and I'm not sure if ours has this, you can search by the qualities of the room.

33:17  
So how many people fit in it, for example, it will often have a little notification.

33:24  
Yeah, see, I don't know why it's not coming up, but it maybe you have to select a building first.

33:32  
Here we go.

33:44  
Well, in classic Outlook, which is what I use, it has this feature and you can see if it's five people, if it's ten people.

33:49  
So especially if you're unfamiliar with a company or traveling to another office, it can really help.

34:02  
Yeah, thank you.

34:04  
Great question.

34:08  
And going along with that, you also may want to add calendars.

34:17  
So, so you want to go to the calendar pane and good rule of thumb, at least my suggestion is to have your calendar.

34:30  
Of course, I have my manager's calendar and then have your team's calendar.

34:36  
So the actuary team, we have the product development calendar.

34:41  
And this will just show when people are out of office, when certain events are happening, etcetera.

34:47  
Sometimes I will say I want to see when Joy's available or what what she's doing today.

34:56  
I can just pull up your calendar really quickly.

34:58  
This is another an alternative to scheduling assistant and your team might have a shared calendar like the product development calendar.

35:09  
Ask your your managers.

35:12  
Did you do the color coding formatting?

35:14  
I did not do it.

35:15  
I believe Outlook automatically does it for you.

35:19  
I don't know if you have the option to change.

35:21  
Oh, you do you do have the option to change it.

35:23  
I just never have Yeah.

35:29  
How do you do that again?

35:30  
I'm sorry you did do.

35:32  
Oh, OK, so we add someone's like get to the screen.

35:35  
OK, so this is what it will come up the first open just go and actually let me so say all these people.

35:45  
I've already say I wanted to add someone's calendar.

35:48  
Say I wanted to add Blithe's calendar.

35:51  
I would cook add calendar and add some direct directory and I would just search her and I could add it and then you can see her calendar, right?

36:19  
And then if you have, if you select anyone's calendars, I guess you can, yeah, you can remove them, but I guess I would just never build them.

36:28  
So I've looked at all those counters.

36:37  
All right, finally, we'll just go into a couple more tips and drinks.

36:52  
First thing we'll go into some rules.

37:00  
Something important to set up is auto replies.

37:04  
So, so you're going to be out of office tomorrow.

37:07  
You'll want your e-mail and teams to auto reply and say that you're out of office.

37:17  
Go to my settings accounts and then automatic replies.

37:29  
So you want to say turn on automatic replies and say I want them tomorrow after one to two.

37:43  
And you can create sort of whatever message you want it to send for e-mail.

37:51  
And it's usually best to give your manager's name and e-mail if anything urgent comes up out of office.

37:59  
You can also block your calendar and some other options to find meetings.

38:10  
You can also have it send a different message to outside your organization.

38:22  
I'm going to start that off another.

38:30  
You'll see here that some of my emails are lit.

38:36  
That's sort of another little trick you can do.

38:39  
So go to your inbox, view, view settings, you make sure you're in the Mail tab, and then go to Conditional Formatting.

38:56  
You can get very creative with this, but I'll just show you one simple little thing.

39:03  
Definitely make it more complicated.

39:08  
You're going to add a rule.

39:09  
So you want any other rule to me or to me?

39:21  
Then you want to select a condition, a condition.

39:23  
So if you want to sort of filter all emails that are to you say the condition is that my name is on the, I'm on the two line.

39:34  
And then you can select whatever colour you want, select blue and then save it.

39:45  
So I already have this rule, so I'm going to discard.

39:49  
But now anything that has me on the two line is blue.

39:53  
So this e-mail I'm not on the two line.

39:55  
I'm just CC Ed in agreement.

39:58  
So it's not blue.

39:59  
It's sort of is good so that the emails that are you're in the two line in they stand out to you, but of course, it's everyone's preference.

40:20  
OK.

40:21  
And lastly, I will talk about.

40:27  
Customization of the ribbon.

40:35  
So the ribbon is appears up here and you can actually customize it to whatever you want.

40:43  
You can add or delete any of these.

40:48  
So again you're going to go to view 3 dots and customize and here you can drag things around.

40:56  
I want this to go here instead of here.

40:59  
You can uncheck things so if I don't want density on my in my ribbon and uncheck it.

41:11  
You can also change the groups around to whatever ever order long.

41:19  
I haven't really played with this much myself, but if you want to get fancy, make things make more sense to you, feel free Down.

41:43  
That's all I have for the PowerPoint.

41:48  
Does anyone have any questions, comments?

41:51  
I also have my e-mail on this slide in case anyone wants to reach out.

41:57  
Questions.

41:58  
Comments.

42:06  
That's great, Abby.

42:07  
Thank you so much.

42:08  
I learned some new tricks.

42:12  
Yeah.

42:12  
Thank you, everyone, for the questions participating.

42:18  
And thanks live for the additional, additional things that I didn't know.

42:22  
Oh, yeah, of course.

42:23  
And yeah, again, I'm so glad this is going to be captured for people to watch.

42:29  
Thank you very much.

42:30  
Thanks, everybody.

42:32  
Have a lovely rest of your day.

42:34  
Thank you.

42:35  
Thank you.

42:35  
Yeah, thank you.

42:37  
Thank you.