

THE **5 CHOICES**[®]
to extraordinary productivity

TECHNICAL GUIDE

Microsoft[®] Outlook[®] 2019 for Windows Edition





TECHNICAL GUIDE

Microsoft® Outlook® 2019 for Windows Edition

petervarga @ rocketmortgages.com



IMPORTANT NOTICE

Copyright © Franklin Covey Co. All rights reserved.

FranklinCovey owns or controls all proprietary rights and copyrights to the content contained herein. Except as provided for under a license agreement, no part of this publication may be transferred, resold (in part or whole), file-shared, copied, reproduced, modified, stored in a retrieval system, transmitted (e.g., sent via email), or made public (e.g., posted to Slideshare, Facebook, YouTube) in any form without the express written permission of FranklinCovey. FranklinCovey may pursue criminal and civil claims for any unauthorized use, misappropriation, or distribution of any content contained herein.

ABOUT FRANKLINCOVEY

FranklinCovey is a global company specializing in performance improvement.

We help organizations achieve results that require a change in human behavior. Our expertise is in seven areas: Leadership, Execution, Productivity, Trust, Sales Performance, Customer Loyalty, and Education.

For FranklinCovey All Access Pass® inquiries, call 855-711-CARE (2273). Product and program catalogs can be requested by calling 888-868-1776 in the United States or by contacting your local representative outside the United States.

Franklin Covey Co.
2200 W. Parkway Blvd.
Salt Lake City, UT 84119
www.franklincovey.com

0617S

 30% Post-Consumer Fiber.

PRO1941561 Version 1.0.3

Table of Contents: Outlook 2019

Introduction	3
Core 4 Basics	
Create an Appointment	4
Create a Task	7
Create New Categories	8
Assign Categories to Tasks	12
Create a Contact	13
3 Master Moves	
Win Without Fighting	16
Rule to Delete	16
Rule to File	18
How to Change a Rule	21
Rule to Highlight	22
Turn It Into What It Is	28
Turn an Email Into an Appointment	28
Turn an Email Into a Task	31
Turn an Email Into a Contact	33
Turn an Email Into a Note	35
Turn a Note Into an Email	37
Link to Locate (Outlook Version)	38
Insert a File	38
Insert a Hyperlink	40
Insert a Task	42
Insert a Contact	44
To Finish	46
Outlook Web App Tips	
Create a Task	48
Create Email Rules	50
Manage Categories	53
Assign a Category	55
Insert a File in a Task or an Email	56

Weekly Q2 Planning

Step 1: Connect With Your Roles and Goals	59
Choose Your View	59
Add the Master Task List to the Week View	60
Arrange Tasks by Categories	61
Step 2: Schedule the Big Rocks.....	62
Create an Appointment From an Existing Task.....	62
Open the Daily Task List	64
Arrange Tasks by Start Date.....	64
Arrange Tasks by Due Date.....	65
Step 3: Organize the Rest.....	65

Daily Q2 Planning

Step 1: Close Out the Day.....	67
Reschedule Tasks for Another Day or Time	67
Highlight Information (“Capture the Gold”).	68
Step 2: Identify the Few “Must-Dos”	70
Prioritize Daily Tasks.....	70
Schedule a Task as an Appointment	71
Step 3: Organize the Rest.....	71

Q2 Extras

Dual Calendars	72
View Dual Calendars	72
Turn Off Email Notifications	74
Turn On VIP Notifications.....	76

Email Detox

Steps 1–3	82
------------------------	-----------

Microsoft® Outlook® 2019

petervarga @ rocketmortgage . com

petervarga @ rocketmortgage . com

Microsoft® Outlook® 2019

Welcome to the Microsoft Outlook 2019 Technical Guide. This guide is designed to help you apply what you learned in the *5 Choices* to your Outlook program.

1. Core 4 Basics: These are the basics of setting up appointments, tasks, contacts, and notes. You will also find help on how to set up and use categories.
2. 3 Master Moves: These are the 3 Master Moves taught in the *5 Choices* Work Session: Win Without Fighting, Turn It Into What It Is, and Link to Locate.
3. Outlook Web App Tips: Instructions on how to use the Outlook Web App to access Outlook on the go.
4. Weekly Q2 Planning: Instructions on how to do your Weekly Q2 Planning.
5. Daily Q2 Planning: Instructions on how to do your Daily Q2 Planning.
6. Q2 Extras: How to work with dual calendars and turn off email notifications.
7. Email Detox: This is a radical approach that can help you get on top of an out-of-control inbox.

In addition, look for the “Tip” boxes throughout the guide.



Here, you will find quick ideas on how to use Outlook more effectively.

Combine these Outlook capabilities with the principles you learned in the *5 Choices* Work Session, and you'll be on your way to extraordinary productivity.

Core 4 Basics

The Core 4 are the building blocks for managing your Inbox. Once you know how to create appointments, tasks, contacts, and notes, it will be easy for you to manage messages as they land in your Inbox.

Create an Appointment

The screenshot shows the Microsoft Outlook interface. At the top, the ribbon has tabs: File, Home, Send / Receive, Folder, View, and Help. The Home tab is selected. Below the ribbon is a toolbar with icons for New Appointment, New Meeting Items, Today, Next 7 Days, Day, and Work Week. A calendar for April 2019 is displayed, with April 8 highlighted. A tooltip for the 'Work Week' view is visible. The main area shows an appointment for 'Finish Feedback Report - Ap'. The appointment details are: Subject: Finish Feedback Report, Location: (empty), Start time: Fri 4/19/19 3:00 PM, End time: Fri 4/19/19 4:00 PM, and a checked checkbox for 'All day event'. The ribbon above the appointment form has tabs: File, Appointment (selected), Insert, Format Text, Review, Help, and a search bar. The 'Appointment' tab has sub-options: Save & Delete, Close, Forward, Calendar, Scheduling Assistant, Show, and Actions. The 'Actions' tab is selected. On the right side of the ribbon, there are buttons for 'Show As' (Busy), 'Reminder' (15 minutes), and 'Options'. A red box highlights the 'New Appointment' icon in the toolbar. A callout bubble labeled '1' points to it with the text: 'From the Calendar pane in Outlook, click **New Appointment**'. A red box highlights the 'Invite Attendees' button in the ribbon. A callout bubble labeled '4' points to it with the text: 'Click **Invite Attendees**'. A red box highlights the 'Subject' field in the appointment form. A callout bubble labeled '2' points to it with the text: 'A new appointment opens. Click in the **Subject** text field to add a subject.' A red box highlights the 'Start time' and 'End time' fields. A callout bubble labeled '3' points to it with the text: 'Use the down arrow next to the **Start time** and **End time** fields to adjust the date and time of the appointment.'

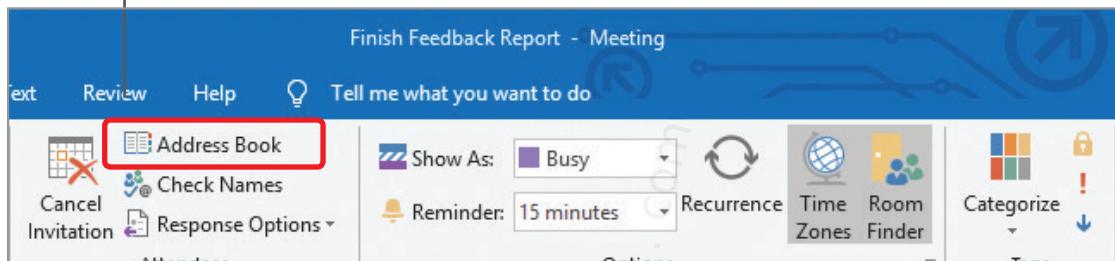
1 From the Calendar pane in Outlook, click **New Appointment**.

2 A new appointment opens. Click in the **Subject** text field to add a subject.

3 Use the down arrow next to the **Start time** and **End time** fields to adjust the date and time of the appointment.

4 Click **Invite Attendees**.

- 5 The form shifts to become a meeting invitation. Click the **Address Book** button to open the address book.



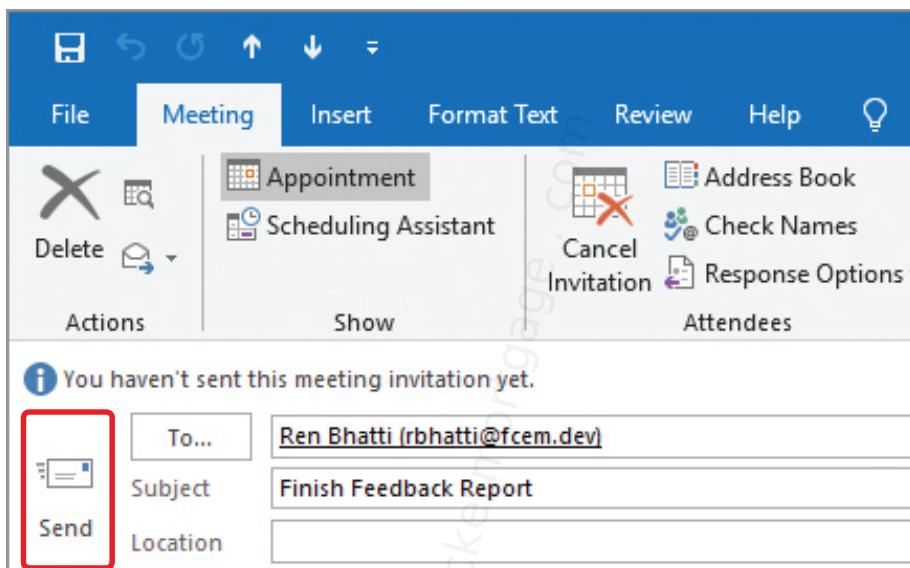
- 6 Select attendees from the list of contacts that appears.

A screenshot of the 'Select Attendees and Resources: Contacts' dialog box. At the top, there is a search bar with 'Search:' options ('Name only' and 'More columns') and a 'Address Book' button. Below the search bar is a dropdown menu showing 'Contacts - jennifer.campbell@fcem.dev' and a 'Go' button. The main area is a table with columns 'Name', 'Display Name', and 'Email Address'. It lists several contacts: Adam Chan, Jeni Innova, Jerri Ledford, Kelly Thompson, Michael Tremblay, Omar Kadam, Ren Bhatti, Sara Smith, and Stephen Thompson. The contact 'Ren Bhatti' is highlighted with a red box and a number '6' above it. At the bottom of the dialog box, there are three buttons: 'Required' (which has a red box around it and contains the name 'Ren Bhatti (rbhatti@fcem.dev)'), 'Optional', and 'Resources'. On the right side, there are 'OK' and 'Cancel' buttons, both of which have red boxes around them and a number '8' above them.

- 7 Click **Required** for each attendee who's required to attend the meeting.

- 8 Click **OK** when you've finished selecting attendees.

Create an Appointment (continued)



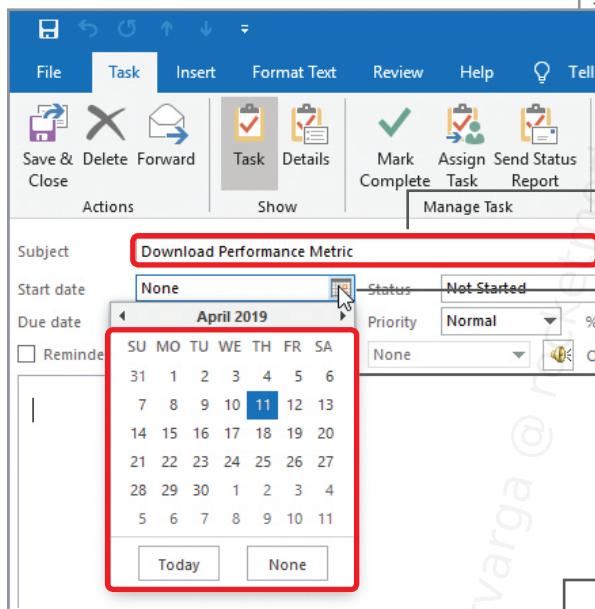
- 9 When you've finished editing the details of the appointment, click **Send** to send the meeting invitation and save the appointment to your calendar.

Create a Task

Tasks are a power tool in Outlook. Use them to centralize your tasks, prioritize easily, and build your reputation.

From the Tasks pane in Outlook, click **New Task**.

1



2

A new task opens. Click in the **Subject** field to add a subject to the task.

3

Click the calendar next to **Start date** to open the date picker.

4

Select the start date.

Click the calendar next to **Due date** to open the date picker.

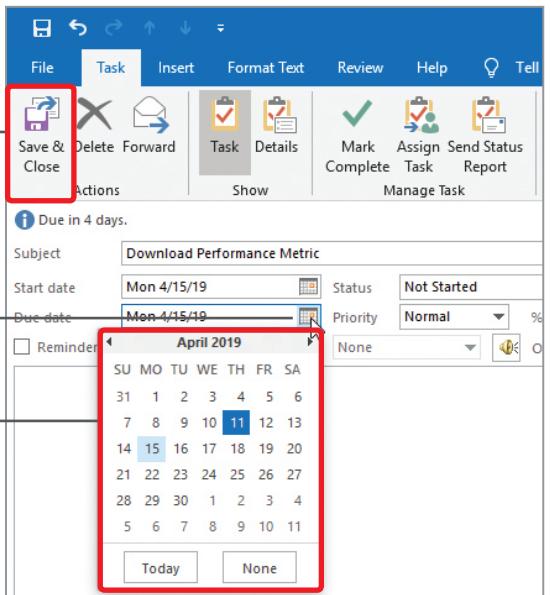
5

Select the due date.

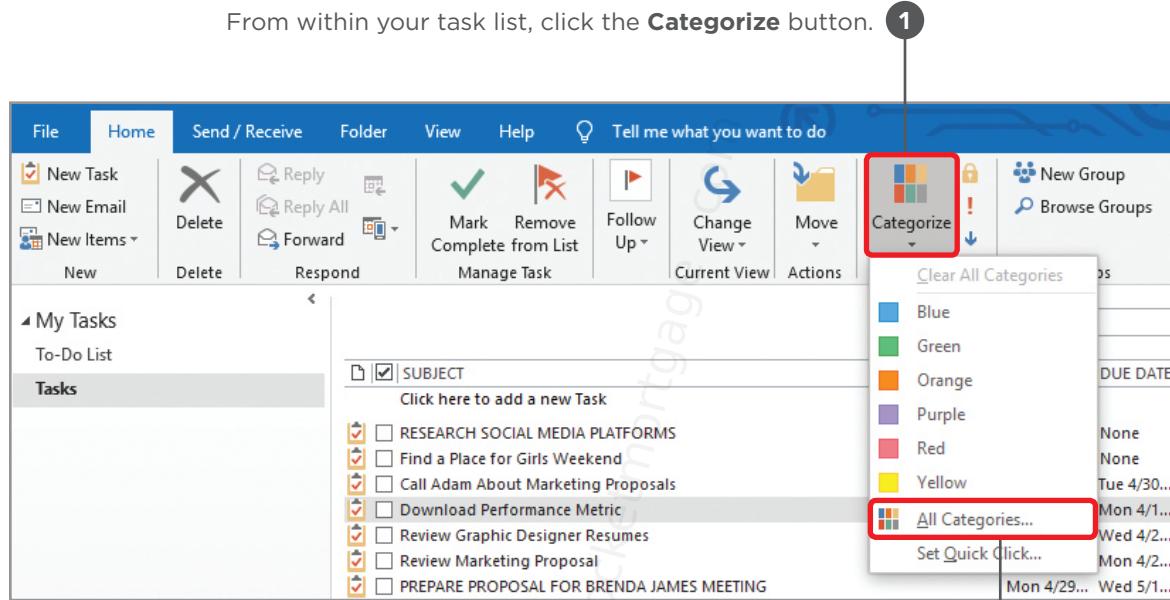
6

When you've finished editing the details of the task, click **Save & Close** to save the task and add it to your task list.

7

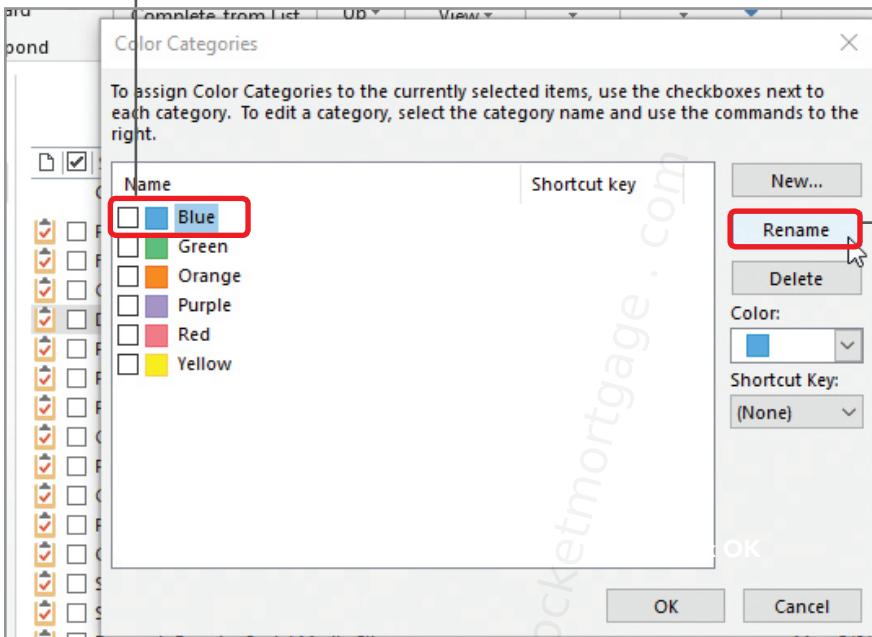


Create New Categories

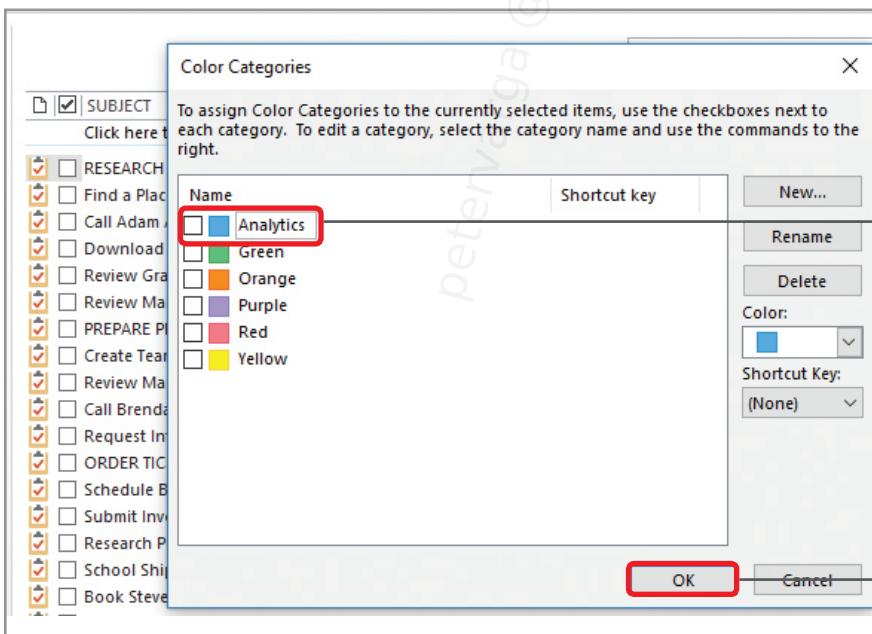


3

In the Color Categories dialog box, select the name of a default category (e.g., Blue, Red, etc.)

**4**

Click **Rename**.

**5**

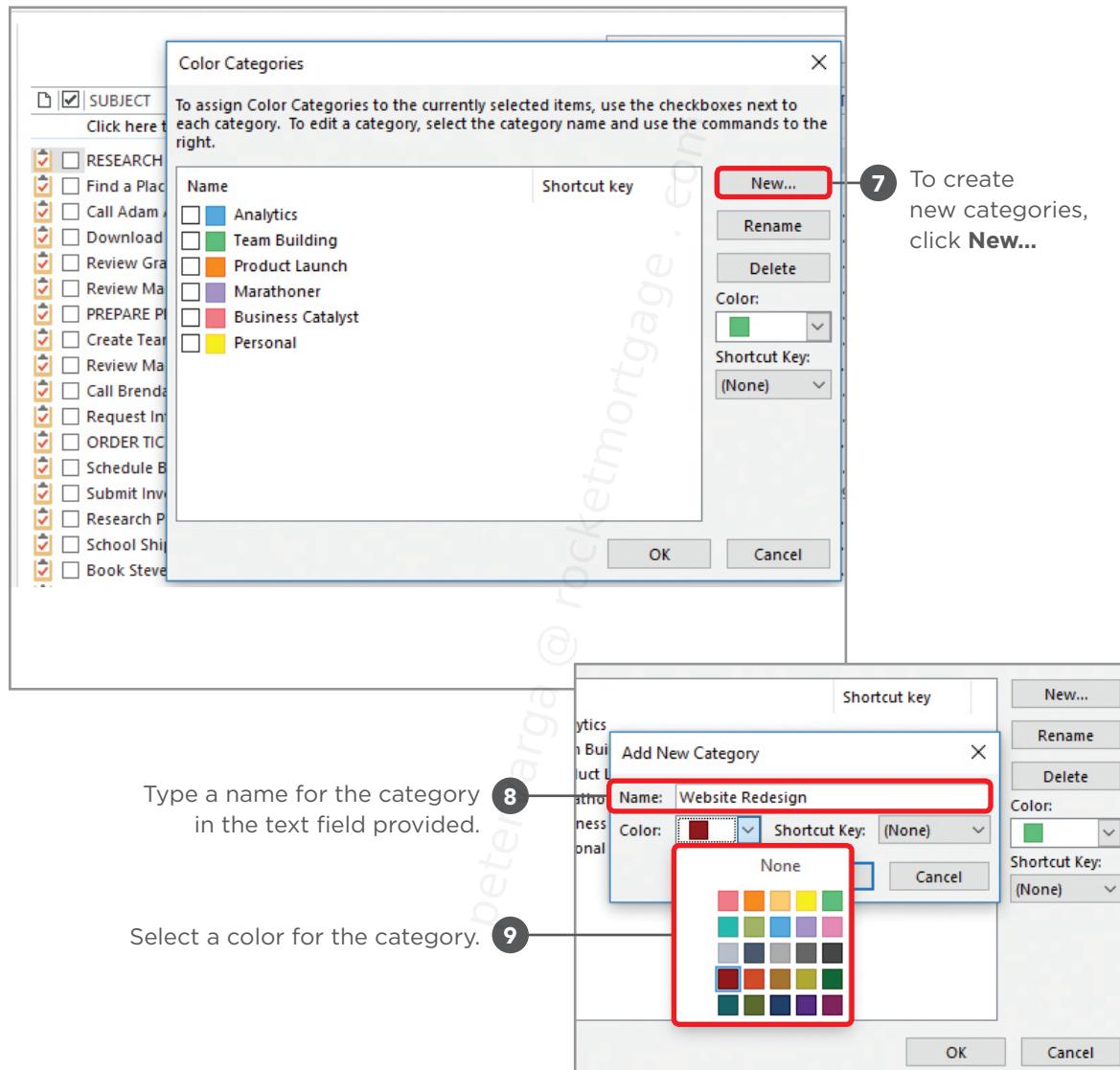
Type a name for the category in the text field.

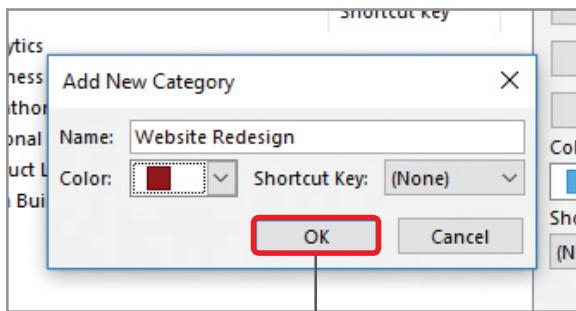
6

Click **OK**.

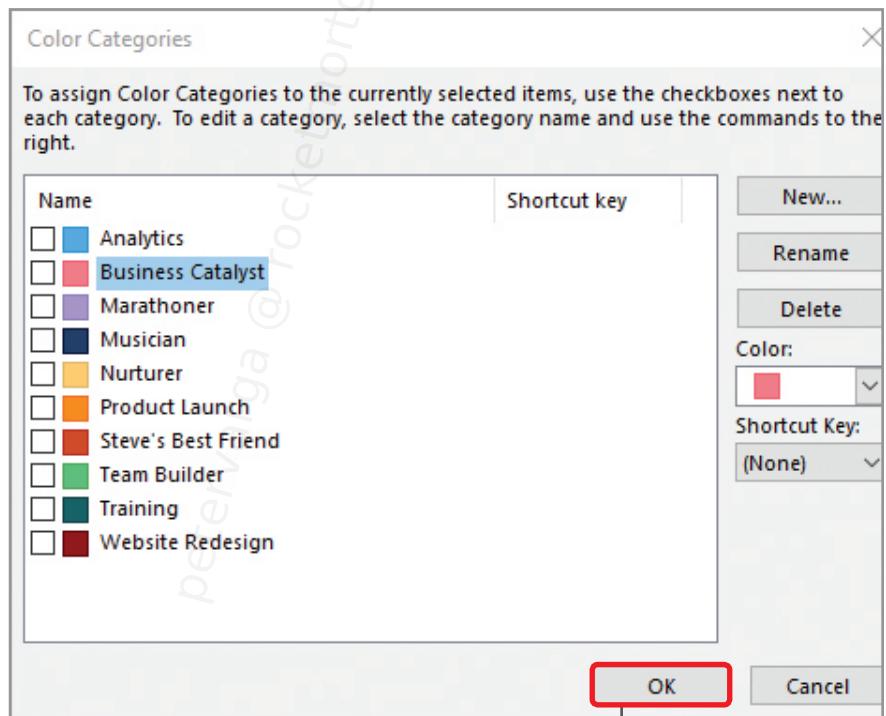
Create New Categories (continued)

After you have renamed all of the default categories, you can continue to add new categories as needed.



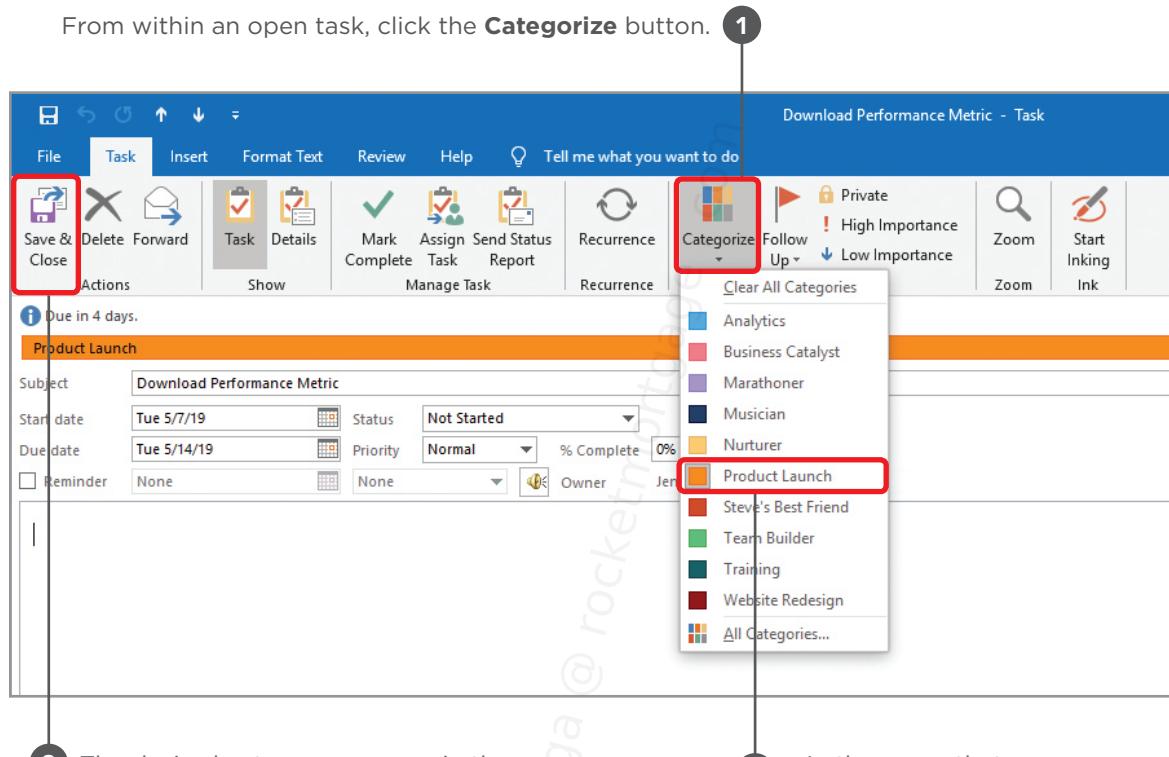


- 10 Click **OK**. Repeat the process until all desired categories have been added.



When you've finished adding categories, click **OK**. 11

Assign Categories to Tasks

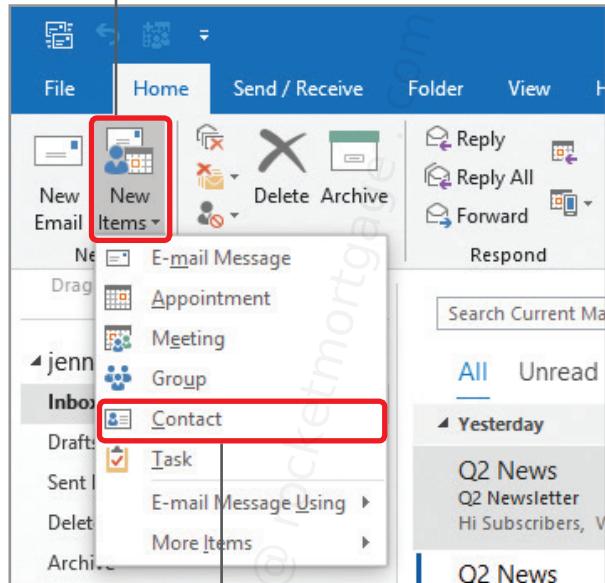


3 The desired category appears in the Categories field on the task form. Click **Save & Close** to save the changes.

2 In the menu that appears, select the category you want to apply to the task.

Create a Contact

- 1 From anywhere in Outlook, click the down arrow next to **New Items**.



- 2 In the menu that appears, select **Contact**.

Create a Contact (continued)

3 A new Contact form appears. Add the contact information you have.

4 Click **Save & Close** to close the Contact form and save the new contact to your contacts list.

The screenshot shows the Microsoft Dynamics 365 Contact form. The 'Actions' ribbon tab is selected. The 'General' section is open, displaying contact details for 'Genevieve Marcus'. The 'Show' dropdown menu is visible. The main form area contains the following data:

Field	Value								
Full Name...	Genevieve Marcus								
Company	Marcus Executive Coaching								
Job title	Consultant								
File as	Marcus, Genevieve								
Email...	g.marcus@coachmec.com								
Display as	Genevieve Marcus (g.marcus@coachmec.com)								
Web page address	(empty)								
IM address	(empty)								
Phone numbers	<table border="1"><tr><td>Business...</td><td>(808) 555-0189</td></tr><tr><td>Home...</td><td>(empty)</td></tr><tr><td>Business Fax..</td><td>(empty)</td></tr><tr><td>Mobile...</td><td>(empty)</td></tr></table>	Business...	(808) 555-0189	Home...	(empty)	Business Fax..	(empty)	Mobile...	(empty)
Business...	(808) 555-0189								
Home...	(empty)								
Business Fax..	(empty)								
Mobile...	(empty)								
Addresses	<table border="1"><tr><td>Business...</td><td>(empty)</td></tr><tr><td><input type="checkbox"/> This is the mailing address</td><td>(empty)</td></tr></table>	Business...	(empty)	<input type="checkbox"/> This is the mailing address	(empty)				
Business...	(empty)								
<input type="checkbox"/> This is the mailing address	(empty)								

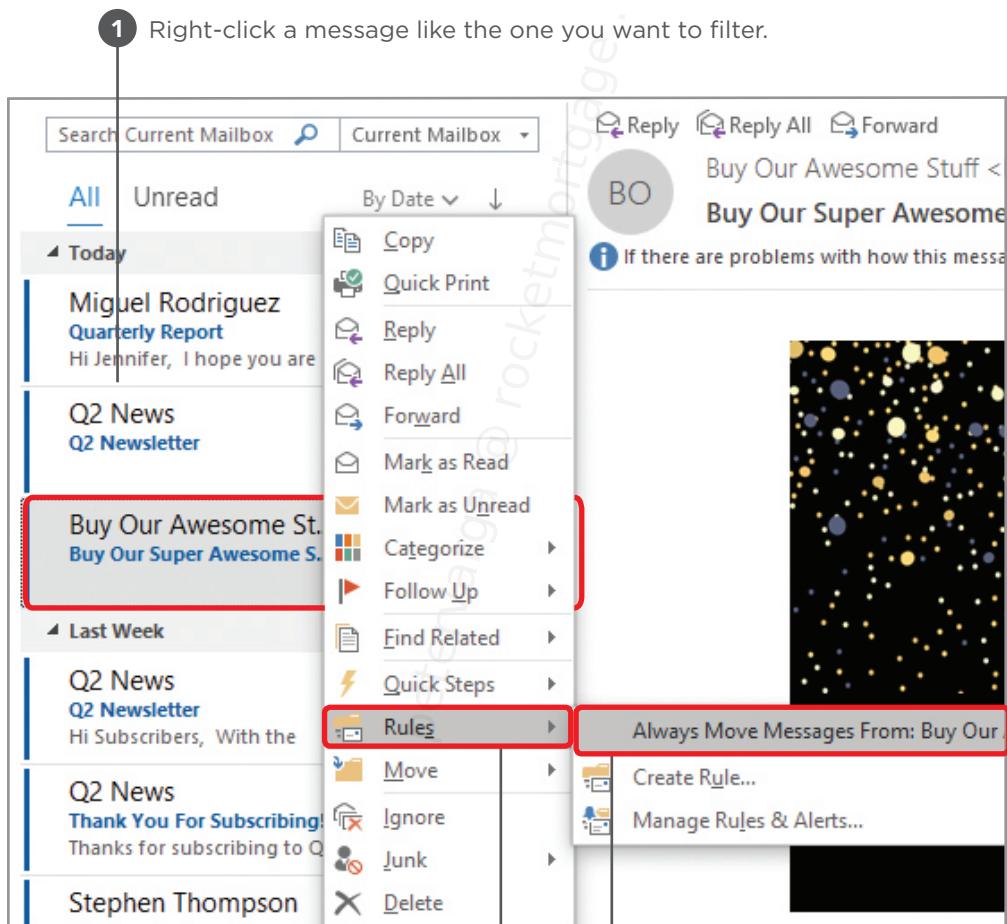
Notes

petervargate.com | petervargate@rocketmortgage.com

Win Without Fighting

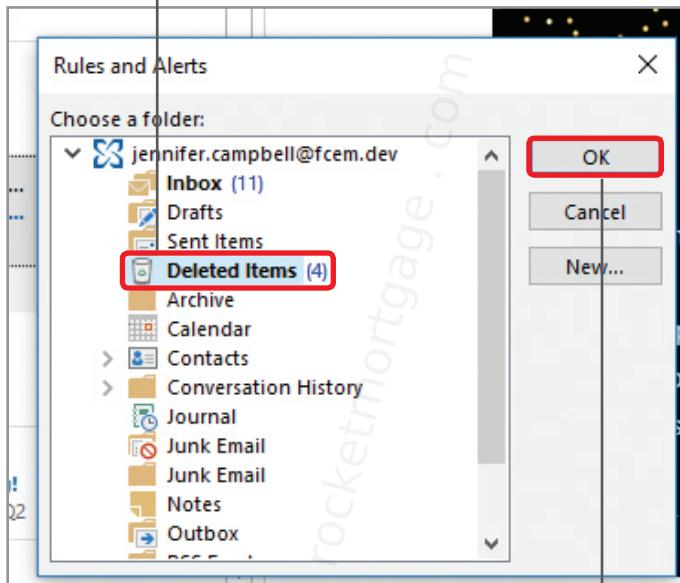
The best way to deal with the gravel that threatens to fill up your Inbox is to create rules in Outlook to handle those messages for you. Outlook Rules can automatically delete, file, and highlight messages so that you can deal with them when you're ready, or so that you don't have to deal with them at all.

Rule to Delete



- 1 Right-click a message like the one you want to filter.
- 2 In the menu that appears, select **Rules**.
- 3 Select **Always Move Messages From: <sender>**.

- 4 In the Rules and Alerts dialog box that appears, navigate to and select the **Deleted Items** folder.

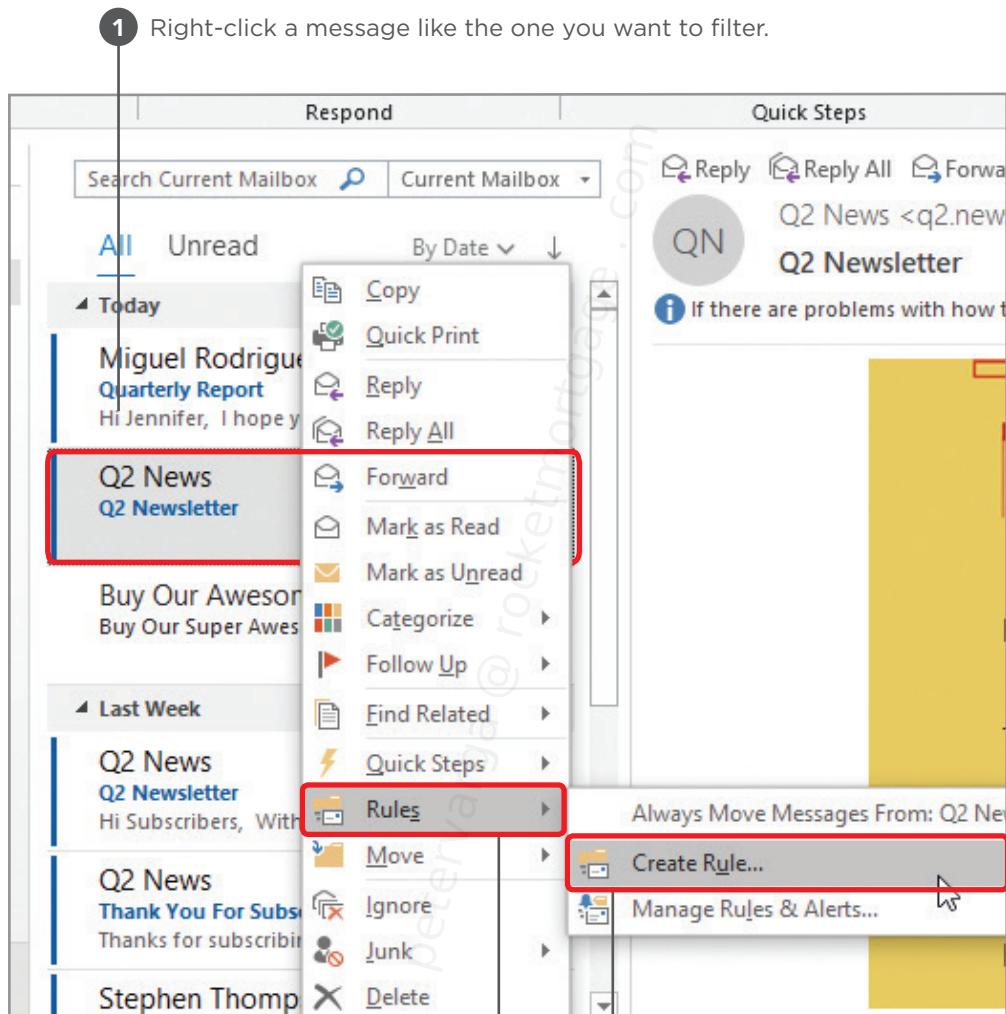


- 5 Click **OK**. The rule is created and runs on existing messages as well as those future incoming messages that meet your requirements. You are returned to your Inbox.

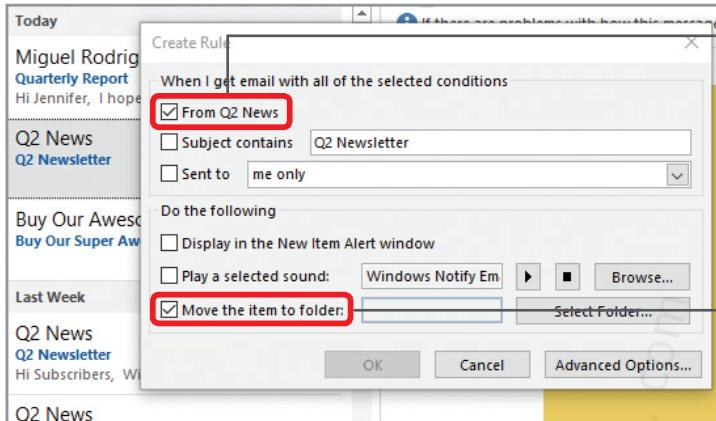
TIP

Manage your rules by selecting **Manage Rules and Alerts** from the File menu under **Info**. In the dialog box that opens, you can create, change, delete, and run email rules.

Rule to File

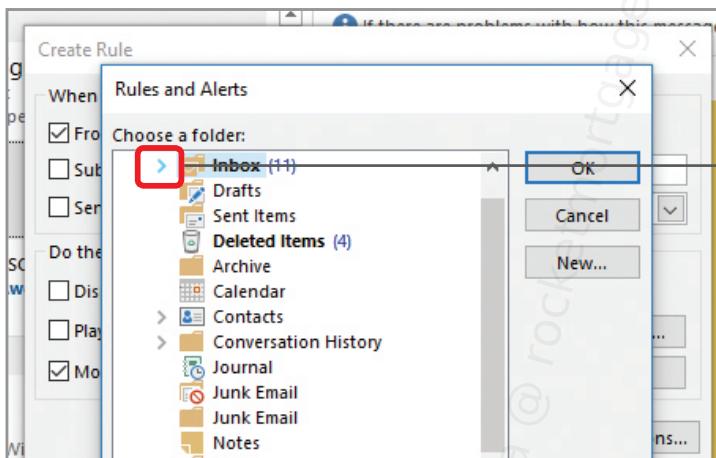


In the menu that appears, select **Rules**. **2** **3** Select **Create Rule...**



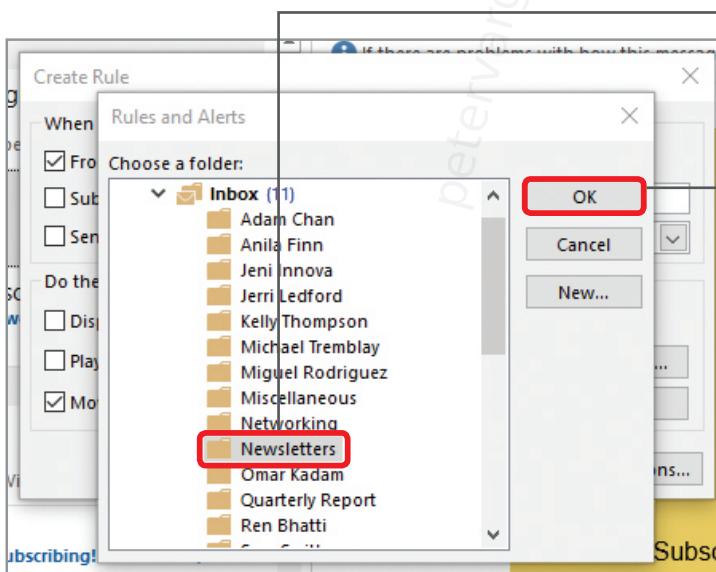
4

The Create Rule dialog box appears. In the first section (**When I get email with all of the selected conditions**), select the first option **From <sender>**.



5

In the second section (**Do the following**), select **Move the item to folder:**.



6

Click the arrow next to **Inbox** to view your folders.

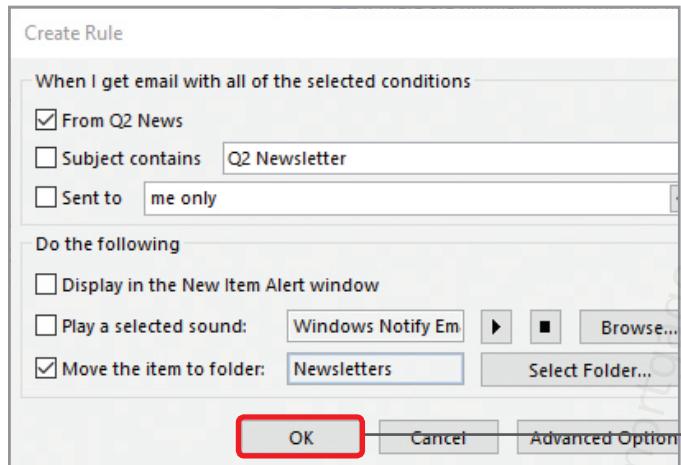
7

Navigate to and select the folder you want to file messages to.

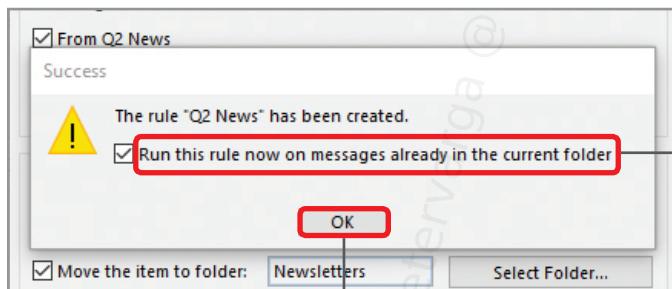
8

Click **OK** to return to the **Create Rule** dialog box.

Rule to File (continued)



9 Click **OK** to create the rule.

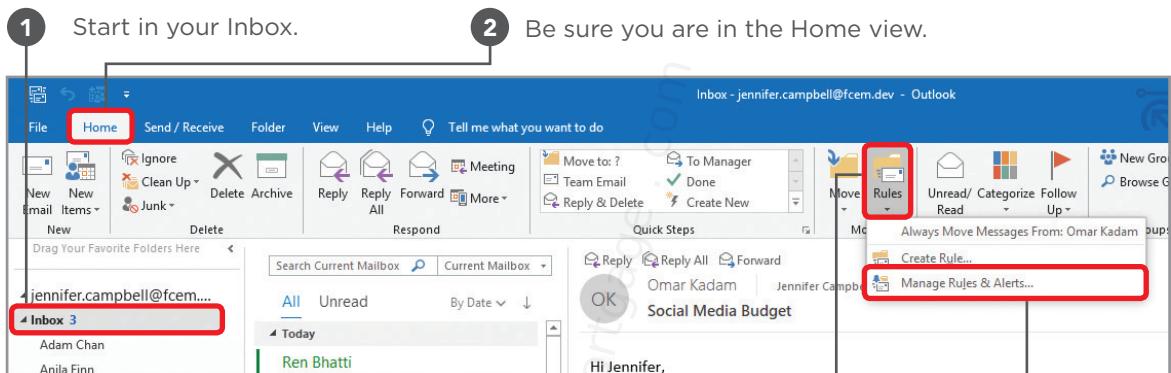


10 In the confirmation dialog box that appears, select **Run this rule now on messages already in the current folder**.

11 Click **OK**. The rule is created and you are returned to your Inbox.

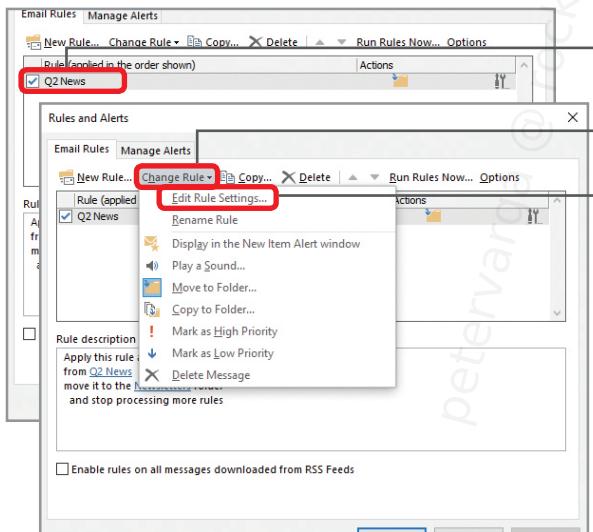
How to Change a Rule

When certain circumstances change, you may want to edit a rule. For example, you might have a personnel change when a new manager replaces your old manager. If you want to update the former manager's information in a rule, you simply edit the rule with the new information.

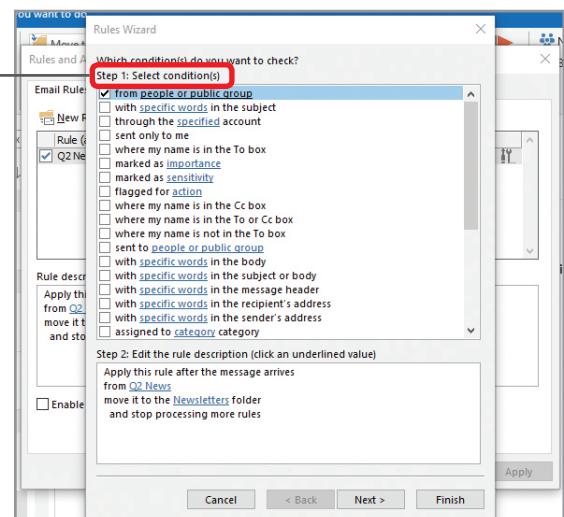


Click **Rules** in the Move section of the toolbar.

3 Select Manage Rules & Alerts...

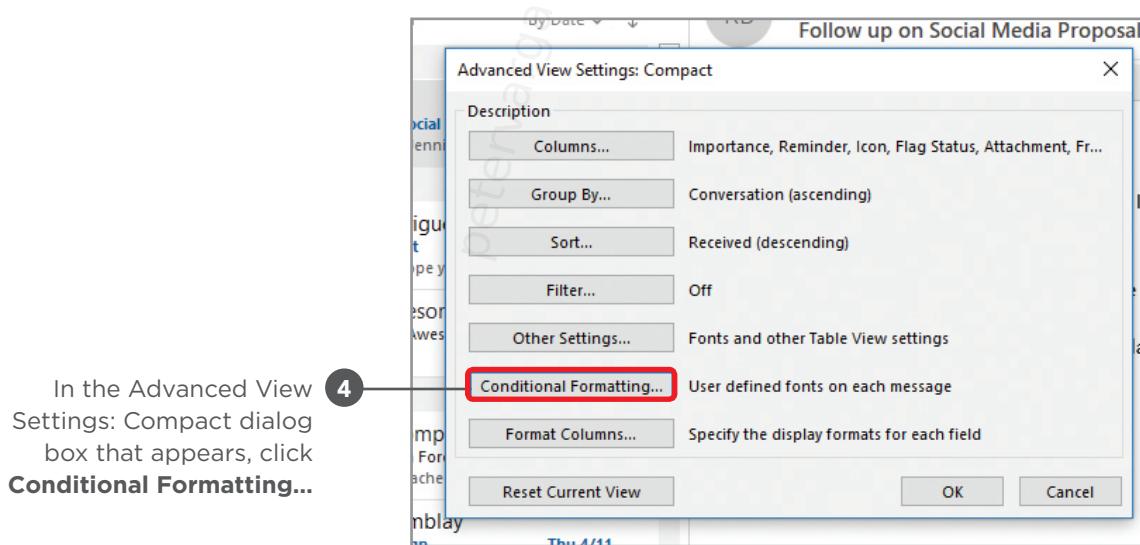
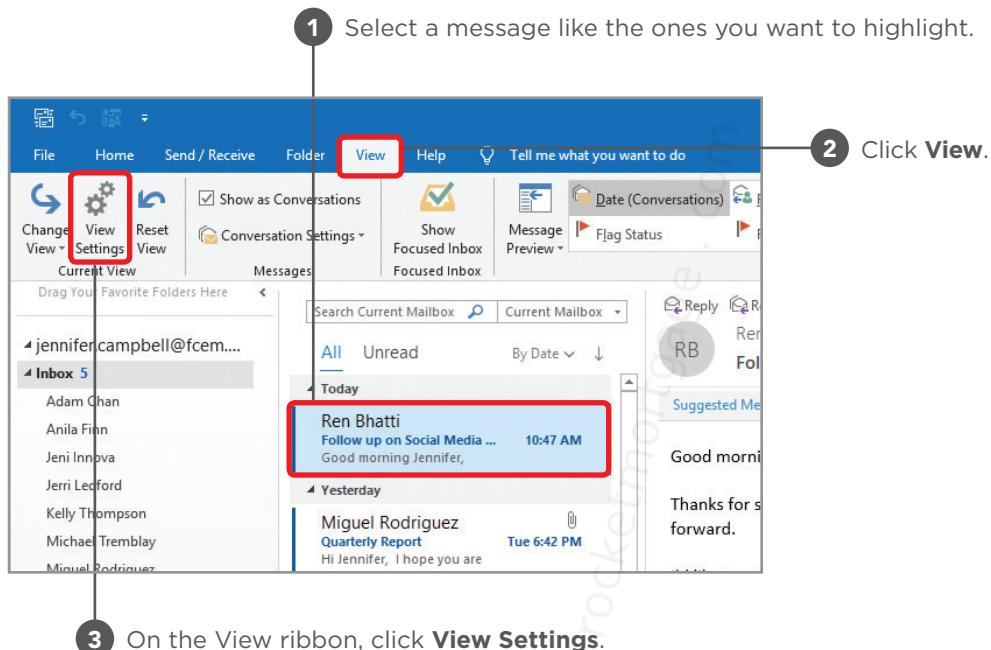


Follow the directions in the Rules Wizard dialog box to change the conditions for the rule, starting with **Step 1: Select conditions**.



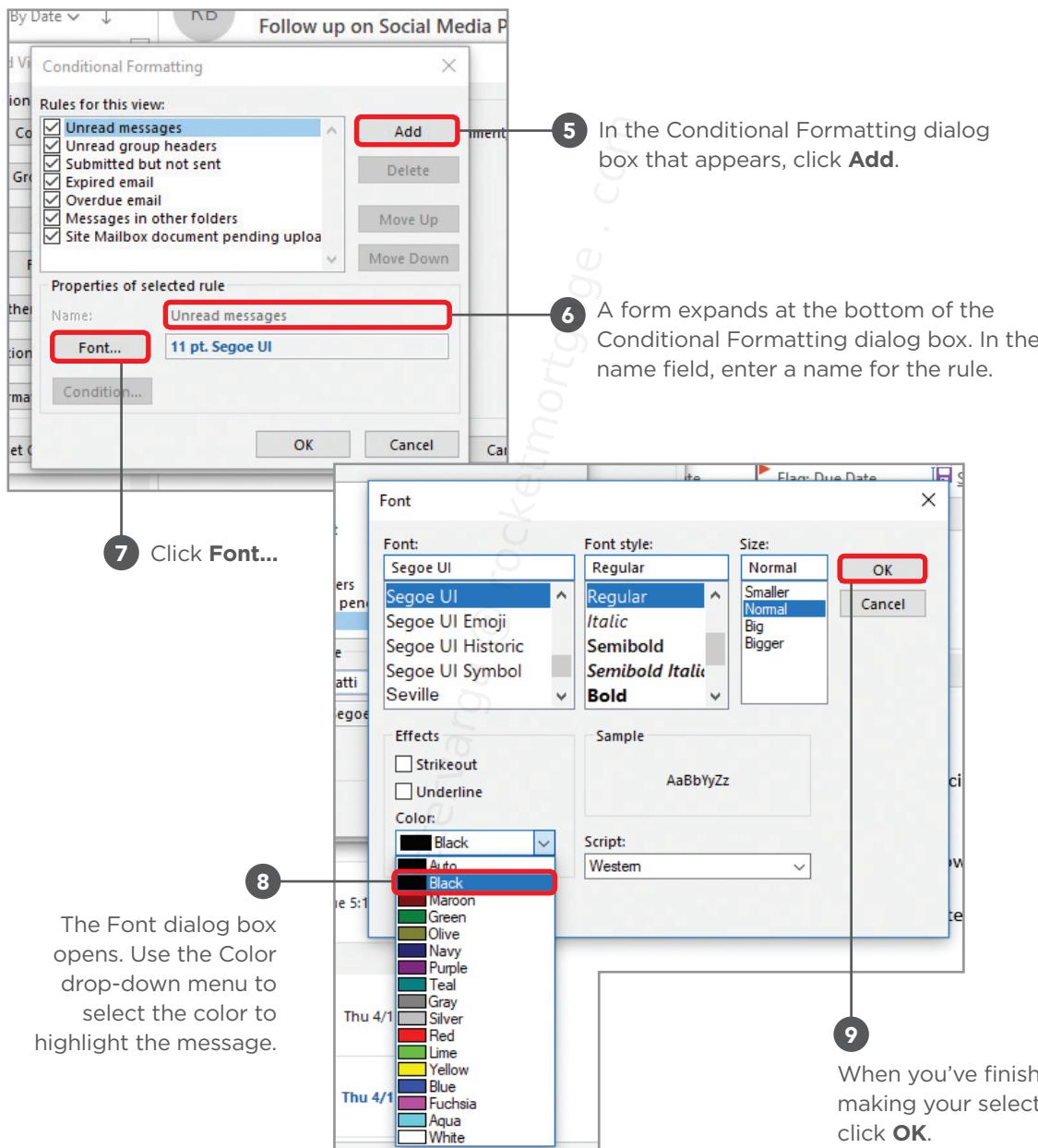
Technical Guide—3 Master Moves

Rule to Highlight

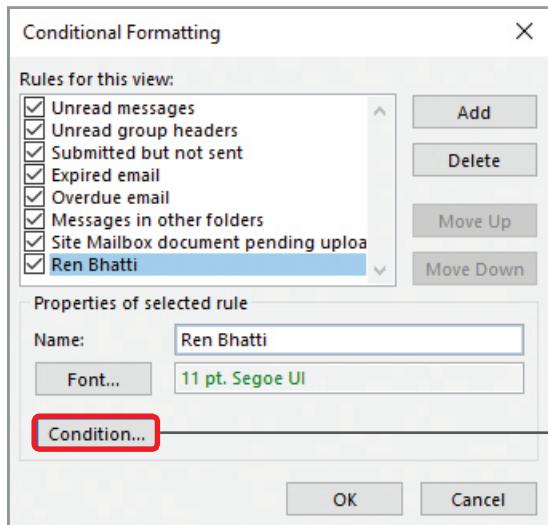


In the Advanced View Settings: Compact dialog box that appears, click **Conditional Formatting...**

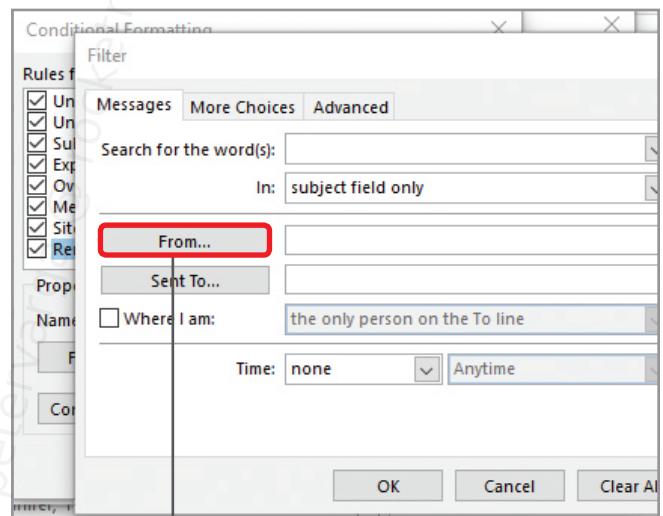
Rule to Highlight (continued)



Technical Guide—3 Master Moves



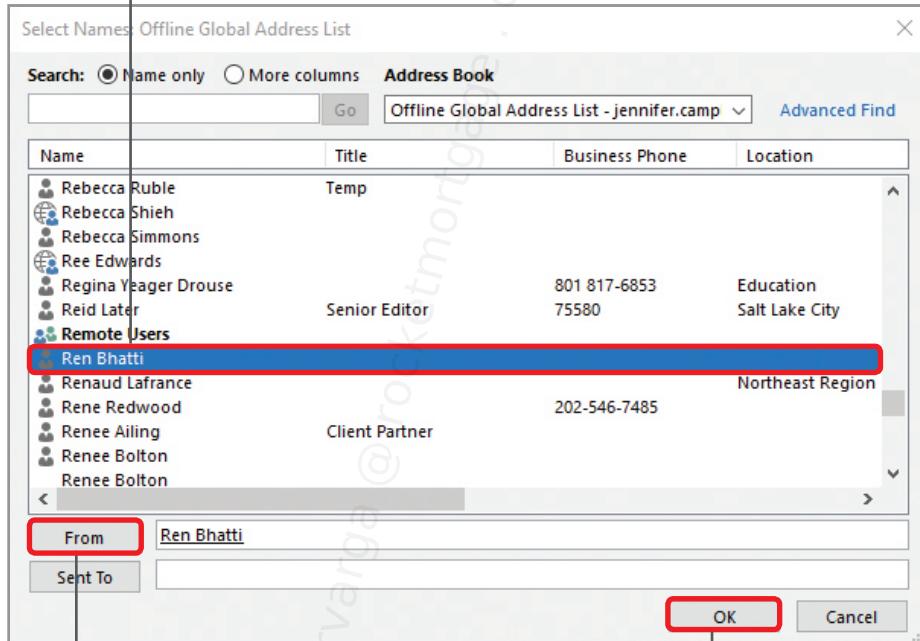
- 10 You're returned to the Conditional Formatting dialog box. Click the **Condition...** button.



- 11 Click the **From...** button.

Rule to Highlight (continued)

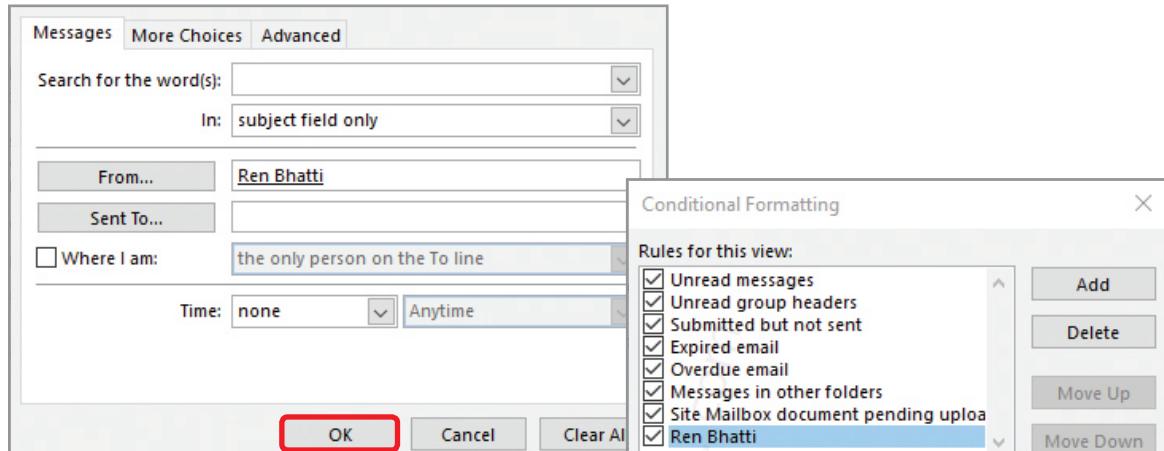
- 12 The offline Global Address List opens. Select the name of the senders for whom you want messages highlighted.



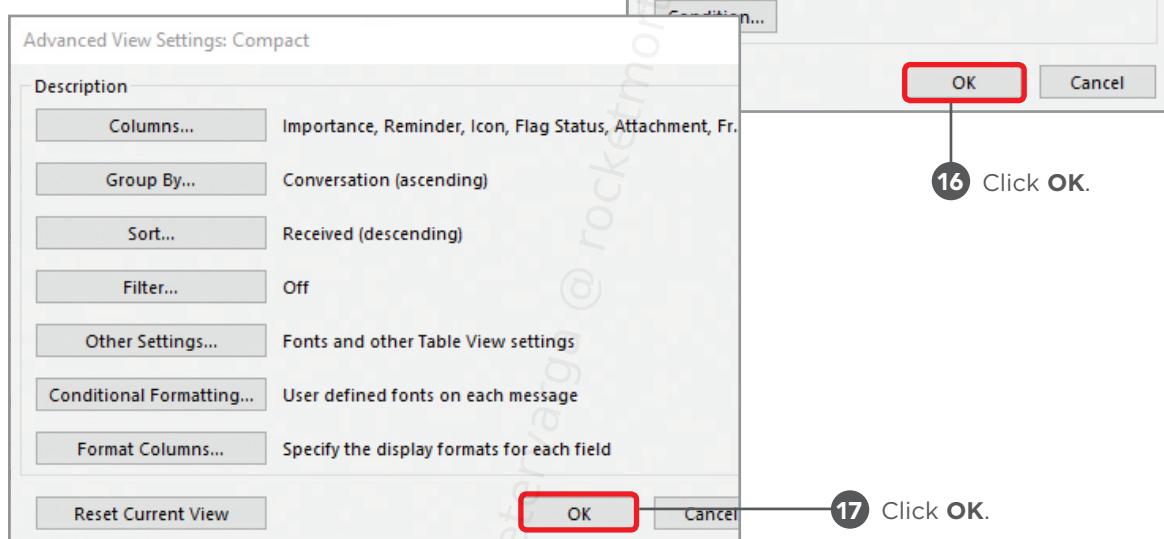
13 Click **From**.

14 Click **OK**.

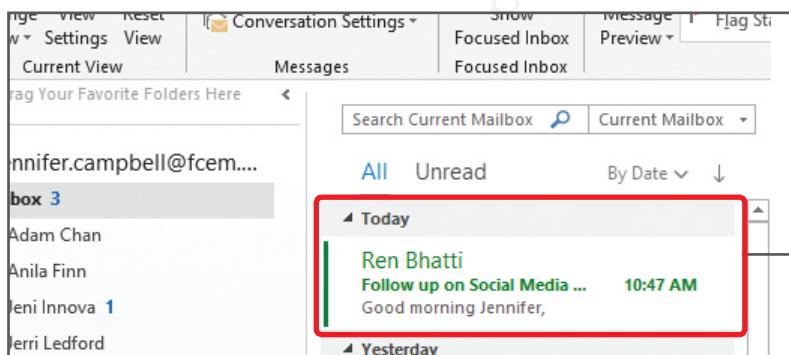
Technical Guide—3 Master Moves



15 Click OK.



16 Click OK.



17 Click OK.
18 The selected messages now appear in your Inbox in the color you chose.

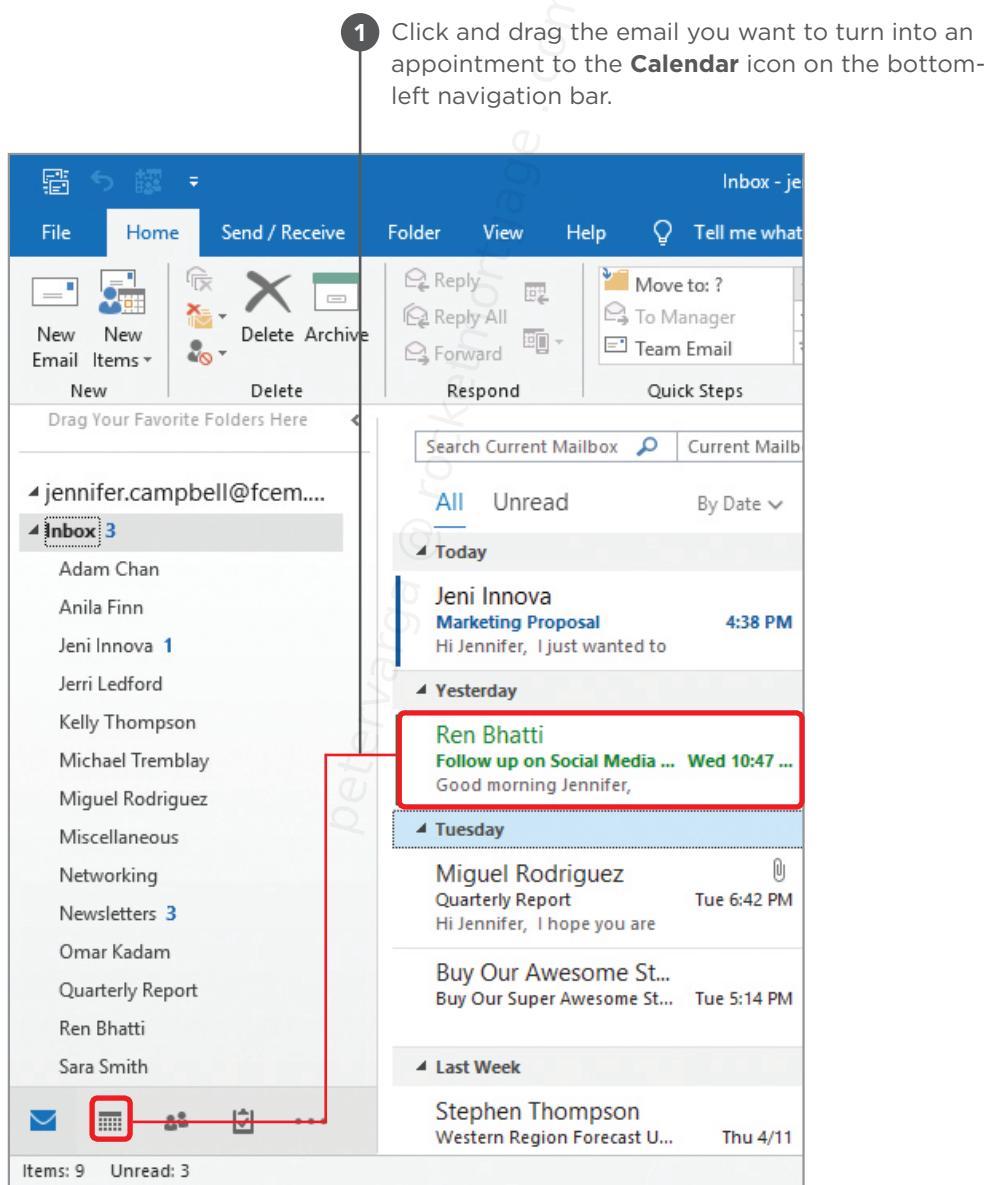
Notes

petervargate.com | petervargate@rocketmortgage.com

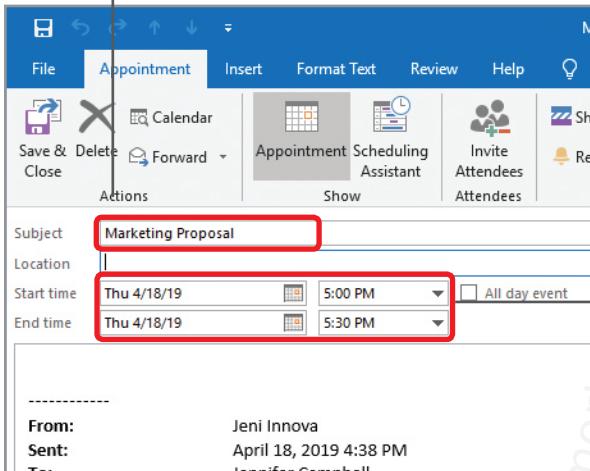
Turn It Into What It Is

The fastest way to get your Inbox under control is to turn messages into what they are the first time you deal with them. Emails usually fall into one of four categories: appointments, tasks, contacts, or trash.

Turn an Email Into an Appointment

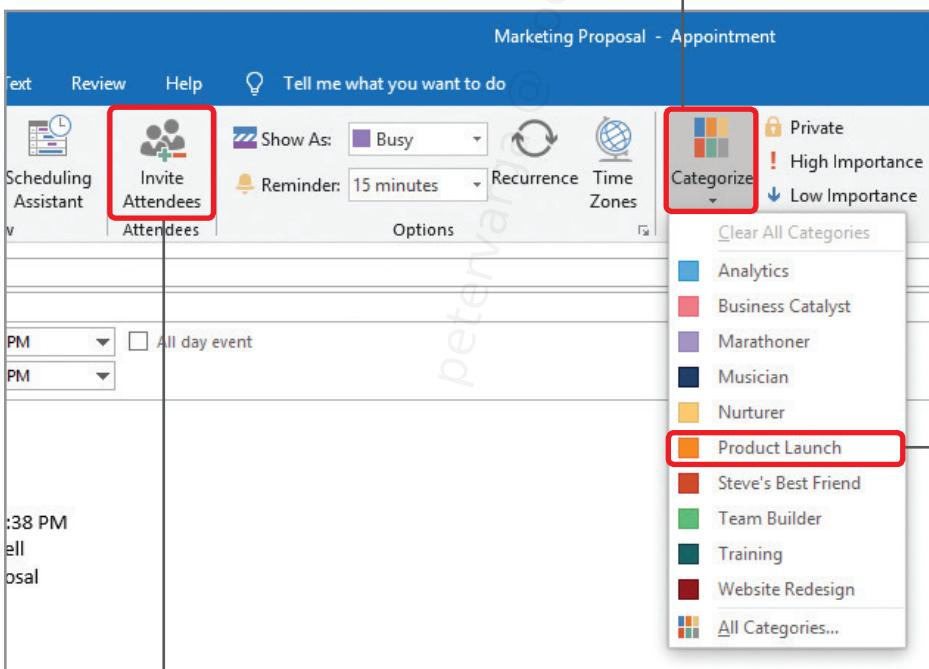


- 2** A new Appointment form opens. Click in the **Subject** text box to add or edit the appointment subject.



- 3** Adjust the date and time for the **Start time** and **End time** to adjust the length of your appointment.

- 4** Click **Categorize**.



- 5** Select a category from the list that appears.

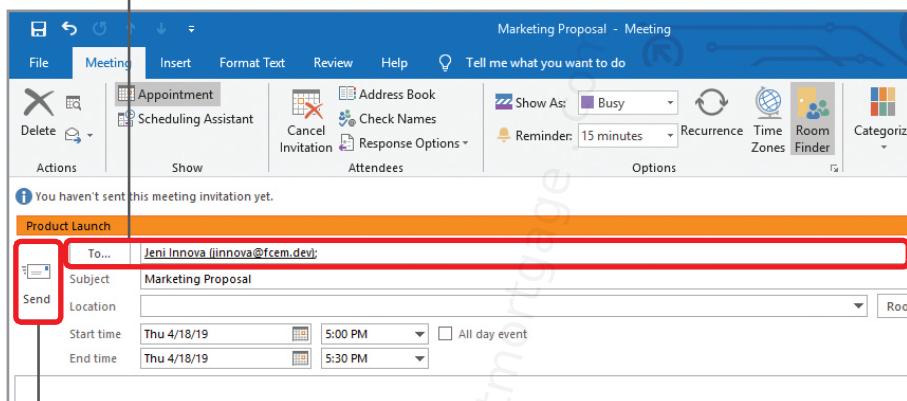
- 6** The Categorize menu disappears. Click **Invite Attendees**.

Technical Guide—3 Master Moves

Turn an Email Into an Appointment (continued)

7

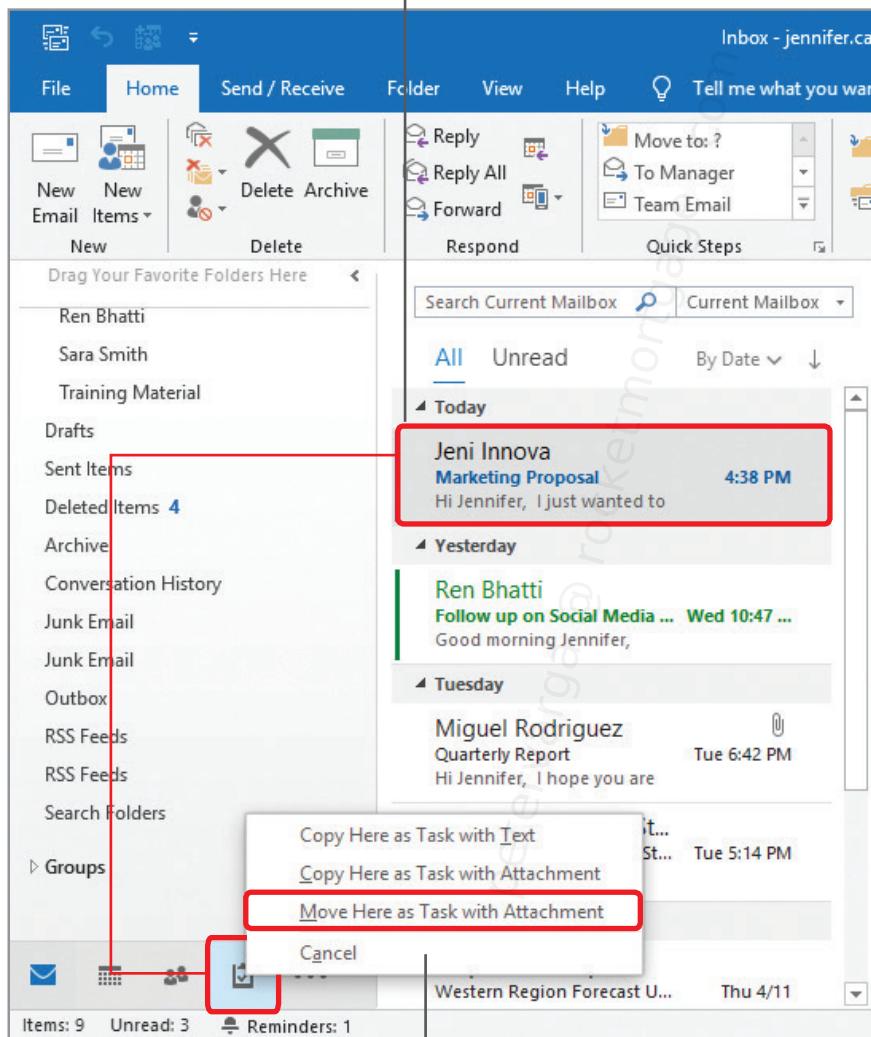
The Appointment form shifts to become a meeting invitation. Enter email addresses for the attendees you want to invite.



8

Click **Send** to send the invitation and save the new appointment to your calendar.

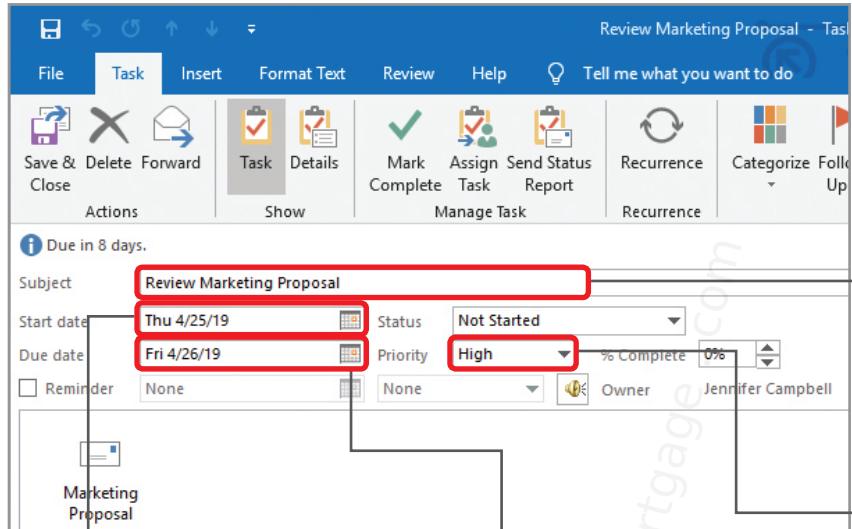
Turn an Email Into a Task



- 1 Right-click and drag the message you want to turn into a task to the **Tasks** icon on the bottom-left navigation bar.

- 2 This opens options for what can be done with the message. Select **Move Here as Task with Attachment**. (This moves the message completely, removing it from your Inbox.)

Technical Guide—3 Master Moves



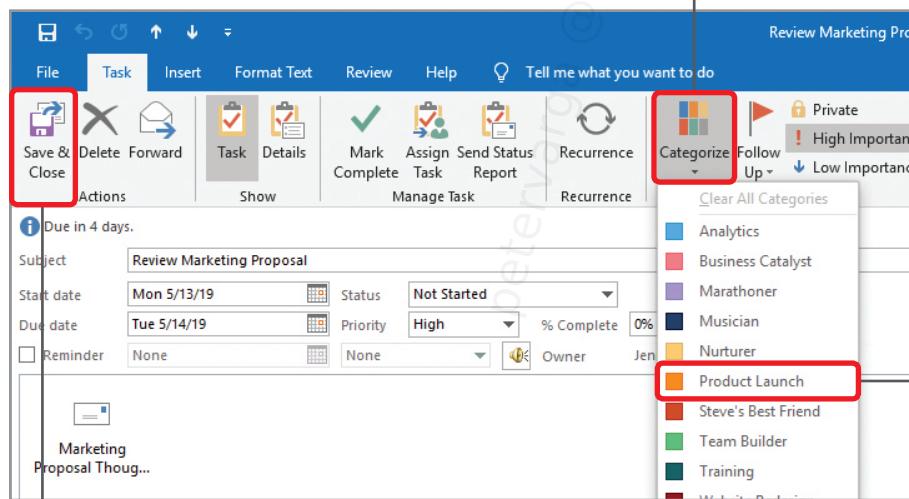
4 Click the calendar next to **Start date** to select a start date.

5 Click the calendar next to **Due date** to select a due date.

3 A new Task form opens. Click in the **Subject** text field to edit the subject.

6 Click the down arrow next to **Priority** to select a priority for the task.

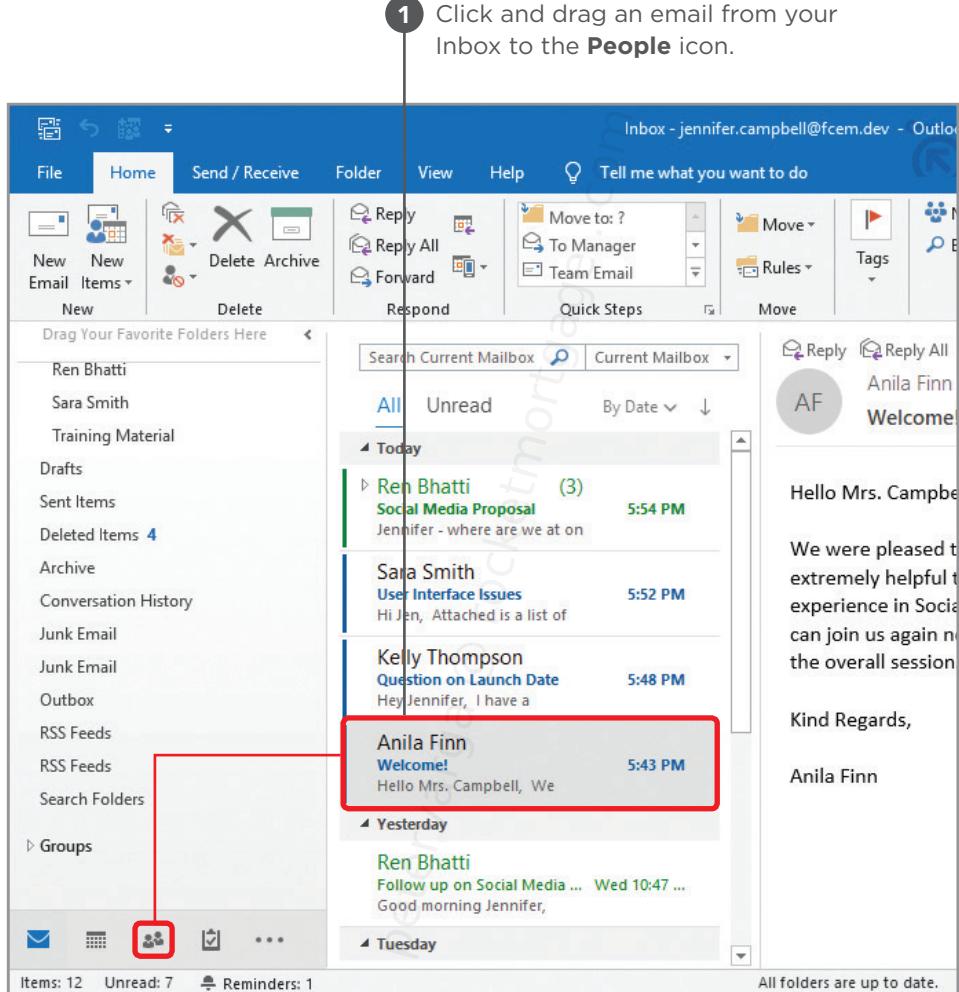
7 Click **Categorize**.



8 Select a category from the menu that appears.

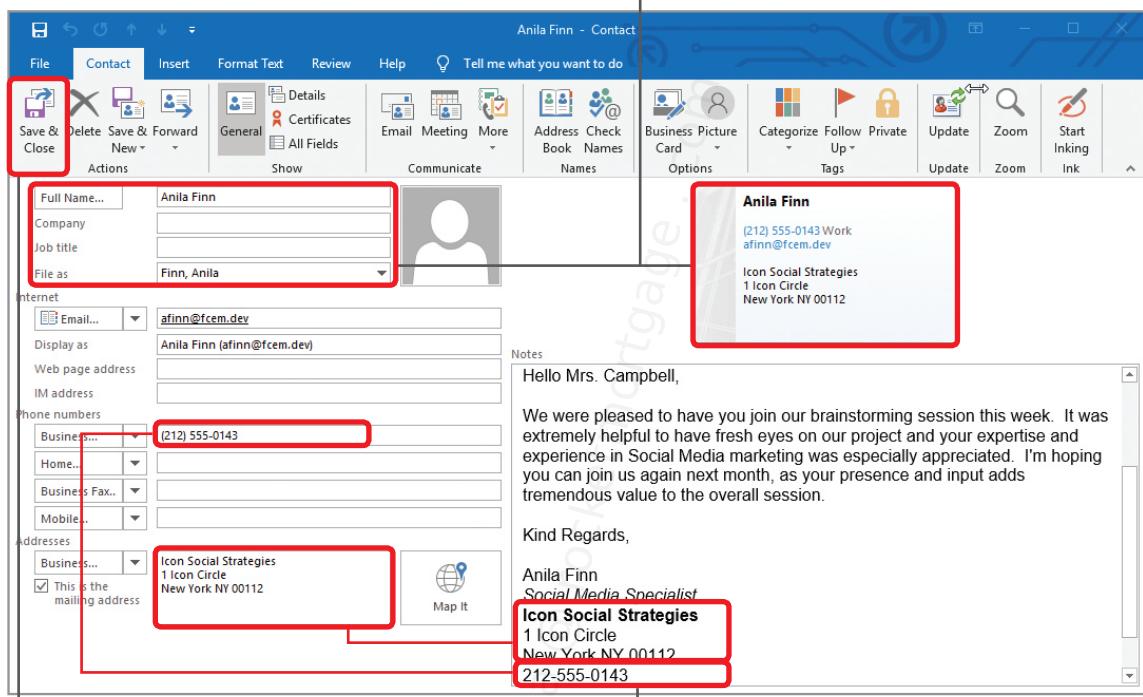
9 When you've finished editing the details of the task, click **Save & Close** to close the new task and save it to your task list.

Turn an Email Into a Contact



Technical Guide—3 Master Moves

The new Contact form opens with the name and email address of the sender already included in the appropriate fields. The body of the email message is included in the Notes section of the contact.



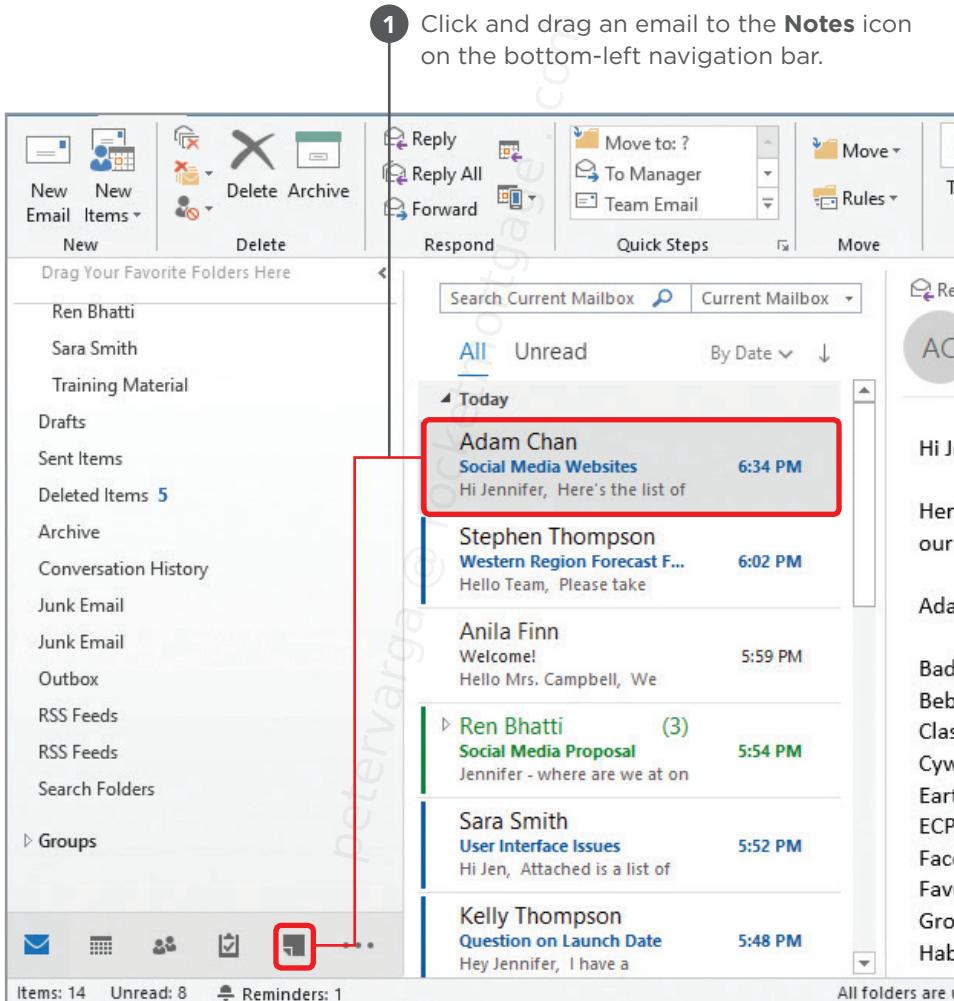
- 4** When you've finished editing the new contact, click **Save & Close** to close the contact and add it to your Contacts list.

2

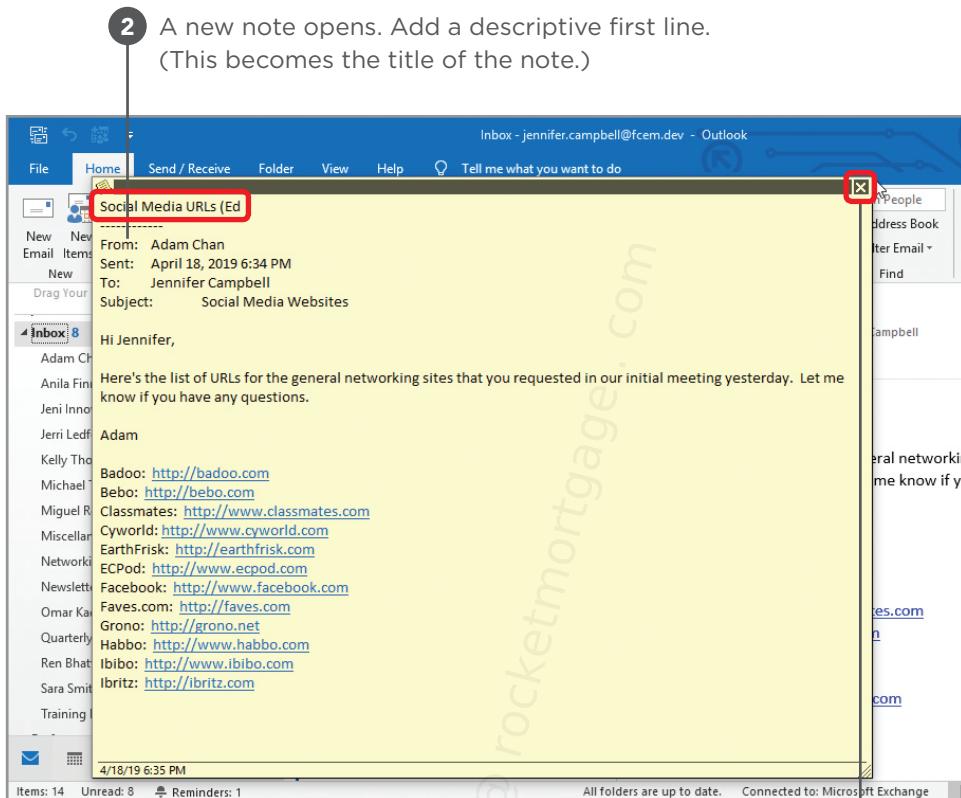
- 3** Highlight contact information that might be included in the body of the message and copy-paste it into the appropriate fields on the Contact form.

The next few pages show how to turn an email into a note and a note into an email.

Turn an Email Into a Note



Technical Guide—3 Master Moves



When you've finished editing the note, click the X **3** to close the note and save it to your Notes list.

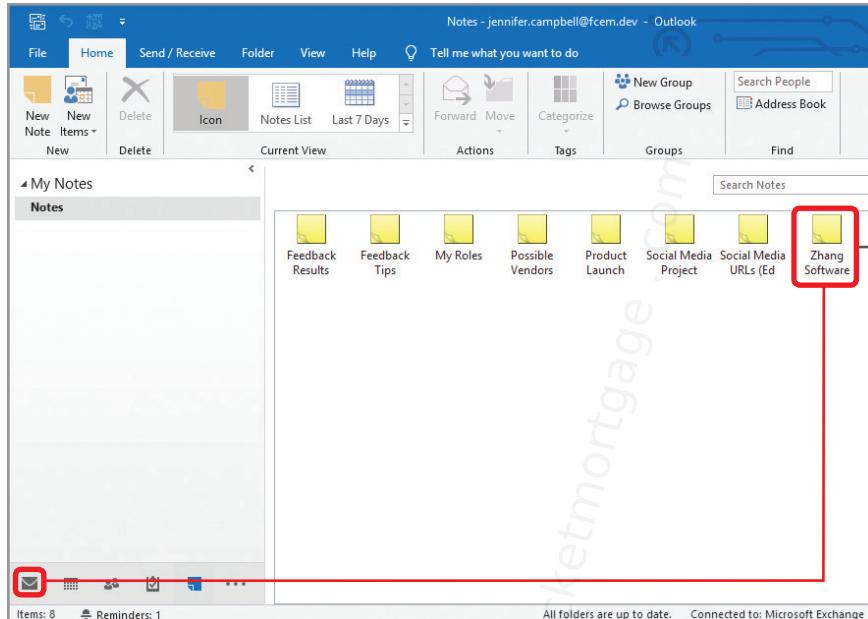
TIP

Notice that a copy of the email is included in the body of the appointment, task, contact, or note you create. If you're finished with the original message, you can delete it after you create these items without fear of losing the information in the message.

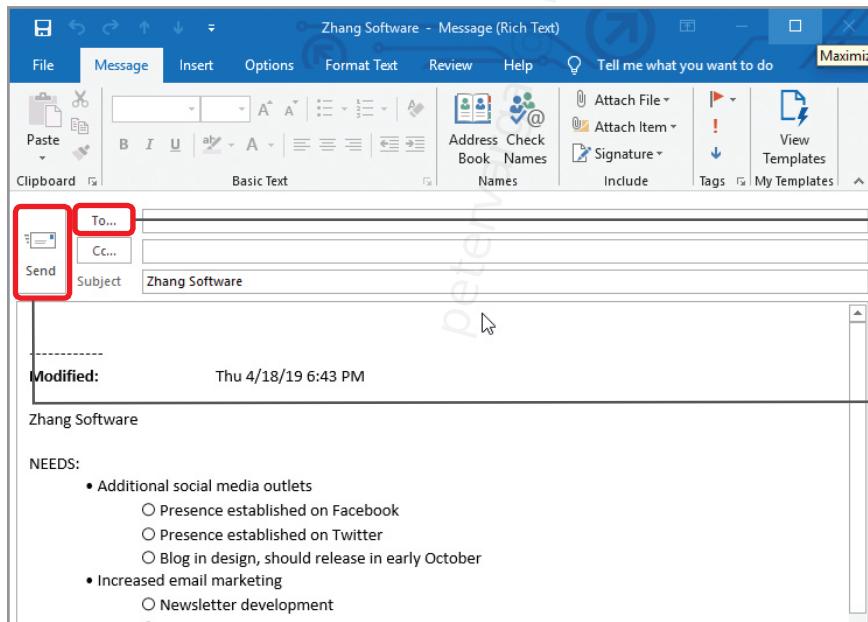
TIP

An email can become more than one item. And each item you create with it contains a copy of the message in the body of the item.

Turn a Note Into an Email



- 1 Click and drag a note to the **Mail** icon on the bottom-left navigation bar.



- 2 Type the recipient of the email in the **To...** field.

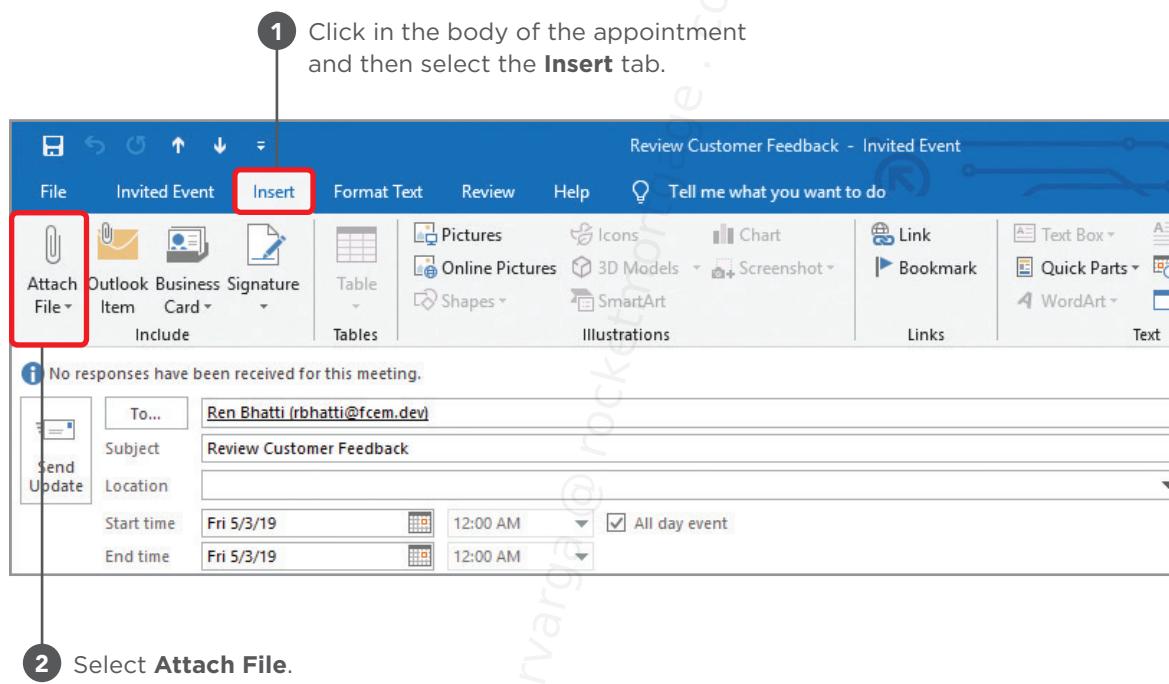
- 3 Click **Send**.

Link to Locate

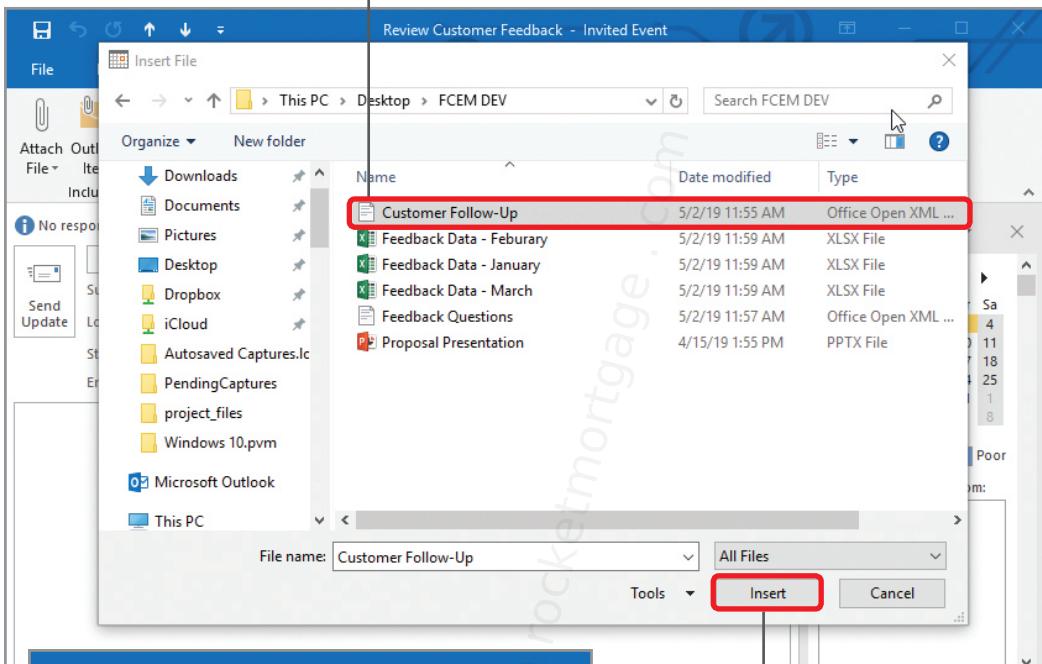
Keeping items together makes it faster and easier to find what you need when you need it.

Start by opening an existing appointment or task, or create a new appointment or task.

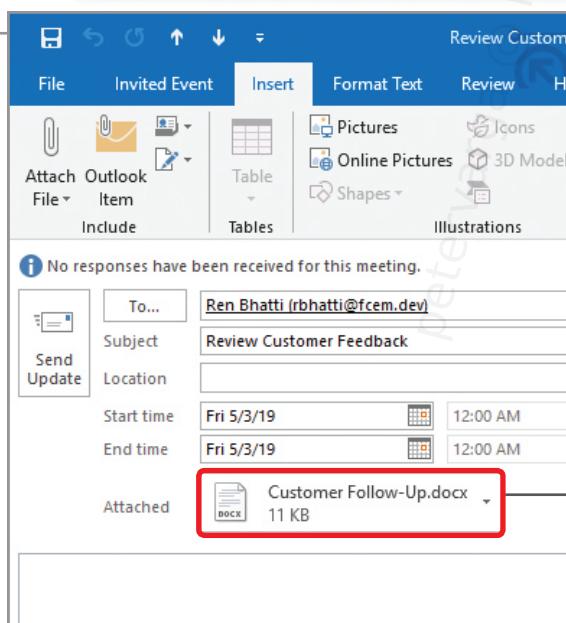
Insert a File



- 3 In the Insert File dialog box, navigate to and select the document you want to insert.



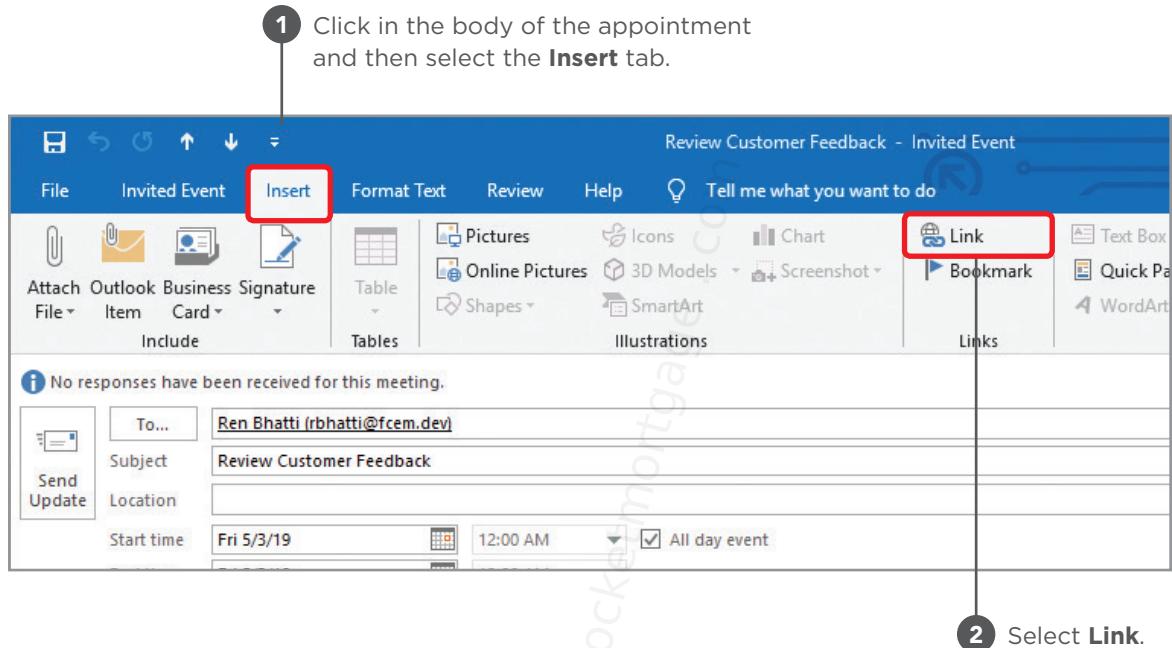
- 4 Click **Insert**.



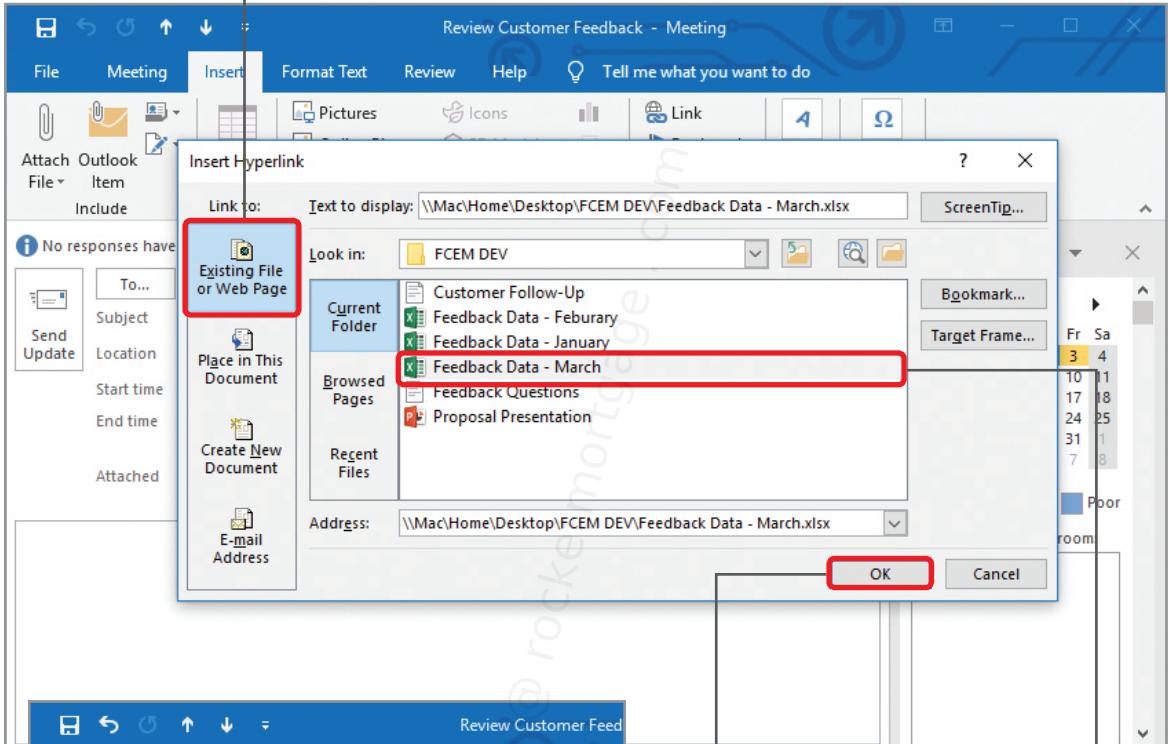
- 5 Now a copy of the document appears in the appointment.

Technical Guide—3 Master Moves

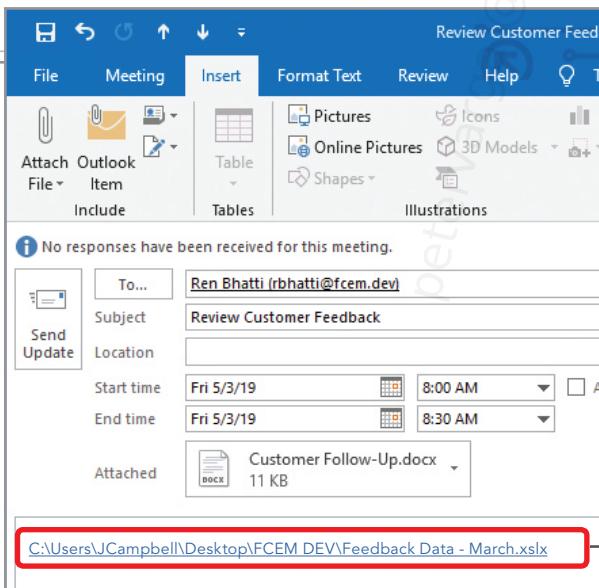
Insert a Hyperlink



3 Under **Link to:** select **Existing File or Web Page**.



4 Navigate to and select the file to which you want to create a link.



5 Click **OK**.

6 A link to the document you selected is inserted into the body of the appointment.

NOTE: If the recipient of the appointment/task does not share access to the drive where your file is located, they will not be able to open the file.

Technical Guide—3 Master Moves

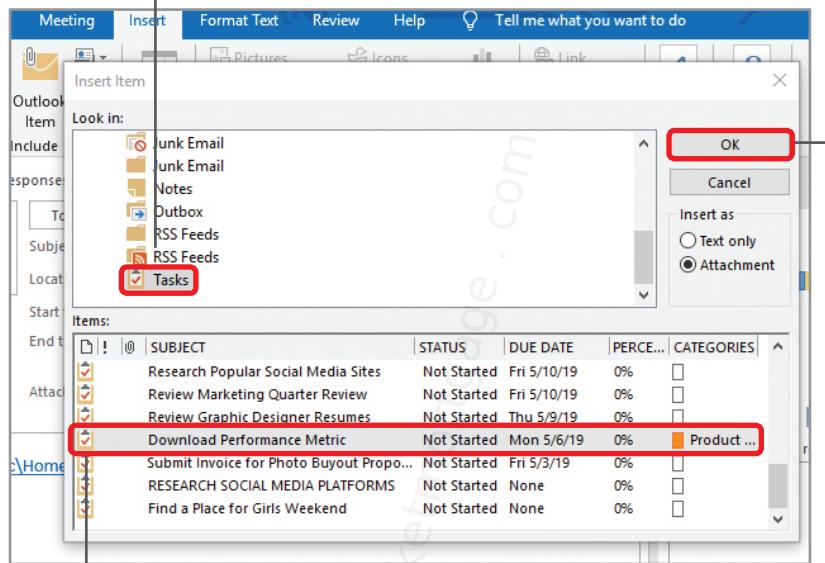
Insert a Task

1 Click in the body of the appointment and then select the **Insert** tab.

2 Select **Outlook Item**.

The screenshot shows the Microsoft Outlook ribbon with the 'Meeting' tab selected. The 'Insert' tab is highlighted with a red box and has a callout bubble pointing to it. In the 'Outlook' group of the ribbon, the 'Item' icon is also highlighted with a red box. Below the ribbon, a meeting appointment is being created. The 'To...' field contains 'Ren Bhatti (rbhatti@fcm.dev)'. The subject is 'Review Customer Feedback'. The start time is set for Friday, May 3, 2019, at 8:00 AM, and the end time is at 8:30 AM. There is a checkbox for 'All day event' which is unchecked. A 'Rooms...' button is visible. On the far left, there is a 'Send Update' button.

- 3 In the Insert Item dialog box that appears, scroll through the **Look in:** section and select **Tasks**.



- 4 Then in the **Items** section below, select the task you want to insert.

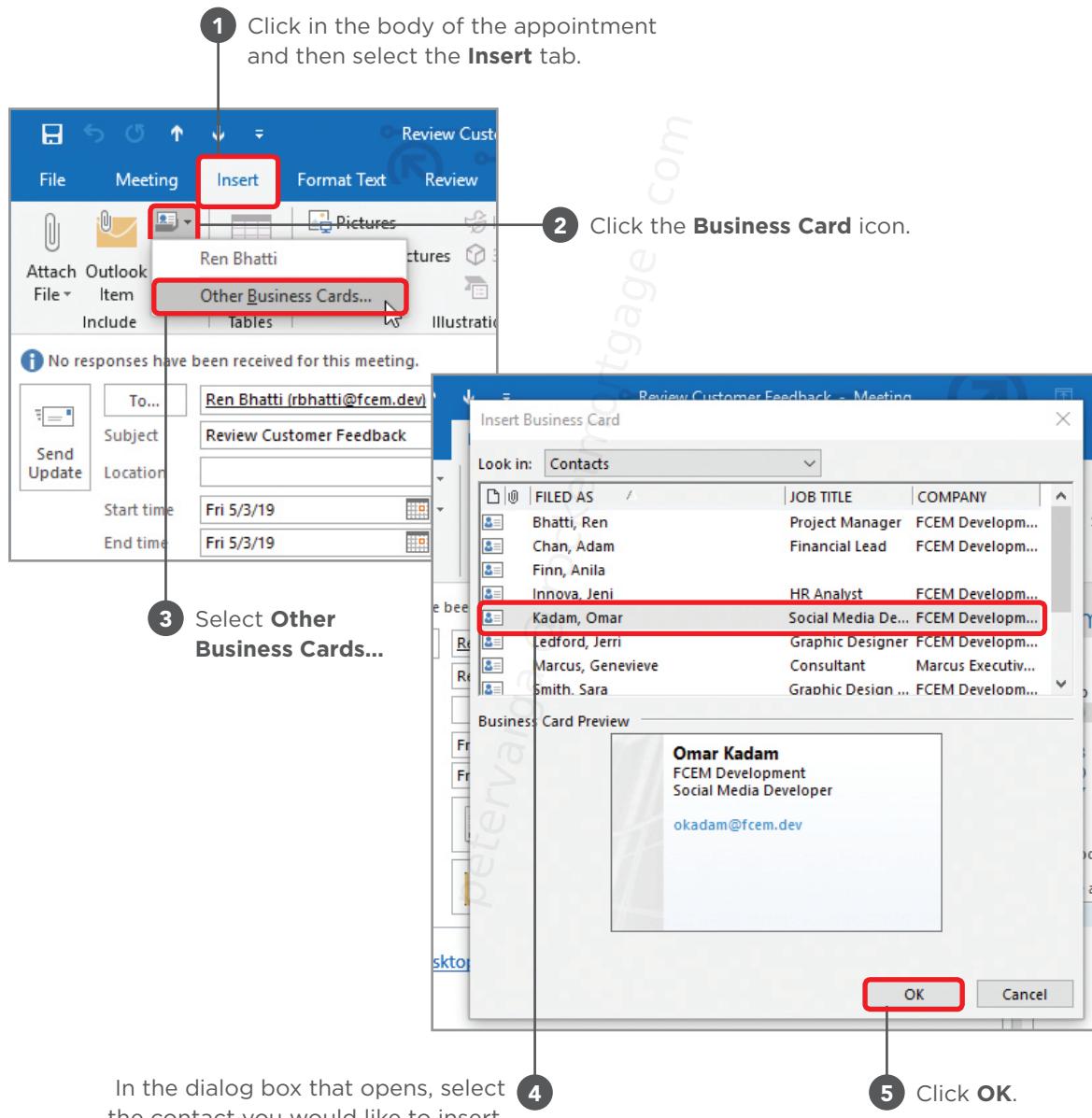
- 5 Click **OK**.

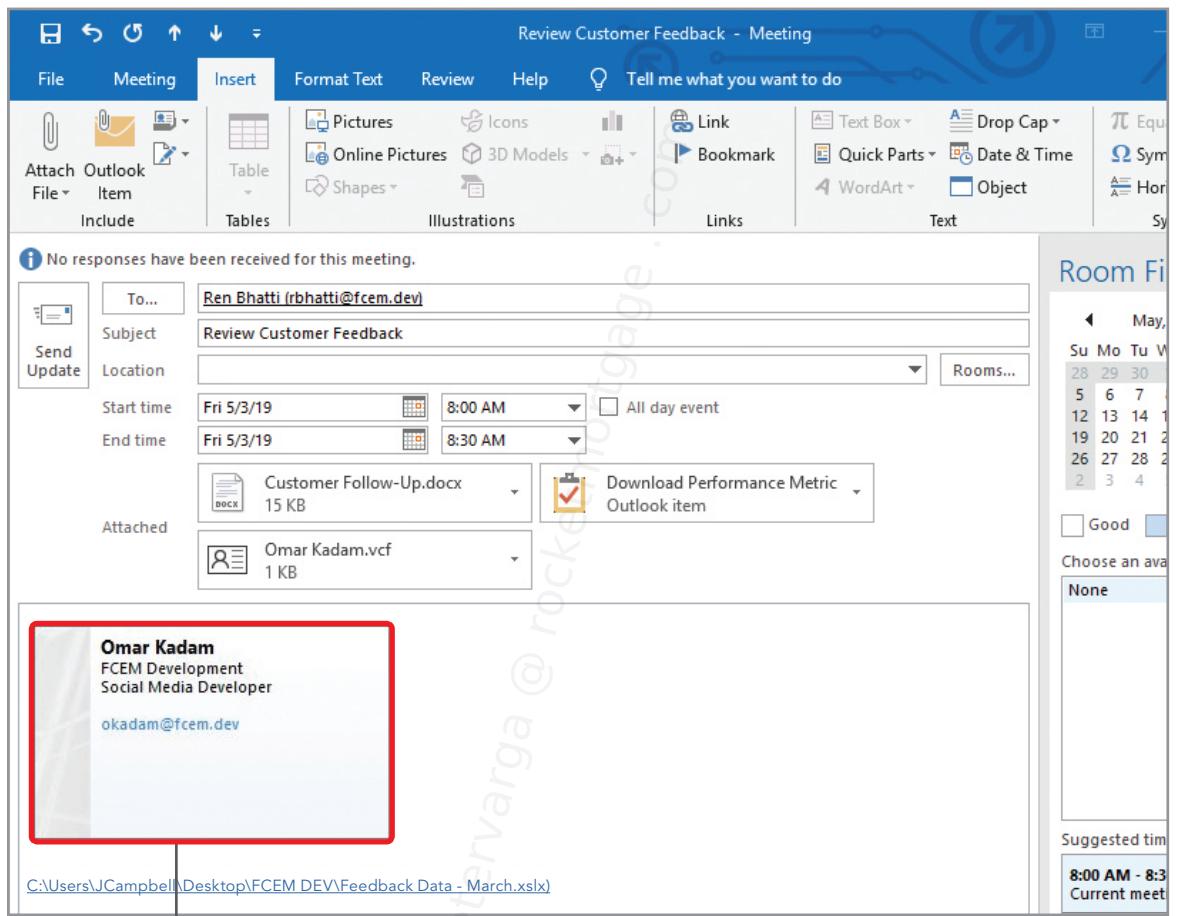
The screenshot shows a Microsoft Outlook meeting appointment window. At the bottom of the appointment details, there is a section labeled 'Items'. Inside this section, a task titled 'Download Performance Metric' is listed. This task is highlighted with a red box. Next to the task name, it says 'Outlook item'. The rest of the appointment details include the subject 'Review Customer Feedback', date 'Fri 5/3/19', time '8:00 AM', duration '15 KB', and a document attachment 'Customer Follow-Up.docx'.

- 6 Now that task is included in the appointment.

Technical Guide—3 Master Moves

Insert a Contact

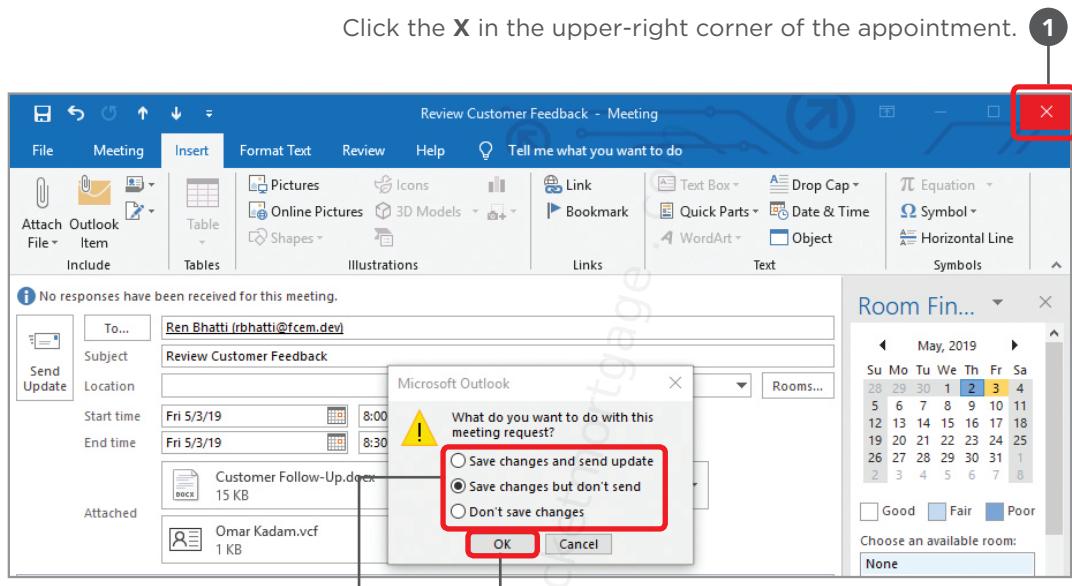




- 6 The contact is inserted into the body of the appointment.

Technical Guide—3 Master Moves

To Finish



A dialog box appears.
Choose a save option.

Click **OK** to save the
appointment to your calendar.

TIP

You can also insert items into the body of a task or contact, so if there's a specific document or Outlook item that's related to one of your Outlook tasks or contacts, you can follow the steps above to insert items into the Notes section of those items as well.

Notes

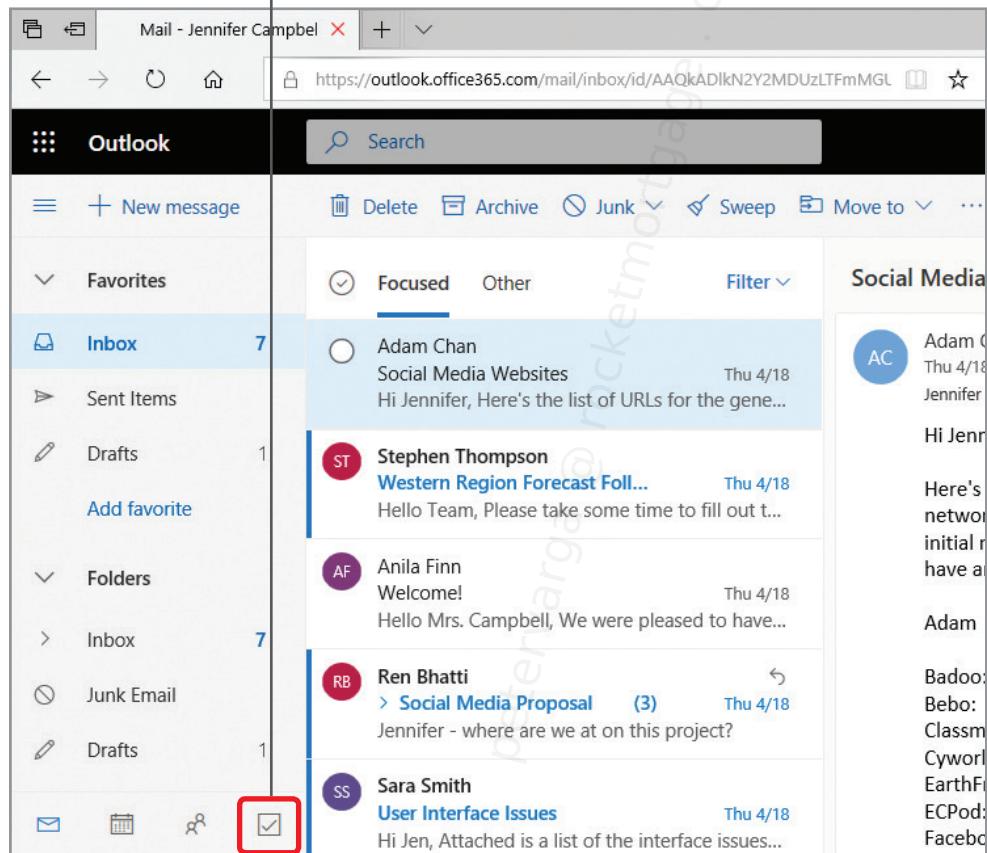
petervargate.com | petervargate@rocketmortgage.com

Outlook Web App Tips

Many people like to use the Outlook Web App to access Outlook on the go. This section tells how to use the *5 Choices* tools that are available online.

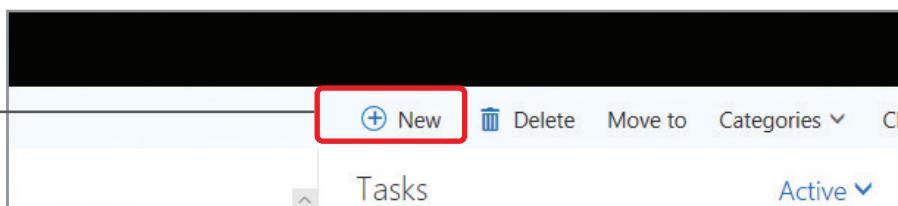
Create a Task

1 Click **Tasks** on the Web App menu.

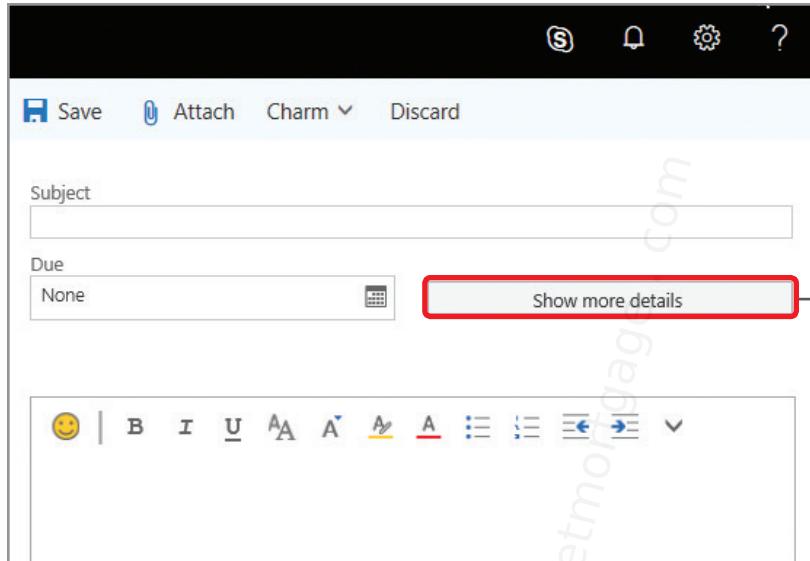


The screenshot shows the Outlook Web App interface. The left sidebar lists 'Favorites' (Focused), 'Inbox' (7 items), 'Sent Items', 'Drafts', 'Folders' (Inbox, Junk Email, Drafts), and other icons. The main area shows an inbox with several messages from Adam Chan, Stephen Thompson, Anila Finn, Ren Bhatti, and Sara Smith. A red box highlights the 'Tasks' menu item at the top of the page. A callout bubble with the number '1' points to this menu item.

2 Click **New**.



The screenshot shows the 'Tasks' screen. At the top, there are buttons for '+ New', 'Delete', 'Move to', 'Categories', and 'Close'. Below this is a table header with columns for 'Due by', 'Subject', and 'Status'. The status column has a dropdown arrow pointing down. A red box highlights the '+ New' button. A callout bubble with the number '2' points to this button.



3 Select **Show more details** in order to set due date, start date, repetition, etc.

Fill in the relevant fields, then click **Save**.

Save Attach Charm Discard

Due in 8 days.

Subject

Update Marketing Proposal

Due

Fri 5/10/2019

Show fewer details

Start date

Mon 5/6/2019

Date complete

None

Status

Not started

% complete

0

Priority

Normal

Reminder

None

Mark private

Repetition

Never

Create Email Rules

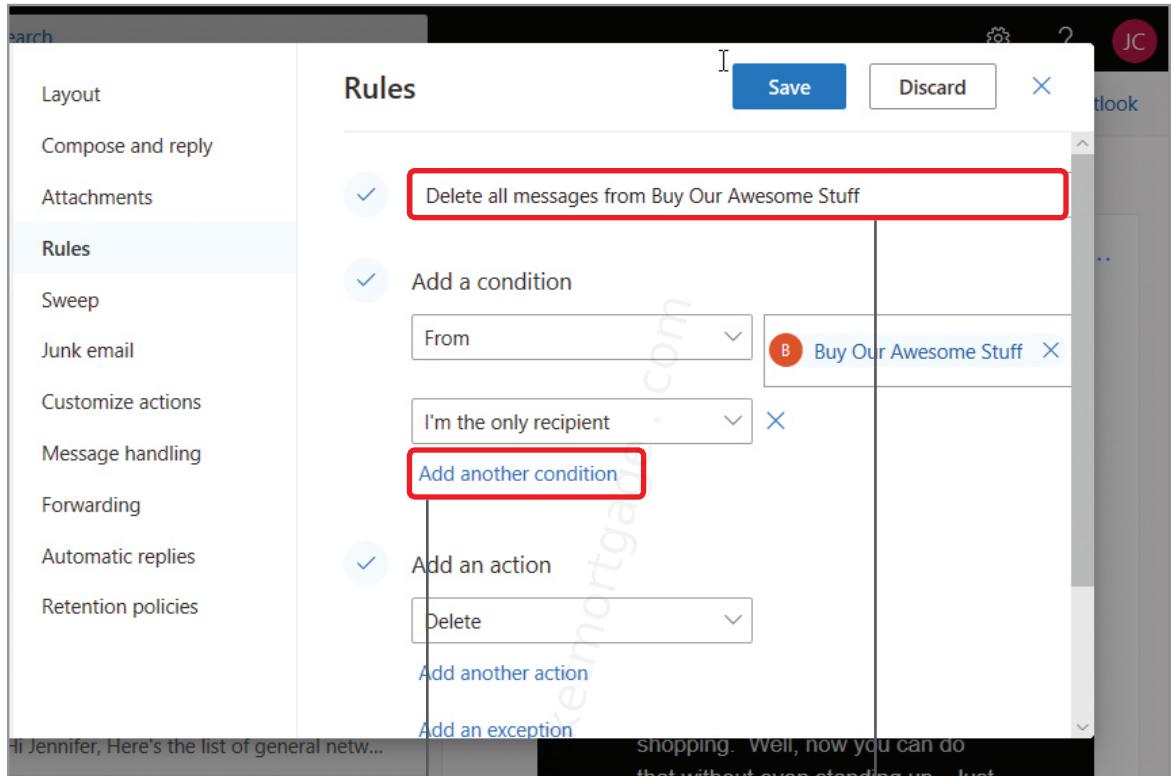
The screenshot shows the Outlook Web App inbox. A right-click context menu is open over an email from "Buy Our Awesome Stuff". The menu items include: Move, Copy, Categorize, Mark as unread, Flag, Pin, Mark as junk, Ignore, Block, and Create rule. The "Create rule" option is highlighted with a red box and numbered 2.

1 Right-click on an email message.

2 Scroll down to select **Create rule** to open the new **Create a rule** dialog box.

The "Create a rule" dialog box is displayed. It contains the text: "Always move messages from Buy Our Awesome Stuff to this folder:". Below this is a "Select a folder" dropdown menu and a "More options" button, which is also highlighted with a red box and numbered 3.

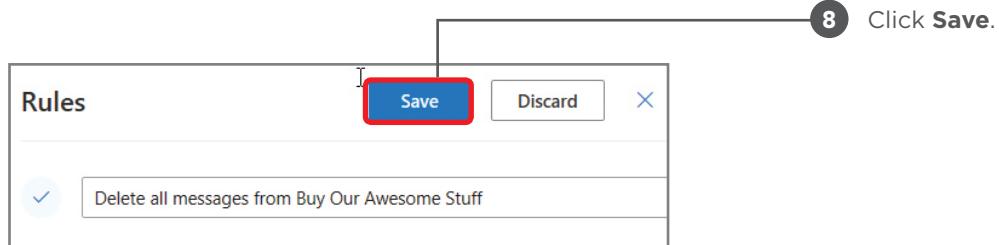
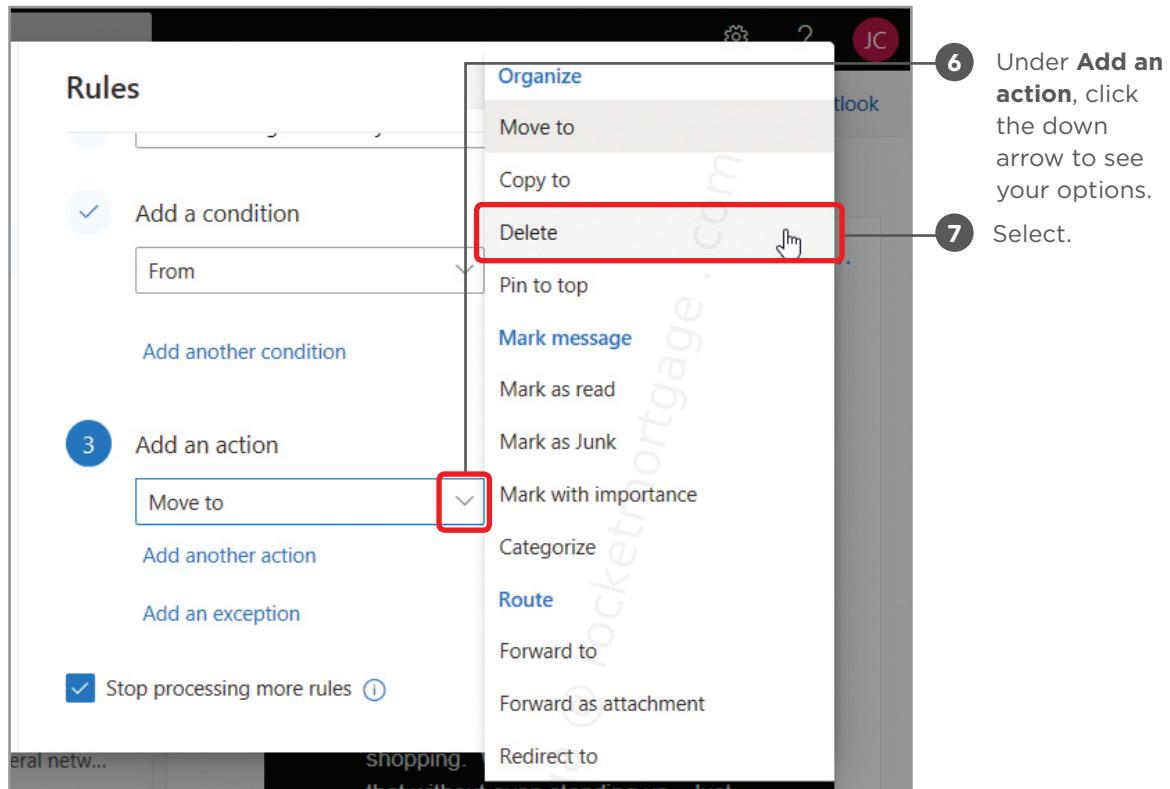
3 Select **More options**.



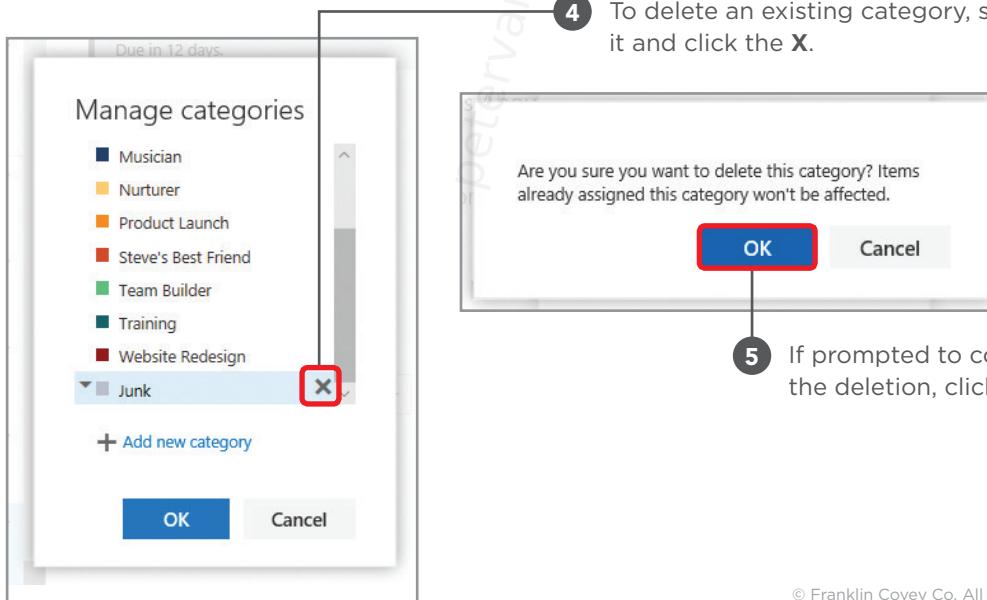
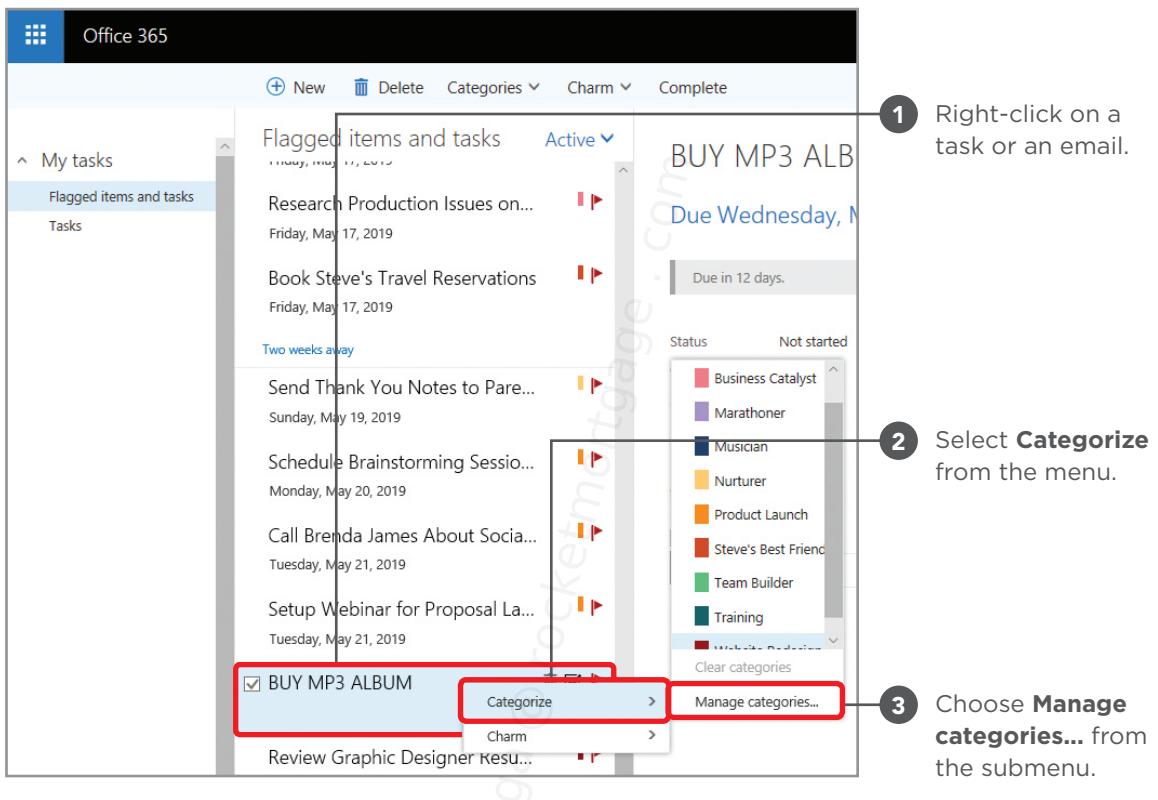
5 Click **Add another condition** to add as many conditions as you need for your intended result.

4 The Name field is automatically populated. Change the name if needed.

Create Email Rules (continued)



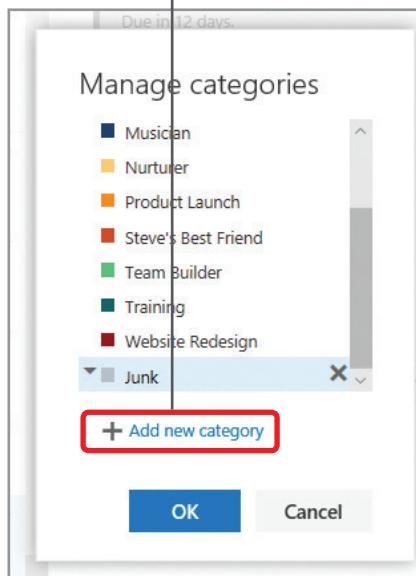
Manage Categories



Technical Guide—Outlook Web App Tips

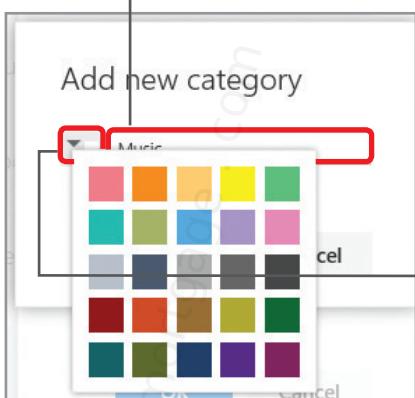
6

To add a category, click **+ Add new category**.



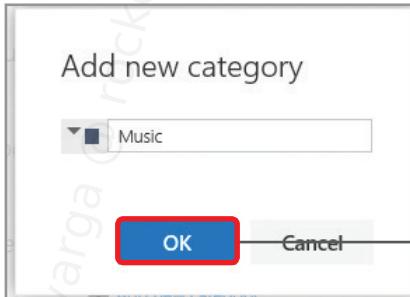
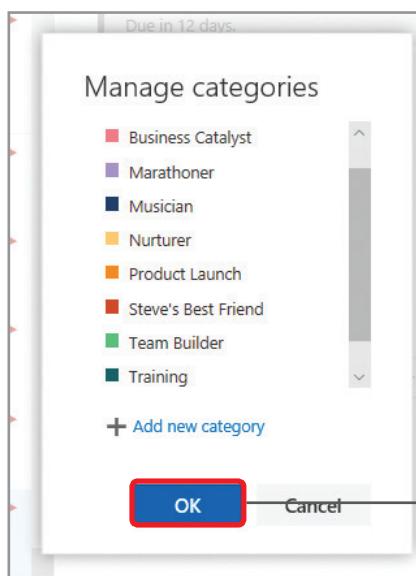
7

Type the category name in the text field.



8

Click the down arrow to select a color for the category.



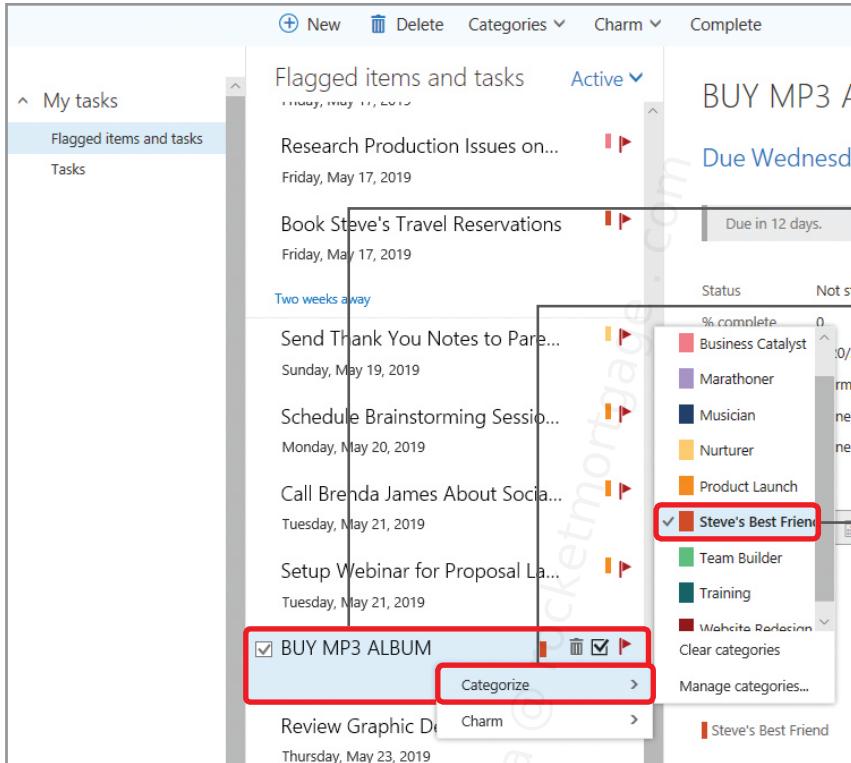
9

Click **OK**.

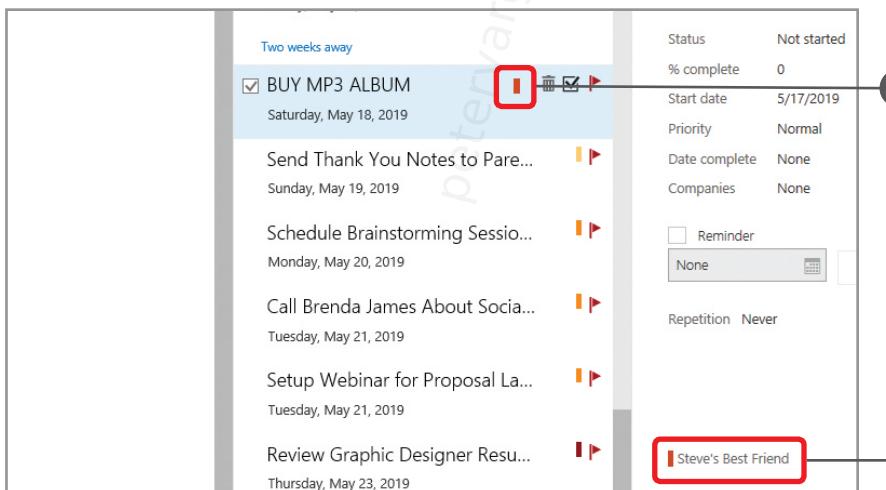
10

When you've finished editing categories, click **OK** to close the Manage categories dialog box.

Assign a Category



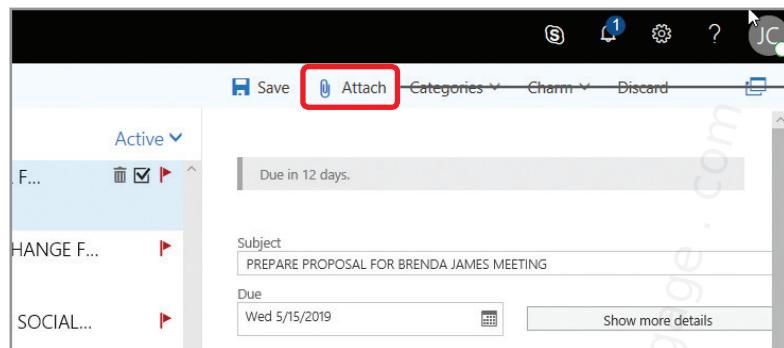
- 1 Right-click on a task or an email.
- 2 Select **Categorize** from the menu.
- 3 Choose a category from the pop-up list.



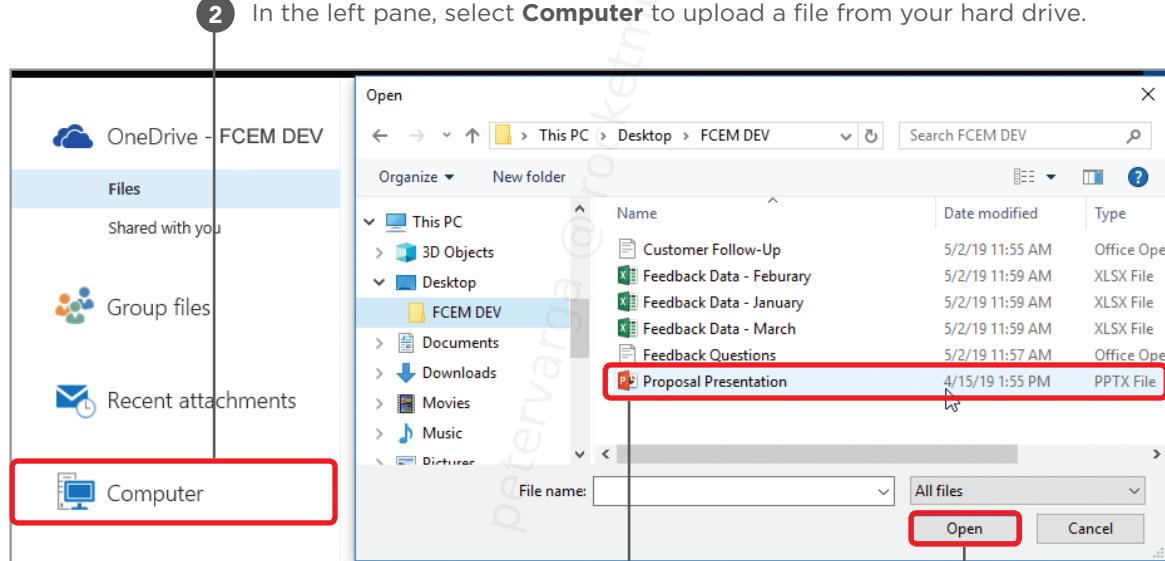
- 4 Category markers appear in the task body and the task list.

Insert a File in a Task or an Email

Follow these steps to insert a file in a task. (The same steps apply to emails.)

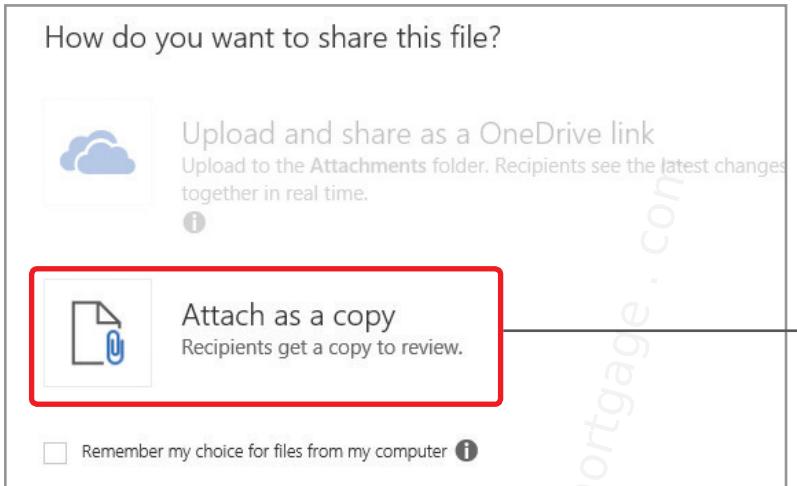


1 With the task open, select **Attach**.



In the Open dialog box, navigate to the correct location, then select a file.

Click **Open**. 4



- 5 Click **Attach as a copy**.

Now a copy of the file appears in the task.

6

Save Attach Categories Charm Discard

Due in 12 days.

Subject PREPARE PROPOSAL FOR BRENDA JAMES MEETING

Due Wed 5/15/2019 Show more

Proposal Presentation.pptx 4 MB

7

Click **Save** to finish attaching the file.

Technical Guide – Outlook Web App Tips

Notes

petervarga @ rocketmortgage . com

Technical Guide – Weekly Q2 Planning

Weekly Q2 Planning

Weekly Q2 Planning is one of the most important steps in remaining focused on your Q2 priorities. Using the Weekly Q2 Planning steps you learned in the Work Session, spend a few minutes each week making sure you're prepared to put Q2 first during the week. During your 20-30 minutes of Weekly Q2 Planning time:

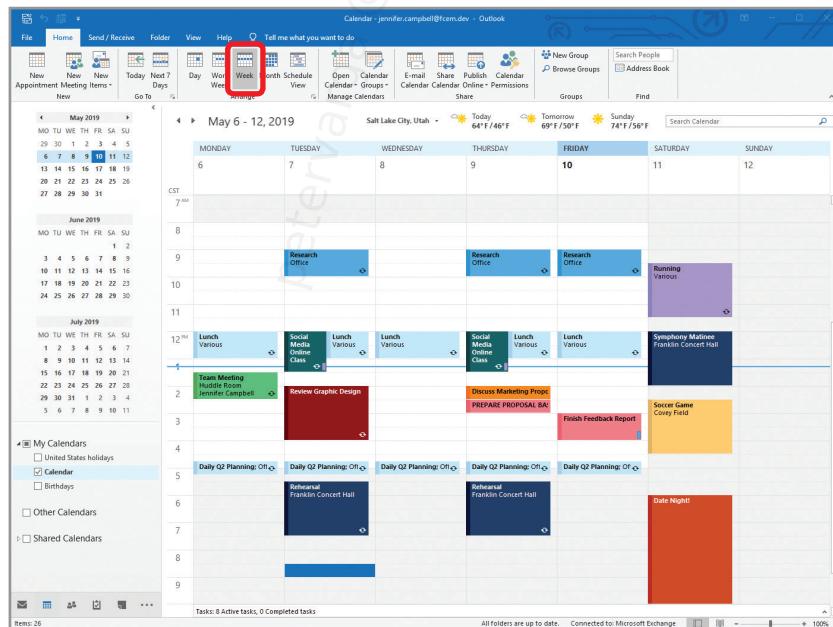


Step 1: Connect With Your Roles and Goals

Whether you have your roles and goals in a paper planner or notebook, or you have them in an electronic format, you should connect with them to help you identify the most important things you want to accomplish this week.

Choose Your View

Use the Week view in Outlook to plan your week. To ensure that you're looking at the full week on your calendar, open the calendar and select **Week**. This is the seven-day week view in Outlook 2019.



Add the Master Task List to the Week View

To ensure you have everything you need as you're planning, you should also enable the Master Task List.

- 1 From within the calendar, click the **View** tab.
 - 2 On the View ribbon, select the **To-Do Bar** button.
 - 3 In the menu that appears, select **Tasks**. The **To-Do Bar** should appear on the right side of your screen with nothing but your Master Task List showing.
-
- The screenshot shows the Microsoft Outlook calendar interface. Step 1 highlights the 'View' tab in the ribbon. Step 2 highlights the 'To-Do Bar' button in the ribbon's 'Layout' section. A dropdown menu from step 2 is shown, with 'Tasks' selected. Step 3 points to the 'Tasks' option in the dropdown menu. The calendar view shows the week of May 6-12, 2019, with days Monday through Saturday labeled 6 through 11. The 'To-Do Bar' is visible on the right side of the screen, displaying the Master Task List.

TIP

To open Outlook to your calendar by default, select the **File** tab and then click **Options**. Choose the **Other** tab and then select **Advanced Options**. In the **Startup in this folder:** section, click **Browse**. Select **Calendar**. Then click **OK** until you return to Outlook. The next time you start Outlook, you'll automatically be taken to your Calendar view.

Arrange Tasks by Categories

1 Right-click the **Arrange By:** bar at the top of the task list and select **Arrange By**.

2 In the menu that appears, select **Categories**.

3 Your tasks will be rearranged in the Master Task List by category so you can easily see which tasks apply to which role.

The screenshot shows the Microsoft Outlook ribbon interface. A context menu is open over a list of tasks, with the 'Arrange By' option highlighted. A red box highlights the 'Categories' option in the menu. To the right, a second window shows a task list where items are grouped by category, such as 'Business Catalyst', 'Nurturer', 'Product Launch', etc. A red box highlights this grouped view.

Category	Task Description
Business Catalyst	Review Marketing Proposal
Business Catalyst	Call Brenda James About Soc...
Nurturer	PREPARE PROPOSAL BASED ...
Nurturer	Research Production Issues o...
Nurturer	Research Popular Social Med...
Nurturer	Request Information on Socia...
Product Launch	Request Information on Best...
Product Launch	School Shopping Trip
Product Launch	Send Thank You Notes to Par...
Product Launch	Brainstorm Product Presentat...
Product Launch	Review Marketing Proposal
Product Launch	PREPARE PROPOSAL FOR BR...
Product Launch	Setup Webinar for Proposal ...
Product Launch	REQUEST BUDGET CHANGE F...
Product Launch	Submit Invoice for Photo Buy...
Product Launch	Schedule Brainstorming Sess...
Product Launch	Download Performance Metric
Product Launch	Review Marketing Proposal
Steve's Best Friend	BUY MP3 ALBUM
Steve's Best Friend	Make Reservations for Date ...
Steve's Best Friend	Book Steve's Travel Reservati...
Team Builder	Create Team Calendar
Team Builder	Find a Place for Girls Weekend
Training	Book Travel RE Social Media ...
Website Redesign	Review Graphic Designer Res...
Website Redesign	Call Adam About Marketing ...
Website Redesign	Research Team Services
Website Redesign	RESEARCH SOCIAL MEDIA PL...

Step 2: Schedule the Big Rocks

Create an Appointment From an Existing Task

To create an appointment from an existing task, click and drag the task from your Master Task List to the desired day on the calendar.

The screenshot shows a weekly calendar for Salt Lake City, Utah, with the current date being Friday, April 10th. The calendar grid contains several events: "Research Office" (blue) on Wednesday and Thursday; "Lunch Various" (light blue) on Wednesday, Thursday, and Saturday; "Social Media Online Class" (dark green) on Thursday; "Discuss Marketing" (orange) on Friday; "Finish Feedback Report" (red) on Friday; and "Running Various" (purple), "Symphony Matinee Franklin Concert Hall" (dark blue), and "Soccer Game Covey Field" (yellow) on Saturday. A red box highlights the "Discuss Marketing" task. A red arrow points from this highlighted task to the master task list on the right. The master task list is titled "Arrange by: Categories | A to Z" and includes the following items:

- Analytics
 - Update Marketing Proposal
 - Review Marketing Quarter Re...
- Business Catalyst
 - Review Marketing Proposal
 - Call Brenda James About Soc...
 - PREPARE PROPOSAL BASED ...** (highlighted)
- Marathoner
 - Research Production Issues o...
 - Research Popular Social Med...
 - Request Information on Soci...
- Nurturer
 - School Shopping Trip
 - Send Thank You Notes to Par...
- Product Launch
 - Brainstorm Product Presentat...
 - Review Marketing Proposal
 - PREPARE PROPOSAL FOR BR...**
 - Setup Webinar for Proposal ...
 - REQUEST BUDGET CHANGE F...
 - Submit Invoice for Photo Buy...
 - Schedule Brainstorming Sess...
 - Download Performance Metric
 - Review Marketing Proposal
- Steve's Best Friend

- 2 Click and drag the upper or lower edge of the appointment to increase the time allotted to complete the task.

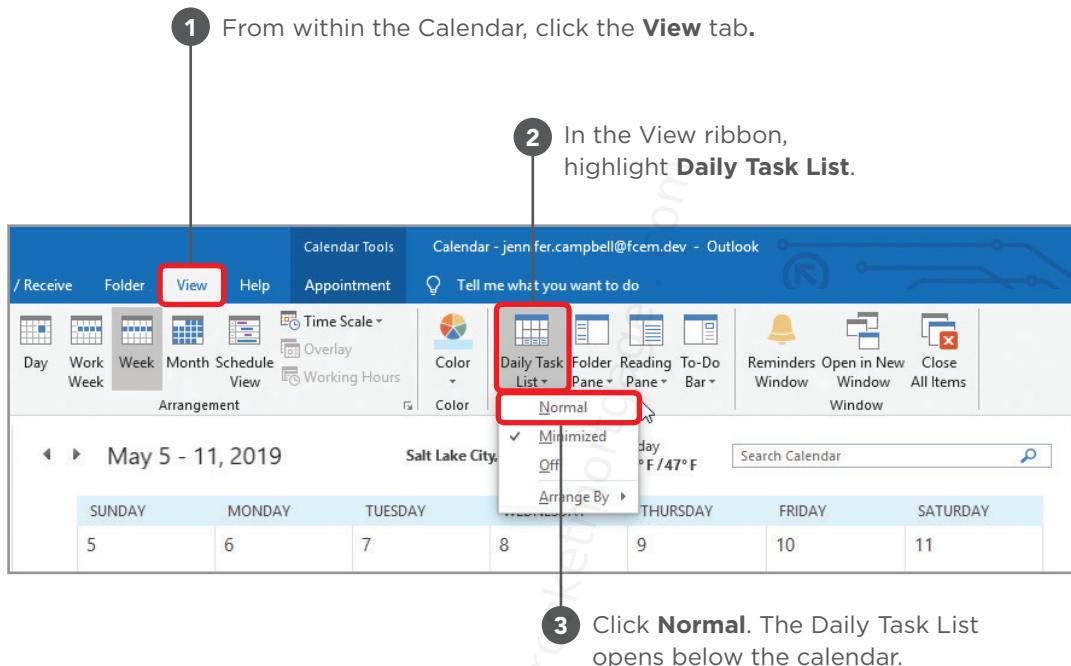
The screenshot shows a Microsoft Outlook calendar for Salt Lake City, Utah. The calendar view includes a weather forecast for Today (64°F / 46°F) and a search bar. The main area displays a weekly grid from Wednesday to Sunday. A purple appointment titled "Running Various" is selected and is being resized by dragging its bottom edge. To the right of the calendar is a task list pane titled "Arrange by: Categories | A to Z". The task list contains various items categorized under "Analytics", "Business Catalyst", "Marathoner", "Nurturer", and "Product Launch". One item, "PREPARE PROPOSAL BASED ...", is highlighted with a red border.

Double-click the appointment to open it for editing. Remember to click **Save & Close** when you've finished editing.

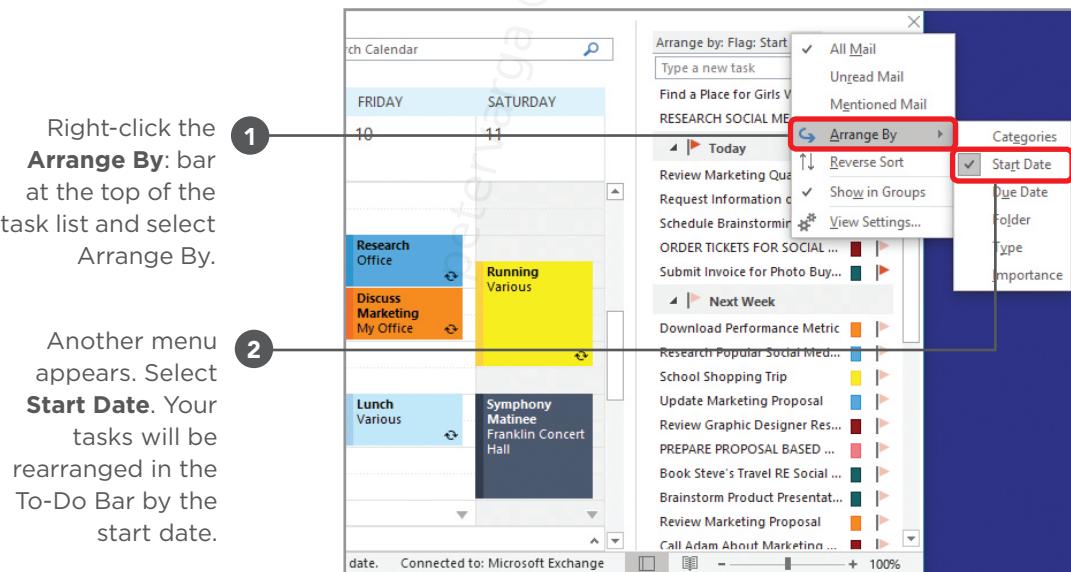
- 3

The screenshot shows the "PREPARE PROPOSAL BASE ON RESEARCH" appointment dialog box. The "Appointment" tab is selected. The "Actions" group contains a "Save & Close" button, which is highlighted with a red box. The "Show" group includes "Appointment", "Scheduling Assistant", "Invite Attendees", and "Reminders". The "Business Catalyst" section contains fields for "Subject" (set to "PREPARE PROPOSAL BASE ON RESEARCH"), "Location" (empty), "Start time" (set to "Thu 5/9/19 2:30 PM"), and "End time" (set to "Thu 5/9/19 3:00 PM"). There is also a checkbox for "All day event" which is unchecked.

Open the Daily Task List

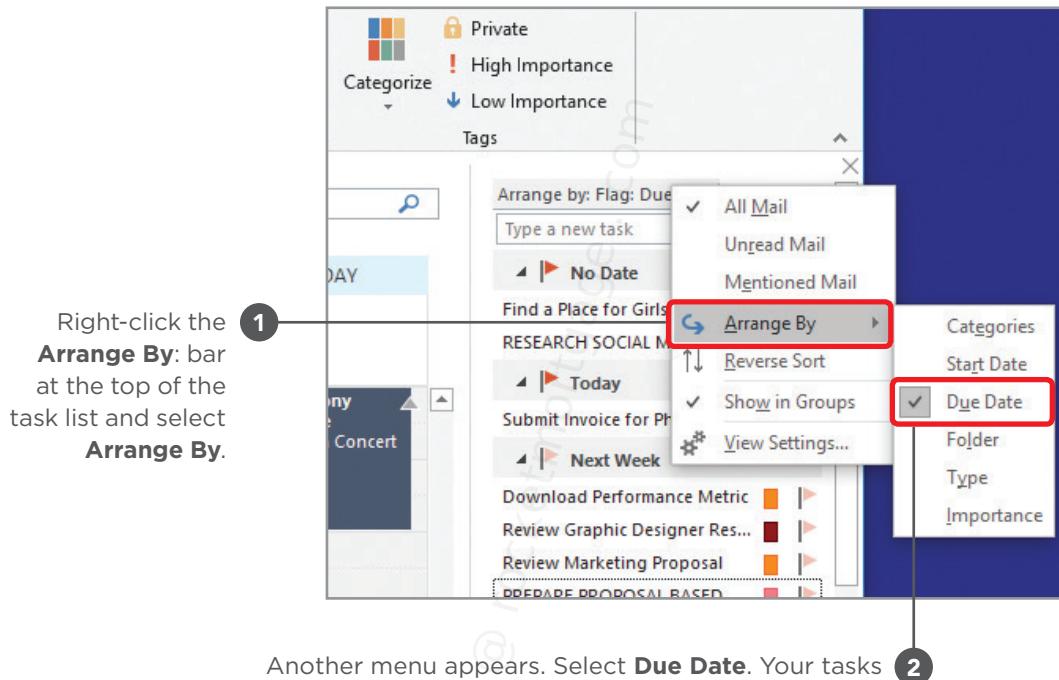


Arrange Tasks by Start Date



Arrange Tasks by Due Date

Sometimes you may want to view your tasks by when they are due, rather than by when they are set to start.



Right-click the **Arrange By**: bar at the top of the task list and select **Arrange By**.

Another menu appears. Select **Due Date**. Your tasks will be rearranged in the To-Do Bar by the due date.

Step 3: Organize the Rest

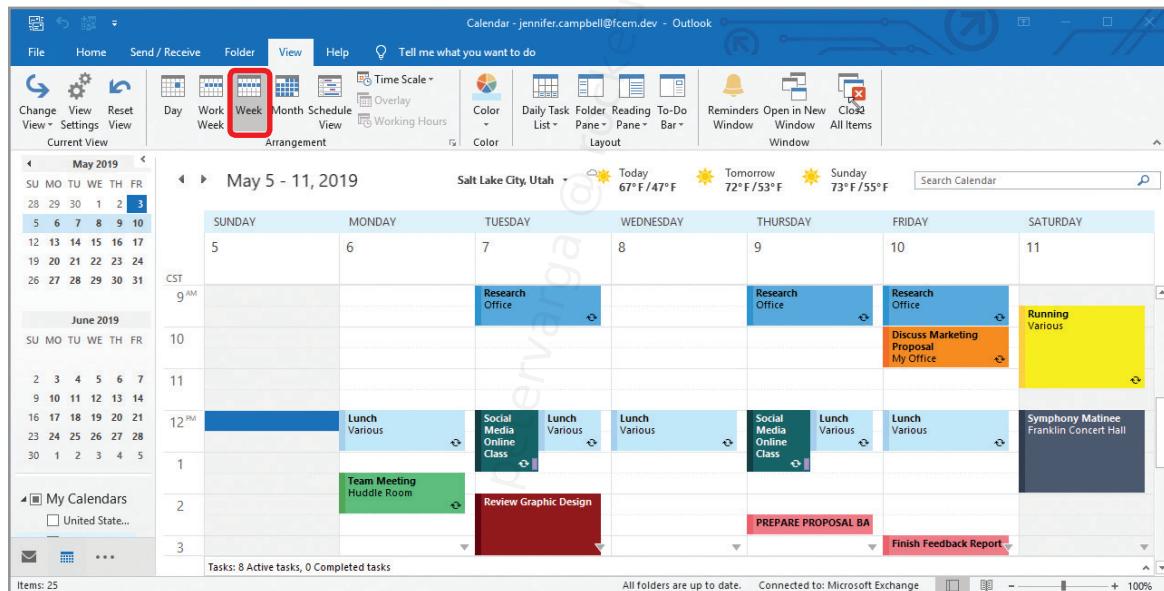
You can use the same techniques to organize the other appointments and tasks for the week, making sure to keep the most important Big Rocks first.

Daily Q2 Planning

Daily Q2 Planning is equally as important as Weekly Q2 Planning for keeping your day under control and focused on your Q2 priorities. Take 5–10 minutes each afternoon to close out your day and plan for the next day. Make adjustments to your schedule where necessary, always keeping Q2 as your highest priority.

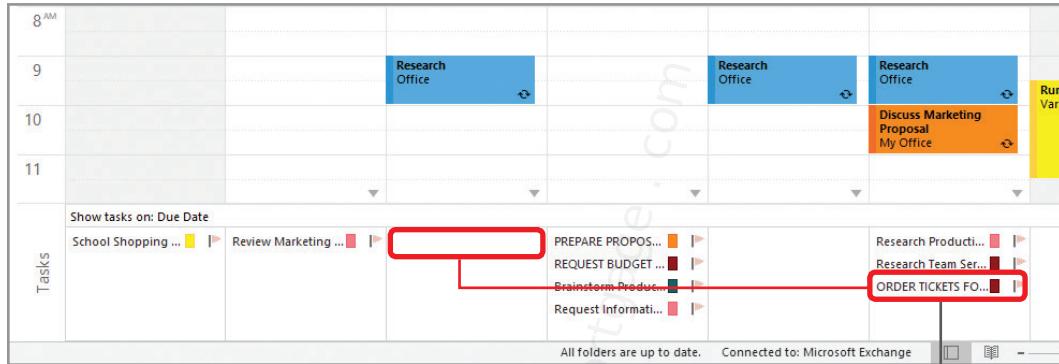


For Daily Q2 Planning purposes, it's best to use your calendar in the Week view. Click the **Week** button to switch to the full seven-day week.



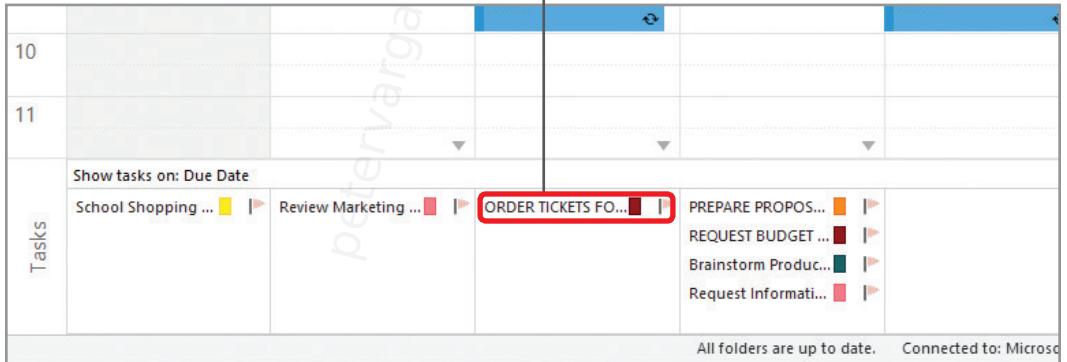
Step 1: Close Out the Day

Reschedule Tasks for Another Day or Time



To assign a task a new due date, click 1 and drag the task on the Daily Task List.

- 2 Release the task on a new date to change the due date for the task.



Highlight Information (“Capture the Gold”)

- 1 In an existing appointment, task, or contact, locate the information you want to highlight. Click and drag the cursor to select the text to be highlighted.

The screenshot shows the Microsoft Outlook ribbon with the 'Format Text' tab selected. The 'Font' section of the ribbon is highlighted with a red box around the 'Aa Rich Text' button. A yellow box highlights the 'Highlight' button (the 'A' with a yellow background) in the font toolbar. The main pane displays an appointment for 'Question - Appointment' with details like subject, location, start time, end time, and email body. The email body contains a bulleted list of benefits, which is highlighted with a red box.

From: Anila Finn
Sent: May 3, 2019 8:40 PM
To: Jennifer Campbell
Subject: Question

Hi Jennifer,

I have a quick question. On this proposal, do you want to have the team working on everything from our offices? We can work it either way, but it depends on your needs.

Some of the benefits of us being onsite:

- Faster response times
- Crisis management
- We can act as your face to the world for questions that come up from your customers

Let me know if you want me to get this set up!

- 2 Click the **Highlight** button on the Format Text ribbon to highlight the selected text.

Switch to the Appointment ribbon and click **Save & Close** when you’re finished.

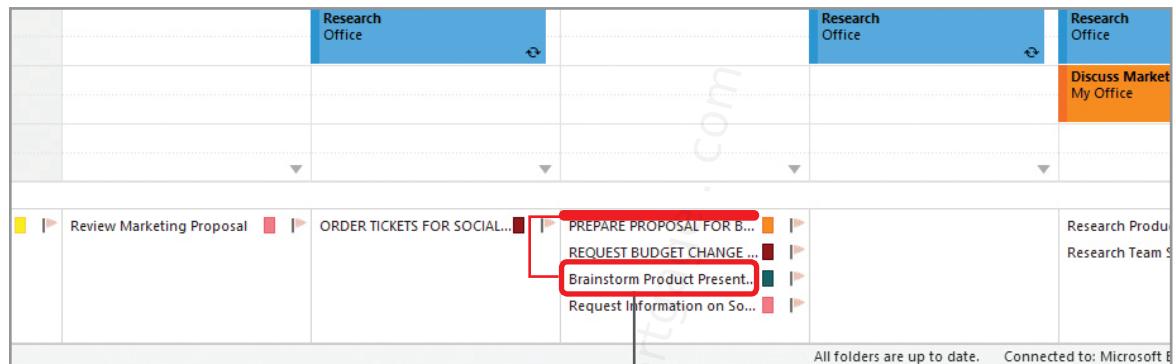
The screenshot shows the Microsoft Outlook ribbon with the 'Appointment' tab selected. The 'Actions' section of the ribbon is highlighted with a red box around the 'Save & Close' button. The main pane displays the same appointment details as the previous screenshot, with the 'Save & Close' button highlighted.

Notes

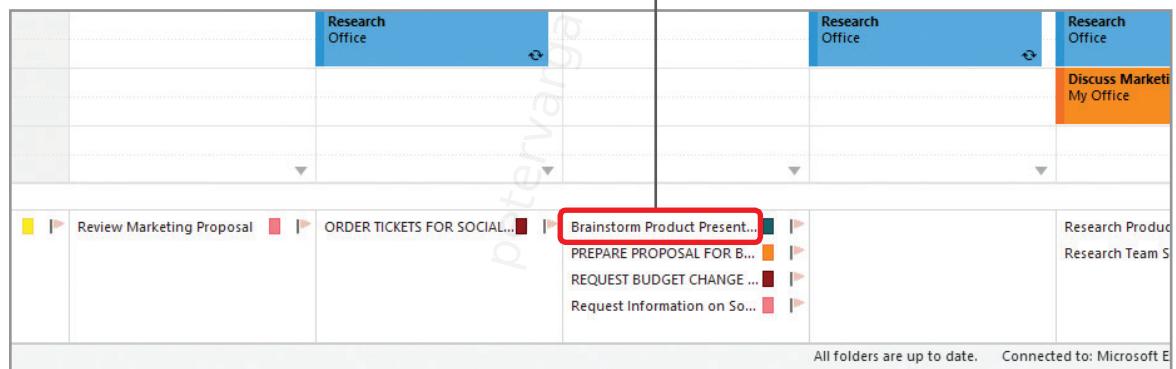
petervargate.com | petervargate@rocketmortgage.com

Step 2: Identify the Few “Must-Dos”

Prioritize Daily Tasks

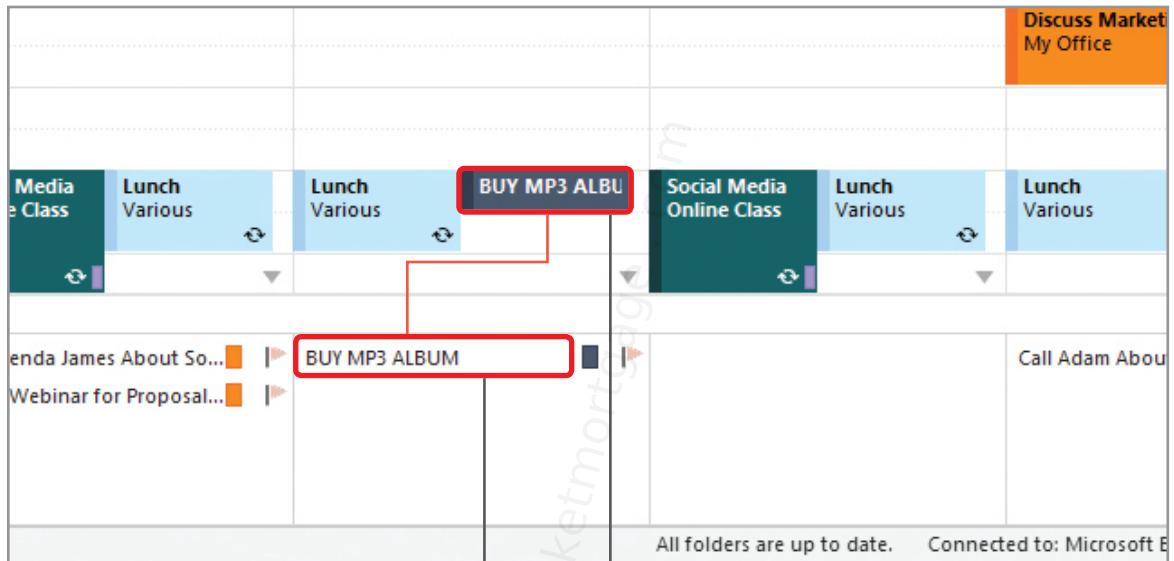


- 1 Click and drag tasks within a day on the Daily Task List to reorganize.



- 2 When you release the task, it will stay in the newly assigned order.

Schedule a Task as an Appointment



Click and drag the task from the Daily Task List to the date and time during the week you want to schedule it.

1

2 When you release the task, a new appointment is added to your calendar.

Step 3: Organize the Rest

You can use the same techniques to organize the other appointments and tasks for the day, making sure to allow adequate time for the “must-dos.”

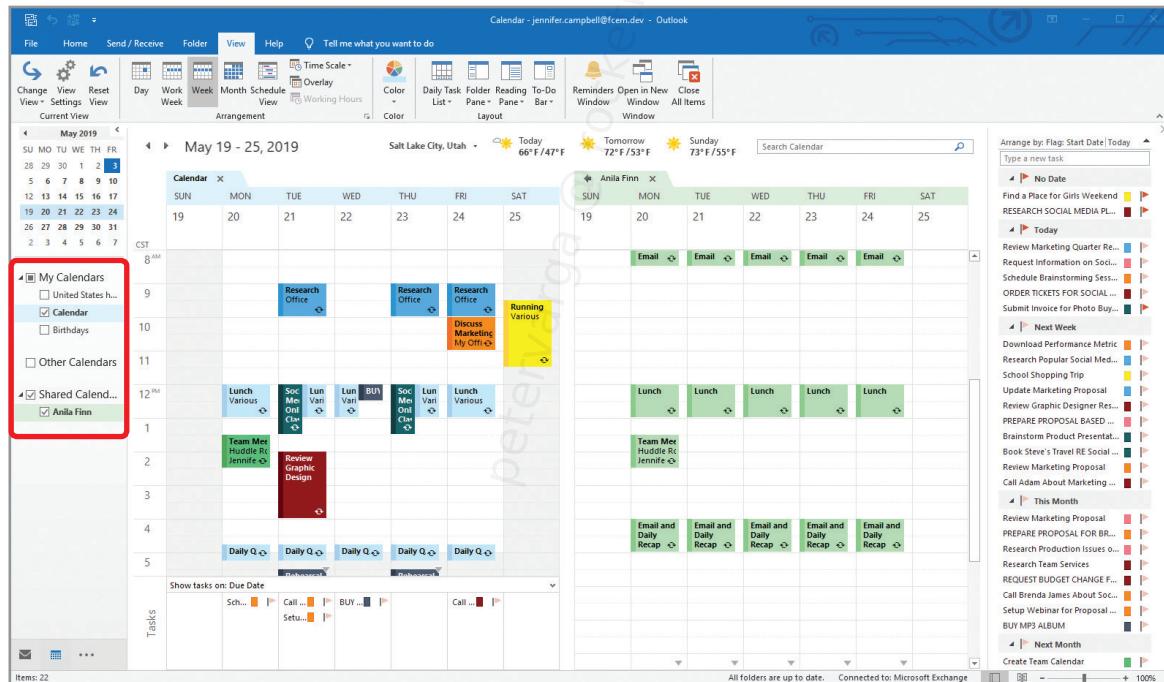
Q2 Extras

Dual Calendars

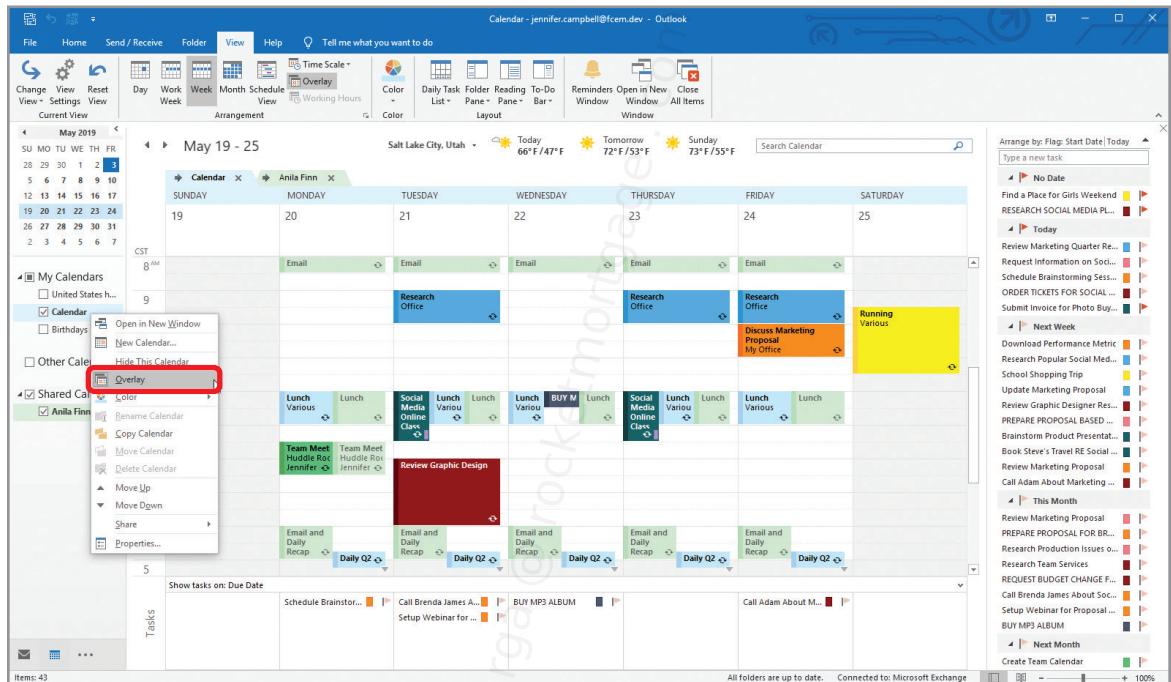
Dual calendars allow you to view two calendars side by side. Those two calendars might be your own personal and work calendars, or maybe they are your own calendar and that of a team member. No matter which two calendars you're looking at, this view of the calendar allows you to compare two calendars so you can create schedules without conflict.

View Dual Calendars

To view dual calendars, you must be in the Calendar view of Outlook. Then, in the left navigation pane, you will see the **My Calendars** heading. Place a check mark next to the name of any of the calendars in the list.



Right-click the **My Calendars** list and select **Overlay** to see the calendars superimposed over one another rather than side by side. In this view, one calendar is shown in the foreground while the other is shown in the background.



TIP

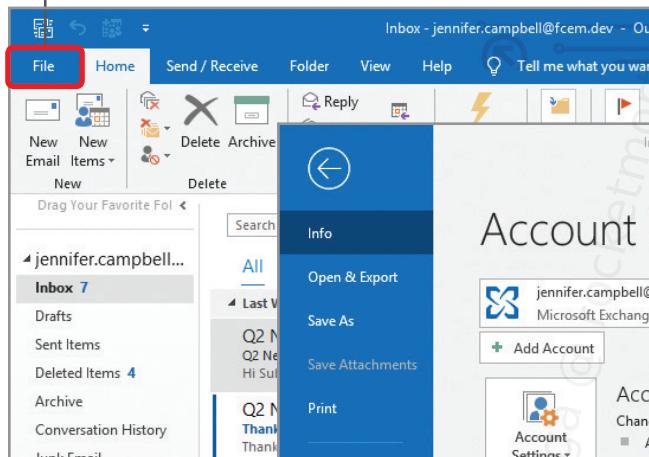
You can view more than two calendars at a time. Just select the calendars you want to view from the **My Calendars** list, and all will be shown in the Calendar window.

Turn Off Email Notifications

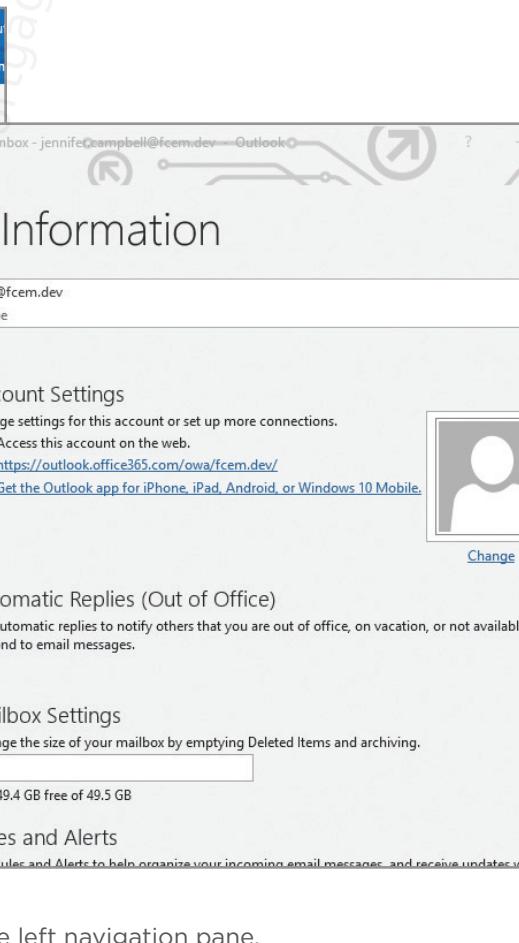
Studies show that much of the productive time you lose in a day is due to interruptions. Interruptions come in different forms, many of which you cannot control. However, you can control one interruption: email notifications.

Turning off your email notifications and checking your email only at prescribed times during the day could save you as much as two hours of time lost due to being distracted by incoming emails.

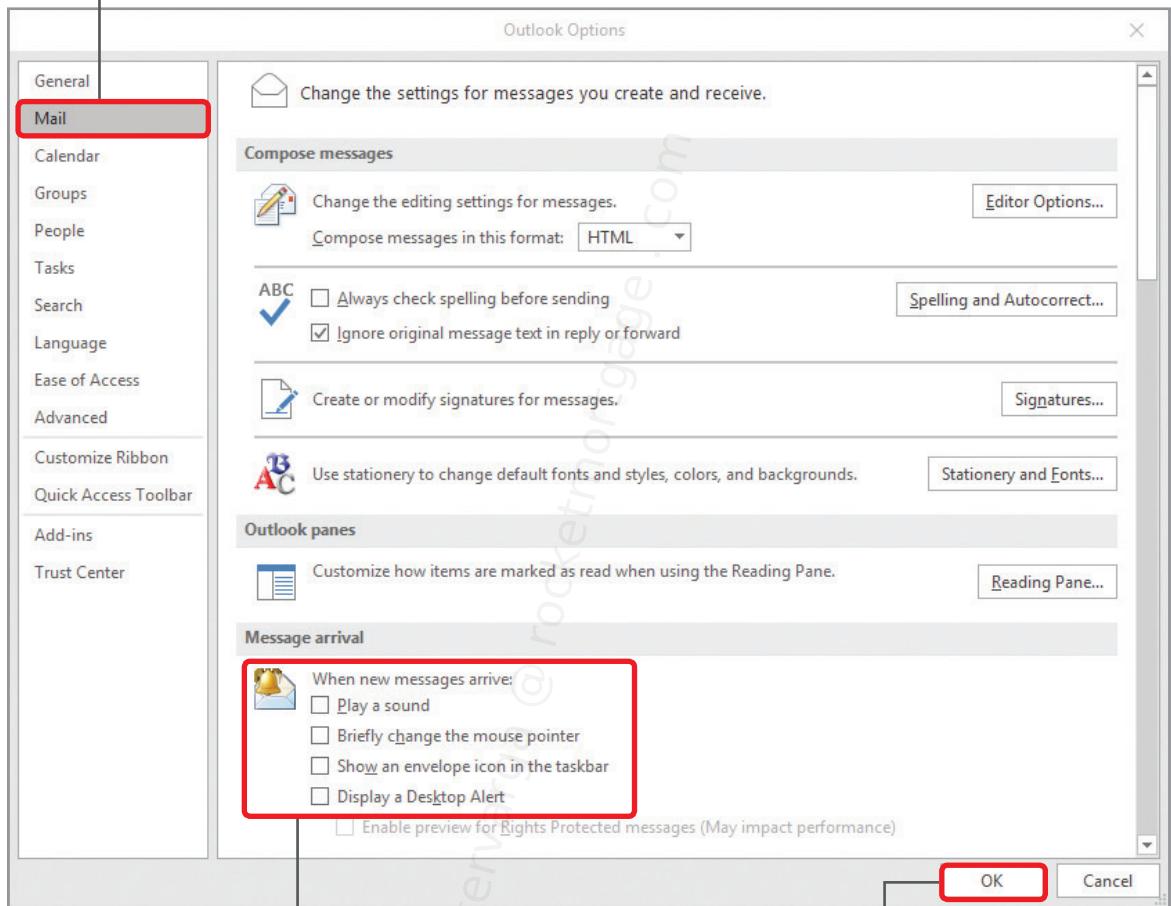
1 From your Inbox, select **File**.



2 Click **Options** from the left navigation pane.



- 3 In the Outlook Options dialog box, select **Mail**.

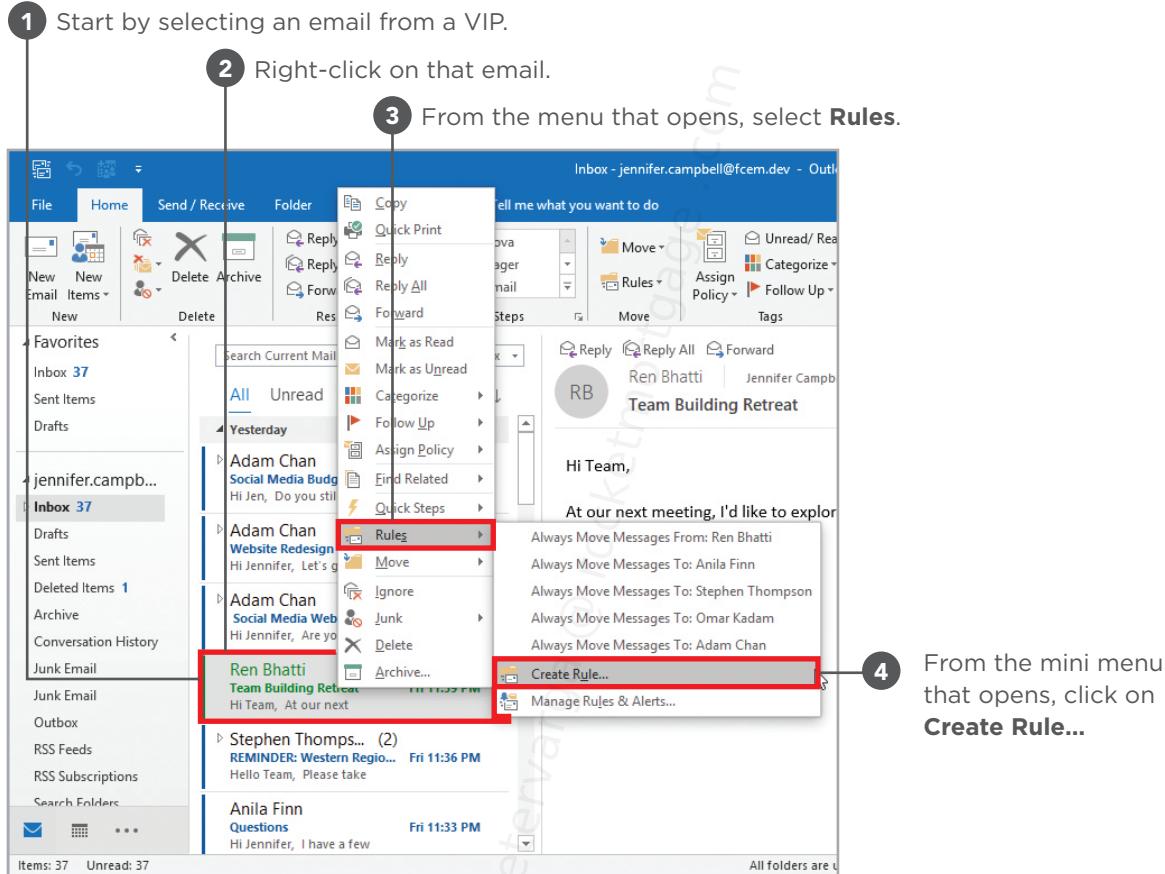


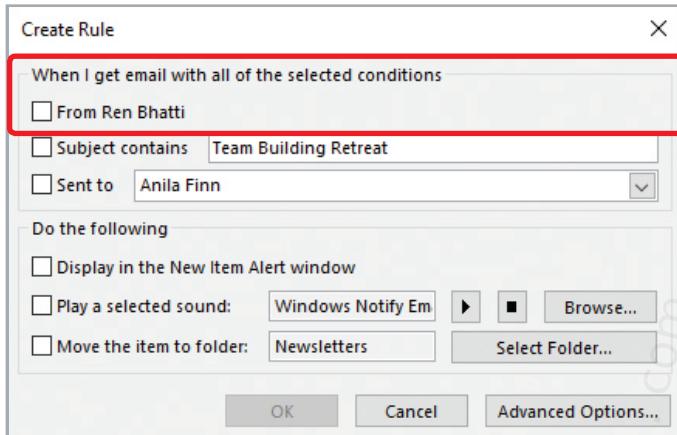
- 4 Under the **Message arrival** section of the dialog box, deselect all notification options.

- 5 Click **OK** to save your preferences and return to your Inbox. Now no notifications will play or appear when email arrives in your Inbox.

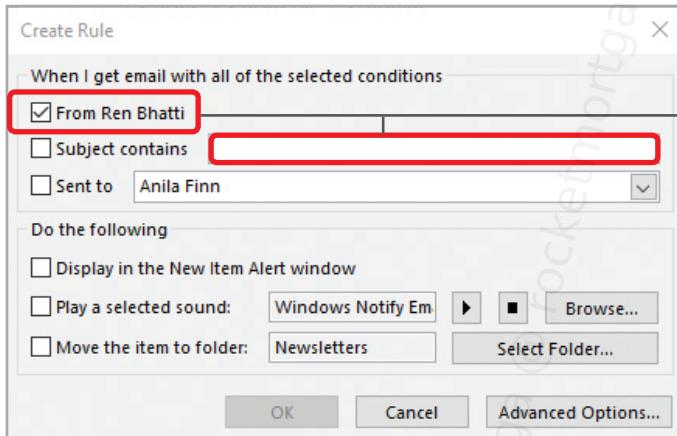
Turn On VIP Notifications

Now that you've set yourself up for concentrated effort by turning off notifications globally, you need to learn to turn a few back on selectively for your very important people (VIPs).

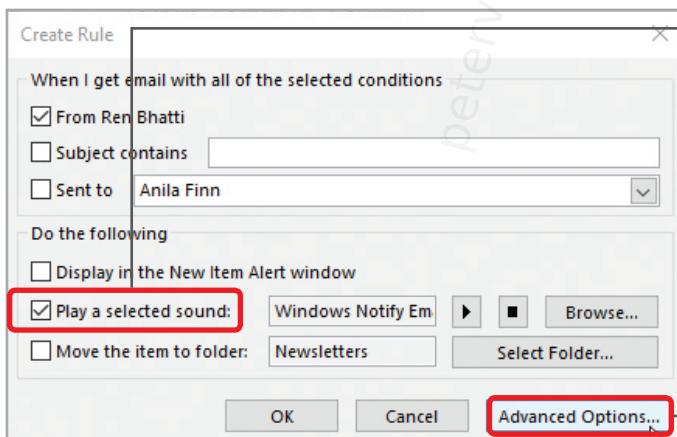




5 Notice the top section in the Create Rule dialog box: "When I get email with all the selected conditions." Outlook will remember the sender of the email where you started.



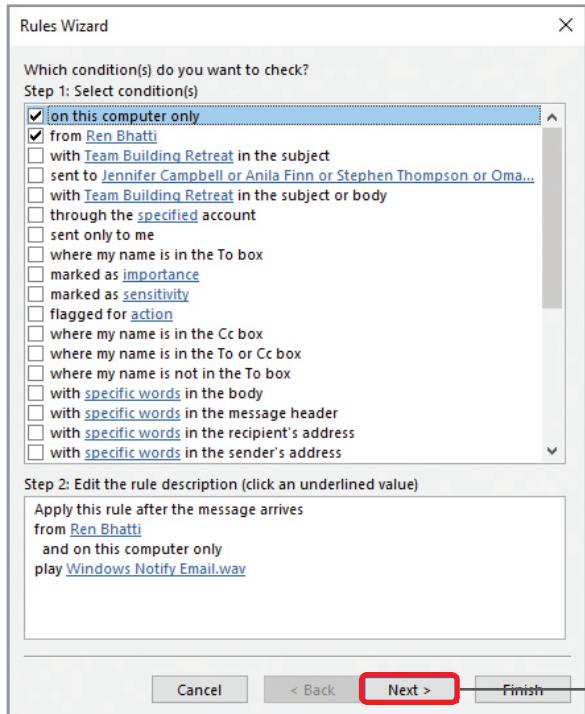
6 Leave the **From [VIP]** box checked and delete the content in the **Subject contains** section.



7 In the "Do the following" section of the **Create Rule** dialog box, click the checkbox for **Play a selected sound**.

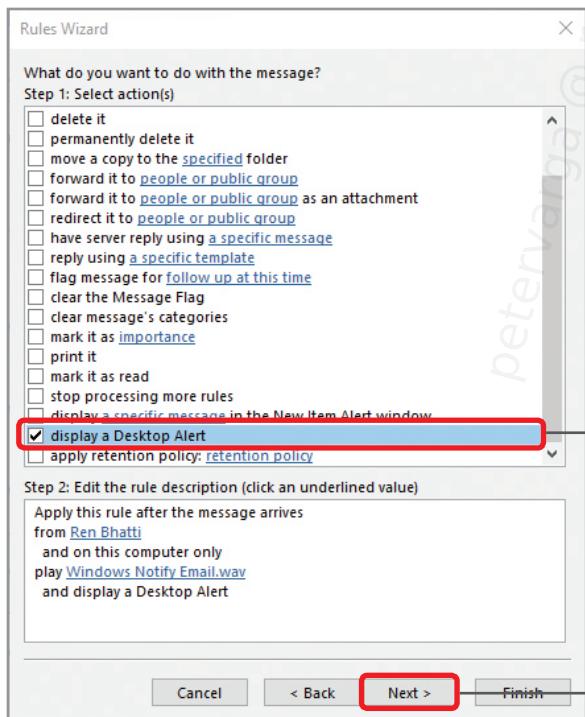
8 To get the notification you're used to seeing (the bubble with the sender and subject that pops up on your screen and then fades), click the **Advanced Options...** button.

Technical Guide—Q2 Extras



9

You won't make any changes to this Rules Wizard dialog box, because you took care of this in the previous dialog box. Make sure the condition **from [VIP]** is selected.



10

Click **Next**.

11

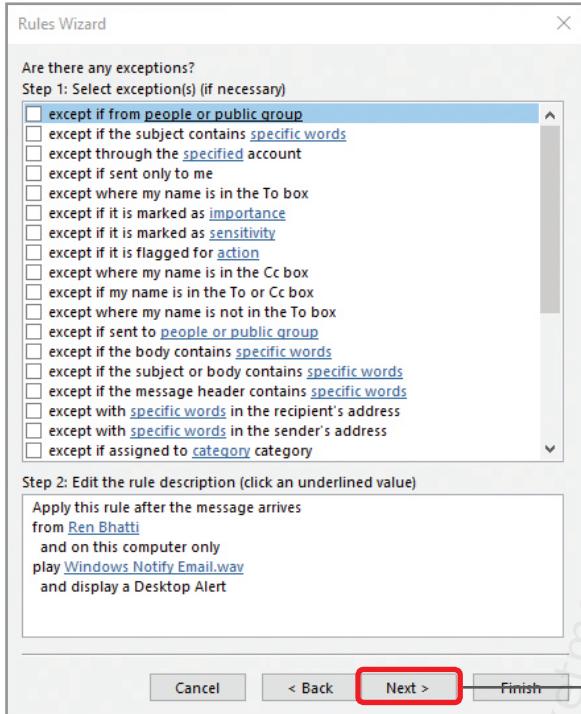
In this dialog box, use the scroll bar on the right of the Step 1 window to go to the bottom of the list.

12

Check the option to **display a Desktop Alert**.

13

Click **Next**.



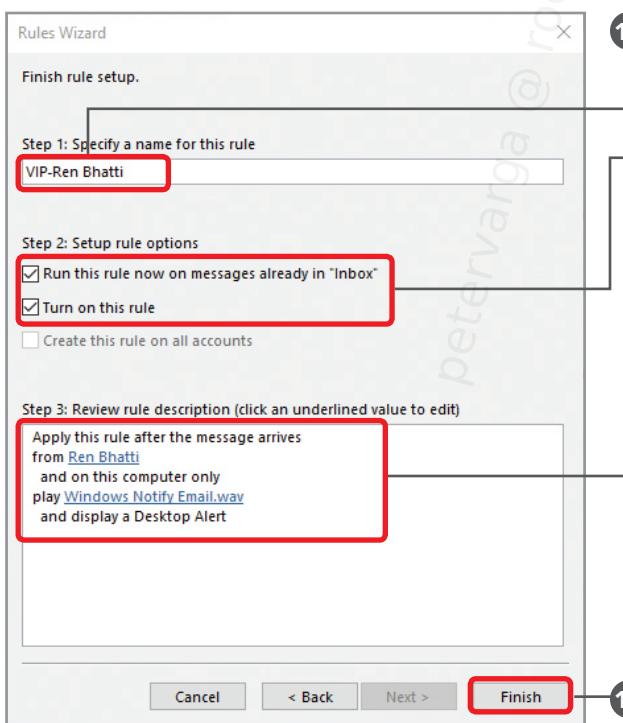
- 14** In this next dialog box, there are no exceptions, so click **Next**.

- 15** In the **Finish rule setup** window, do three things:

Step 1: Give the rule a name.

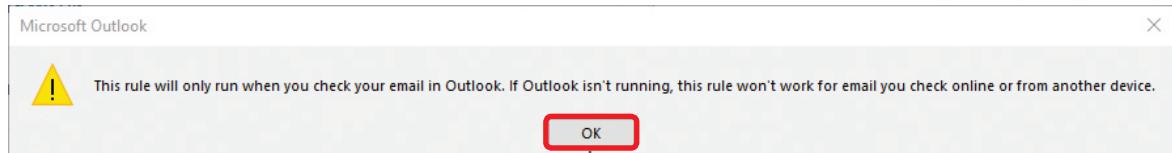
Step 2: Check both **Run this rule now on messages already in Inbox** AND **Turn on this rule**.

Step 3: Review the rule.



- 16** Click **Finish**.

Technical Guide—Q2 Extras



17

You will receive a warning that this rule will only run if Outlook is running. Click **OK**.

Notes

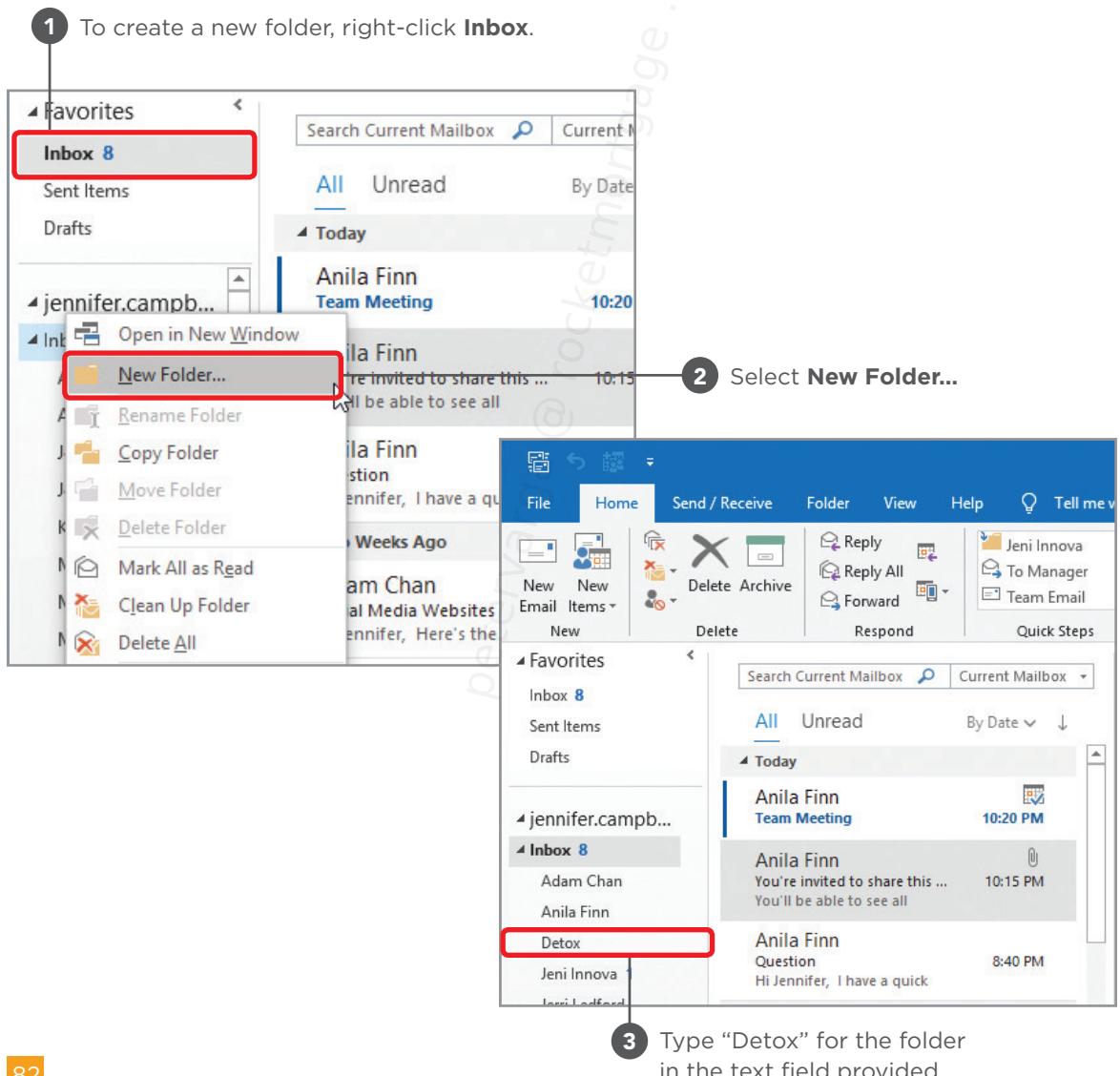
petervargate.com | petervargate@rocketmortgage.com

Email Detox

If you are feeling overwhelmed by your Inbox and need to take some drastic action, here is a three-step plan to come clean and get back in charge.

Step 1:

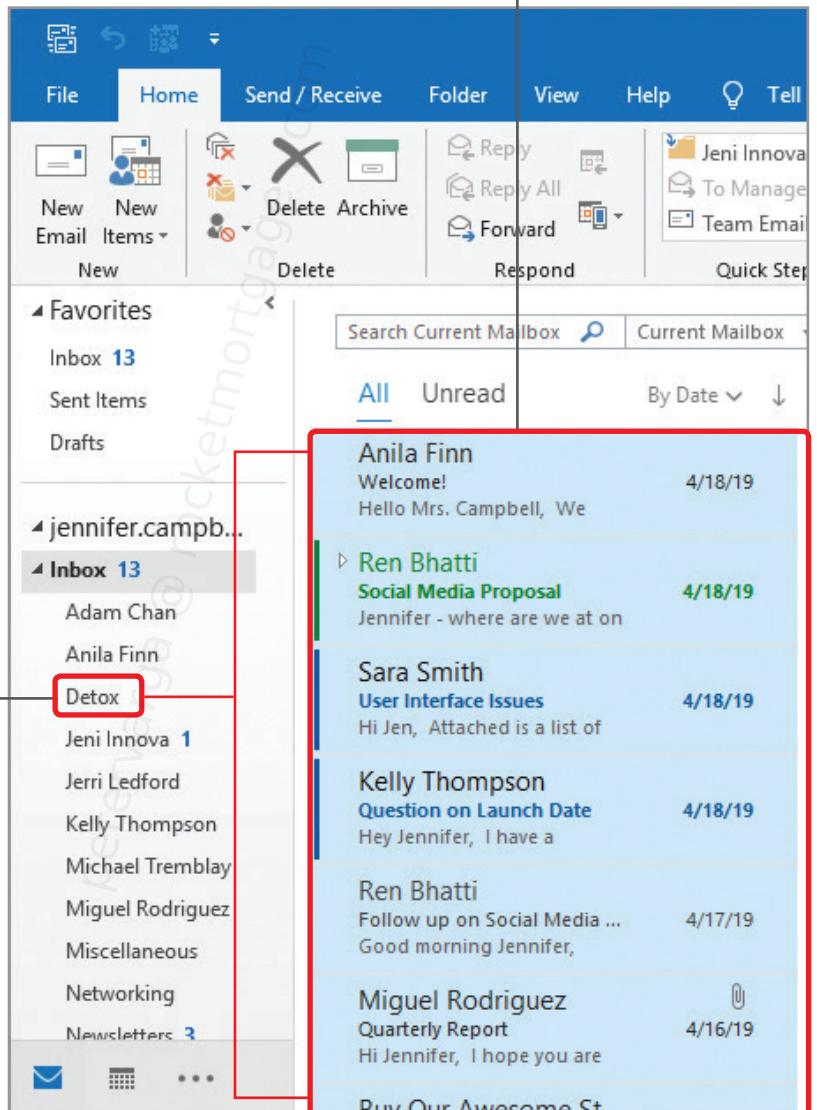
Create a subfolder in your Inbox called “Detox.”



Step 2:

Take everything from your Inbox except the most recent 200 messages and move them to your Detox folder. Now you only have 200 messages in your Inbox.

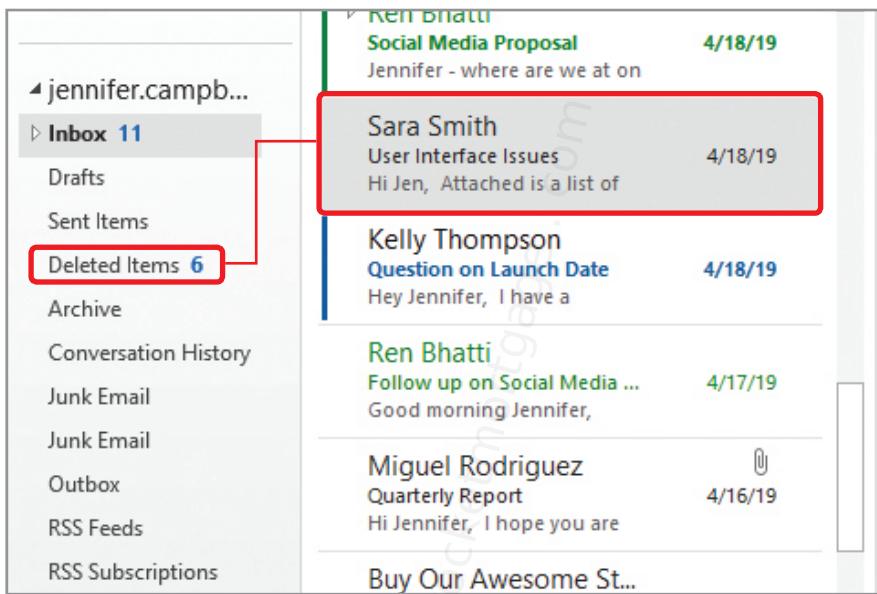
Select the first message and use **Shift+Click** to select the last message. (This selects all of the messages in between, as well.)



Click and drag the whole block of messages to the **Detox** folder.

Step 3:

Review the remaining 200 items and either...



- Delete them. (Just click and drag a message to the **Deleted Items** folder as shown above.)
- If appropriate, create a specific rule to handle them in the future. (See “Win Without Fighting” on pages 16–26 in this Technical Guide.)
- If they require action, turn them into an appointment, a task, a contact, or a note so you can work on them later—and then delete them! (See “Turn It Into What It Is” on pages 28–37 in this Technical Guide.)

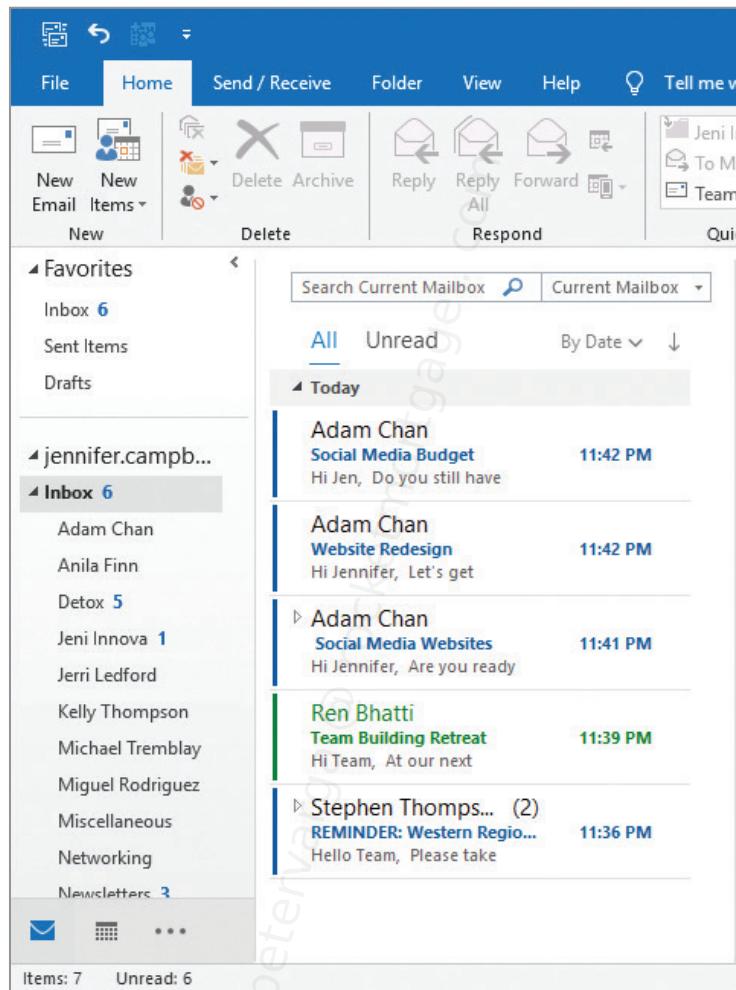
Or...

- Respond to them immediately if you can do it in a minute or less.

Handling these 200 messages shouldn't take too long, because you are simply organizing where they go. You are not taking time now to act on them, unless it can be done in a minute or less.

By following these three steps, you have cleaned out your Inbox and set up some basic rules to keep your Inbox clean moving forward. To stay on top of this, you should schedule a regular time to handle your email and consistently set up new rules for messages you want to never see in your Inbox to begin with.

Once you've "detoxed" your Inbox, this is the end result. Look how clean!



Technical Guide – Email Detox

Notes

petervargate.com | petervargate@rocketmortgage.com

petervarga @ rocketmortgage . com