

Tips for Mindful Organizing with Microsoft Outlook (M.O./M.O.)

Microsoft Outlook can be a powerful tool for consciously aligning your priorities and actions. Let it do the grunt work of keeping your calendar, contacts, emails and tasks for you, so you can focus your energy on what matters to you. By implementing these habits/tips, Outlook becomes the keeper of your tasks, freeing your mind for higher uses.

E-mail

- Create subfolders in your In Box representing discreet work/life areas
 - Right-click In Box; choose New Folder; in Create New Folder, name the folder and show where to place it (under In Box).
- Some recommended subfolders:
 - Waiting for-for items that need a response from someone else
 - One for each client
 - Someday-for items you want to consider acting on in the future
- Use Rules—a powerful and easy way to let Outlook do the work of sorting your incoming email into your subfolders.
 - From your In Box, right-click an email item and choose Create Rule
 - Follow the prompts (including Advanced Options) to have Outlook react strategically to key words or senders.
 - Look for opportunities to create new Rules; they free up your consciousness to focus on more important things.
- Use color-coded Follow Up Flags
 - These can be set with Rules
 - Recommended uses: personal email; items to review (listservs, for example); club activities; special projects.
 - Keep In Box sorted by Flags so unflagged items are at top.
 - Sorting and separating specific items lets you review them, intentionally, when you want to, rather than every time they gain your attention
- Stop the distracting “bing bong” of arriving emails:
 - Go to Tools/Options/Email Options/Advanced Email Options; uncheck all boxes under “When New Items Arrive in my In Box.”
- Methodically review email
 - Set specific times that work for you
 - Create a routine that works for you. Process sub In Boxes in a particular order (alphabetical, most unread messages, “worst first,” whatever works for you).
 - Make it your goal to regularly empty your email In Box. Don’t use it for storage.
 - Once you open an email, act on it: delete it; forward it; do what it requires if it can be done in less than two minutes; or turn it into a Task; do not leave opened email in your In Box.
- Convert an email to a Task, Calendar event, Contact, Note or other: Drag the message to the appropriate button in the Navigation Pane, and select options you want in the window that opens

Calendar

- Two ways to add items:
 - On calendar page, right-click and choose the type of appointment you want to add
 - Place your cursor in the appropriate spot and start typing
- Use the Calendar ONLY for items that are schedule-oriented; this is NOT the place for To Do’s or Tasks.

- Streamline communication about meetings by “Inviting Attendees;” this emails a Calendar item with all details about a meeting to attendees, allows them to RSVP, and puts the item right on their calendar.
- Use “Calendar Coloring” in a way that is meaningful to you.
- Use “Recurring Event” and “Reminders” strategically.

Tasks

- Use “Categories” to assign Tasks appropriately. You’ll have to reset the Master Category list to consist of your projects and priorities.
- Fill in Subject, Due Date, Start Date, Priority, Reminder and Category.
- Use a verb in the subject line.
- Review Tasks regularly (at least weekly)
 - Sort by different views as needed
 - Indicate their current priority (↓ low; ! high)
 - Use Due Dates (they turn red when they’re due)

Contacts

- Create meaningful subfolders (for example, by client).
- A great way to keep a phone call record: right-click contact; choose Journal entry; record details. To see/print, go to Journal (ctrl+8), sort as needed.
- Create Call Tasks that contain all the necessary information by dragging a Contact to Tasks, then select appropriate options in the window that opens.

Notes

- Keep reference information in this handy location: log-ins and passwords; account numbers; frequent flyer account information; membership i.d.’s
- Also good for capturing ideas and lists: recommended books, movies, vacation destinations, etc.; favorites; gift ideas
- Use Categories to make sorting more meaningful

Integration

This is the point. Bring your organizing together so you can constantly choose actions based on priority, time available and present energy level. Commit yourself to your system, and allow it (and you) to continually evolve. Use your MoMo.

- Use Outlook Today
 - Customize
 - Have Outlook Today show at startup (get back to it any time by clicking icon at top of mail folders)
 - Show no messages (or as few as it will allow)
 - Show All Tasks, sorted by Importance then Due Date (both in descending order)
 - This is a great reference showing your time commitments (schedule) and priority Tasks at a glance.
- Print Calendar (Optional; for times you prefer to work with paper media)
 - Customize size/format to fit in your planner
 - Use Page Setup to get your preferred style
 - Chose to show Tasks (recommended) and Notes, if you like