Outlook for Packrats

Keeping Your Stuff without Losing Your Mind

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My Credentials

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Focus on Tasks rather than Email

*With some intention and self-discipline, at first. It gets easier!*

Use a triage system to prioritize and process

*Handle each email as few times as possible.*

Keep actionable tasks in view; all others within easy reach

*You never know when it might come in handy*

Get to “In-box ZERO”

*(Or something very close to it)*
Three Steps of Outlook for Packrats

Launch from TASKS
Systematic PROCESSING
Organize by CATEGORIES
Using Tasks in Outlook

Integrates easily with Email and Calendar
  • Drag email to “Calendar” or “Task” links at bottom of screen to copy/convert it
  • Use Follow-up Flags on email – the item appears in your “To Do” list OR
  • I prefer to create a task from an email, which allows for managing with all task features: status, priority, etc.

Away from desk (no tasks on iphone): email to self, later convert to Task

Assign to others (for me, a future possibility)

**Set Tasks as the default folder – Outlook opens to that instead of Inbox**
Create Task "Checklists" - Daily repeating chores in a single Task

- Daily repeating chores in a single Task
Use Rules to manage emails BEFORE they get to your in-box
See Cheat Sheet for more info

Process email 2-3 x day – on your schedule - turn off alerts!

To Process: Follow the 4 Ds to conduct triage:

• **Delete** –
• **Delegate** – is this really meant for you? Delegate, then delete or assign Category and Archive it
• **Defer** – Assign a Category and Make it a Task (drag and drop)
• **Do** – (if 2 minutes) – then Delete or Categorize and Archive
Use Categories as “tags”

• Include Categories field in your Inbox view (View tab → Add Columns button)

• Keep Inbox sorted by Categories (click on header to sort); uncategorized will show at top. These are your actionable emails – the ones that need processing.

• As you process, assign Categories that make sense to you – by person, by project, by priority – or use more than one

• Frequently used Categories? Use Quick Steps to speed up processing

• Routinely clear inactive Categorized emails out of Inbox to Archives
Resources

**Getting Things Done: The Art of Stress-Free Productivity**, David Allen
See also his TEDx talk: [https://youtu.be/CHxhjDPKfbY](https://youtu.be/CHxhjDPKfbY) or search GTD on Google or YouTube

**Maximize Your Productivity with Outlook 2010-13 Part 1 Email Management**, Surface7Associates
[https://www.youtube.com/watch?v=EE6E5WX5AJM](https://www.youtube.com/watch?v=EE6E5WX5AJM)

**Maximize Your Productivity with Outlook 2010 Part 2 - Managing Tasks**, Surface7Associates
[https://youtu.be/GJJu4dAbiso](https://youtu.be/GJJu4dAbiso)

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