

## – Roundtable –

### **Can technology really organize (or lessen) my workload?**

Barely a day goes by without hearing a co-worker, friend or family member complain about being overworked. For most of us, having a reasonable workload is an important aspect of a good job. What tools do we have to allow us enough time to do our job well, balance work and personal life and not constantly feeling stressed or frenzied?

#### **Productivity Tools such as Google Desktop**

- ⇒ **Quick access to information on your computer.** Searches your email, files, music, photos and web pages that you've viewed. You no longer have to manually organize your files, emails and bookmarks.
- ⇒ **Scratch Pad.** Type and save notes for yourself. The Scratch Pad automatically saves itself whenever you type a character in it, so you don't even have to worry about remembering to hit 'save.'
- ⇒ **Quick View.** Keep a list of the web pages and files you access most frequently right in your Sidebar. You can double-click an item to open it, star items to move them to the top of the list (and prevent them from disappearing from the list).
- ⇒ **Todo List.** To-Do item list now lives in your Sidebar. You can easily add new tasks, check off completed ones, and drag and drop items.
- ⇒ **System Monitor.** Keep track of your computer's performance, which displays CPU, memory, disk, and network usage.
- ⇒ **Desktop Calendar.** Be able to see the current date and a whole month right at a glance. The date is automatically set to your system calendar. You can click the "Expand" button to toggle the calendar on/off, change the month by using the arrow keys to go forward or backward, and change your calendar's color.
- ⇒ If you have enabled the **Search Across Computers** feature with multiple computers, you may also see results from these other computers.
- ⇒ **Timeline View.** Allows you to either find items based on when you recall viewing them, or to view what items you looked at or used over a specific time period.

## **Productivity Tools such as Microsoft Outlook Exchange or Entourage for Mac**

⇒ **Tasks** – assignments, duties, responsibilities.

- **Create.** Creation date is recorded automatically. Specify the due date and priority. Note: An email can be copied (by dragging directly into a task window) to a task, but the original e-mail is not deleted or moved from its original location. Also, a task can be copied to the calendar to allot enough time to complete your task
- **Assign.** Assignment date is recorded automatically and assignee receives an e-mail message with the task assignment. If the assignee clicks the Accept button, the task appears on the assignee's task list.
- **Sort.** Assignees can see who sent the tasks and sort their tasks accordingly.
- **Update.** As progress occurs, change the percent complete, and any notes.
- **Send a status report.** Assignee can send you a status report on the task, automatically updating your tasks list with the current status information.
- **Schedule a reminder.** You or the task assignee can schedule task reminders. To be reminded to follow up on delegated tasks, schedule a reminder for each task.

⇒ **Calendar in Outlook** - is a great tool to use to schedule and organize your appointments, events, and meetings. In a busy office, it can be difficult to find the time to do the necessary task follow-up. You can use the calendar tools to:

- **Schedule a (recurring) appointment to follow up on a task.** Or, block a daily time period for you to work on a project or task, such as to read email or return phone calls. Now, a quick glance at your calendar shows others that you're busy.
- **Schedule a meeting with someone.** Require that person to attend and set a reminder that automatically displays a message to remind you of the scheduled event.
- **Share.** Share your calendar or group calendar, for example, BMT Tandem calendar.
- **Personal Calendar.** Create a separate calendar to track “after work” responsibilities or keep in main calendar and mark private. Use Out of Office or Busy appropriately.

⇒ **E-mail features** - Communicating by e-mail is essential to monitor and schedule delegated tasks. Use these feature as a basis for your “To Do” list.

- **Flag an e-mail message.** Both sent and received e-mail can be flagged on a particular topic to help find them easily. Set a due date and time, select a flag color, and mark the task completed. Sort flagged emails or move to a separate folder.

- **Folders.** Can help you stay on task. If you regularly sort, toss, and file your messages, you already know how useful folders can be. On the other hand, if you like to hang on to piles of e-mail forever, think of folders as a way to make more room for your “collections”.
- **Arrange By.** Commonly emails are arranged by Date, Subject or Person. Try other arrangements such as by conversation, where you see the "traffic flow" of a conversation.
- **Search Folders.** For emails that don't fit neatly into one group, and, therefore, won't fit tidily into one single folder. What if you want to put that message into two folders, or more? No copying, pasting, or moving required since these are “virtual folders”. Outlook creates three Search Folders by default:
  - o Large Mail, Unread Mail, For Follow Up. Or create your own.
- **Rules.** Avoid being overwhelmed by the number of e-mail messages in your Inbox Use the Rules Wizard to automatically process and organize your messages. A rule is a set of conditions, actions, and exceptions that processes and organizes messages automatically and that is triggered by an event. Think of the relationship between the event, condition, action, and exception this way:
  - o An event triggers the rule. For example, select Check messages when they arrive as the event.
  - o A condition specifies the messages that the rule will apply to. For example, select sent only to me or where my name is in the Cc box as conditions. You can select one or many conditions. If you do not select any conditions, it is the same as selecting all conditions.
  - o An action specifies what should be done with qualifying messages. Select one, many, or no actions. For example, you can select delete it if you do not want to read messages that have the word "jokes" in the Subject line.
  - o An exception specifies which messages will not be affected by the rule. Select, one, many, or no exceptions. A rule is not applied if any one of the exceptions specified is met. For example, delete all messages with "jokes" in the Subject line, except those from your cousin (whose jokes you like).

Rules can automatically:

- o Move messages to a particular folder based on who sent them.
- o Move messages, such as Out of Office messages, to another folder.
- o Delete messages in a conversation.
- o Flag messages from a particular person.
- o Notify with a message or sound, for important emails.
- o Redirect a message to a person or to a distribution list.
- o Auto-reply to a certain type of message with a message you've created.

- Assign categories to messages you send based on contents of emails.
- Delay delivery of messages by a specified amount of time.
- Start a program.

To avoid mistyping, create rules based on a message. Open a message, and then on the Actions menu, click Create Rule. Many conditions and exceptions are filled in for you.

To test new rules, select Run this rule now on messages already in "Inbox".

To back up your rules by exporting them to an .rwz file, in the **Rules Wizard** dialog box (**Tools** menu, **Rules Wizard** command), click **Options**, and then click **Export Rules**. You can even import this file to another computer or to a laptop, so you don't have to recreate your rules and risk introducing errors in the process.

- ⇒ **Contact features** - keep business and/or personal contact info inside or outside of your organization, about whom you can save several types of information, such as street and e-mail addresses, telephone and fax numbers, and Web page URLs
- Initiate e-mails, appointments, and tasks right from your contacts list and track the activities so that you can view them at any time from a contact record.
  - Link electronic files to a contact. For example, you can link tasks and Word documents to a contact record. Open all tasks and Word files directly from a contact record, without having to search for them.

- ⇒ **Journal** - automatically records actions that you choose relating to the contacts that you choose and places the actions in a timeline view. You can keep a record of any interaction you want to remember— even something that is not located on your computer, such as a phone conversation or a handwritten letter you mailed or received.

Use Journal to record the dates and times of your interactions with contacts, such as tracking hours spent on a particular account. If you want to create a list of all the items related to a contact, use activity tracking, instead, to link the items to that contact.

Do you remember the day you worked on a file, but can't remember the path to it? Use Journal to locate information based on when you perform actions. For example, you can quickly look up an Excel document you worked on last Tuesday if you set Excel documents to be automatically recorded in Journal.

Journal entries are recorded based on when the action occurs. For example, a Word document is recorded on the timeline when it is created or was last modified. You can organize Journal entries on the timeline into logical groups— such as e-mail messages, meetings, and phone calls— to quickly locate information, such as all the meetings you attended in the past week or month.

## **Low technology or non-electronic organization methods (but just as effective!):**

### ⇒ **Tickler Folders**

- **Daily tickler folders** - Create file folders for every day of the week and for every month of the year. When you accept or delegate a task, place a copy of the task description in the folder that corresponds to the date for follow up.

Preferably at the same time each day, remove the folder for that day and follow up on all of the tasks in that folder. If you need to follow up on a task again, place that task in the folder that corresponds to a future date. At the beginning of each month, move the items from that month's folder into the daily folders.

- **Priority tickler folders** - Set up tickler files based on a priority system. For example, create three file folders: High priority, Medium priority and Low priority. Place a copy of the task description in the folder that corresponds to the task's priority.
- **Employee tickler folders** - Designate a tickler folder for each of your staff members (or sections). When you assign a task to an employee or section, place a copy of the task description into the corresponding folder. When you meet with that employee or section, you can have all of your task information in one place for quick review.

### ⇒ **Job status board** - Use a chalkboard or a whiteboard for each task, write:

- Description, Date assigned, Person assigned to the task, Follow-up and Due date.
- Write the follow-up date in a different color so that it stands out. Check board daily, and follow up on the indicated date. Change dates and repeat as needed. Erase the task from the board when it has been completed.

### ⇒ **The day planner** - Write down each task or delegated task and its relevant information on the date assigned. Also record the task information on the date in your planner that you want to follow up on the task.

## Delegation methods

- ⇒ **Decisively** – let go of tasks that you've always done in the past.
- ⇒ **Not just for supervisors/managers.** Would your supervisor support your ideas?
- ⇒ **List your tasks and responsibilities.** What could be done by someone else? Or eliminated entirely?
- ⇒ **Lose your ego.** Don't tell yourself that no one does anything as well as you do and nobody works harder or longer.
- ⇒ **Let go in stages.** Everyone needs time to grow into new, unaccustomed roles.
- ⇒ **Make your intentions clear - Communicate** your expectations and goals. Explain **what** needs to be accomplished, but don't give detailed directions on **how** to do it.
- ⇒ **Don't dump, delegate.** Your attitude must not come across as that you can't be bothered to do the task, so you're asking them.
- ⇒ **Follow through on your delegation.** To be successful at delegating tasks, you must make sure that tasks are completed. Find a follow-up method that works best for you, and stick with it.