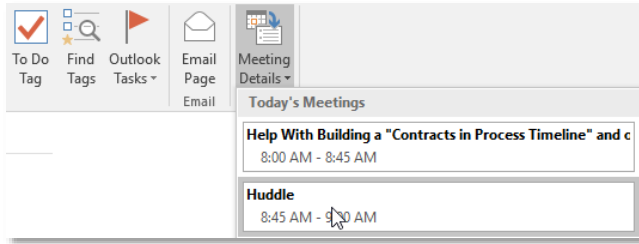


5 Ways to Improve your Efficiency: OneNote & Outlook

#1 | Take and share meeting notes

Home → Meeting Details → Select meeting from Outlook options



Take attendance and notes

Help With Building a "Contracts in Process Timeline"

Friday, February 1, 2019 11:00 AM

Meeting Date: 2/1/2019 8:00 AM

Location: Compliance Management

Link to Outlook Item: [click here](#)

Invitation Message (Collapse)

Here's the message from the Outlook invite with any details or instructions that would have been given in advance.

Participants (Collapse)

[Kristen Walker](#) (Meeting Organizer)

[Nate Chamberlain](#)

Notes

Here are some notes

And more notes

And more

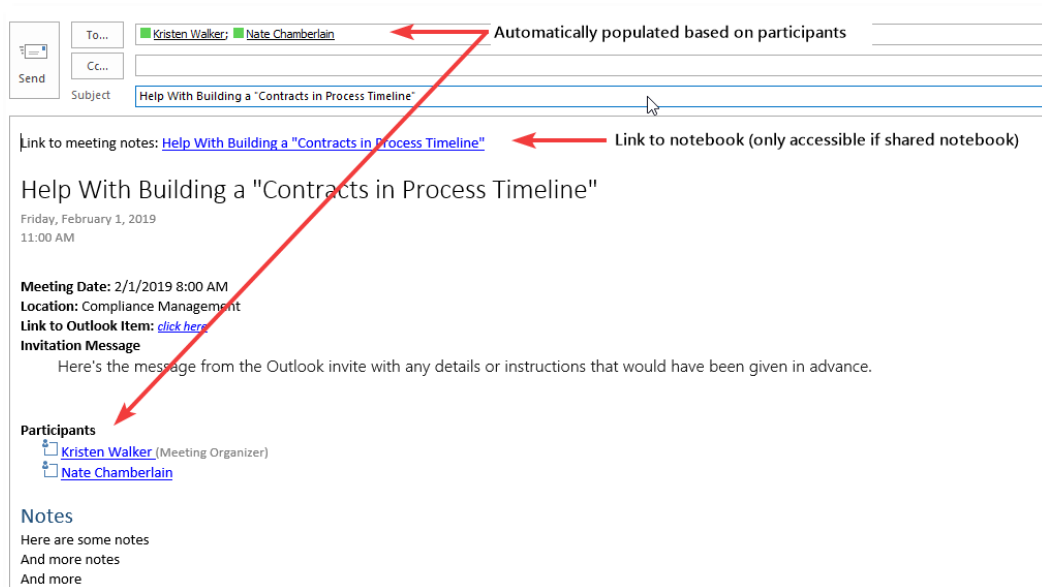
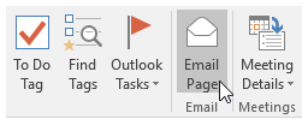
← Open the meeting item in Outlook

← See the message included in the original invite

← Take attendance

← Take notes

Send notes to all "participants"



#2 | Share Categorized tag or to-do list from OneNote

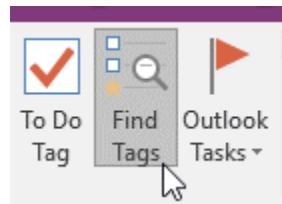
OneNote → Outlook → Establish and Work the Process

When you don't necessarily need others to receive emails, but you want to easily share a list with your team or supervisor, use OneNote. You can tag and build custom reports from across **all of your notebooks**.

And with the built-in email page option, you can quickly email your to-do list(s) to anyone, internal or external.

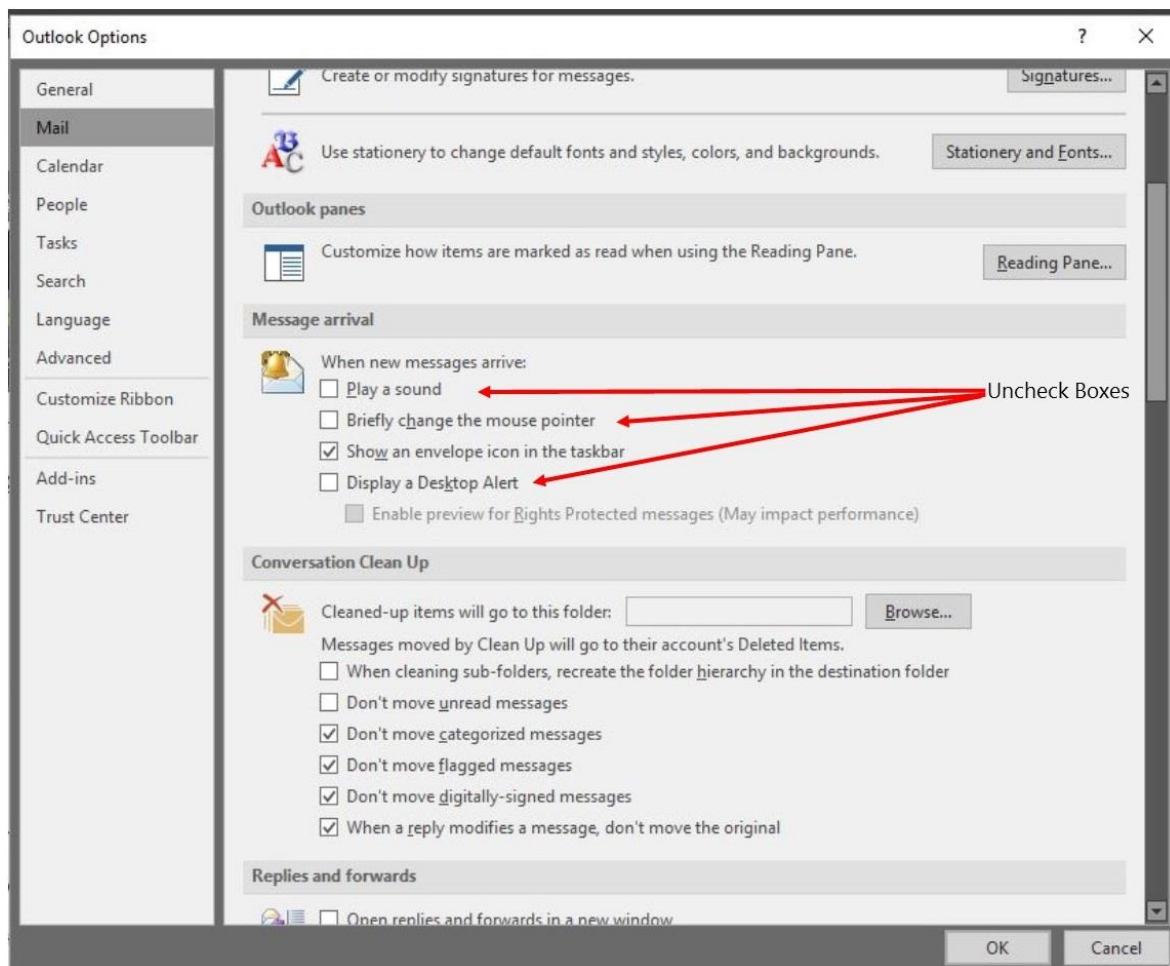
Need a starting place? Use page templates (Insert → Page Templates → Page Templates...) to explore all the built-in templates for note-taking and task tracking available to you. You can also create and save your own templates to use repeatedly.

Ready to run a report? Go to Home → "Find Tags" and customize the settings in the right panel to generate the report you need. When you're ready, either direct your collaborators to check out the shared notebook or click "Email page" to send it to anyone regardless of their access to your notebook.



#3 | Remove email distractions

File → Options → Mail → Uncheck Play a sound, Display a Desktop Alert → Click OK



#4 | Make your inbox work for you

Clean It → Decide → Categorize → Do It

Changing Your Mindset: View your Inbox as your Mailbox at Home

- Do you put your mail back in your mailbox if you haven't read it yet?

Clean it: Been here since email came? Have a fear of deleting old emails?

- Setting up your View
 - To-Do Bar, Calendar, etc.
- Do not be afraid to delete old emails (>1 year). Filter to Archive folder those that are left (<1 Year)
 - Create a Reference Folder System for emails going forward
 - Date Archive folder with Expiration date; then delete in 1 year
- You can move old (older than 1 year) into an Archive folder go back through Sent emails, even if Deleted emails have been archived.

Decide: I got this email, now what to do with it?

- Communication
 - Keep for Reference
 - Maybe One Day
 - Delete It
- Response From *My* Request: drives an action
- Requests for Action or Meeting

Categorize: How should I prioritize?

- Categories are a great way to keep it organized
 - ETF = Eat The Frog
 - Team Member/Boss Name for Follow Up
 - Review or Follow-Up

Do It: Take Action → Creating Quick Steps

- *Task/To-Do
 - *Don't Use Follow Up Flags - they are NOT the same thing as Tasks
 - Ctrl + Shift + K → Creates a New Task
 - Just remember Ctrl + Shift + K will make your DAY!
- Meeting Invite

#5 | Establish a to-do list

OneNote → Outlook → Establish and Work the Process

Create Quick Step → Convert Email into To-Do using Tasks

- Find a process that works and stick with it
- You can assign tasks to easily notify others of to-dos, and receive an email when it's completed
- Categorize your to-dos to easily identify those of a certain priority or topic

