

Outlook Dashboard.com

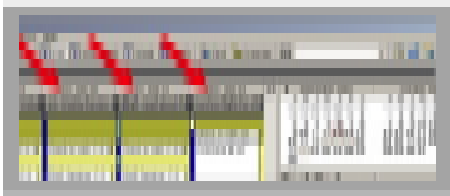
Action follows Attention

"Think about what you're doing, and do something that you're thinking about." *James Womack*

That's a fast and sure way to increase your productivity!

Are you looking:
 ...at the **right** resources
 ...at the **right** time
 ...to get the **right** things done?

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Outlook Dashboard.com: I think you know what I did (calendar), what I did (calendar), the calendar I did (calendar) for in management (calendar).

For many years, I have heard people talk about having to use Microsoft (Outlook?) as an "organizational" productivity and communication resource.

What I do is partner with clients to coordinate their habits and workflow procedures to maximize using Outlook as a "business" productivity and knowledge management solution.

What should you expect from Personal Digital organizational system?
 Before you answer that, write down any and all systems you *currently* use to get organized:

Now, when you look over that list, what do you think? Are your thoughts along the lines of “cool...easy, I know how to be most efficient?”

Or, in the words of a client I worked with on the phone,

“Ok Jason, looking at my desk I have...2, 3, 4 legal pads going right...oh, wait, there’s another legal pad with notes on it, make that 5...and that’s just my paper system. How can I possibly organize my digital system as well?”

For over a decade, I have worked with people looking for ways to make the *best* they can do a little bit *better*...working for executives in their offices, for groups in and out of conference training rooms, and athletes on and off the field, I search for, test and implement what I *think* are the best systems available to manage our busy lives and excel in all we do.

Let’s own up to this fact: Systems, methods and technology – whether paper based or digital – are here to stay. Now, it is up to us to maximize how we use them.

I am no expert in technology, but people call me insatiably curious. I like to tell people that I spend hours (so they don’t have to) looking at

different systems and matching them to individual clients' needs for productivity, organization and action management. And, in fact, that's one of the challenges in writing this powerful book.

You- the reader – are different than anyone I have ever worked with. Because of this fact, I will do my best to write in generalities. When (not if!) you have a question about how this works, I personally invite you to e-mail me directly: jason@womackcompany.com

At [The Womack Company](#) we commit ourselves to collecting, experimenting with and distributing the best information we can find for one purpose: to Make Things Possible. Enjoy this book, use it, print it out, write in it, digest it, and most of all, please test it!

Thank you for trusting in us enough to purchase and maximize our products...and, if there is an addition or correction we should make, I hope you will let us know!

By about 1997, I knew something had to change.

I worked 10-15 hours each day; I went in to the office on the weekends; I even planned and took vacations that aligned with work projects I was managing!

Over the past decade, I have searched for ways to be more in control of my work. I was NOT looking for more ways to be a control-freak, type-A, work-a-holic employee...

...I was looking for ways to identify and realize greater balance in my life and my work. That led me to bring two very significant concepts together:

Workflow Management Processes

Workflow Management Systems

A personal assistant is someone who reminds you of the right things at the right times, who covers for you when you are extremely busy, who knows you well enough to “answer the phone,” or even make reservations at restaurants or (possibly) for travel...wouldn't it be great if you had another part-time (or full-time!) assistant?

Many people endure the “interruptive nature” of Microsoft® Outlook® (as it so often does!) with incoming e-mails, meeting announcements and task reminders.

It’s time to change that. Start using settings so that you start getting the right information, at the right time, all day long...

Where your attention goes, action follows.

Go ahead; read that sentence again, it is a significant thesis behind this work. Ok, now let me ask you, where does your attention go throughout the day? If you are at all like me, a typical day is one constant stream of interruptions, opportunities, invitations and more.

One client told me, “If I just had an hour to myself each day, I’d get so much more done. I could focus on the MITs you talk about [Most Important Things] and actually get my work done!”

To be effective, you must introduce and practice routines, structures and procedures to sustain that productivity.

During certain “work hours” during the day, you must focus on those MITs [Most Important Things]. To do this, you may have to redirect the areas you place your attention. By the way, I approach workplace performance enhancement as a completely iterative process. One step at a time, one new move a day, and your habits, disciplines, behaviors and (most importantly) results WILL improve.

Let me start at the end – where we’re going – and then I will fill in as many blanks as possible along the way. Whatever version of Microsoft® Outlook® you are using [2000, XP, 2003 – look for an update to this book for 2007 early next year]; I hope you ultimately

realize a dashboard view that is customized and as useful and familiar to you as the dashboard in your car.

That is where I got the idea, by the way. You see, I travel a LOT sharing ideas and practices in the areas of psychology of work and professional productivity. I rent cars, sometimes two or even three in one week! Even though “most” cars have “almost” the same items available for view on the dashboard, there are still enough differences that I have to relearn and rethink the placement and use of the information there every time.

It may sound like more work, but to this day, when I first get in a rental car, I take about 2 minutes and actually look over the entire dashboard. I look to find out where the gas cap is; I open the glove box, and center console. I do all of this so that the car and the dashboard are familiar. That way, as I’m driving I don’t have to think (as much) I can simply work on getting to where I need to be.

I want to get rid of ambiguity and un-functionality of my workflow systems. I found that the traditional “opening screen” of Microsoft® Outlook® [quick: What is the *first* screen YOU see when you launch Outlook?] only distracts me and pulls my focus out of what I need to be doing. When I open up the OutlookDashboard.com view, I see what I need to see, when I need to see it.

Too much “mouse-clicking” and too many different open windows WILL slow you down. In a world of MORE, FASTER and BETTER...your system MUST be able to keep up with as fast as you are. Let me show you how.

By the time you finish reading this book, you will have a new, more effective view set up for your use of Microsoft® Outlook® as a PIMS – **personal information management system**. No, I’m not affiliated with Microsoft in any way, I am just a power user of several of their programs and I want to share some ideas with you.

In all of the work I do, I like to ask my clients (and my friends!) to answer the “...so that...” question. Here it is: What is your so that?

It would be great if you go ahead and do it here:

Please fill in this sentence: “I want to increase my productivity and enhance the way I use Microsoft® Outlook® so that...

_____.”

In many years (since first dreaming up this activity as an elementary school teacher in Santa Barbara, CA in 1994) I have found this to be a valuable – and often critical – starting point on the path to change.

When someone is absolutely clear on WHY they are doing something, many of the “HOWs” of getting there just tend to appear.

Allow me to share mine with you:

“I want to write a book and create a website showing people how to set up and maximize the OutlookDashboard.com so that they can work more efficiently and use more of the tools, effectively, that they already have.”

This book and the accompanying website www.OutlookDashboard.com demonstrate many of the critical areas of professional AND personal productivity. One, you must develop, maintain and enhance your organizational systems so that you trust and use them efficiently and with ease. Two, you must develop, maintain and enhance your productivity processes so that you can adequately and completely (and efficiently and easily) update your systems.

In this book, I'm going to skip over a lot of the **processes** (the second of the critical areas) and weigh in heavily on the **systems-based** ideas I have for your productivity. I would like you to know that any systems-based observations or recommendations I make are deeply rooted in philosophical and organizational behavior-based processes. I'm always happy to share these with you, any time you want! (Check back to our blog regularly: www.JasonWomackBlog.com.)

I have heard something like the following too many times (it is time to create clarity and get this “systems-thing” right.)

“I was going crazy and then I realized I did not have a reliable system or even any system.”

SO, open up Microsoft® Outlook® and let’s get going!

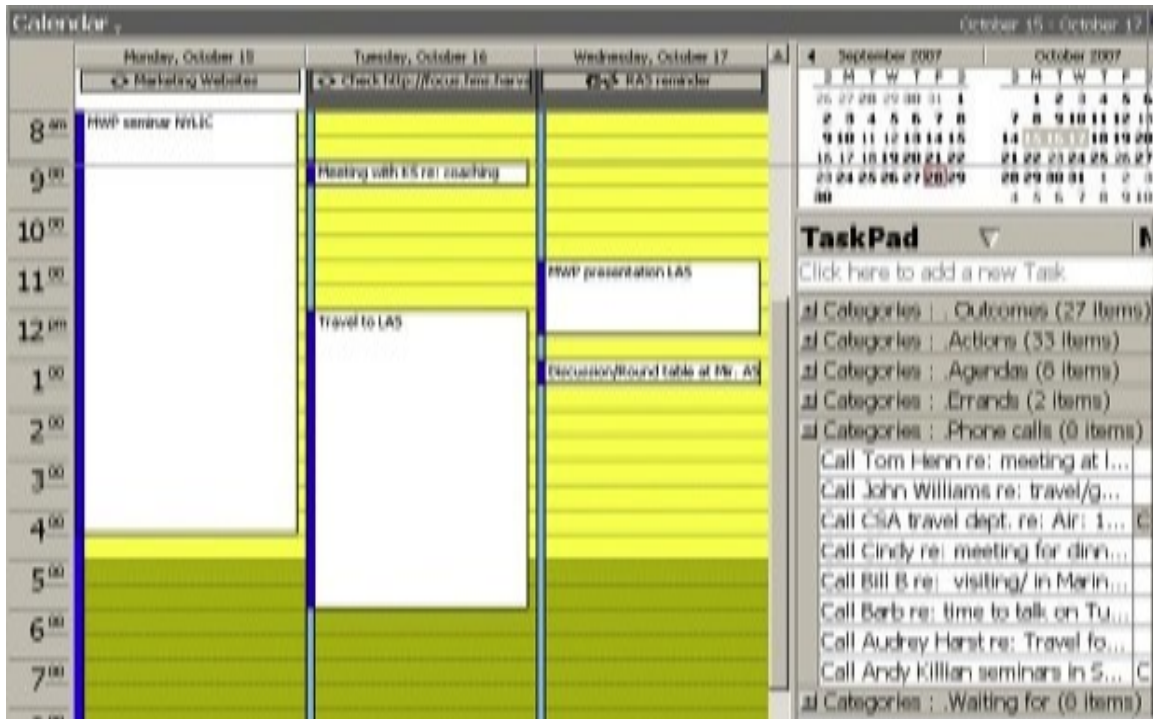
For many years, I have heard people talk about having to use Microsoft® Outlook® as an "*organizational*" productivity and communication resource. When I hear someone mix in complaints that their workload is increasing, or that they are getting "just too many e-mails to get anything done," I like to step in and offer some ideas on organization and systems-based approaches to managing work and workflow.

Over the past several years of being an executive coach, a writer, a speaker, a frequent traveler, as well as all of the things that keep me busy at home, I have searched for ways to "make things easier." What I do is partner with clients to coordinate their habits and workflow procedures to maximize using Microsoft® Outlook® as a "personal" productivity and "organizational" knowledge management solution.

As a result, you will see and use Microsoft® Outlook® as "your" tool for managing your 4 most limited resources. Time, Energy, Focus and Systems are the limited resources we all have to manage, as we're being productive.

When tools become "personal," productivity increases ... and when personal productivity increases, so does the productivity of the workgroup and the organization.

Get ready to “view” the Outlook Dashboard



*** One note... you may have a version that “looks” different than this. Don’t worry; your version of Microsoft® Outlook® will hold these systems view. Sometimes, you just have to click things in a different order. *** Except the newest version of Microsoft® Outlook®, 2007, which has different settings. We’ll create an update to this eBook as time permits.

Launch Microsoft® Outlook®, and click to open your Calendar.

Choose the “Day” view by clicking that button toward the top of the calendar.

Move the mouse toward the right hand margin of Microsoft® Outlook® until you see two parallel lines right next to each other. Click and hold that right-gray margin and drag your mouse toward the left. This will open up a multi-month calendar view.

You may have to do this same hold-and-drag just above the word TaskPad. Hover the mouse over the grey bar, until you see two small parallel lines. Click and hold, and drag downward. By now you should see 2 or 3 or 4 or 6 (you decide how many!) months on the top RIGHT along with your TaskPad on the bottom right hand side of your screen.

Next, find “today” in the top right calendar (it’s the day that has a box around it). Hold down the CONTROL key on your keyboard, and click on Today, Yesterday and Tomorrow. This will give you the three-day view.

Click on the top tool bar view. Choose Current View [you may have to choose “Arrange by” first] and then choose **Day/Week/Month View with AutoPreview**.

Right-Click your mouse cursor over the gray TaskPad bar and scroll down to choose Customize Current View...

Change the following:

Fields...Subject and Notes

Group By...Categories (ascending)

Sort...Subject (ascending)

And, change the **Filter** by following these steps:

Click on Filter...

Click the Advanced tab

Click on Field

Choose Frequently-used fields

Choose Complete

Add to List

Click the “Ok” button as many times as you need to get back to your calendar.

Now you are ready to go!

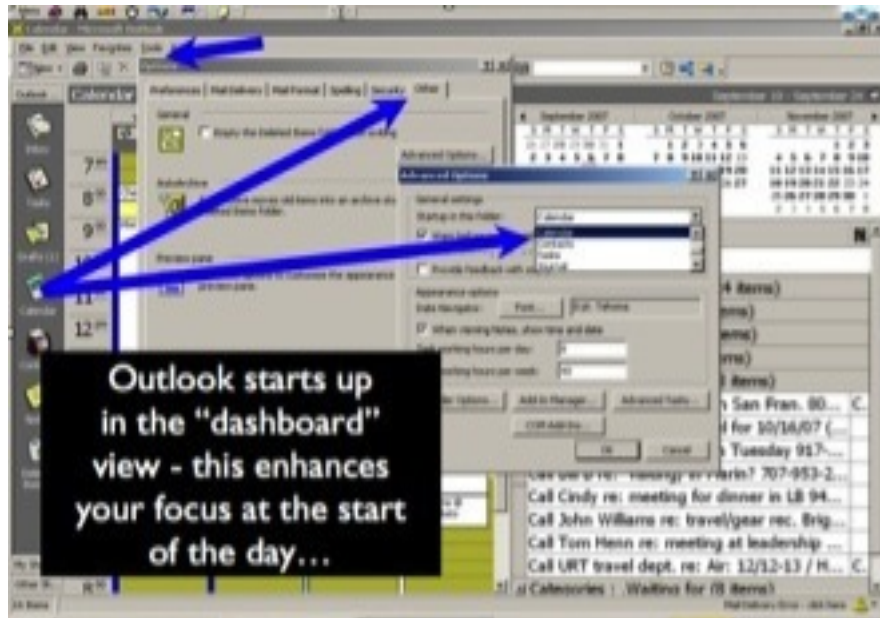
Fill in some of the meetings and agendas on your calendar for today and tomorrow. Also, add some tasks to your TaskPad by doing the following:

Press CTRL+SHIFT+K

Enter a task (as the subject)

Click Save and Close

Advanced Settings



This has been a huge factor in my own personal and professional success. When I start Microsoft® Outlook®, I see the OutlookDashboard...first!

How is this different than my old behaviors?

It used to be that whenever I looked at my computer, I was compelled to "check e-mail"...

...only problem was that this was a huge distraction! While I was "checking e-mail, I was actually ignoring pending deadlines (that were on my calendar), work that I had collected and processed (on my task lists), and even the paper documents or files on my desk!

So, some time ago, I found the following “productivity trick” extremely useful.

Every time I start my PIMS (**P**ersonal **I**nformation **M**anagement **S**ystem) I see my calendar on one side and my task list on the other. After I glance at what I already said I would do (calendar and tasks) I then I have more options - more appropriate and more valid - of what to choose to do:

Something I’ve already decided needs doing;

or

Something I’ve not yet found out about that needs to be done.

It’s a delicate balance of work that I’m:

1.thinking about

2.doing

3.managing

How you manage them will be up to you, we’ll just provide you with the tools to make the options available!

Click on the following:

TOOLS

OPTIONS

OTHER (tab)

Advanced Options...

then...under the General settings heading, choose

Startup in this folder...Calendar

Now, press the Ok button until you are back at your "main screen."

Make sure you have followed the OutlookDashboard set up instructions and whenever you start your PIMS, you'll see your OutlookDashboard first!

Microsoft® Outlook® as a Multi-Function Tool

Well, hello! If you're still reading this, you're one of the few who has decided to take it as far as possible. So, I'd like to continue sharing information with you, information that works, information you can use, workflow methods and behaviors that will make it easier for you to get more of the right things done.

If you've come this far, you're willing to experiment with ***not only*** **WHAT** you do as it relates to your own personal productivity...you're also willing to experiment with **HOW** you get your work done.

Fundamentally, it's time to change the way you think about how you work. In doing so, you will find processes and methods that make it easier; easier to focus on priorities, maximize your time, and achieve more than you thought possible in the same amount of work-time (or even less!) you spend in front of a computer.

Start by becoming familiar with the different functions within your "Personal Information Management System" (PIMS). You probably use most of the 5 main features...they are:

Inbox

Calendar

Contacts

Tasks

Notes

There is (a LOT!) more to Microsoft® Outlook® than meets the eye. Over the next few entries (just click Next, below to the right) we'll share ways to really get more out of your organization and your system.

We believe that by combining two of the highlighted features - Calendar and Tasks - it is easier to prioritize and ensure you're getting the right things done.

AGENDAS

Let's do this one...by just doing it. All right, with your outlook open to your OutlookDashboard.com view, press these three keys simultaneously on your keyboard:

CTRL+SHIFT+K

This will bring up a new task. Now, type in someone's name, choose someone you meet with regularly (weekly or more) into the subject field.

Next, let's set up your system so you can easily process and track all your "items to talk to people about." Click on the Category button [lower right], and then click on the Master Categories button. You're going to add a new category, just like this:

.Agendas

Then, click the Add button.

While you're there, add in another couple of Categories, just like this:

. Outcomes

.To Call

.To Do

Yes, all those “dots” are necessary. If you do this with the dots (and the dot-space before . Outcomes) you’ll see this:

. Outcomes

.Agendas

.To Call

.To Do

My thinking behind this “system” set up is that it facilitates your processing...you see, all the actions, items to talk about with other people, and to-dos live “underneath” your outcomes; the actions drive to the top!

The . before the words does two things: (1) it lines them up appropriately, and (2) it shows you objectively the changes you’ve made since beginning to work with this document. If you want to change anything after you experiment with this information, you will know exactly what you did pre and post working with this material.

Let’s return to the task. You have written someone’s name in the Subject line, now, open the categories again (if you closed them) and put a check in the small box next to .Agendas by clicking there with your mouse. Now, you have an agenda ready to be filled in and organized; you’re ready to match a system to a process.

Let me share with you how this might work: Right now, with that agenda item open, click the mouse in the large, white “note” area below. Begin by typing in today’s date. The, one item per line, type in

anything you would like to speak about with that person the next time you talk face to face.

Really go for it here, and it's normal for people I work with write down 10, 15 or even 20 items in this note area! There are many advanced features you can incorporate, such as attaching e-mails and other attachments such as MP3 files, photos, documents and more. (We may provide an advanced version of the OutlookDashboard.com document for power users at a future date. For now, stay tuned at the website for up-to-date information and ideas.)

Now, repeat the above process for any other people (bosses, direct reports, even family members and friends) you speak with regularly. Ultimately, you'll have many names, and many more things capture under each person's name to discuss at a later point in time.

Going forward, I suggest you add NEW items at the TOP of the note, under that day's date, thus allowing you to track – and use at your year-end review – all the items you met about during the year. I've found this a valuable process with bosses...and have even kept one for "meetings" my wife I have where we discuss our company business, upcoming vacation plans, volunteer opportunities, and more. Our company minutes are easy to complete, and we have great records as we move through the different responsibilities we hold ourselves accountable to in our lives, our community and our negotiations.

Why you should use Agendas

Those of you know me, you know I rarely “*should*” on people during seminars or coaching programs. (Rarely, but not never. Re-read the title of this page!) I believe there are very good reasons you and people around you will appreciate using agendas.

- Pure Efficiency: Having all the information, what you need to tell, and ask of, whom will save you time every single day. No more trying to remember; from now on, you will be able to prioritize and decide what to talk about based on a full inventory of items to discuss.
- Effective follow-up: Knowing what you asked, of home, when is a mark of an effective executive. When people around you trust you keep track of your AND their agreements, they may pay close attention to the things you ask them to get done.
- Ease: Because you already use Outlook for your E-mail, and now that you’ve set up your OutlookDashboard.com view, you will find it easier to keep track of more. I worked with a client in London once, and as she added things to agendas in Outlook, they auto-replicated to her PDA. “Wow,” she said, “now I can meet with other people and look here [pointing at her PDA] to go over our full agendas. I won’t forget anything anymore!”
- Reward: A sense of control goes a long way in boosting personal productivity. My experience proves that when you have identified and can easily track everything you have

- outstanding, you allow yourself to focus at a whole new level. Give yourself this luxury of “knowing what you don’t have to think about right now.” That is, what you don’t have to think about “until later!” More than a way to simply “see if they did what they said they would do,” you get to manage the agreements YOU make more efficiently; this will reduce your stress.
- Eliminate redundancy: Most people tell me they write things down in different place, make new to do lists regularly, and try to remember what they should tell people. Through effective and efficient use of agendas, you’ll eliminate/significantly reduce the number of places a reminder of something to do can be!

To Alarm, or Not To Alarm...that is a question!

You know the drill, you come in to the office on a Tuesday, after taking a Monday off due to a holiday. You launch Outlook, and immediately are bombarded by all the alarms from last week, the weekend, and the week you're now starting. Oh, and right behind these alarms, you can just make out the replicating Inbox, with dozens of read and unread messages there waiting for you.

You know you need to get to your E-mail right away, so you press one of the buttons in that "alarm" window. Here are the two buttons, and what I see as a potential problem in pressing each one.

Dismiss: If you dismiss the calendar or task reminder, where does it go? If you don't rewrite it somewhere (a sticky note, legal pad, TaskPad or...) well then your mind has to take it over. Honestly, in the day you are going to face, do you think you'll be able to remember that item until you can get it done?

Snooze: Now, you've set the system to do (unfortunately) what it seems to have been designed to do: Interrupt you again...later! In fact, when you do set or snooze an alarm, have you EVER been interrupted at an appropriate or opportune time? Have you ever just been sitting at your desk, with nothing to do, when suddenly alarm popped up with a predetermined, pre-timed task and you thought, "Oh good, now I have something to do!"?

Probably not.

So, in an effort to find a systematized approach to getting the “right reminder, at the right time,” let’s review the process you use to set and get your reminder. What you see, generally, is what gets most of your attention. What gets your attention, generally, you do. So, anything that is bold, nor new, or a high priority will usually get more of your attention, and therefore more of your action. In an effort to reduce the number of low-value activity interruptions you endure each day, consider this activity.

Open your calendar, and set it to view today, tomorrow and the 8 work days after that. Do this by opening to the DAY view, and finding the small month-calendar in the upper right hand corner. Hold the CTRL key, and click the mouse on the next 9 work days (including today, for a total of two weeks).

Review each day, look at anything you have already added there and ask yourself if you need an alarm. Remember if you set up the Calendar as your opening screen, you will be sure to see every reminder and each appointment every time you start Microsoft Outlook!

Next, go over the same 10 days, and add anything you would want to see the day of – or even a day or two before – such as upcoming deadlines or milestones, timely reminders, or “last-minute-nee-to-have-done-reminder” notes. These are all examples of things I have

added to my own calendar over the years. When I enter them, I look to see if I'll need an alarm. I don't have any hard-and-fast rules. For a 5am conference call with clients in Europe, YES; for the upcoming marathon I am running, NO.

Repeat...Repeat...Repeat...

Next to some of my appointments, you will see two arrows that look like they wrap around themselves to make a circle – these are my repeating assignments, reminders or inspirational quotes. I find many things I think of, see or receive I want to see at some interval basis, and the Outlook recurrence setting is perfect for this.

Let's take something very personal as an example. I enjoy following the Tour de France each summer. During the month of July, I read the sports section of the newspaper, watch the sports highlights; I even subscribe to a couple of web channels all to find out about the TdF.

Now, because at home I watch so little television (maybe 1-2 hours a week), I don't have that TdF channel all year long. So, as a yearly recurring reminder, in the middle of June, I have a note to "Call cable company to order OLN, the TdF channel."

Here's another example. Many of my consulting clients take advantage of the on-going coaching programs we offer. These programs, delivered over 6 months to a year consist of on-site presentations and one-on-one individual workflow coaching sessions. We also provide monthly or weekly telephone coaching, all of which must be managed – the tasks, the reminders, the assignments – by our office. I do much of this with a recurring reminder.

I learned over 10 years ago about the absolute necessity to complete a weekly review...weekly. As a way to encourage me to DO this each week, not just know I should do it!, I've made a weekly (every Thursday) reminder with an alarm. It is titled, "11am Weekly Review." Now, this reminder comes up first thing in the morning, and I don't ALWAYS do it at 11am, but that little reminder reminds me to schedule the 60 minutes I know I need to DO my weekly review. As soon as I see that alarm, I immediately go to that item, and schedule it for an open 1-hour block of time on Thursday.

Finally, I have some recurring items that show up on my calendar every 7 weeks, or 3 months, or twice a year. Typically, these are quotes or other short, inspirational or informational items that I want to see semi-randomly. Not so often that I'll go "numb" to them, but regular enough to get that injection of inspiration I know I can use throughout my year.

As an exercise, go through several of the sticky notes around your workspace, legal pads or paper notebooks, and look at what you're written there. Are there any of those things there that you think you would like to see regularly...later? Add a few to your calendar and let your system remember...so you can forget (for now!).

To Sync or To Print...yet another question!

“Jason, will I need to call my IT department for any of this?” This question comes up regularly when I’m talking to a client for the first time about our coaching programs. We work with clients on-site, with their systems, setting up their organizational programs and processes to maximize what we call the big four: Time, Energy, Focus and Resources.

The great news about using the OutlookDashboard.com view is that it is a simplified version of installing one of the many add-ons that exist for Microsoft Outlook. I have used some of these to varying levels of success.

So, just setting up and using the OutlookDashboard.com view is really only about changing the views (you’re changing databases or any coding structure) will not take help from your Information Technology (IT) department. This guide will be enough to get you going, enough to walk you through the changing of the views. If, however, you’re looking to the advanced features of synchronizing the calendar and tasks (and contacts and notes) from your desktop (or laptop) to a PDA (personal digital assistant) such as a Treo or Blackberry) you may need a tech-savvy knowledge broker by your side.

Let me describe just some of the ways I use my Treo PDA in conjunction with my desktop version of Microsoft Outlook. I do synchronize between the two...daily. I'm not sure how or why, but long ago I formed, nurtured and sustained the habit of backing up my systems...and trust me; it's a habit I highly recommend.

The four main organizing tools of Outlook are mirrored on my handheld PDA: Address book (Contacts), Calendar, Tasks and Notes. The purpose of this book is really only to identify just two (of the many) tools, and how to display them on the computer itself in coordination with one another; Calendar and TaskPad.

While I am preparing for a trip (I travel on average once a week, around the US and to Europe), I add as much "time and date sensitive" material as possible to my calendar. On the day I travel, confirmation numbers for "The Big Three" (Air, Hotel, Car). The day I work, I add my point of contact, start/end times of the presentation or coaching, and even directions from the hotel to the client site (yes, after learning the hard way, I do look these up before I even leave my home office in California!).

Now, as I travel, I have my Treo PDA current with any information I might need. Of course, my computer is always nearby, and there is a LOT more information there. But, holding on to the bare essentials has proven to be very effective and efficient for me.

With my Tasks – especially my agendas – I have had mixed success in working from the Treo. Most often, it's just not "big enough" (the screen, that is) to see the entire inventory of work. For some things – say my phone calls to make list – the Treo is just fine. For others – like my agendas, or especially the projects I am managing – I prefer to print those lists to use, review and work from. (However, I will add that having my Outlook synchronized to my PDA is a GREAT and CHEAP backup plan!)

Let's take the agenda planning and tracking aspect of Microsoft Outlook. I use my agendas (as I've talked about before) to make, refer to and work from the things I think about to tell or ask someone next time we talk. Because I keep all of these in the TaskPad portion of outlook, let me share two super-cool things (at least I think so!) I can do to not only use, but also really maximize that system.

DRAG, DROP and E-MAIL PRINT BEFORE A MEETING

From either your OutlookDashboard.com view or Tasks view, single click and hold the AGENDA (the person's name in the subject line) who you are going to meet with. Drag that agenda item over to the left of your screen until you are hovering over your inbox icon. Let go of the mouse and, viola, your agenda is copied to a new E-mail! Now, you can send that list of things you have collected with a short note explaining to your colleague that these are the things you have to discuss (and, I always ask if they have anything to add).

Over the years that I have used this technique, I have richer, timelier, extremely efficient meetings. I don't have to remember everything anymore. If I need to tell someone something, I add it to his or her Agenda. And, as I do use my Treo to sync my lists, I even add to these agendas while I am out and doubt Many times, I will be somewhere and see someone, hear something or read a book that I want to share with someone later. I simply add it to the agenda, the agenda system doesn't just make it possible to manage this information – it makes it easy!

I once worked with a manager of an architectural firm and he is now a power user of agendas. We set up the basics, one "task" per person, and then filled in the blank area (Notes) below with things that were on his mind, and on various lists, to talk about the next time they

meet. The one morning we created this system, he spent about an hour, writing over 100 items spread over the 17 people he meets with regularly.

The next day, he scheduled a lunch with one of his direct reports, a person he had a “full agenda” discuss with them. An hour or so before the meeting, he printed that single agenda, looked at it and said, “Wow, there’s a lot to talk about!”

Now is the time we start to talk about prioritization and choice making. Here is a fact of this systems-based approach to managing your thinking: If you really do this, and I mean REALLY, you will actually uplevel your management approach to effective choice making (NOT inefficient data memorization) you will actually be forced to prioritize like never before.

Consider the following example: You arrive at the office on time one day and see a supervisor who is not always in the office (due to their own hectic travel schedule). You launch Microsoft outlook, and see the following. You have meetings scheduled for the late morning and early afternoon. Off to the right – under your TaskPad – you see you DO have a series of agenda items to discuss with your supervisor.

Now, in the 50 minutes before YOUR next meeting starts, you have to decide: Do you print the agenda, walk to your supervisor’s office and ask for time to talk? Or, do you switch screens, open your E-mail

inbox, and catch up until your meetings start? You decide...you prioritize!

One more note about printing the agendas. You may consider printing them once a month and starting fresh with a blank space. Put the past month's agendas in a folder, and at the end of the year you have an objective, time-based record of your discussions for the past 12 months. This is a great tool to use to write any kind of annual review.

Birthdays, Anniversaries, Holidays, Annual Reminders

Quick, what two things do these things have in common?

- A wedding anniversary
- Changing my windshield wipers
- Checking in on my 401K, 403B, RothIRA, SEP, and other investing plans
- Scheduling a medial checkup

- 1) They must be thought about and acted upon yearly
- 2) I don't have a good enough memory to know when the last time was that I thought about them last!

Years ago, I spent a couple of hours in my Outlook calendar, adding these annual events. Yes, every birthday and anniversary, my dental and eye exam visits, even when I want to think about and check the windshield wipers on my and my wife's cars (every Oct. 8!).

Now, here's something I learned the hard way, and I'll pass it on to you here. I put a 7-day alarm notice on any reminder I would want advance notice to do something. All my birthdays, for instance have a "pop up" alarm that arrives 7 days prior to the person's actual birthday. This gives me plenty of time to buy a card, write it and send it away, in time for them to open it on their special day.

Here is another important note: When that alarm pops up, I do not press the snooze button. If I cannot DO the action when the alarm pops up (99% of the time this is the case), I add the task to my actions list on the TaskPad. I do this by pressing CTRL+SHIFT+K (new task), adding my next action to the subject line, putting it into the appropriate category, and pressing ALT+S (save and close). I then dismiss the reminder, until the next year!

For anyone working in any kind of customer relationship building business, this is a key management technique. Starting way back in themed 1980's I learned the value of this kind of annual reminder system. Our family restaurant actually mailed notices, newsletters and coupons to customers. The ones who frequented our business more received more notices, tailored sometimes to their personal preferences.

Then, in the mind 1990's, I used these techniques as a high school and mentor teacher. With just a little bit of research, I found all my co-workers' birthdays, anniversaries and any other special days. A part of my every day then – as it is now – was devoted to sharing my own gratitude and acknowledgement of any other people.

Not only a great way to start my day – there is something satisfying about spending time thinking and writing about what someone else is doing well. I have been about to start, grow and maintain relationships and friendships using these “reminding” techniques. I

guess I'm willing to admit that in this fast-paced life I live in, I can't hope I remember to remember something or someone.

About the Author

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Jason creates effective learning situations and positive performance results. His customized seminars up-level the workflow of entire departments by helping individuals get more done with less time and effort.

Jason is an avid learner who earned two Master's degrees. He got his Master's of Education degree to learn how to teach and went back to school to earn his Master's degree in Psychology to understand learning styles and maximizing information. He applies this wealth of knowledge to corporate learning environments to help solve the day-to-day challenges of work/life balance in an era of increased personal accountability. www.WomackCompany.com