

**Closing the Gap Between
Technology & Performance**

Technology Simplified & Optimized.

Do More, Work Less.

**“Strategies & Secrets” Playbook
Outlook for Mac**

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TABLE OF CONTENTS

Three Key Insights & Quick Shortcut Examples	4
1. Avoid information overload and maximize your time	
Use the “60 Second Rule”	4
“The Daily Wrap”	5
Prioritize remaining information into “Buckets”	9
Handle information only once to prioritize	9
Create only one electronic place to store.....	9
Keys to dealing with interruptions	10
Calendar schedule order	10
Put boulders on your calendar first	10
Use smaller time increments for Appointments in Calendar	12
Create Meeting from e-mail message.....	15
Setting up color codes for appointments	20
Color Code appointments	21
Outlook calendar tricks	
Microsoft Bookings for Customers to Set Appointments with you	23
2. Find e-mails, documents, files, ANY information in seconds	
Find ANY e-mail in Seconds in Outlook	31
3. The most efficient way to process & organize e-mails	
Create new “top” level folders by priority not subject	32
Don’t use your Mailbox or Inbox as a storage box.....	32
How to Save Outlook Email with Attachment in Document Folder.....	33
Turn off desktop notifications	36
Follow effective e-mail guidelines	43
Review each new e-mail only once to prioritize	43
Use “AutoCorrect” for frequently used text	44
How to Create and Use “Waiting for Answer” Rule	60
Outlook Mobile Tips for iOS and Android	70

TABLE OF CONTENTS...CONTINUED

4. Consolidate all to tasks/projects & notes to ONE System

Streamline to Simplify and Improve Efficiency	74
Microsoft To Do and Task Management	75

5. Effective File Organization (SharePoint and/or OneDrive)

Benefits of Using SharePoint and OneDrive for Business	76
Documents = file cabinet or library for reference.....	80
Learn folder and file navigation system.....	80
Quick access to most used folders/files	81
Using Spotlight Search	82

6. Use Shortcuts to Handle Interruptions...

Using mouse shortcuts	83
Using keyboard shortcuts	84
60-Second Rule Tips to handle Interruptions and distractions	

7. Best Practices

The Seven Silos or Pillars of Productivity.....	86
Strategy Tips “Best Practices” to supercharge tech tools.....	87
“Best Practices” for Laptop	89
“Best Practices for Smartphone	90
Training Benefits.....	92
Other Helpful Resources (TurnerTime Partners)	93

Did you know...?

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Three key insights from working with businesses for the past fifteen years. Many business professionals (before our taking training and/or coaching)...

- ...are in a technology-driven “information overload mode” and could benefit from additional training or coaching. That can help you more effectively manage e-mail, priorities and time. Could benefit from help exiting “reactive mode”.
Bottom line: we’ve found that change can be good and productivity can increase quickly!
- ...could benefit from taking a few minutes (15-30) every day at the beginning/end of each business day to keep control of e-mails, action items, projects AND scheduling time to get them done. **15 SAVES 60 -Open Outlook to Calendar**
- ...can become more “indistractable” - the most important skill for the 21st century. Nir Eyal, Instructor at Stanford’s Graduate School of Business—**Turn Off the Reading Pane**

Use the “60 Second Rule”

Voice Transcription to e-Mail:

- a) iPhone/iPad: Siri and/or Dragon Dictation
Android: Google Assistant
- b) MacBook/iMac/Mac Pro/Mac mini Voice Recognition/Enhanced Dictation

Apple Keyboard Shortcuts...



+ TAB (faster than mouse/touchpad) *Hold down Apple key and tap TAB key to scroll through open windows.*

Other Time Savers

- a) Auto Correct’ - Page 44
- b) ...many more ‘secrets’ available (free & via membership)

Avoid Information Overload

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Daily Wrap-Up (OR Daily Start-Up) List - 15 Saves 60

Do not attempt to do this at the very end of your business day! Schedule it for an hour or two before your business day ends (or very early before your day starts) to ensure you are able to get it done before the end of the day. Use your Outlook or Google calendar to confirm/update/revise your schedule.

REVIEWS THESE DAILY, AND ON MONDAYS AND FRIDAYS FOR THE COMING WEEK

What am I not going to have finished today that needs to be prioritized for tomorrow?

1. Which Appointments/Follow-Ups/**Reminders** should be Dismissed? Deleted? Rescheduled?
2. What are the top 3-5 things I must get done tomorrow to be successful?
3. What's already on the agenda for tomorrow? What do I need to have prepared for tomorrow?
4. Have I allocated sufficient "Preparation" and "Catch Up" Time on my calendar for tomorrow?
5. Have all the Meeting Requests I have sent for tomorrow been accepted?
6. Have I accepted all the Meeting Requests sent to me? Or "Declined" and replied to the ones I haven't?
7. Am I double booked at any time tomorrow? What do I need to reschedule/address with meeting organizer?
8. Have I allocated TRAVEL TIME for future meetings when I will be driving or flying?
9. What else do I need to BLOCK time for tomorrow, the rest of this week, and the next week to ensure completion of what needs to be done?
10. Check your iPhone Calendar Inbox (if using the native Calendar app)

GRAB EVERYTHING ELSE - SO YOU MISS NOTHING

1. Review your "Waiting for Answer" Folder
2. Consolidate any open items (check Note/Actionable information locations) to one list. Possible locations include, but are not limited to:

• OneNote Notes	• Outlook Notes
• Paper Notes	• Post-It Notes
• Emails	• Text Messages
• Voice Mails	• Pending/Waiting for Response Folder(s)

3. Move Time-Sensitive/Time-Specific/Actionable Items to your calendar
Move the rest to your "TO-DO/TASK/ACTION LIST" list(s) (see below)

CREATING A TO-DO/TASK/ACTION LIST

1. We recommend Microsoft To-Do and/or Outlook Tasks or Google Tasks and/or ClickUp.
2. Schedule time to "Batch" address your Action List.

DON'T OVERWHELM YOURSELF; HAVE A SEPARATE "STRATEGIC" LIST AND LIST(S) FOR INDIVIDUAL PROJECTS

Example: "Do you have anything that needs to be done but not is urgent?"

1. If yes, add to your "Strategic" List and schedule time by individual Strategic Actions
2. Another list(s) for projects

Valuable Accessories for your Mac or iPad Pro

✓ Envoy Pro FX—High-speed storage solution

Capacity: 240GB – 2TB | Performance: Up to 2,800 MB/s | Robust: Certified dustproof, drop proof, and waterproof to MIL-STD810G | Warranty: 3-year | Price: From \$199

A blazing fast, super-reliable, tough external SSD that's compatible with USB -C and USB-A. It's offered in a range of capacities, from 240GB to 2TB, so you can choose the size you need. Also, the drive is bus-powered, so there's no power adapter to carry.

✓ Thunderbolt Dock Huge array of connectivity options

Ports: 11 | Displays: Two 4K display or one 5K/6K/8K display | Charging power: 90W | Warranty: 2-year | Price: \$249

Turn one Thunderbolt port into 11 ports! This dock gives you four Thunderbolt ports, another four USB ports, an SD reader, Gigabit Ethernet port, and a combo audio in/out. Perfect for turning your new iPad Pro or iMac into a huge workstation!

✓ Thunderbolt Hub Thunderbolt port expander

Ports: 5 | Displays: Two 4K display or one 5K/6K/8K display | Charging power: 60W | Warranty: 2-year | Price: \$149

Using this single small hub, you can connect and charge any device with a USB-C or USB-A connector, even an 8K display. The perfect companion to the M1 iPad Pro!

✓ iphone-14-scorecard-thumbnaill—iPhone 14 Pro innovation scorecard: The homeruns and the strikeouts

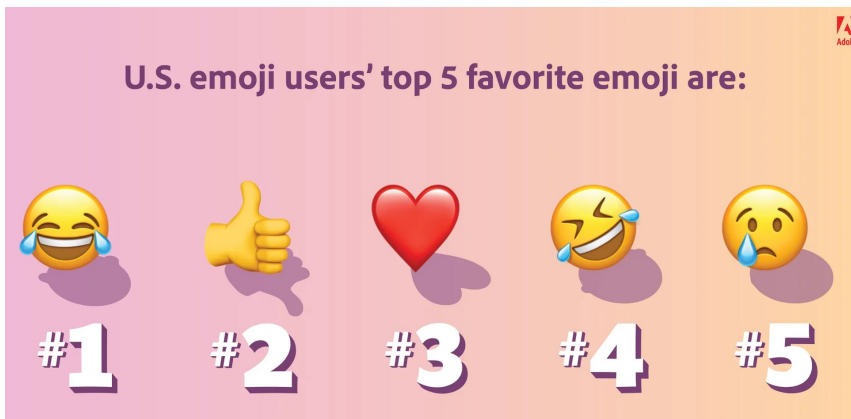
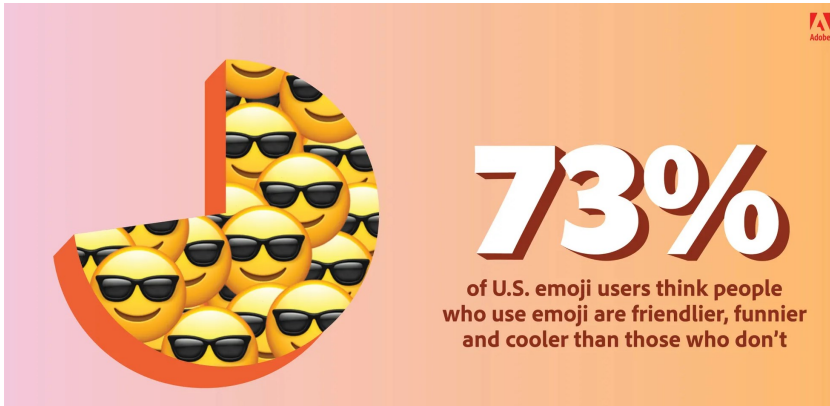
With this travel dock, you can transform a USB-C port into six ports: USB 3 Type-A, HDMI 2.0, SD card reader, Gigabit Ethernet, and USB-C 100W power pass-through.

[Getting a new iPad Pro or iMac? 5 OWC accessories you need | ZDNET](#)

Avoid Information Overload

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The Future of Creativity: 2022 U.S. Emoji Trend Report:



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Avoid Information Overload

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1. **Avoid information overload and maximize your time**

Use a Proven Strategy to Avoid Information Overload

a) Use the “60 Second Rule” for important Actions

- If the information you are handling at the moment:
 - ✓ Requires action
 - ✓ Needs to be completed soon (i.e. today, this week, etc.)
 - ✓ Can be completed in less than 1 minute

Then Do it Now

b) **Prioritize Remaining Information Only Once by Putting into “Buckets”**

Make volume of information less intimidating by dividing it up

- 1 - Actions to Complete (‘Must do’ actions, projects, etc.)
- 2 - Waiting for Answer (Everything needing a reply before action)
- 3 - Read or Review Later (Read or review at your convenience)
- 4 - Under Development (‘Not yet’ or more data/resources needed)
- 5 - Will Refer to Later (Can move later to ‘Documents’ or archive)
- 6 - Keeping Just in Case (Vs. deleting when you may need it later)

Use these buckets for both electronic AND paper information/data

NOTE: If you have already created additional folders by subject for things you are already done with, do not delete them, just move them under folder #5– Will Refer to Later.

c) **Streamline and save time; create only ONE place to go for:**

- ✓ Calendar events (meetings, webinars, calls, etc.)
- ✓ Contacts
- ✓ Actions you need to complete

- Avoid (when possible) multiple calendars, appt. books, scratch pads, post its, et al.
CREATE an efficient electronic **and** physical workspace—Streamline the way you do things and increase efficiency by doing them the same way every time

4. **d) Quickly & consistently deal with interruptions** Use ONE way to take down notes/ action items-Recommendation: Send short e-mails to yourself (usually ‘subject’ only) WITHOUT having to go into the e-mail app on your computer, smartphone or tablet.
Goal: Make taking notes/actions items on all your devices as quick as possible.

- Siri and/or Dragon Dictation (iPhone/iPad), Voice Search/Google Now (Android),
- Laptop/Desktop Computer: Speech Recognition (Windows) or Dragon Dictation Computer Software

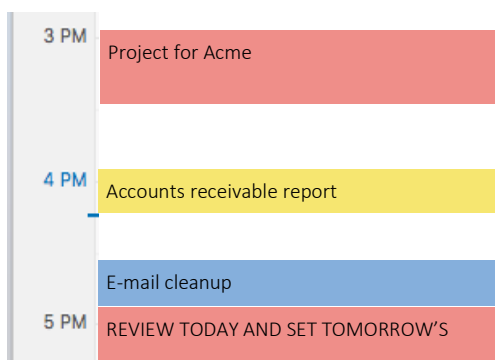
Another Interruptions key: Is it necessary/possible to resolve interruption this minute?

- a. Yes – then just do it!
- b. No - just like any other professional (i.e. doctor, accountant, etc.); set an appointment (we recommend using your electronic calendar’s meeting request)

Avoid Information Overload

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- Interruptions that take you “off track” take at least 7 minutes to recover from, so...**
Don't CREATE interruptions; KEEP YOUR FOCUS BY ELIMINATING non-essential:
 - ⊗ “New e-mail” alerts (Distracting)
 - ⊗ Too many reminders: Calendar, tasks, follow up flags and smartphone/tablet
 - ⊗ Avoid managing e-mail constantly—Check e-mail as often as needed and schedule e-mail management sessions (>5 minutes) approximately than 3-4 times/day
- Unplug Your Electronics to Recharge Your Brain**—Our brains need downtime (away from computers, smartphones, et al) to RECHARGE— Take regular breaks and refresh yourself; breaks also help entrench learning.
- The bottom line: A lot of time on the computer/smartphone/tablet can be counterproductive
- Maximize the use of your time through your daily calendar.** Schedule order:
 - ✓ Boulders (project, actions w/due dates, and RELATIONSHIPS) (Code RED)
 - ✓ Rocks (What you do daily to keep things “running”) (Code YELLOW)



Example Outlook calendar showing the use of color coding for scheduling and identifying items in the proper order (boulders, rocks, sand)

- 15 minutes of planning saves an hour of work - Put “Boulders” on Your Calendar FIRST**
Set “appointments”; set aside time - Eliminate “Where did the day go?”
 - Projects (including those that aren't urgent...YET)
 - ✓ Doesn't have to be HUGE time blocks; just adequately planned
 - Not enough time? Set times to improve efficiency
 - ✓ 'Implement new time-saving strategies', 'Organize', etc.
 - BOTTOM LINE:** Set 'strategic' reminders to help get/stay on track
Make sure you have time scheduled on your calendar to review your “priority” folders
- Use Your Electronic Calendar to Set Time for Calls, Webinars, etc.**
 - Confirm/Lock in date/time with participants
 - Send/ask for meeting requests
 - Send or 'Accept' right away; let's others know time is confirmed (RSVP)
 - Help participant(s) pick best date/time
 - Send them your Calendar 's “Free/Busy” schedule
 - Use the location field to your advantage
 - Address or phone number (and who's calling who)

Process & Organize e-mails

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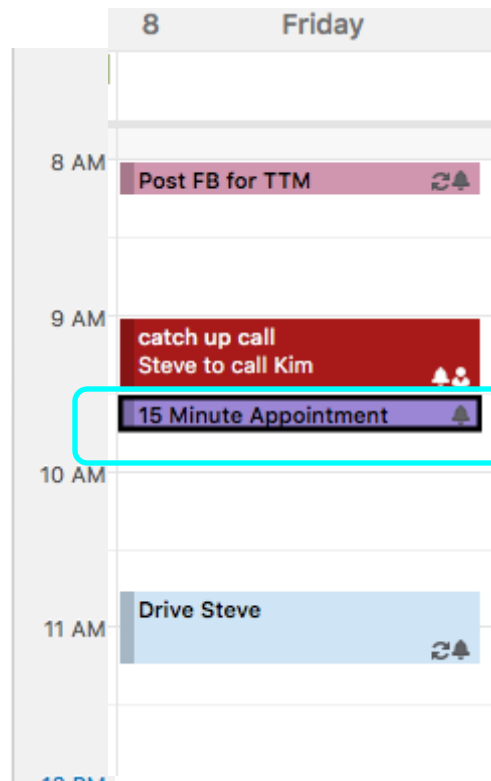
Using Smaller Time Increments in Calendar (Outlook)

You can **NOT** change the calendar in Outlook to show smaller time increments as you can in some other e-mail programs or web applications. However, the calendar event length will be reflected in the size and placement of that event in your calendar display.

This image shows the new 15 minute calendar event as I create it in Outlook.

The screenshot shows the Outlook Appointment form. The subject is "15 Minute Appointment". The start time is 9:30 AM on 7/8/2016, and the end time is 9:45 AM on 7/8/2016. The duration is set to 15 Minutes. The form includes fields for Location, Show As (Busy), Reminder (15 Minutes), Recurrence, Time Zones, Categorize, and Private. The "All day event" checkbox is unchecked.

If you schedule an appointment using a 15 min increment it will be reflected in the size and placement of the appointment on your calendar. This event is scheduled at 9:30 to 9:45.



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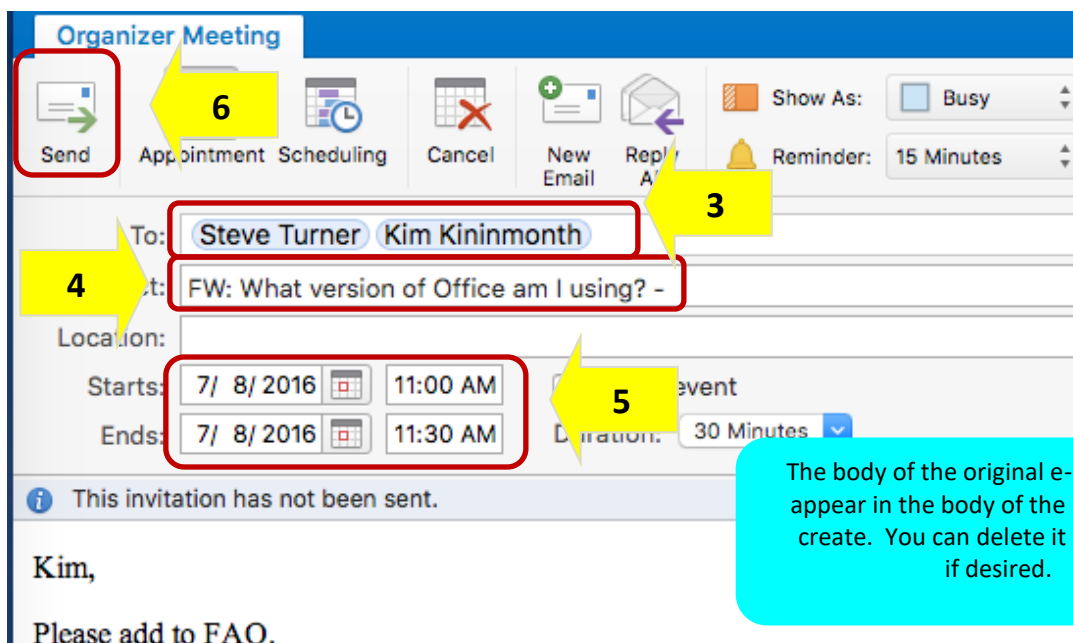
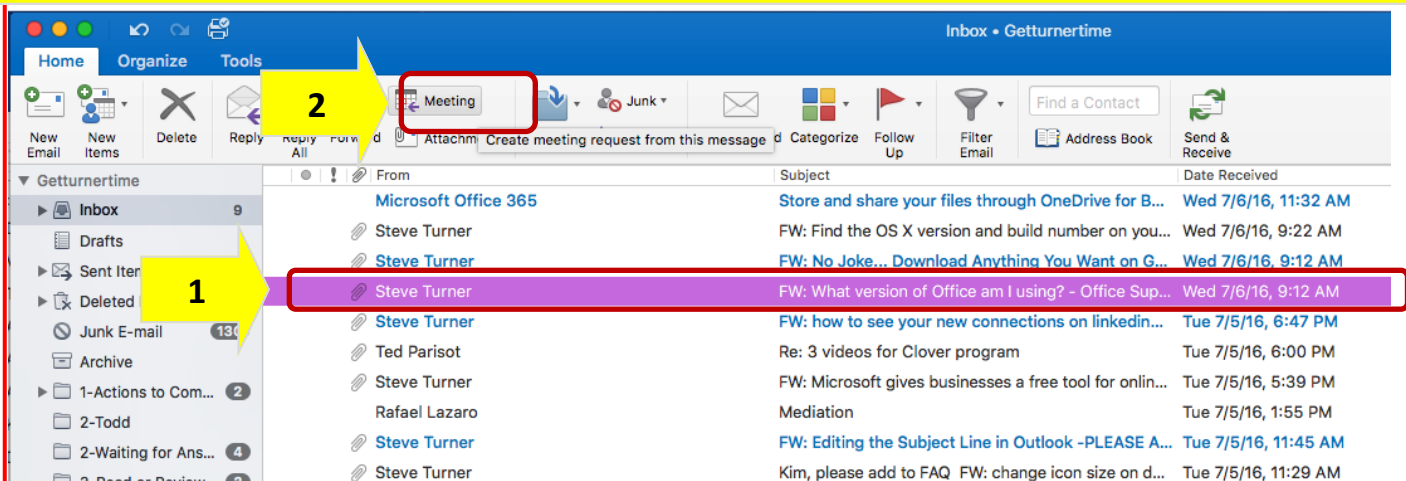
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How to Create An Appointment from an e-mail Message with “Meeting” button (Outlook) (Copy e-mail onto calendar as an meeting/appointment)

To create a reminder for yourself, or create a meeting from a e-mail message, is quick and easy in Outlook.

1. Click to highlight e-mail to create a meeting from.
2. Click “Meeting” button.
3. Change “To” line (if this is just a reminder to yourself you will want to remove every name but your own, if this is a meeting, make sure all attendees names appear in the “To” field).
4. Change subject line if necessary (Outlook will use the subject line from the e-mail).
5. Change start date, end date, start time and end time, and set reminder if necessary.
6. Send the meeting request (If it’s a reminder for yourself, you will want to delete the meeting invitation when it arrives in your in-box).

This image shows my inbox in Outlook. I have Clicked on an e-mail I would like to use to create a “Meeting”.



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Process & Organize e-mails

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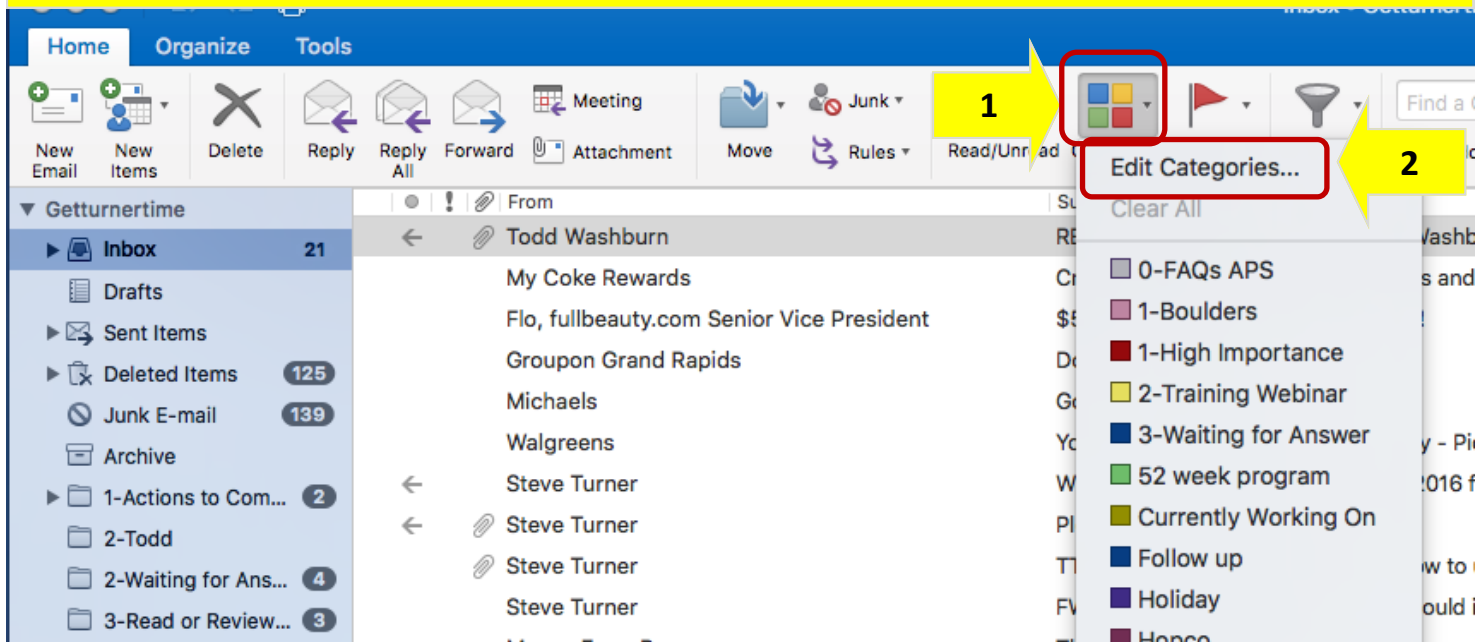
Setting up color coding for appointments using categories

Use categories and their corresponding colors to recognize specific appointment types on your calendar at a glance.

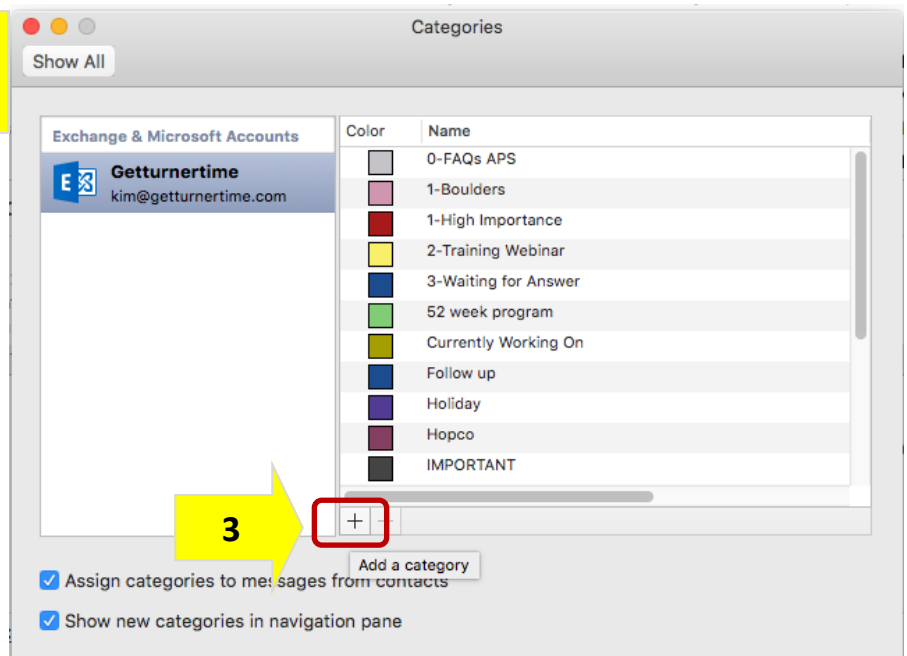
To create categories:

1. Click "Categories" button.
2. Click "Edit Categories".
3. Click "+" to add new Category.

This image shows the "Categories" button (at the top of Outlook when I am viewing my inbox) and the command to Click to "Edit Categories"



This image shows the "+" sign you will click to create new Category.



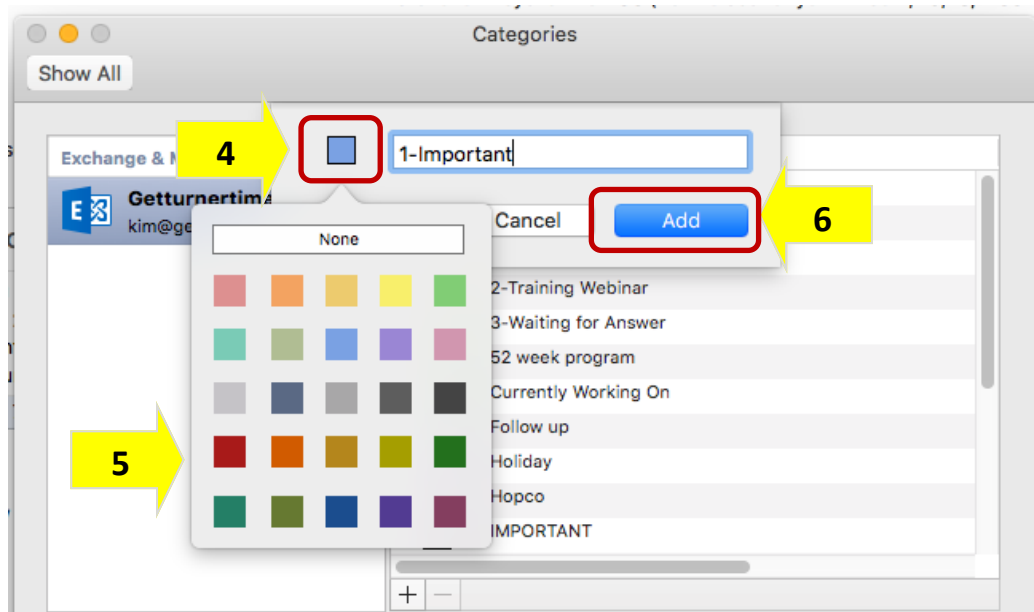
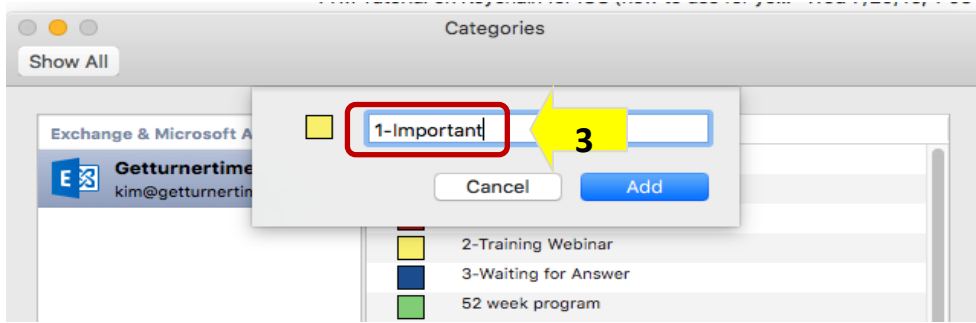
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Set up Categories (continued...)

3. Type a new name for the Category.
4. Click the colored square to assign a color.
5. Click the desired color.
6. Click "Add".

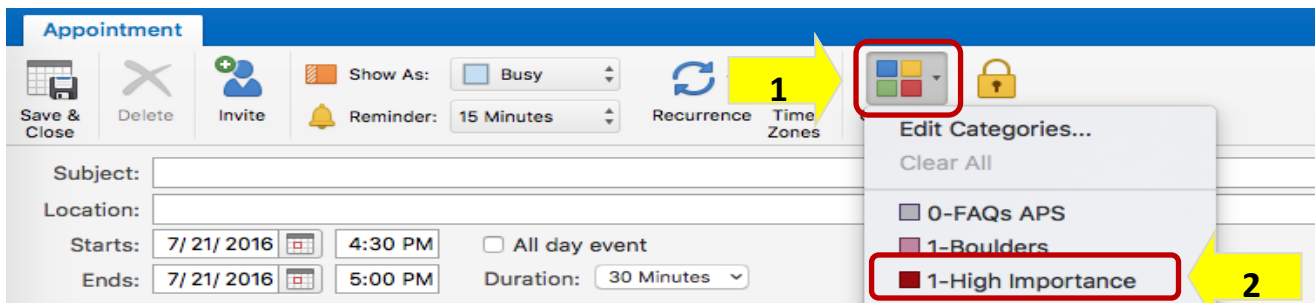
This is the "New Category" box that will appear after (Add New), type over "Untitled" to name the new category.



Color coding appointments in your calendar

In a New Appointment:

1. Click "Categories" button.
2. Click desired category.



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Color coding appointments in your calendar (Continued...)

In Existing appointment:

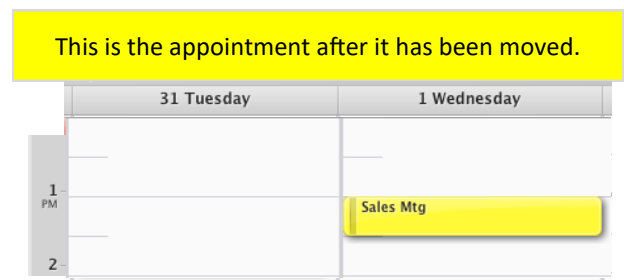
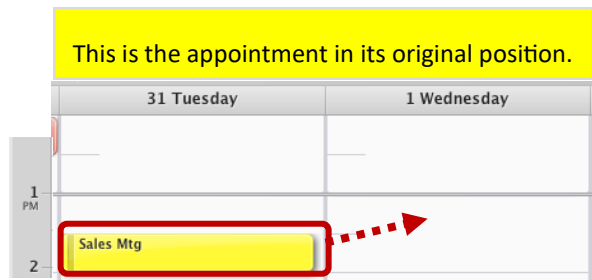
1. CTRL click appointment.
2. Hover over "Categorize".
3. Left click desired category.

Script your day (using the "day" view works well)

Tricks to Navigating your Outlook Calendar

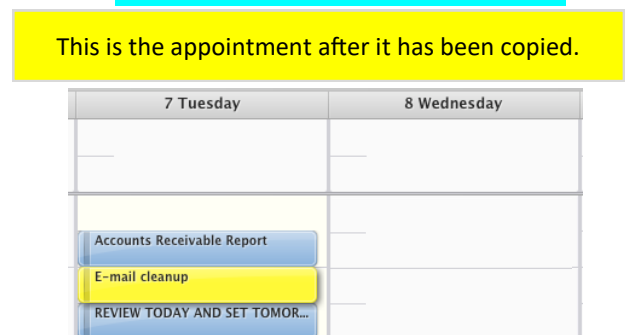
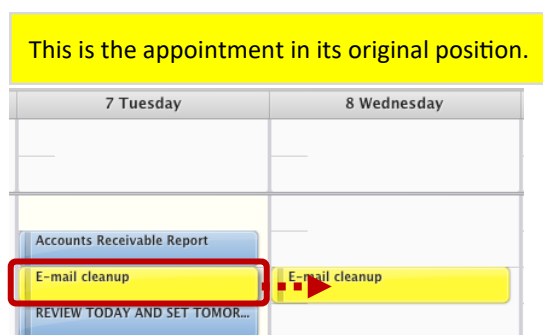
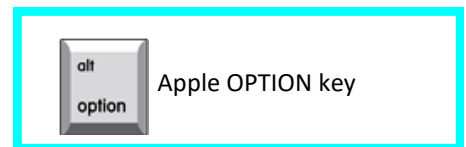
Move a calendar appointment:

1. Click on desired appointment.
2. Drag appointment to new time and/or date.



Duplicate an appointment on a different date/time

1. Click on desired appointment.
2. Press OPTION key.
3. Drag appointment to additional date/time.



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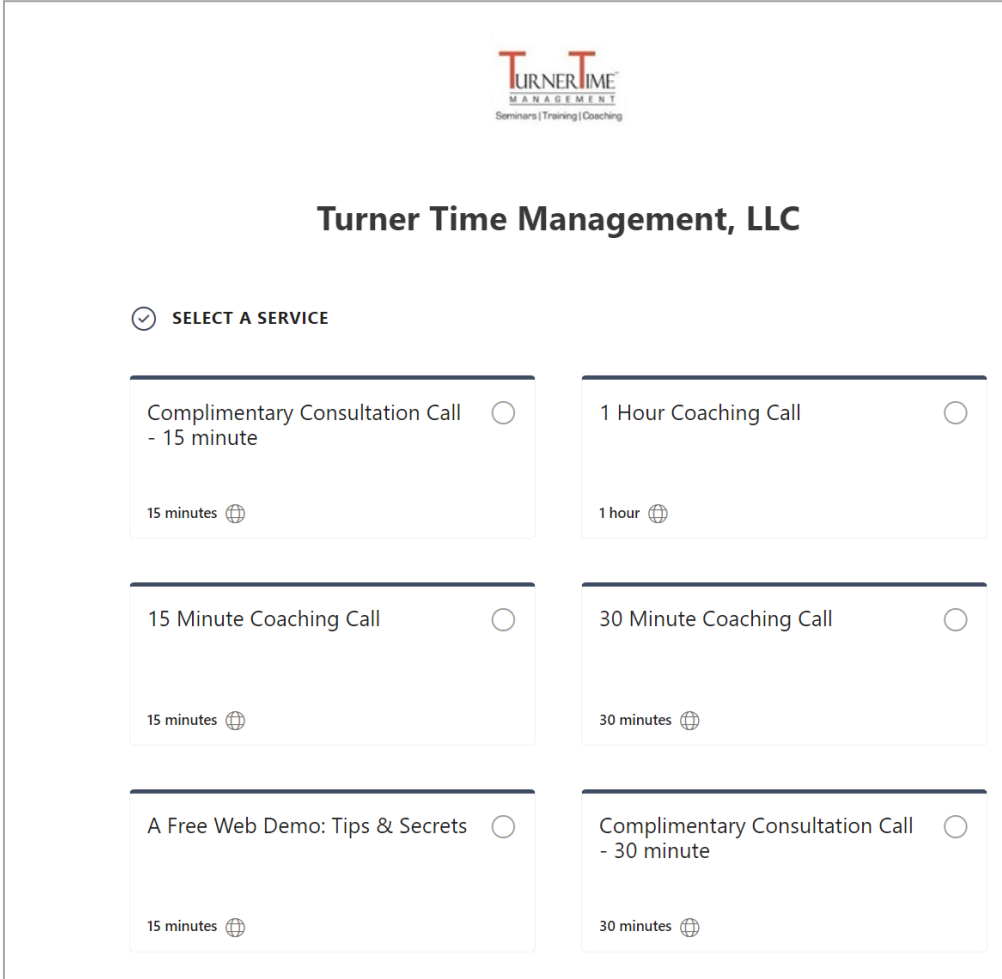
Microsoft Bookings for Customers to Set Appointments with you on your Outlook Calendar


Microsoft Bookings a great platform that is included in your Microsoft 365 suite subscription that you already got. It will help your clients and co-workers see your availability and book a date and that to schedule a meeting with you. [Click here to go to your Bookings account.](#)

[Microsoft Bookings](#)









The image below shows the Microsoft Bookings page for TurnerTime where people can book a meeting with the




Seminars | Training | Coaching

Turner Time Management, LLC

SELECT A SERVICE

<input type="radio"/> Complimentary Consultation Call - 15 minute 15 minutes 	<input type="radio"/> 1 Hour Coaching Call 1 hour 
<input type="radio"/> 15 Minute Coaching Call 15 minutes 	<input type="radio"/> 30 Minute Coaching Call 30 minutes 
<input type="radio"/> A Free Web Demo: Tips & Secrets 15 minutes 	<input type="radio"/> Complimentary Consultation Call - 30 minute 30 minutes 

Optimize Outlook

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Microsoft Bookings to manage Appointments in your Outlook Calendar...CONTINUED

The images below show the process of booking an appointment.

Booking for **A Free Web Demo: Tips & Secrets**

October 21

DATE **TIME**

< > October 2022

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

9:30 PM 11:30 PM

ADD YOUR DETAILS

Name

Email

Phone number
Select country code


Notes (optional)
Add any special requests

PROVIDE ADDITIONAL INFORMATION

What do you want to learn or know primarily in this free web demo?
Add your answer here

Book

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Optimize Outlook

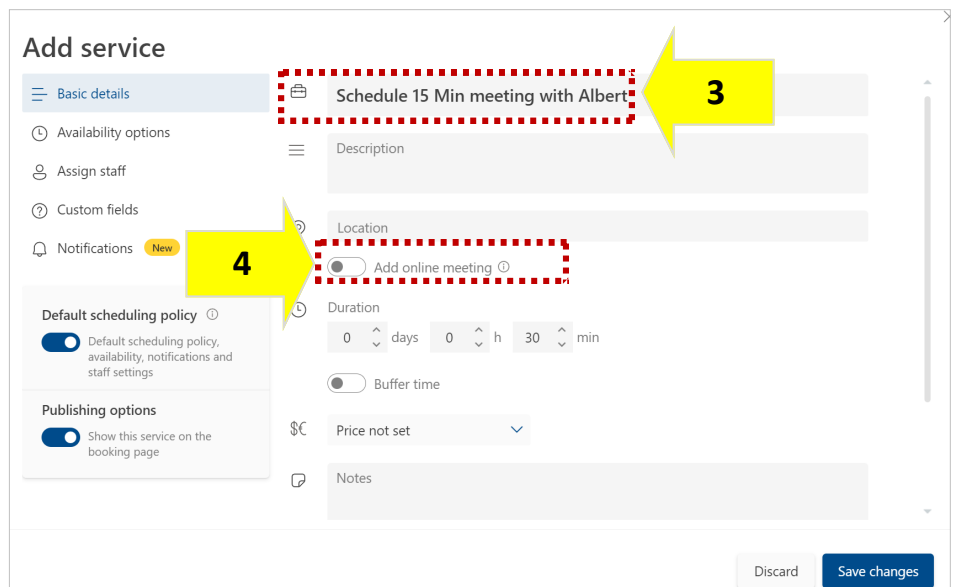
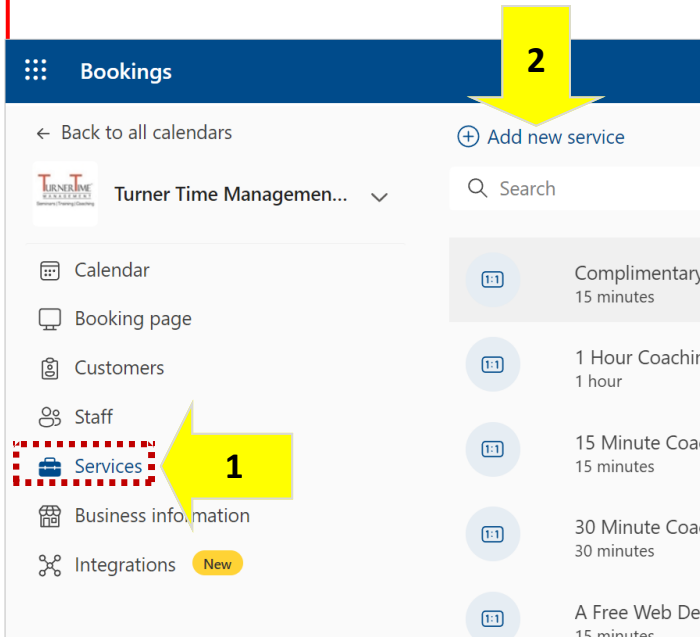
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How to Create a Service in Bookings

Here is how you will create a new service in Microsoft Bookings:

1. Left-click “Services”
2. Left-click “Add new service”
3. Enter the title for the meeting/service
4. Toggle the button to Add online meeting. It would add Microsoft Teams meeting link in the body of the calendar invite.

This images below show the home page of Bookings where you will create a new service.



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How to Create a Service in Bookings

5. Select the time duration
6. After adding details, left-click "Save changes".

This image below shows the home page of Bookings where you will create a new service.

How to Copy Link of a Booking Service to Send via Email or other Platforms

1. In Services, left-click the Service you want to send the link for.
2. Left-click on the copy icon (that would copy the link to your clipboard).

If you want to show up multiple Booking services, you can see them all on the Booking page and copy the link of that page as well to send to others.

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Find Information in Seconds

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2. Find ANY e-mail in seconds in Outlook:

Search for e-mails by:

- ✓ Subject
- ✓ From
- ✓ To
- ✓ Category is
- ✓ Project is

1. Type words to search for in search field (upper right corner of Outlook).
2. Use dropdown to select one of categories listed above.
3. Use buttons to select folder/subfolder/All Mail/All Items.

- ✓ Enter more information to help refine your search...
⇒ Example: "the best iPhone, iPad, and android"

You can also use any of the buttons displayed under the "Search" tab to refine your search:

- From
- Subject
- Has Attachments
- Sent To
- Date Received
- Date Sent
- Marked Important
- Unread
- Flagged
- By Category
- Save your search
- Open "Advanced search options"
- Close Search

Process & Organize e-mails

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3. The most efficient way to process and organize e-mails

RULE #1: Anything you do repeatedly for your business deserves a process (including getting control of your Inbox...)

USE OUTLOOK “SPEED” KEYS TO MORE QUICKLY MANAGE YOUR INBOX

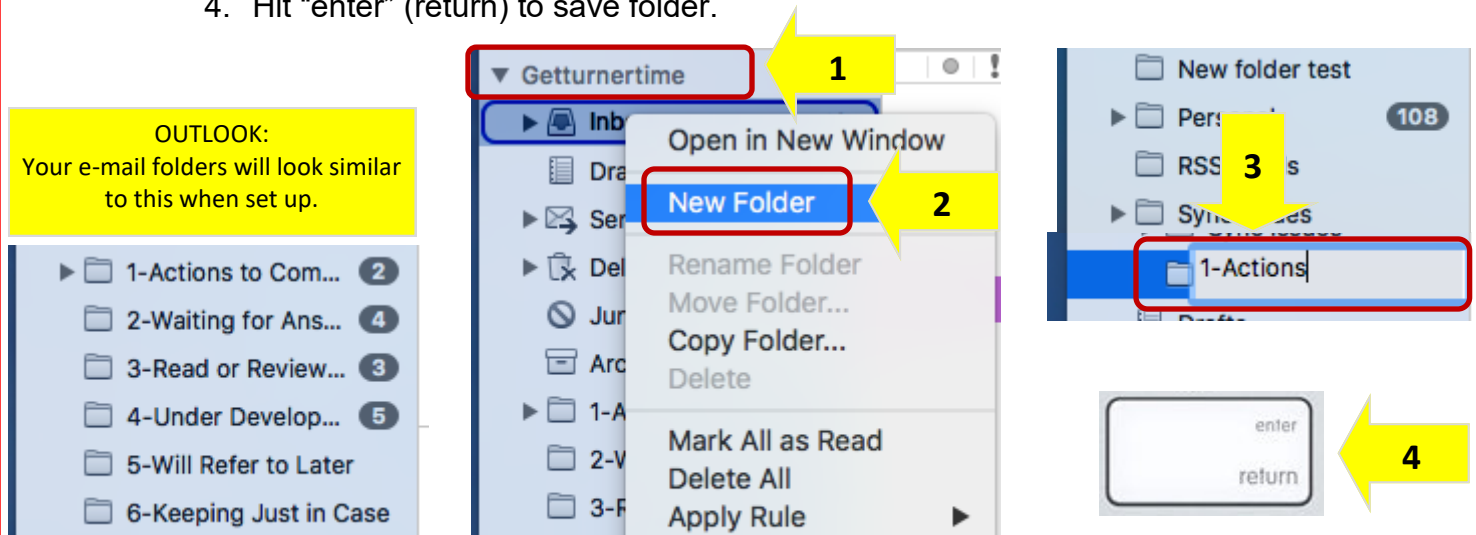
a) Create new “top level” e-mail folders by priority NOT by subject.

Move e-mails out of Inbox and into the proper folder:

- 1 - Actions to Complete (‘Must do’ actions, projects, etc.)
 - ✓ If you have large project(s) can create project sub-folder(s) under here
- 2 - Waiting for Answer (Everything needing a reply before you take action)
- 3 - Read or Review Later (e-mails to read or review at your convenience)
- 4 - Under Development (‘Not yet’ or more data/resources needed)
- 5 - Will Refer to Later (can move later to ‘Documents’ or archive)
 - ✓ **Most of your existing “Subject” folders can go under this folder**
- 6 - Keeping Just in Case (vs. deleting when you may need it later)
 - Inbox: Only e-mails that you haven’t looked yet or working on today*

How to create new “top level” e-mail folders:

1. CMD + click on account name.
2. Click “New Folder”.
3. Type name for folder.
4. Hit “enter” (return) to save folder.



b. Don’t use your Mailbox or Inbox as a “Storage box”

- Recommendation: Only use your Inbox for:
 - ✓ What you haven’t read yet
 - ✓ What you are going to work on today
- More recommendations for organizing your e-mail
 - ✓ “Subject” folders: Move under 5 folder (Will Refer to...)
 - ✓ Sent folder: Keep X mos. of e-mails (archive older)
 - ✓ “...Just in Case” folder: Keep X mos. (archive older)
 - ✓ Contact TurnerTime if you need archiving assistance

Attachments: Store long term in “Documents”; delete from e-mail; can save e-mails there too!

Process & Organize e-mails

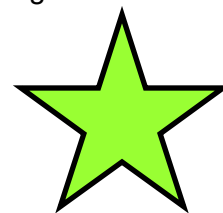
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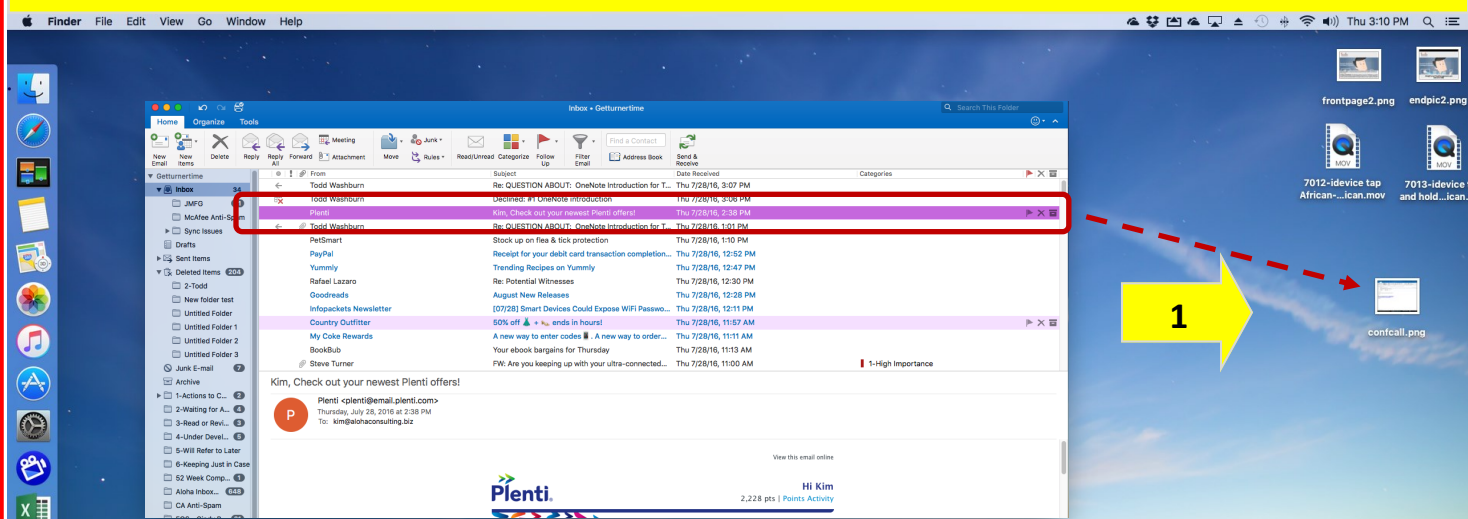
OPTIONAL - How to save an Outlook e-mail (and any attachments) into a "Documents" folder.

You can NOT save an e-mail in your "Documents" folder directly from Outlook, but there is a great work-around that is quick and easy. You will drag the e-mail onto your Desktop and then drag it into the desired folder.

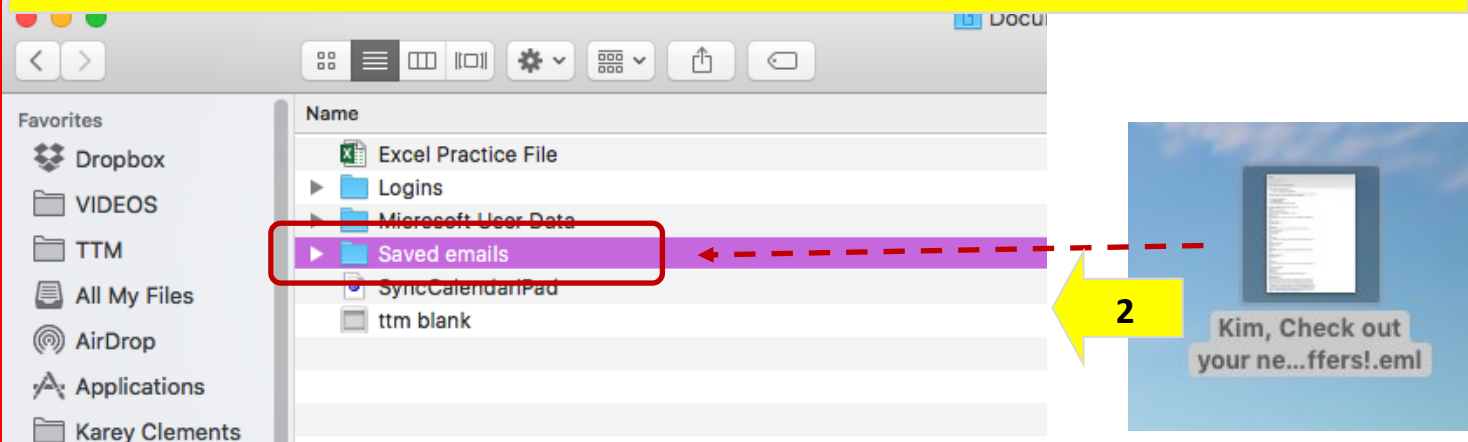
1. Drag desired e-mail onto your desktop.
2. Drag e-mail into desired folder.



This image shows where I click an e-mail in Outlook and drag it to the desktop.



This image shows where I click the e-mail and drag it into a special folder I created.



If you consistently save e-mails to one specific folder, you can keep the folder shortcut on your desktop and drag e-mail directly from Outlook into the folder on your Desktop.

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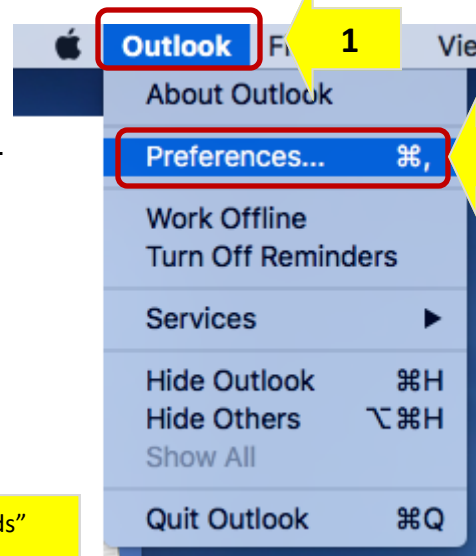
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Process & Organize e-mails

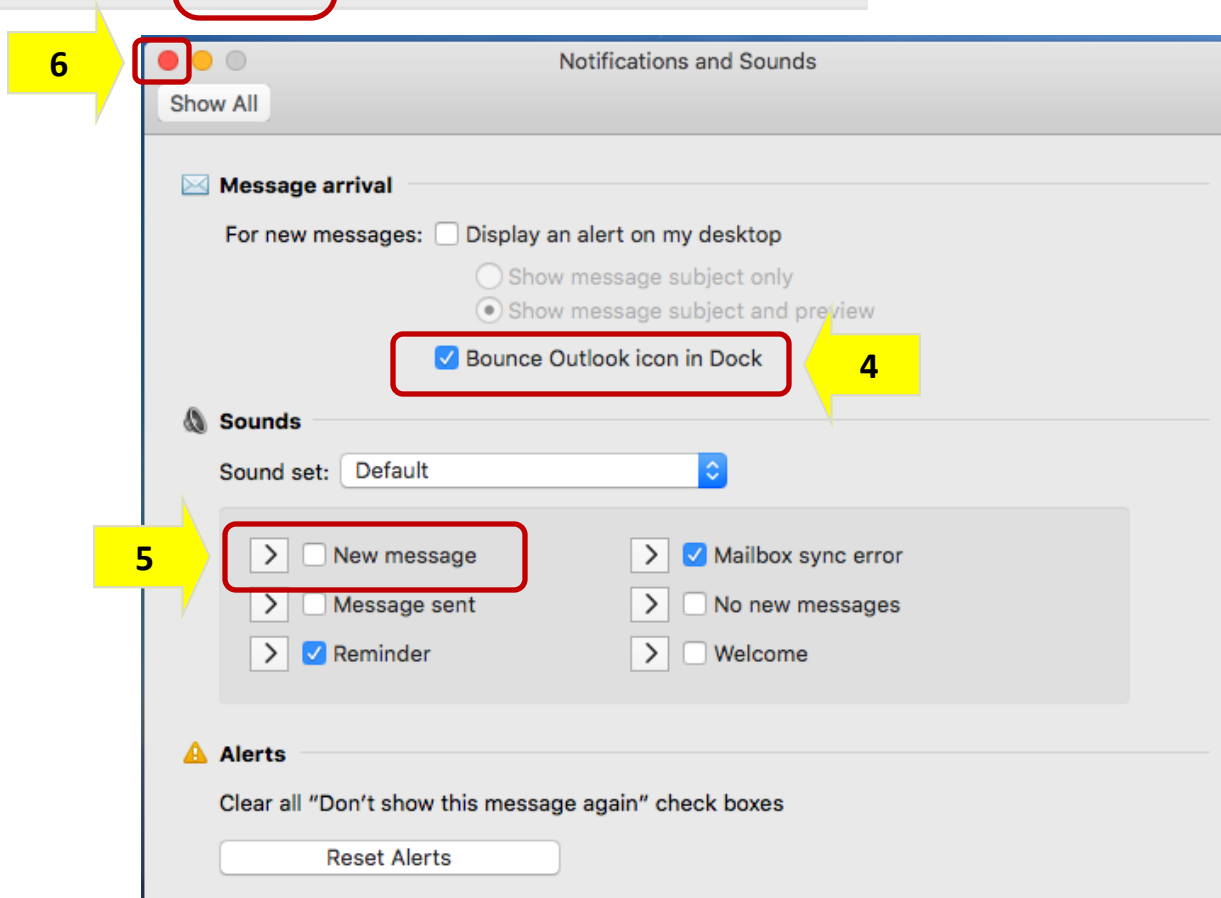
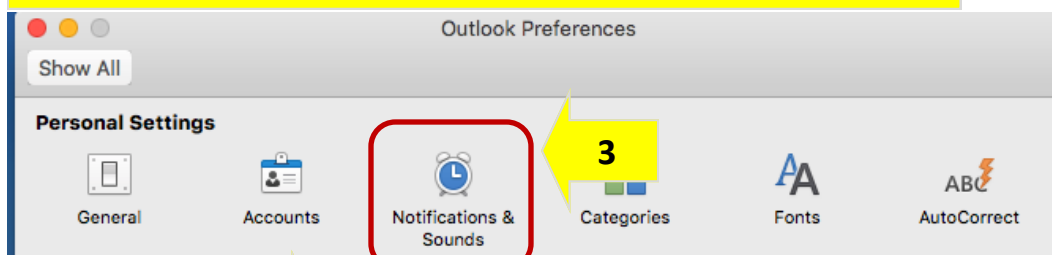
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Remove Unnecessary interruptions; turn off Notifications:

1. Click "Outlook".
2. Click "Preferences".
3. Click "Notifications & Sounds".
4. ONLY check "Bounce Outlook icon in Dock".
5. Uncheck "New message" under Sounds.
6. Close "Notifications and Sound".



These images show the "Outlook Preferences" and "Notifications and Sounds" dialog boxes.



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- d. Follow effective e-mail guidelines**
- Subject Line: It's your "Headline"/"Call to Action"/summary—does your recipient have a good idea what they need to do, by your subject line alone?
 - ✓ Change subject line if subject changes (or start a new e-mail)
Good subject lines will make finding e-mails later easier
 - ✓ Keep Subject line SHORT (many emails are viewed on mobile devices)

**Average subject line: "Usage Report for ABC Co."
"Action" subject line: "ABC Usage shows HUGE upside!"**

- MORE Effective E-mail Guidelines**
- A phone call is virtually always better than just sending an e-mail
 - Avoid e-mail in a back/forth debate or when difficult to write email
 - Don't e-mail when you're upset, unsure or need instant response
 - Sending an important and/or time sensitive e-mail? Call them first
 - If Subject line is blank – fill it in.
 - Try to have only ONE subject matter per e-mail
 - Use 'To:' field for 'Action' and 'Cc:' for 'FYI Only'
 - Put action items/key info at beginning of e-mail
 - Keep e-mail short; bullets/single line sentences will insure its read
 - Provide quick summary of attachments; use good file names

- e. To clean up your Inbox quickly (see our coaching program for several even more powerful recommendations):**
- FIRST...Select all e-mails you know can delete without opening**
1. Select multiple e-mails; press CMD Key + Click to select multiple e-mails OR SHIFT + Click on first and last email in the range you want to select
 2. Delete all those e-mails at once (CMD Key + D or DEL key to delete)

- f. Review each new e-mail only once to prioritize - TOUCH E-MAILS AS FEW TIMES AS POSSIBLE (JUST LIKE PAPER)**
- You must CONTROL the Inbox – since the older the emails in your Inbox get the farther they get from your memory.
- We recommend only keeping in the inbox what you haven't looked at yet or are working on today.
- During E-Mail Management sessions, go through e-mails sequentially - GET INTO THE "ZONE" SO YOU CAN HANDLE E-MAIL FAST
1. Open newest e-mail full screen (double click or press ENTER)
 2. Two minutes or less and important: DO IT NOW
 - ✓ Use e-mail shortcuts to Reply, Forward, Delete, Print, etc.
 3. Going to address it later today?
 - ✓ **Leave it in the e-mail inbox and go to the next message**
 4. Going to address it sometime after today?
 - ✓ File e-mail into appropriate folder
 5. Once Inbox has been gone through once, go back to the top e-mail in your Inbox.

Process & Organize e-mails

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- How to Use “Auto Correct” for Frequently Used Text (Outlook for Mac)**
Using “Auto Correct” for frequently used text, will help you save time when composing e-mail messages. You can create “shortcuts” that allow you to type in a few letters and Outlook will convert them into phrases as you type.

Commonly used phrases for “Auto Correct”:

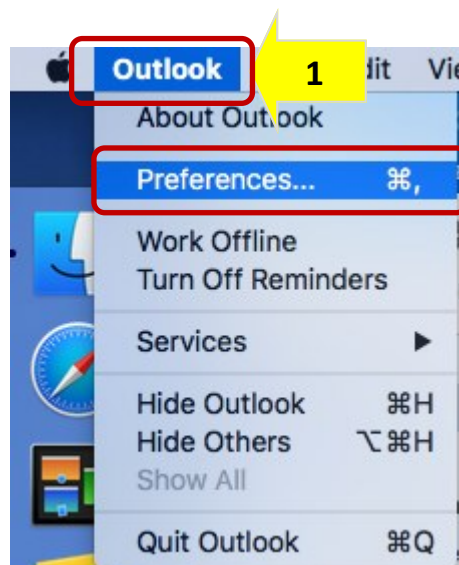
- Please see attached and let me know if you have any questions.
Thank you,
Kim
- Please call me on my cell phone at 630-774-7944. Thanks, Steve
- Thank you for your business!
- I’m in a meeting. Will call you back later.
- For your information
- I thought you might find this helpful.
- My mailing address is:
Turner Time Management, LLC
Attn: Steve Turner
306 Stratford Place, Unit 21
Bloomington, IL 61810

Can also be set up
on iPhone/iPad!
Please see
Shortcut Reference
Tri-fold.

With Outlook open:

1. Click “Outlook”.
2. Click “Preferences”.

This image shows where you will find “Outlook” and “Preferences”.



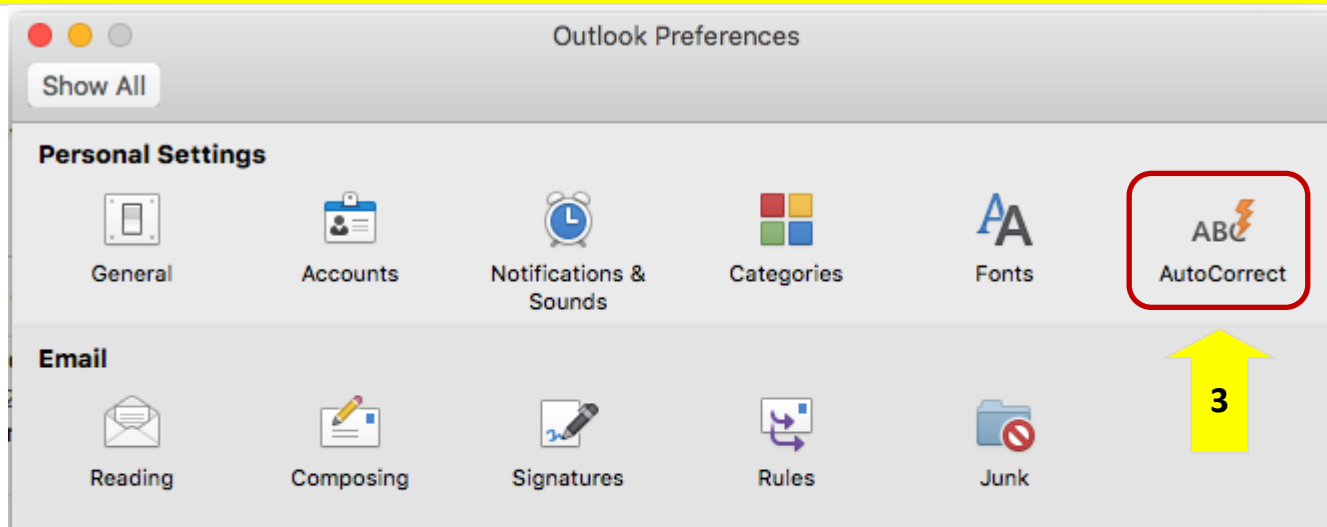
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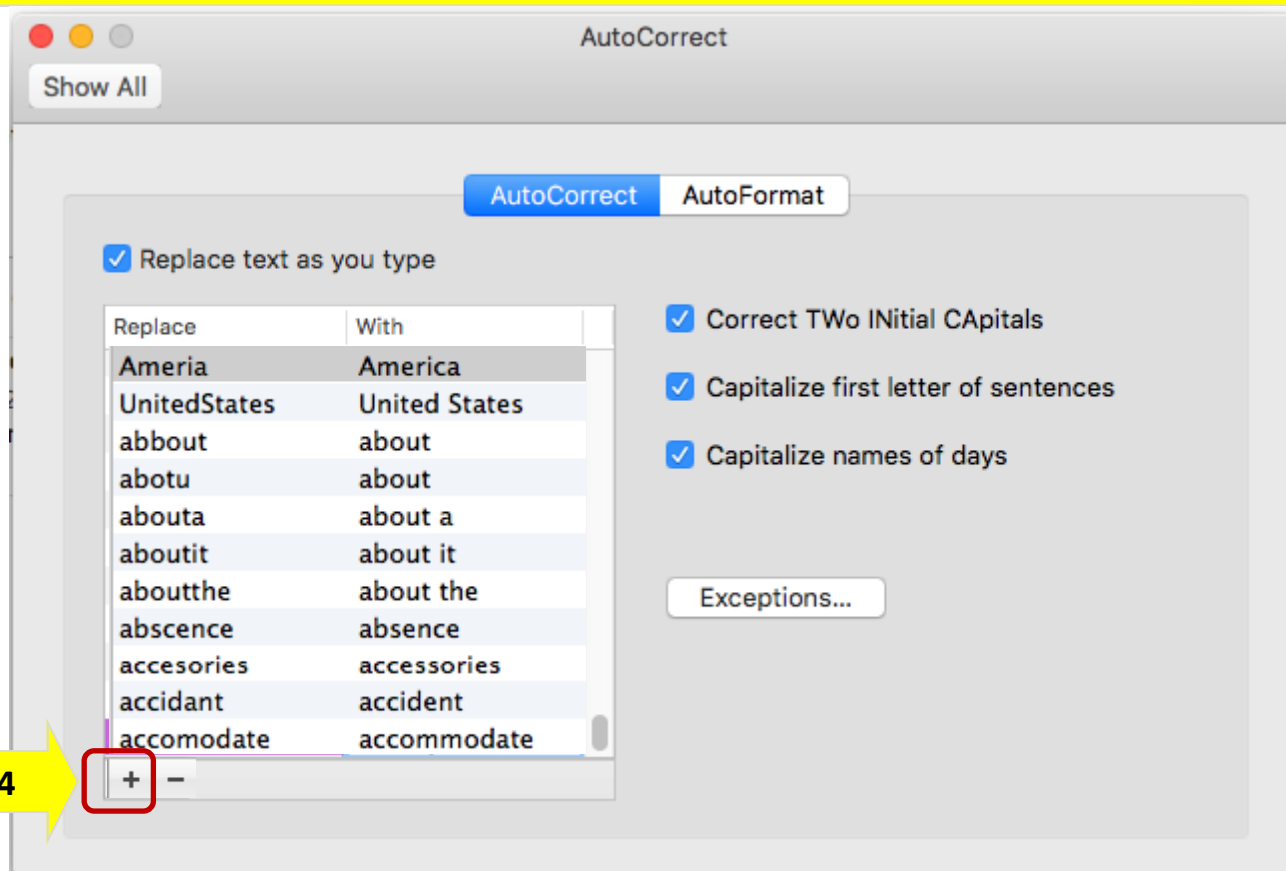
How to Use “Auto Correct” for Frequently Used Text (Outlook for Mac) (continued...)

3. Click “AutoCorrect”.
4. Click the “+” under the list.

This image shows where you will click “AutoCorrect” in Outlook Preferences dialog box.



This image shows where you will click “+” to add a “Correction”.



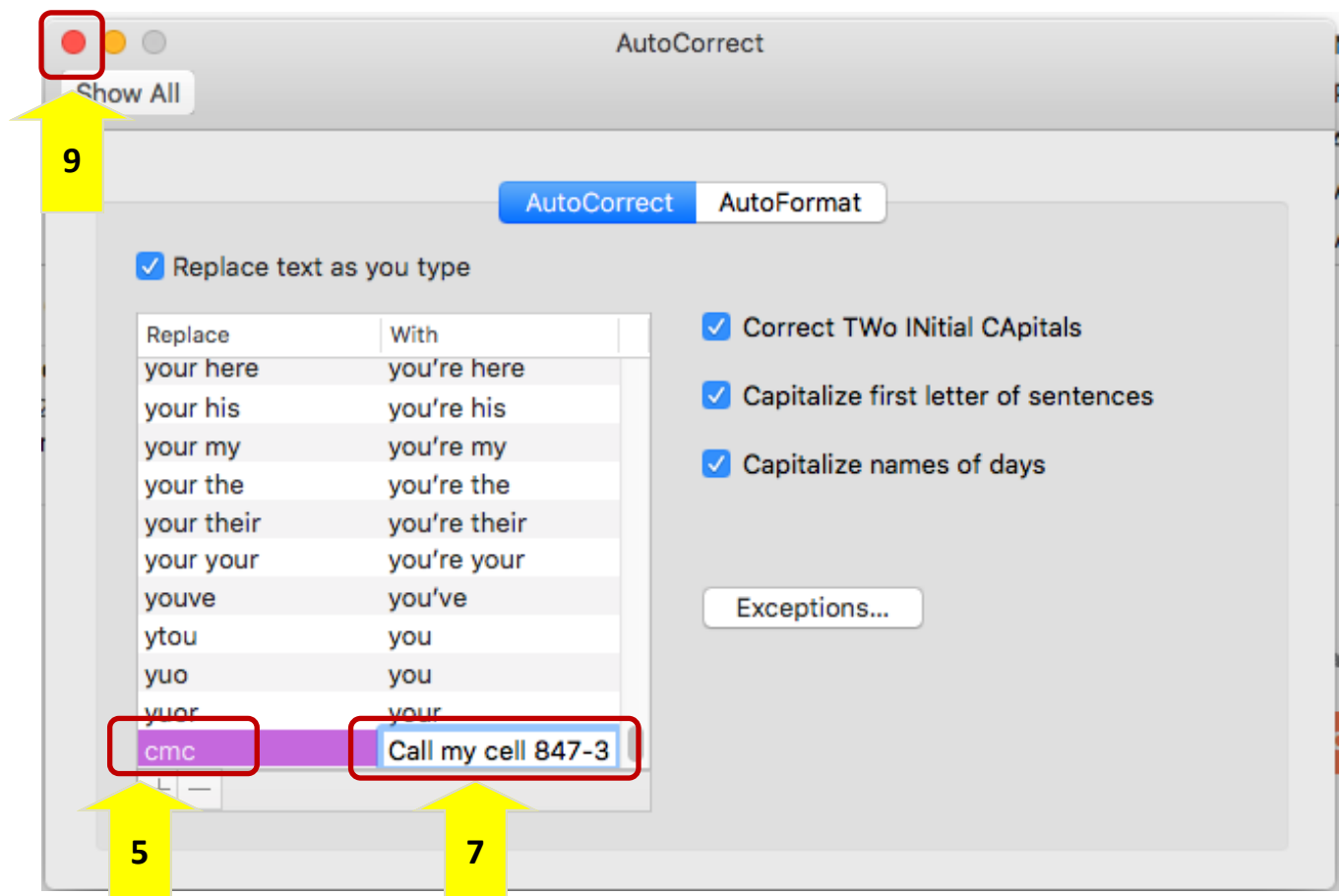
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How to Use “Auto Correct” for Frequently Used Text (Outlook for Mac) (continued...)

5. Type the acronym (or any combination of letters) in the blank “Replace” field (in this example we are using CMC).
6. Press “Tab” key to advance to next field.
7. Type the replacement phrase in the “With” field (In this example - Call my cell 847-555-0047).
8. Hit “Enter” (Return key).
9. Close the “AutoCorrect” dialog box with the red circle.

This image shows where you will type the shortcut in the “Replace” field.



Now that “Auto Correct” is set up, every time you type in “cmc” and hit the space bar it will be replaced with “Call my cell 847-555-0047”.

This can be used for phrases you find yourself typing frequently. This will save you time when creating emails or documents.

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Consolidate All Tasks...

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- Use your Auto Signature and have useful information in it**
 - Make sure you have a signature for both new and replies
 - Set up on each mobile device (tablet, smartphone)
 - "Best Practices" for everyone in the organization
 - Contact info (Name, title, phone, fax, e-mail, website)
 - Legal disclaimer
 - Any other information you want all customers to know - www.pointacross.com

- 4. Consolidate all tasks, projects, etc.**
TAKING ACTION... "Action precedes motivation"; you must START to become motivated
"Better to do something imperfectly than to do nothing flawlessly."
Decide what to do with e-mails that would normally accumulate in your Inbox

- It's about prioritizing what truly needs action—**
 What will get you to your goals? (boulders & rocks)
NOT
 Just doing what's easy (i.e. "sand") or what's more enjoyable
You can't do everything, so do what matters most

- Streamline to simplify/improve efficiency - Have ONE place to take notes/action items and initially get all your action items into Inbox**
 - We recommend using short (subject only) e-mails:
 - a) Computer e-mail program **see free video tutorial on our website**
 - b) Siri and/or Dragon Dictation (iPhone/iPad), VoiceActions/ Commands (Android), www.dial2do.com (cell phones)
 - c) Captio (\$1.99): Email yourself with 1 tap (iPhone/iPad)

- Next, get Your Inbox under control and your Today's "To Do list" assembled:**
 - ✓ Critical & can do it in <2 minutes? Do it Now
 - ✓ Going to do later today? Leave e-mail in your Inbox
 - ✓ Going to do it sometime after today? File e-mail in appropriate folder

- Once you've reduced your Inbox down to your "To Do list" for today:**
 - ✓ Schedule remaining boulders/rocks on your calendar (can drag e-mail to calendar)
 - ✓ **Make sure you have time scheduled on calendar to review your "priority" folders**

- Want/need a task management system?** Use '1-Actions to Complete' to consolidate all "tasks"
 - ✓ Streamline: No separate task list to have to go to
 - ✓ Quicker to review/re-prioritize and eliminates re-writing paper list
 - ✓ Possible columns "Order*" or "Due Date" *Have a large number of e-mails in the folder? "ROI" for "Return on Investment" might be more useful (see following pages)

Consolidate All Tasks...

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Effective File Organization

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How to Create and Use “Waiting for Answer” Rule (Outlook for Mac)

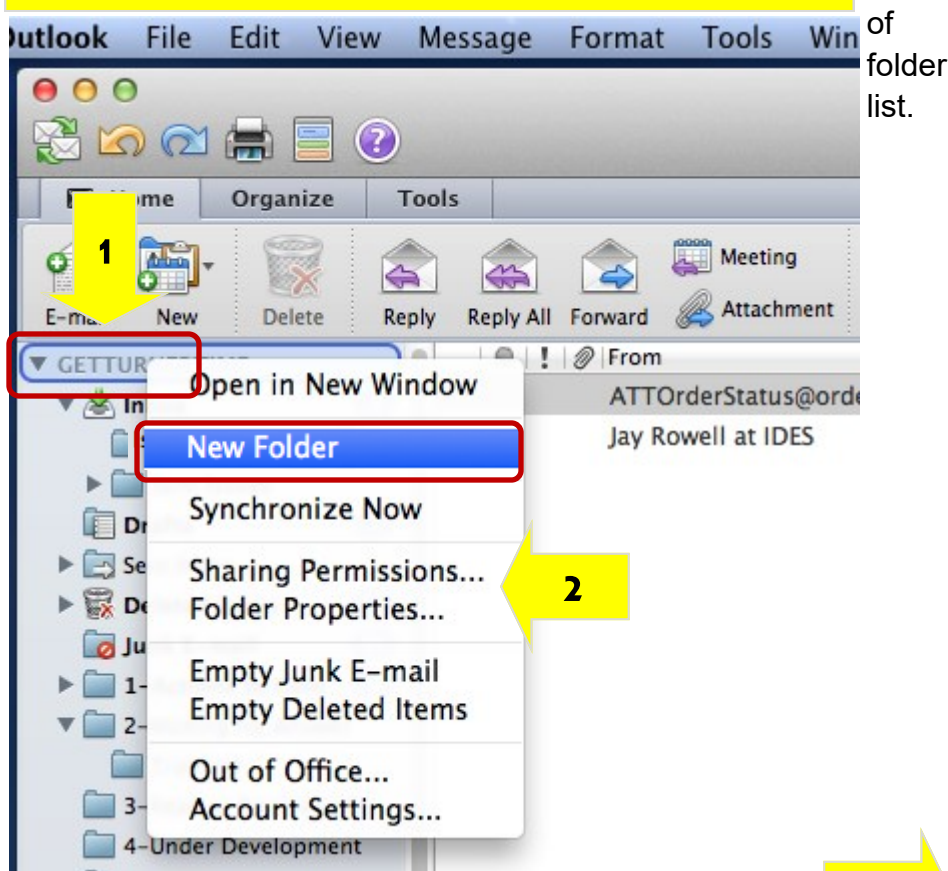
If you would like to keep track of e-mails you send that you are waiting for an answer on, you can create a “Waiting for Answer” rule in Outlook. You will create a folder to store the e-mails and a rule that checks all incoming mail for a specific term in the subject line or body of message.

Create Folder:

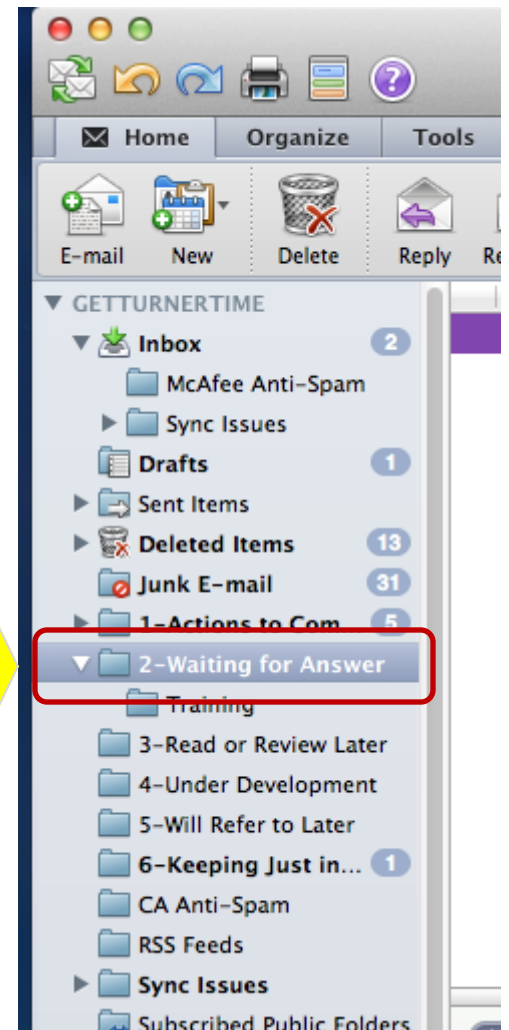
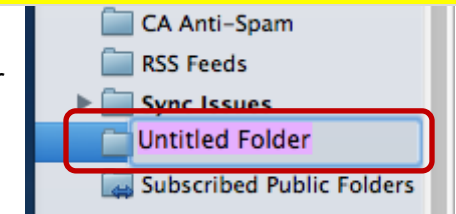
First you will need to create a “Waiting for Answer” folder to keep the e-mails in.

1. Control + Click on your e-mail address at top

This image shows the top left corner of Outlook for Mac.



The folder will be placed alphabetically in the list. When it is “Untitled” it will be in the U section, when you name it, the folder will move to the ap-



2. Click “New Folder” (this will put the folder on the Server, which allows you to access it from your mobile devices, as well as in Outlook on your Mac).
3. Type the name for the folder (in this example 2-Waiting for Answer).

Effective File Organization

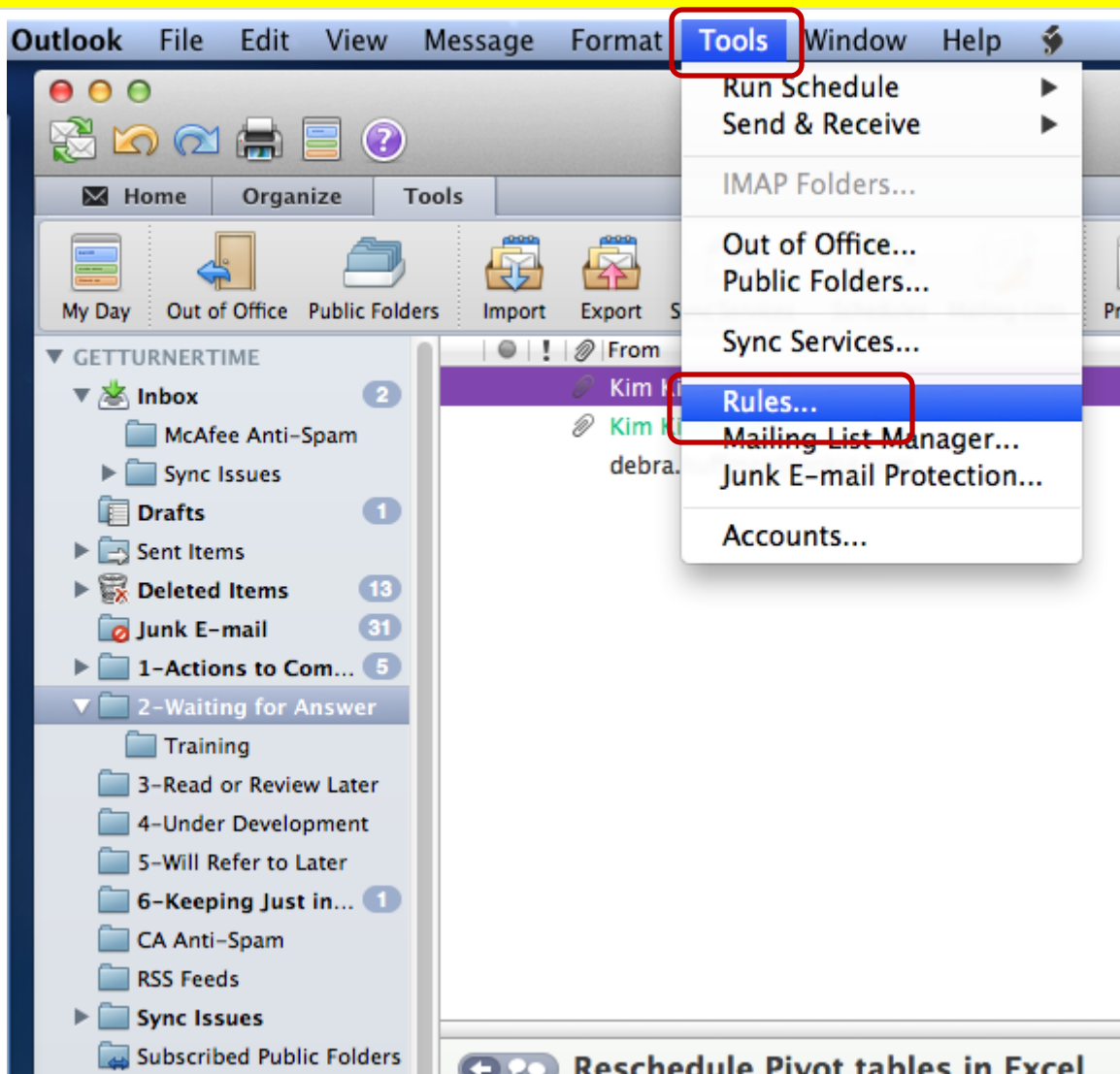
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How to Create and Use “Waiting for Answer” rule (Outlook for Mac) (continued...)

Create Rule:

1. Click on “Tools” at the top of your screen (in Outlook menu bar).
2. Click “Rules”.

This image shows where you will click “Tools” and “Rules”.



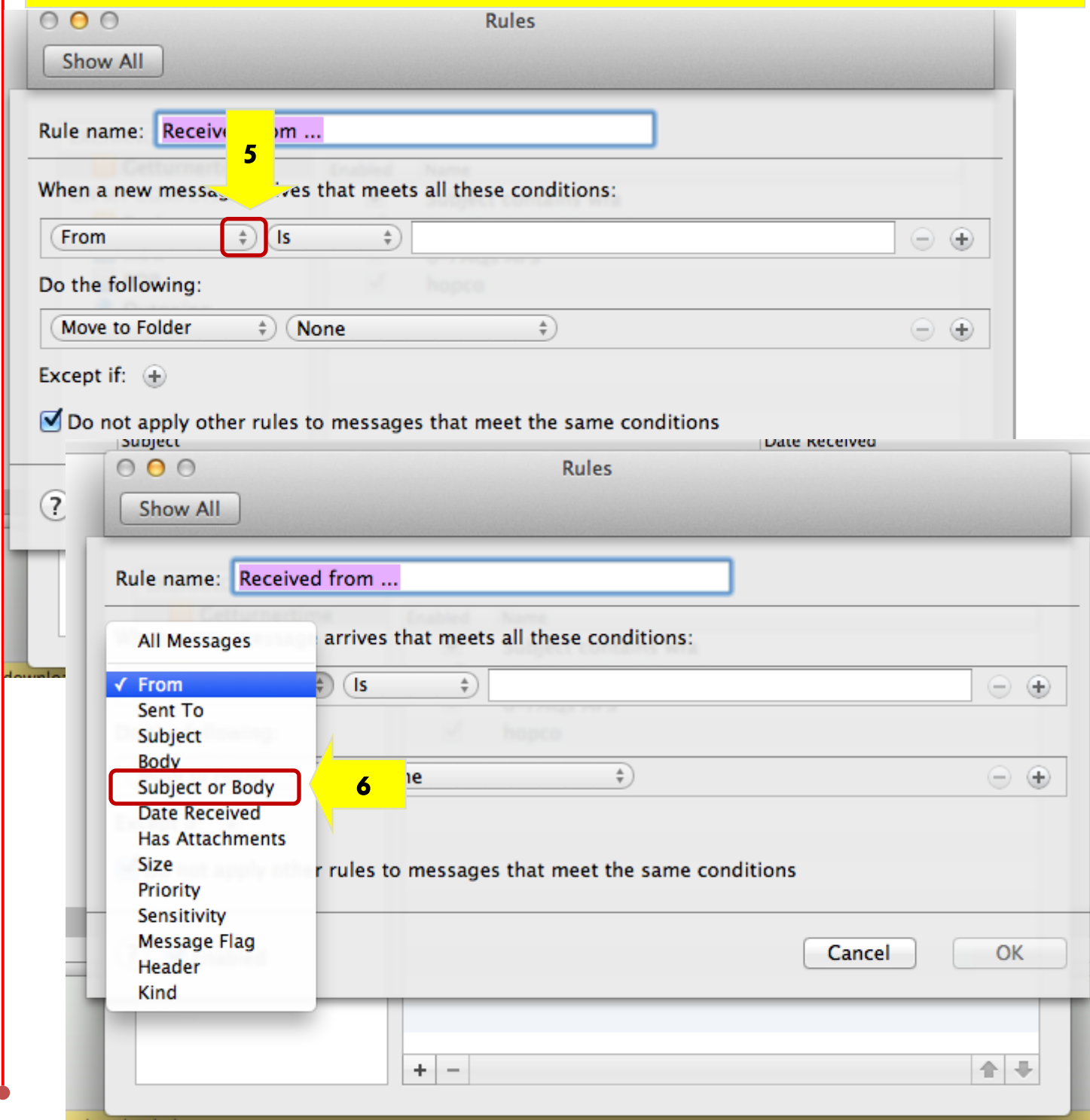
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How to Create and Use “Waiting for Answer” rule (Outlook for Mac) (continued...)

5. Click arrow in the first condition field.

These images show where you will create the conditions for your rule.



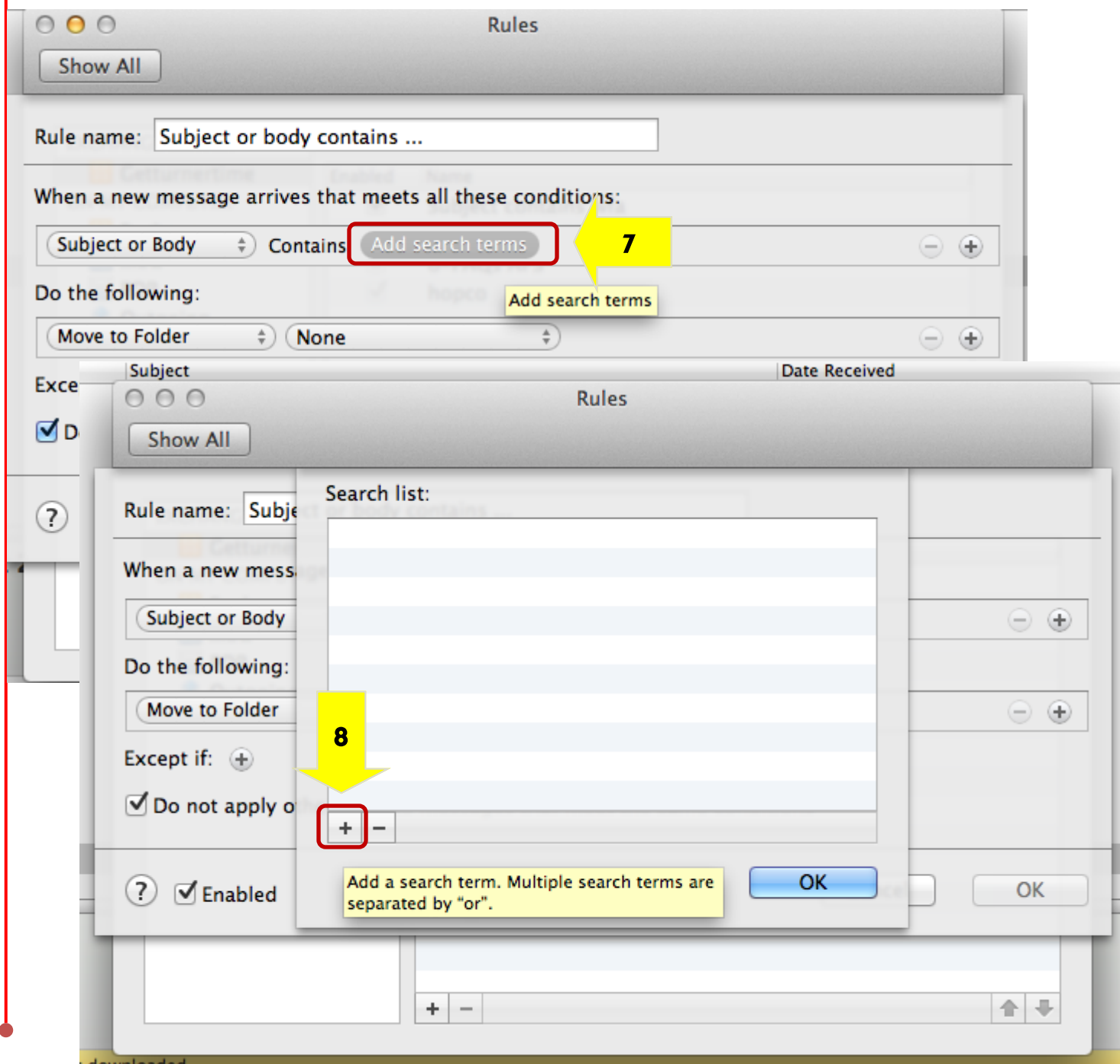
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How to Create and Use “Waiting for Answer” rule (Outlook for Mac) (continued...)

7. Click “Add search terms”.
8. Click + to add your new search term.

These images show where you will enter your search term for the rule. Outlook will search for this term as e-mails arrive.



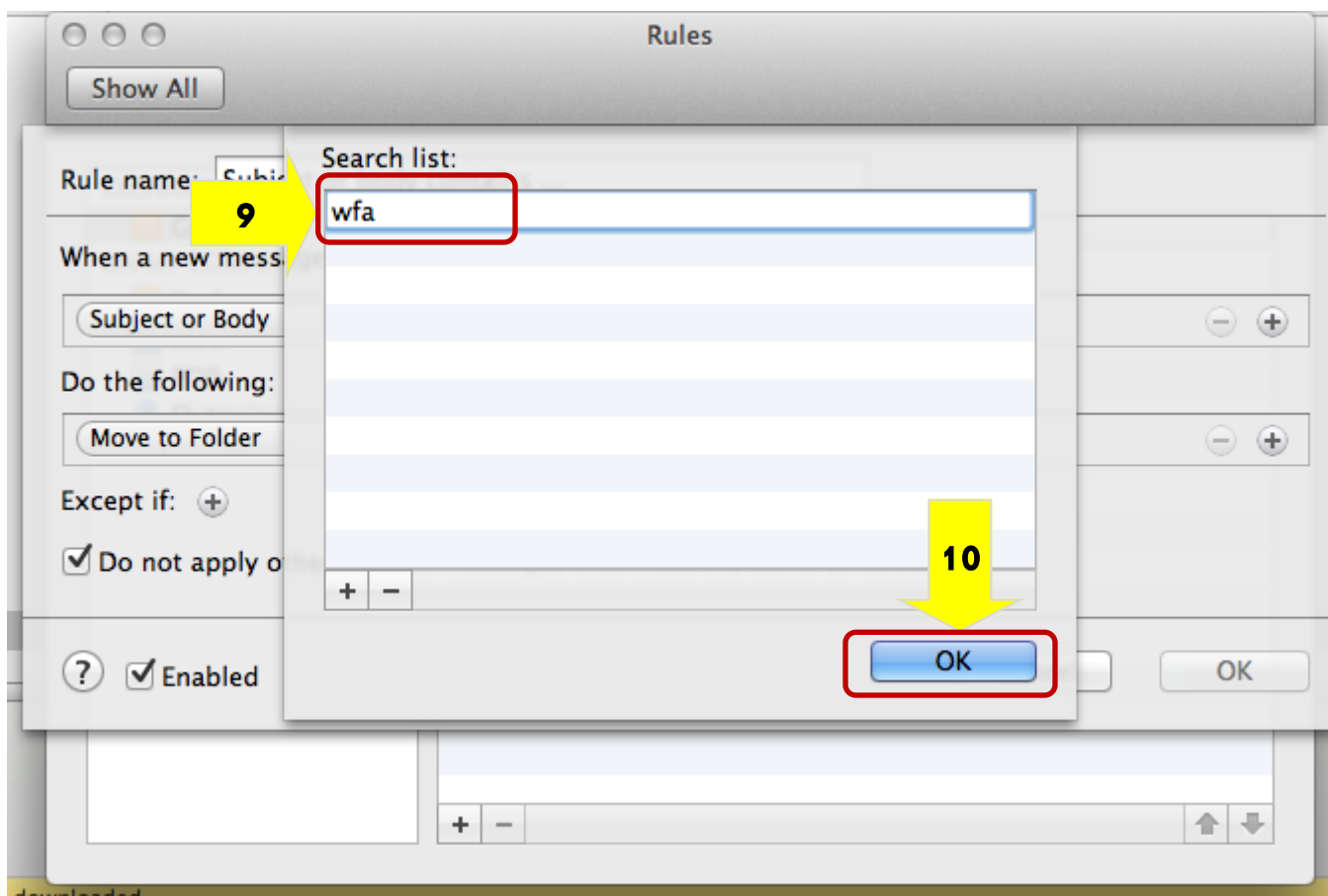
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How to Create and Use “Waiting for Answer” rule (Outlook for Mac) (continued...)

9. Type “wfa”.
10. Click “OK”.

This image shows where you will type your search term.



Consolidate All Tasks...

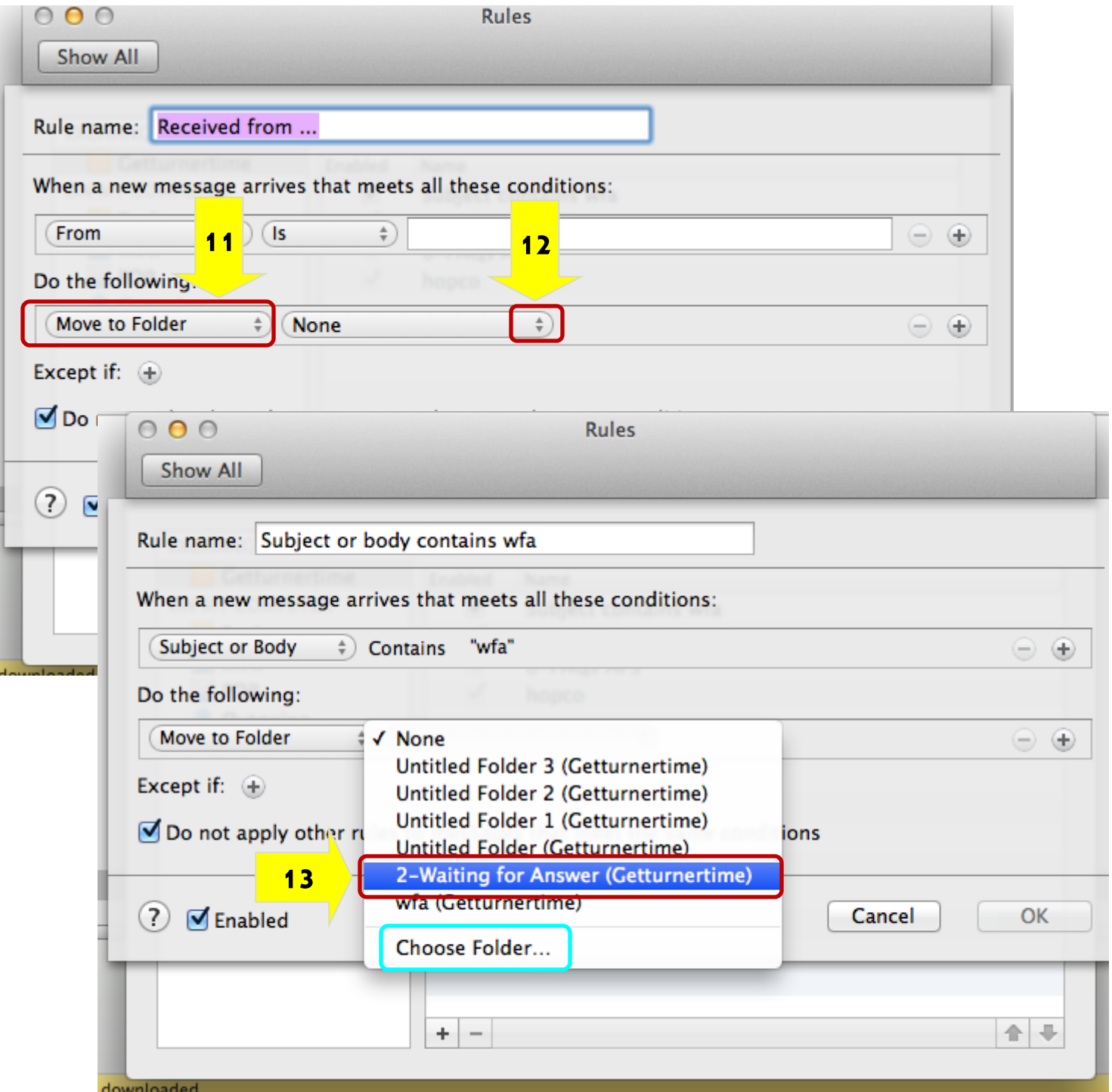
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How to Create and Use “Waiting for Answer” rule (Outlook for Mac) (continued...)

11. Make sure “Move to Folder” is selected (if not use drop down arrow to select).

12. Click drop down arrow on second field in “Do the following”.

These images show where you will select a folder to store the Waiting for Answer e-mails.



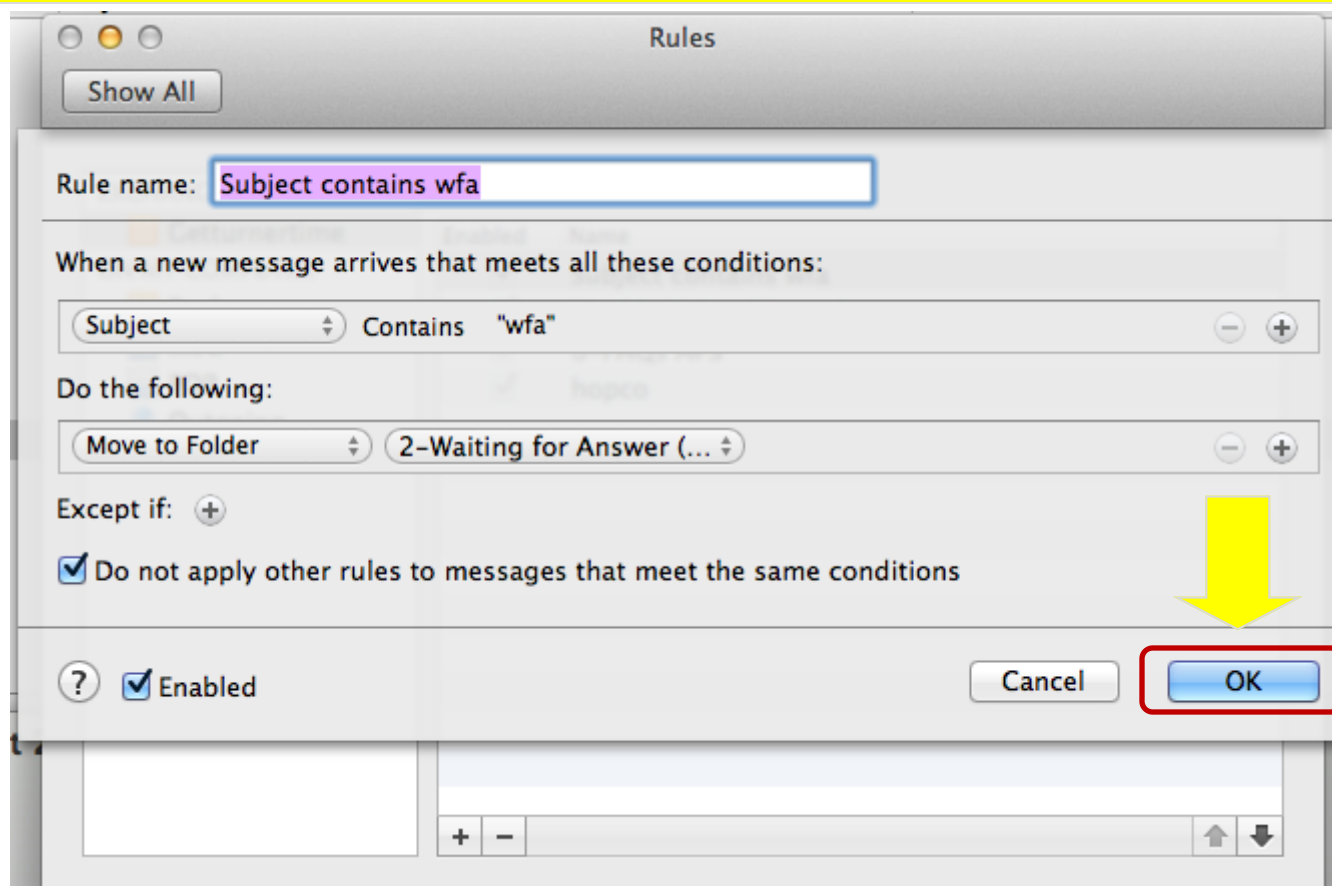
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How to Create and Use “Waiting for Answer” rule (Outlook for Mac) (continued...)

14. Click “OK” to save rule.

This image shows where you will click “OK” to save the rule.



Effective File Organization

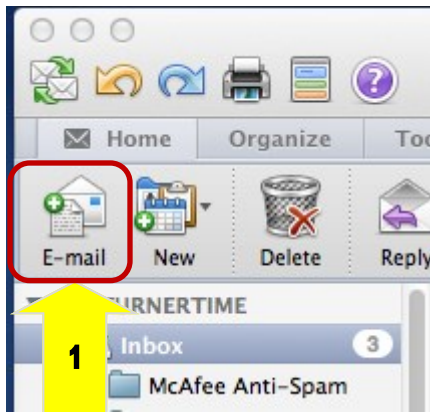
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How to Create and Use "Waiting for Answer" rule (Outlook for Mac) (continued...)

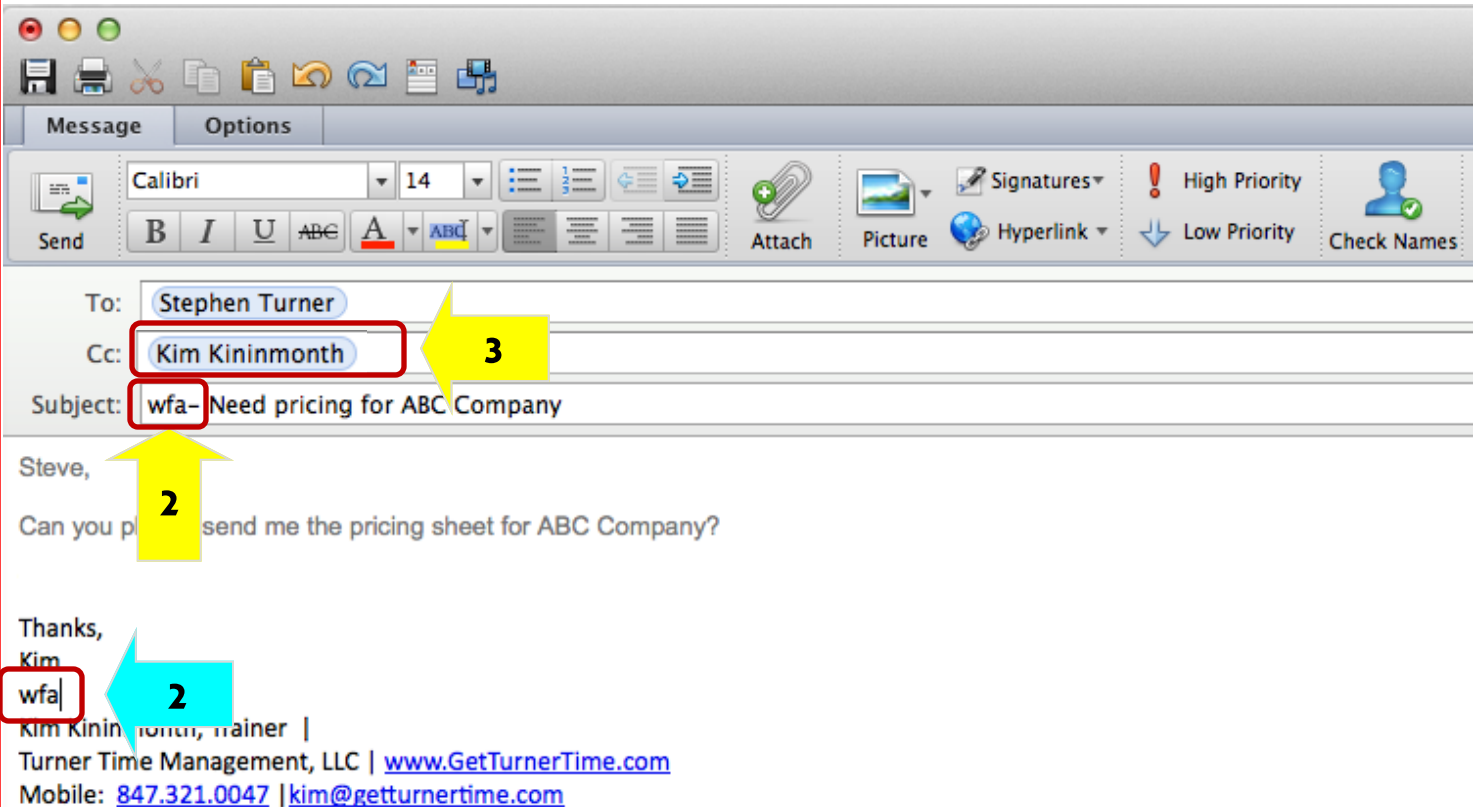
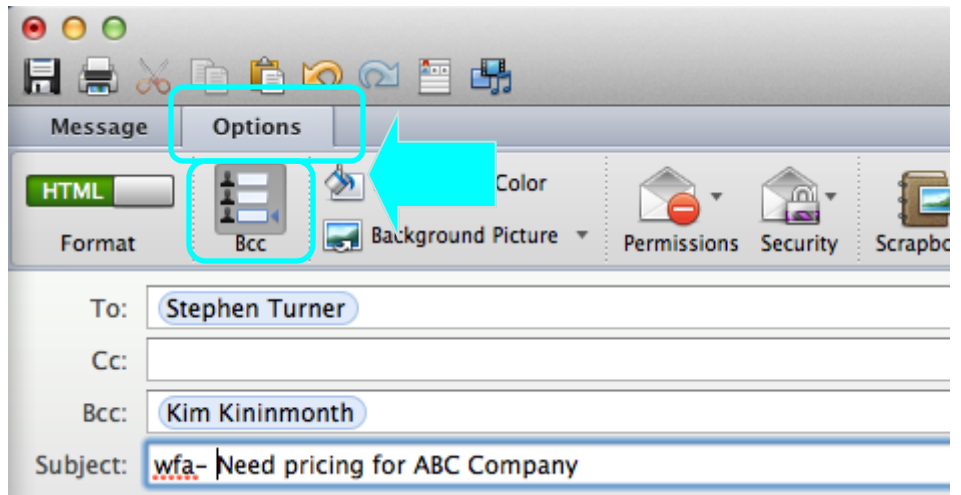
Use the "Waiting for Answer" Rule:

1. Open new e-mail message.
2. Add your search term (wfa) to either the subject line or body of e-mail.

These images show where you will add "wfa" in the message and Bcc yourself so a copy of the sent e-mail is stored in your "Waiting for Answer" folder.



3. Copy yourself on the email



The information (and any attached files) contained herein may be confidential and is intended solely for the use of the individual(s)

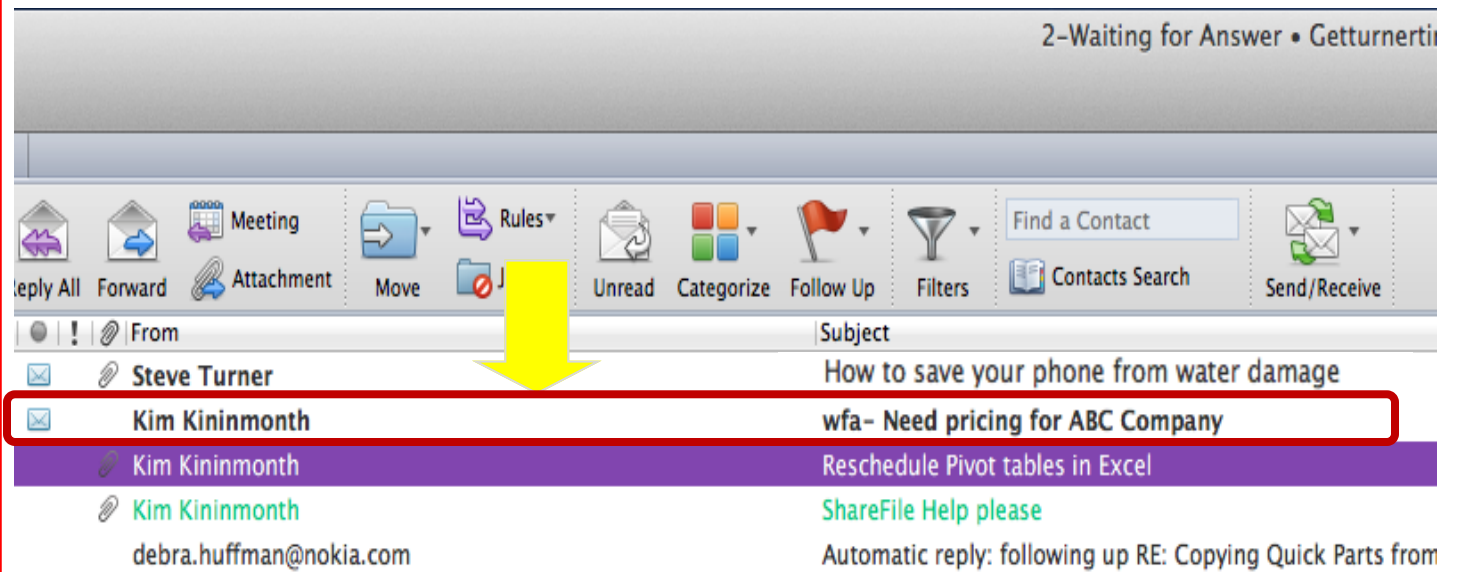
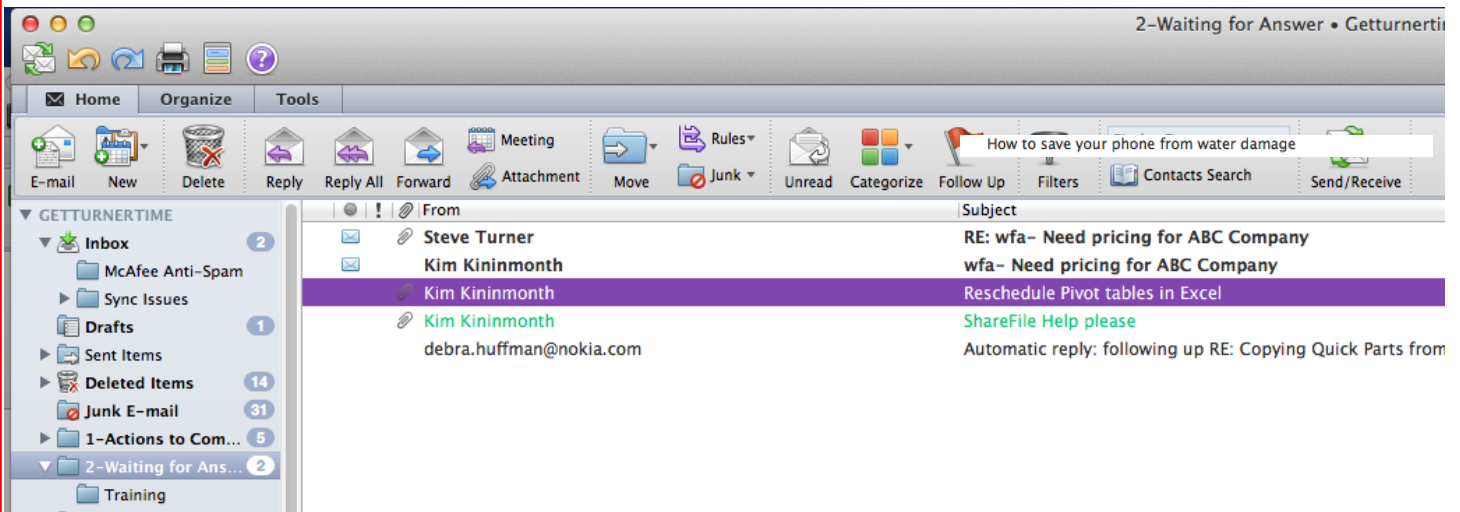
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How to Create and Use “Waiting for Answer” rule (Outlook for Mac) (continued...)

The e-mail you sent to yourself (Bcc field), will be saved in the “Waiting for Answer” folder.

This image shows the e-mail that arrived when I Bcc'd myself. It is automatically placed in the “Waiting for Answer” folder.



Process & Organize e-mails

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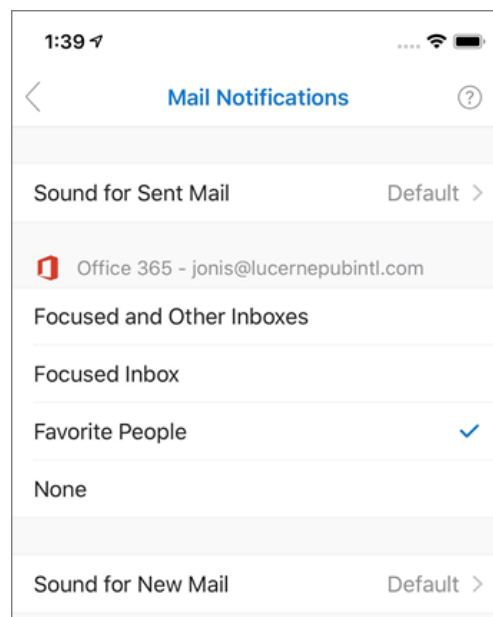
Outlook Mobile Tips for iOS and Android

Outlook for iOS and Android gives you the power of Outlook on the go to keep everything in one place, stay organized, and have security you can trust. We are going to layout tips and secrets for managing your emails and calendar for your Outlook mobile app that would help you save time and energy and be stay more organized and productive.

Outlook Mobile Tips for Emails:

Manage notifications

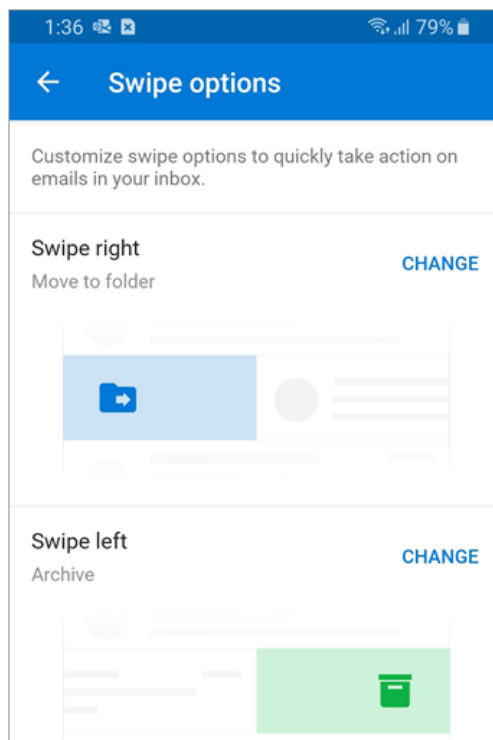
1. Tap the menu in the upper left (your avatar).
2. Go to Settings > Notifications under Mail.
3. Change which email accounts you wish to see notifications for.
4. Set email notifications for Focused and Other Inboxes, Focused Inbox, Favorite People, or None.



Change Swipe Options

The first time you swipe on an email, Outlook will help you set up your preferred swipe actions. To update your settings:

1. Tap the menu in the upper left (your avatar).
2. Select Settings > Swipe Options.
3. Choose the options you want for Swipe Right and Swipe Left.



Process & Organize e-mails

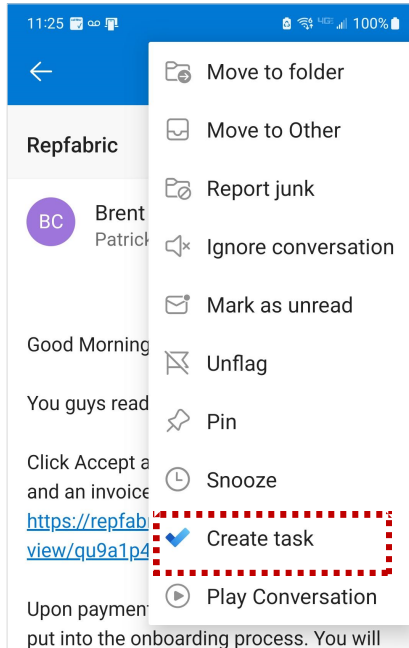
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Outlook Mobile Tips for Emails...CONTINUED

Creating a Task from an Email

You can quickly create a task from an email message. Here is how you can do that:

1. Open up the email you want Outlook app to read for you.
2. Tap on three dots at the top right corner.
3. Tap "Create task".



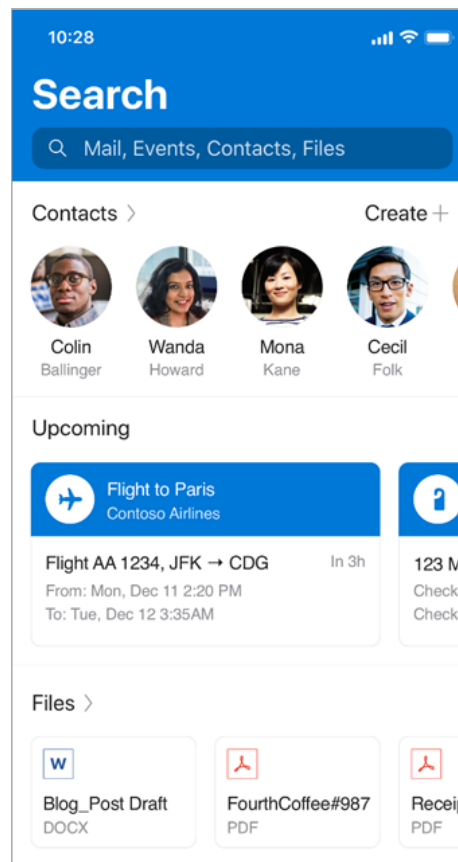
Tap Search for top results

iPhone users:

1. Tap the magnifying glass icon at the bottom once to see the top Search results.
2. Or, tap the magnifying glass icon twice to search on a keyword.

Android users:

1. Tap the magnifying glass icon at the top right corner search Mail, People and Events.



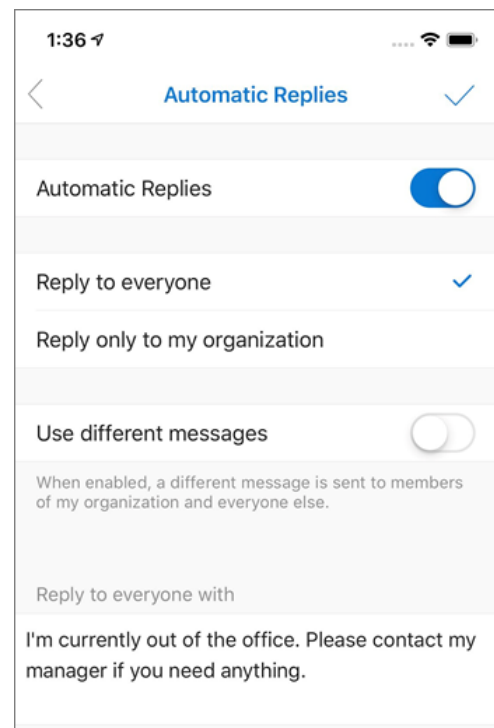
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Outlook Mobile Tips for iOS and Android...CONTINUED

Turn On Automatic reply (Out of Office)

1. Tap the menu in the upper left (your avatar).
2. Select Settings.
3. Choose a Mail Account.
4. Select Automatic Replies and turn it on.
5. Choose if you want to Reply to everyone or Reply only to my organization. If you Reply to everyone, choose if you want to Use different messages.
6. Select the check mark when you're done.



Switch accounts

1. Tap the menu in the upper left.
2. Long hold to open each account.
3. Open any folder. Tap the Home icon and tap Inbox.

Bulk action

1. In your Inbox, long hold a message and then drag up or down to select several messages.
2. Choose the action you want, like Flag.

Process & Organize e-mails

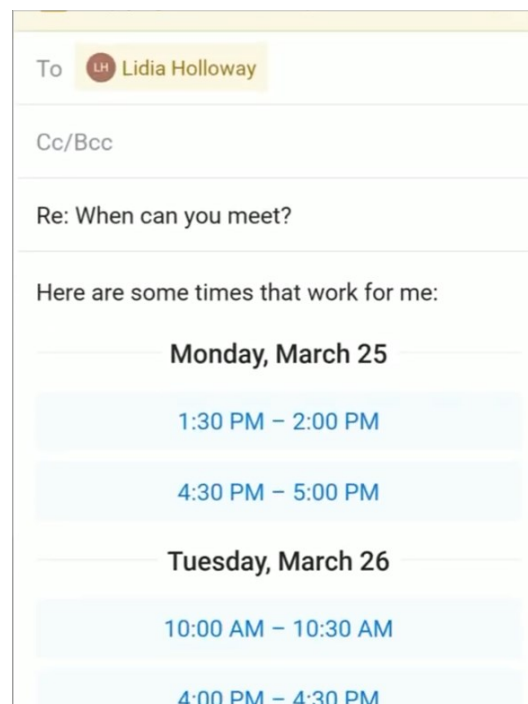
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Outlook Mobile Tips for Calendar:

Send your availability (calendar)

Just like Outlook desktop version, you can quickly send your availability via Outlook mobile app too.

1. Open up a new email or reply/forward an email.
2. When the keyboard appears up, tap calendar icon showing above it.
3. Select a date and tap the time durations you are available. Repeat the same procedure if you want to add more dates.
4. Tap the check-mark icon to insert the selected availability into the body of your email.



Rotate your phone to get a 7-day view

1. Open your calendar and rotate your phone.

Plan a New Event

1. On your calendar, long hold to select a time for your event.
2. Add the event details and select the checkmark at the top to schedule it.

Add a charm to your event

1. When adding a New Event, add the word call, meeting, or coffee in the Title to add a charm.

Swipe or tap to find a time

1. When adding a New Event, tap Date, select a date, and swipe left to see the calendar.
2. Tap the date at the top to go back.

Jump to your date

1. In the calendar, tap the date to show a monthly calendar.
2. When you select another date, the calendar icon at the bottom right fans forward for future dates, and fans back for past dates. Tap to return to today.

Consolidate All Tasks...

QUESTIONS? 855-778-8463 or
Steve@TurnerTimeManagement.com

- 4. Consolidate all tasks, projects, etc.**
TAKING ACTION... "Action precedes motivation"; you must START to become motivated
"Better to do something imperfectly than to do nothing flawlessly."
Decide what to do with e-mails that would normally accumulate in your Inbox

- It's about prioritizing what truly needs action—**
 What will get you to your goals? (boulders & rocks)
NOT
 Just doing what's easy (i.e. "sand") or what's more enjoyable
You can't do everything, so do what matters most

- Streamline to simplify/improve efficiency - Get all your tasks into "one system"**
NOTE: Tasks that are NOT Customer/Propsect Specific)
 - Have ONE place to put create new tasks and Schedule them on your calendar
 - Tools you can use to track tasks:
 - Microsoft To Do
 - Outlook Tasks
 - OneNote Tasks
 - Email Folders
 - Email Categories

- Next, get Your Inbox under control and your Today's "To Do list" assembled:**
 - ✓ Critical & can do it in <2 minutes? Do it Now
 - ✓ Going to do later today? Leave e-mail in your Inbox
 - ✓ Going to do it sometime after today? File e-mail in appropriate folder

- Once you've reduced your Inbox down to your "To Do list" for today:**
 - ✓ Schedule remaining boulders/rocks on your calendar (can drag e-mail to calendar)
 - ✓ **Make sure you have time scheduled on calendar to review your "priority" folders**

- Want/need a task management system?** Use '1-Actions to Complete' to consolidate all "tasks"
 - ✓ Streamline: No separate task list to have to go to
 - ✓ Quicker to review/re-prioritize and eliminates re-writing paper list
 - ✓ Possible columns "Order*" or "Due Date" *Have a large number of e-mails in the folder? "ROI" for "Return on Investment" might be more useful (see following pages)

Consolidate All Tasks...

QUESTIONS? 855-778-8463 or
Steve@TurnerTimeManagement.com

Introduction to Microsoft To-Do

Microsoft To Do is the part of Microsoft 365 Suite of apps for both computer and mobile device. Left-click or tap this link to open To-Do app: <https://to-do.office.com/>

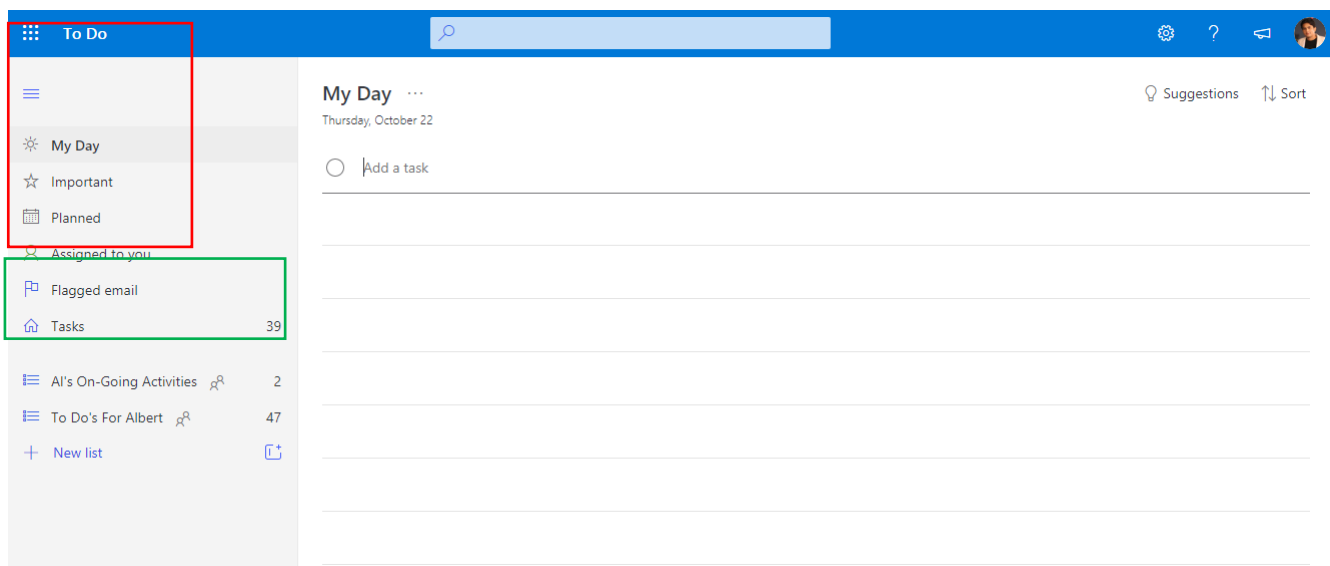
It is free and for managing tasks and keeping track of projects. It is accessible from the web, iOS, and Android. It lets you set up each task with a due date, reminder, attachment, note, and other attributes. You can add multiple steps to a single task, organize your tasks into different lists, and share your lists with other people. And by signing in with your Microsoft Account, you're able to sync your tasks among your computers and mobile devices.

How to set up Microsoft To-Do

Sign in with your Microsoft Account. The app starts with default lists for My Day and Tasks. You can easily add tasks in it. However, you can also create different lists.

The first six lists (red highlighted) on the left are created by default. The green highlighted are created manually.

This image below shows the To-Do on web. The first six tasks lists are created by default and the other two task lists are created manually.

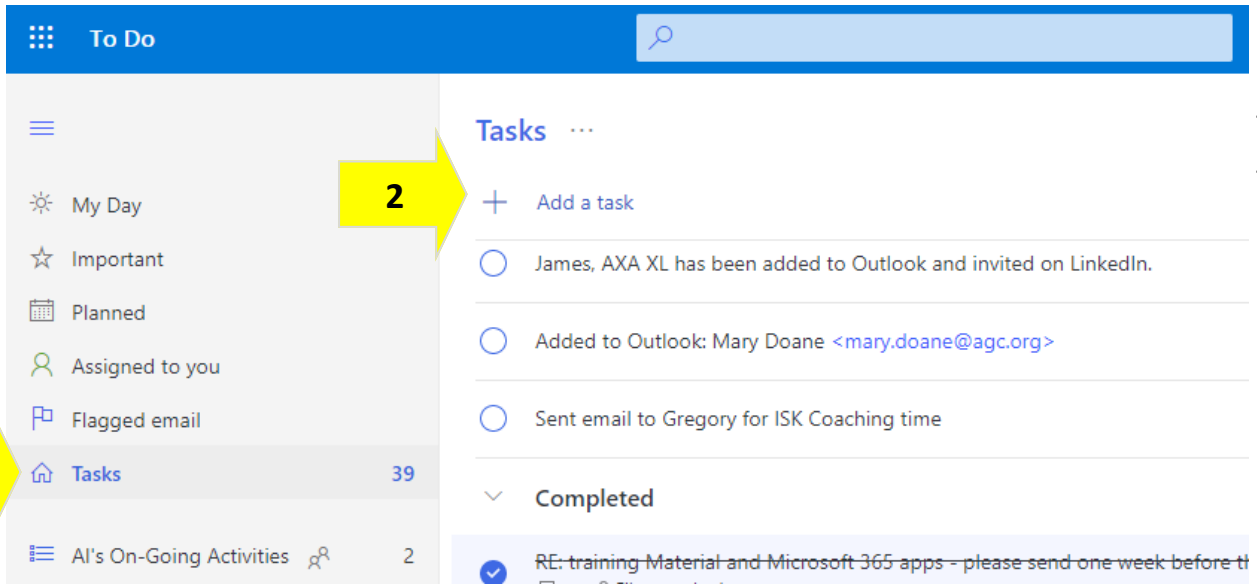


Consolidate All Tasks...

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How to Add New Tasks or Edit Existing Task in in Microsoft To-Do

Follow these steps to add a task:

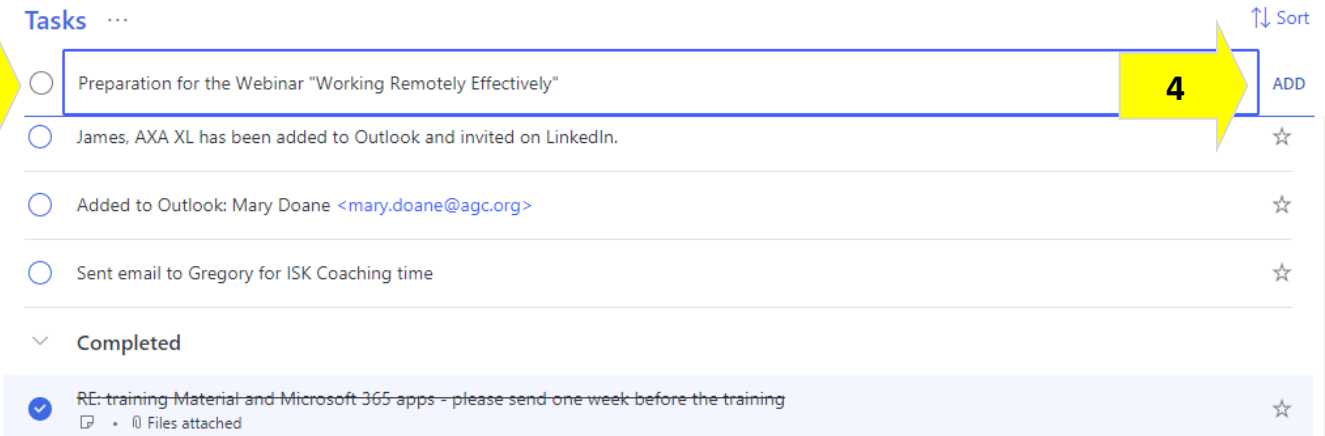


1. Go to the relevant list

event list

2. Left-click or tap + sign or left-click on “Add a task”

This image below shows how you can create and add a task in a list in Microsoft To-Do



Effective File Organization

QUESTIONS? 855-778-8463 or
Steve@TurnerTimeManagement.com

Benefits of Using SharePoint & OneDrive for Business

What is Microsoft SharePoint:



Microsoft SharePoint is a cloud-storage of 1TB and any of the employee of your company can be given access to it. It is a great place to share documents, files and folders to work together on single projects. All maintenance tasks are performed by Microsoft and updates are installed automatically when they become available. SharePoint Server and SharePoint Online features are almost identical.

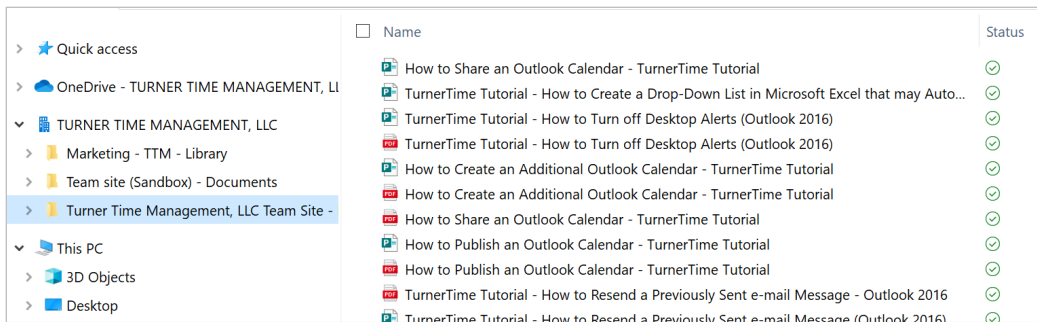
What is Microsoft OneDrive for Business:



Microsoft OneDrive is a personal cloud storage of 1TB assigned to each member of your company that has Microsoft 365 license. Only that individual person has access. However, the files and documents can be shared with others based with specific permission level.

Here are the benefits of using SharePoint & OneDrive:

⇒ They can be synced with your computer, so you don't need to open your browser to access files.



In the image below Steve is currently in cell A3 where Excel shows it as "ST" and Albert is in cell C3.

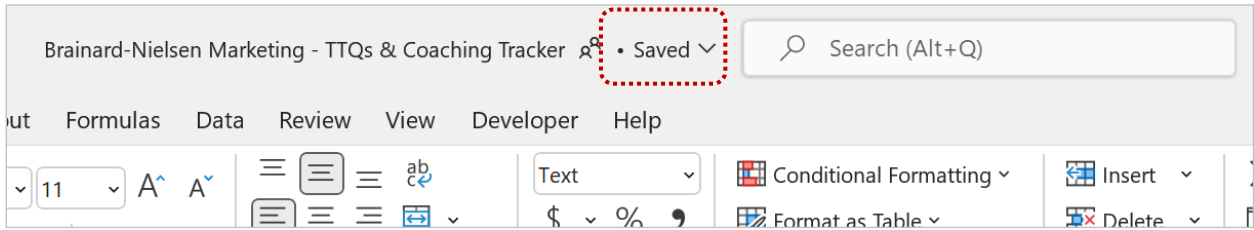
	A	B	C	D	E
1	Coaching Topics	Coaching Date-Time	First Name	Last Name	Certification
2	Coaching Call	1/13/2020 - 30			
	Coaching Call	6/29/2021 - 30			
	Coaching Call	7/6/2021 - 30	Paul	Nielsen	Completed
	Coaching Call	7/27/2021 - 30			
3	OneNote and OneDrive	8/12/2021 - 30			

Effective File Organization

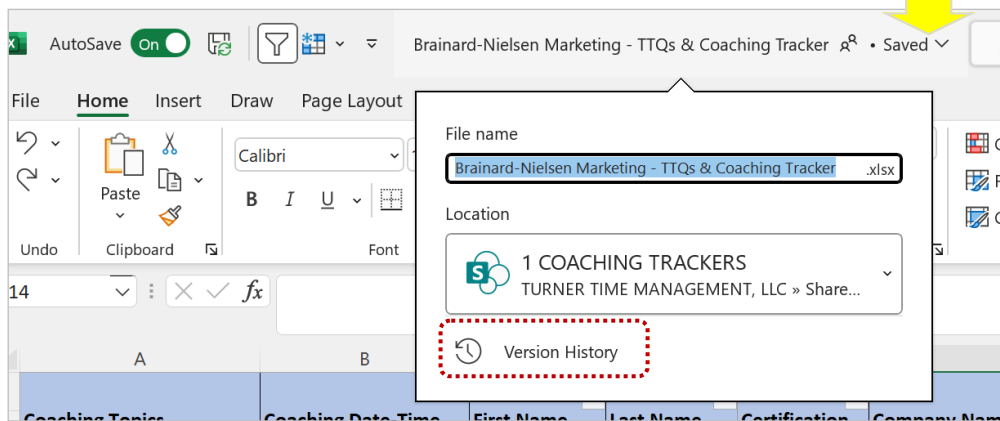
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Benefits of Using SharePoint & OneDrive...CONTINUED

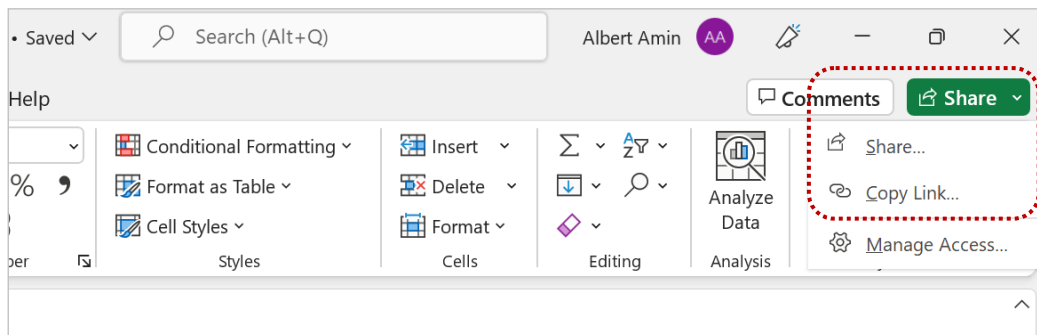
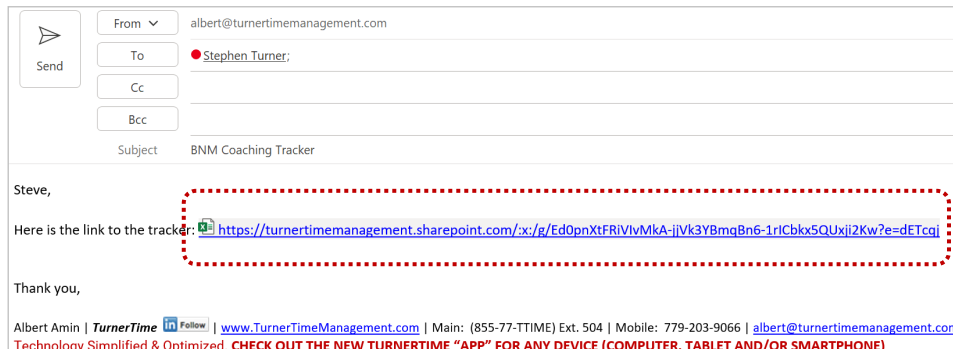
⇒ All the changes are save automatically.



⇒ 99 previous versions of a document or file is available, so you can always open up a file for a specific date.



⇒ Instead of sending a file as an attachment in the email, you can Share with others by sending a live link.



Effective File Organization

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Benefits of Using SharePoint & OneDrive...CONTINUED

Technical and Security Related Benefits:

- ⇒ **SharePoint Online is available within the Microsoft 365 Enterprise and Business editions. So, no hardware or software is required.**
- ⇒ **Microsoft team takes care of online data security. Although, the user can take the backup also.**
- ⇒ **Microsoft makes sure that you are getting the latest version of SharePoint.**
- ⇒ **For customization, the user requires to contact Microsoft support team.**
- ⇒ **The availability of the data is dependent on bandwidth of the Internet.**
- ⇒ **Microsoft has robust security protocols to protect the data.**

Effective File Organization

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5. Set up Effective File Organization & Folder/File Navigation (Documents & Desktop) “Documents” = your “file cabinet” or “reference library”

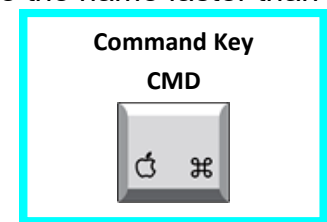
Keys to Organizing:

1. Set up primary “top level” folders where you store documents
 2. Make the top level folders match your key storage categories
 3. We recommend 5-15 ‘primary’ (top level) folders
 4. “Drill down” to sub-folders with more specific information
- Recommendation: Limit desktop to files you are working on today.

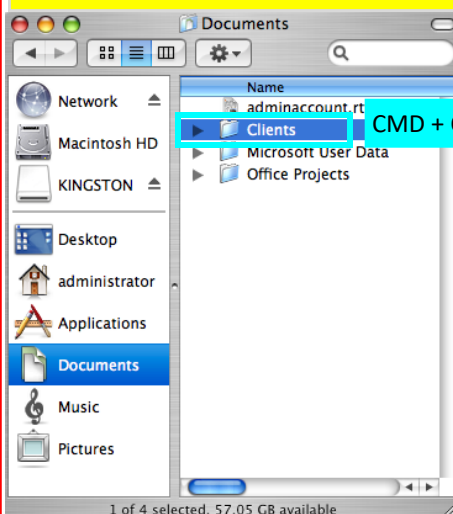
NOTE: Some companies do NOT back up the desktop—check if you aren’t sure

Learn folder/file Navigation Shortcuts

- Type first few letters of folder/file name to select
 - ✓ When you know the folder name—you can type the name faster than you can visually search and find it
- ✓ Open the selected folder or file: CMD + O
 - ✓ Select multiple files/folders:
 1. Hold down CMD key
 2. Click on each item you want to select
 - ✓ Select range of files/folders:
 1. Click and drag cursor around range of files to select
 - ✓ Go back to previous folder: CMD + [
 - ✓ Go forward to next folder: CMD +]

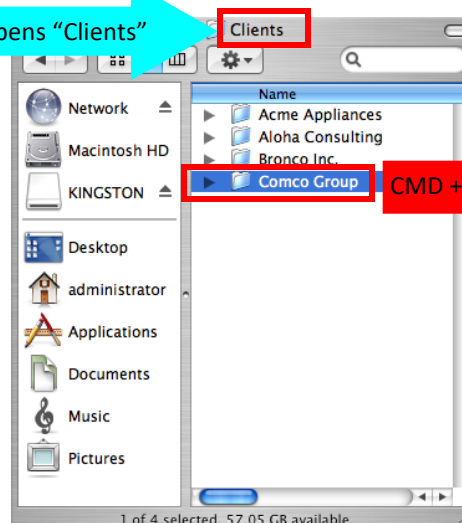


Example: In “Documents” type “cl” on keyboard to navigate to “Clients” folder, hold CMD + O to open

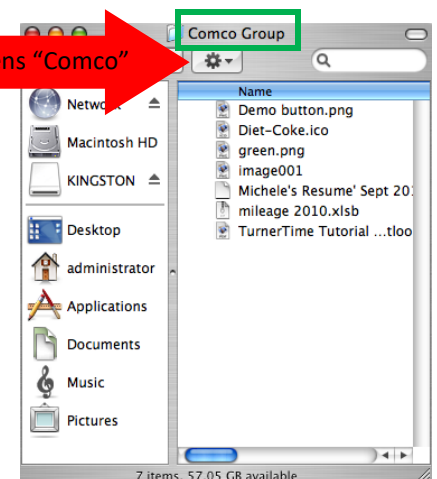


CMD + O opens “Clients”

In “Clients” type “co” on keyboard to navigate to “Comco Group” folder, hold CMD + O to open



CMD + O opens “Comco”



Effective File Organization

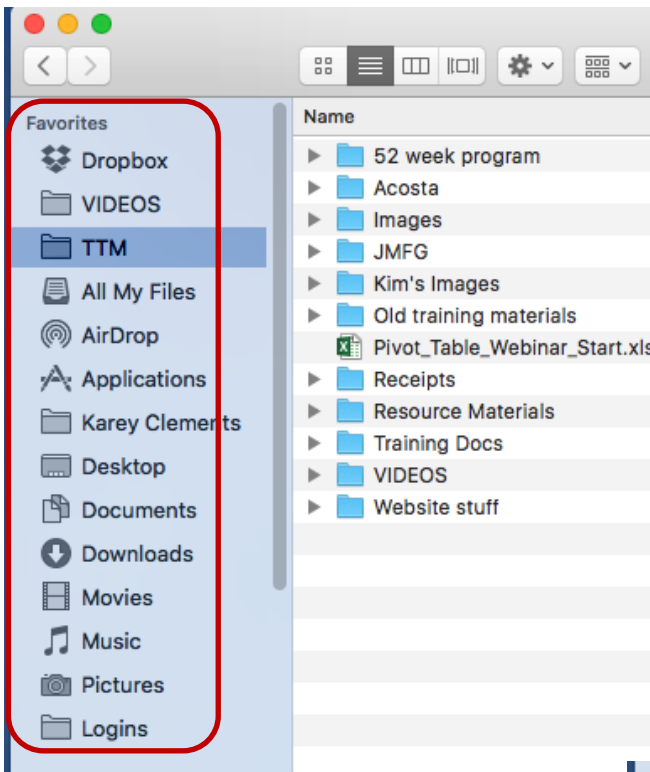
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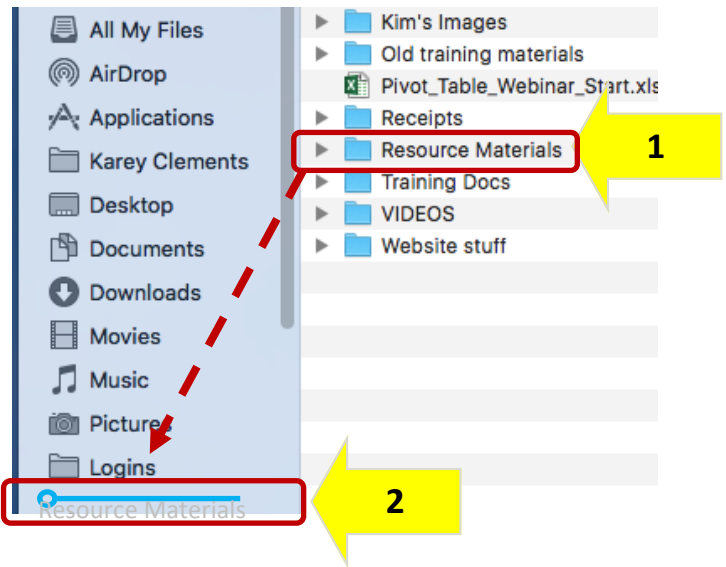
Use Sidebar for Favorites To quickly access most used folders when opening/saving files. In this example we will move the “Clients’ folder to the sidebar for quick access. It is a folder that is used everyday on this computer.

1. Click on folder to move to Sidebar.
2. Drag folder to sidebar (blue line indicates the new location of the folder when you drop it on the sidebar) and release mouse button.

This image shows the Sidebar highlighted in red.



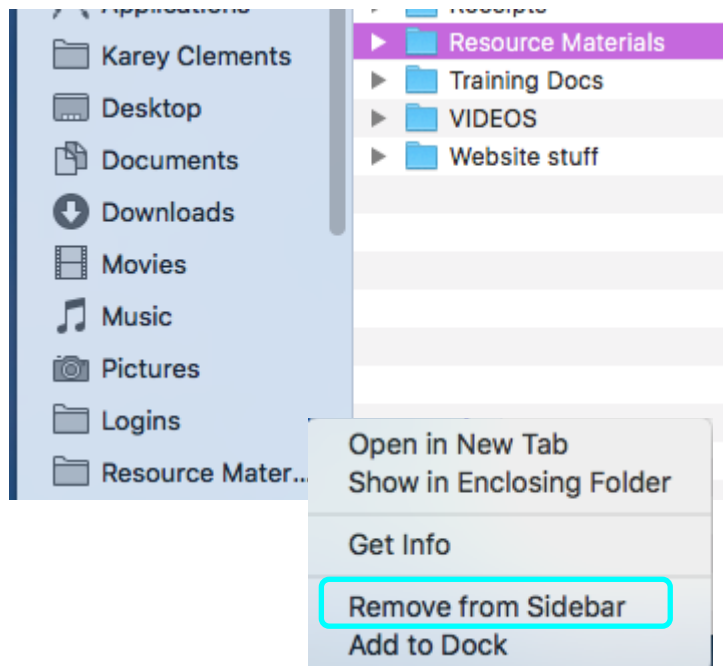
In this image you can see an example of what it looks like to drag a folder to the sidebar. The blue line with the circle indicates the location you will be dropping the folder into. Until you release the mouse the folder name “Resource Materials’ appears faintly in the background.



This image shows the “Resource Materials” folder after it has been moved to the sidebar.

This makes it quicker to access a most used folder.

CMD Click to remove from Sidebar





Find Information in Seconds

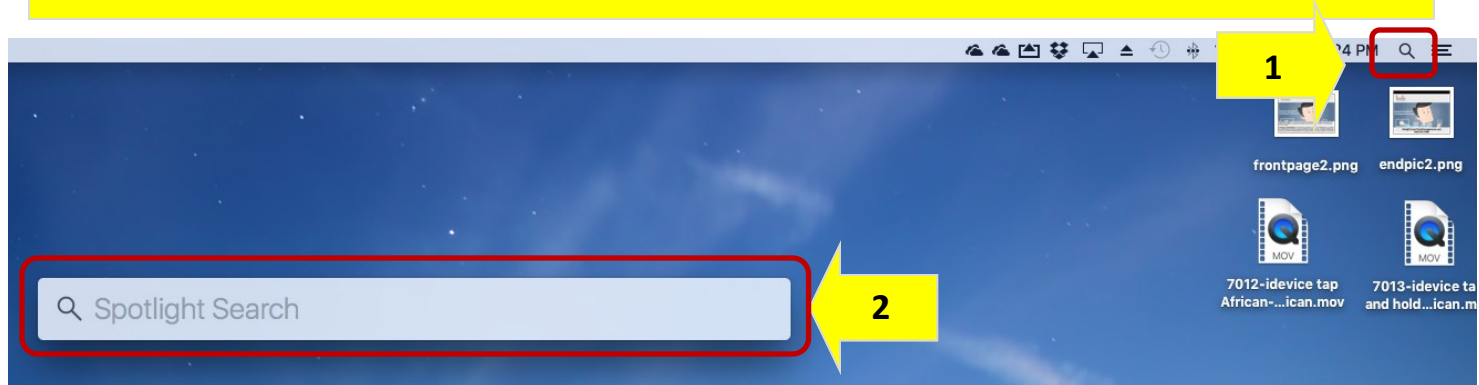
QUESTIONS? 855-778-8463 or
Steve@TurnerTimeManagement.com

Find e-mails, documents, files, ANY information in seconds Use Spotlight Search

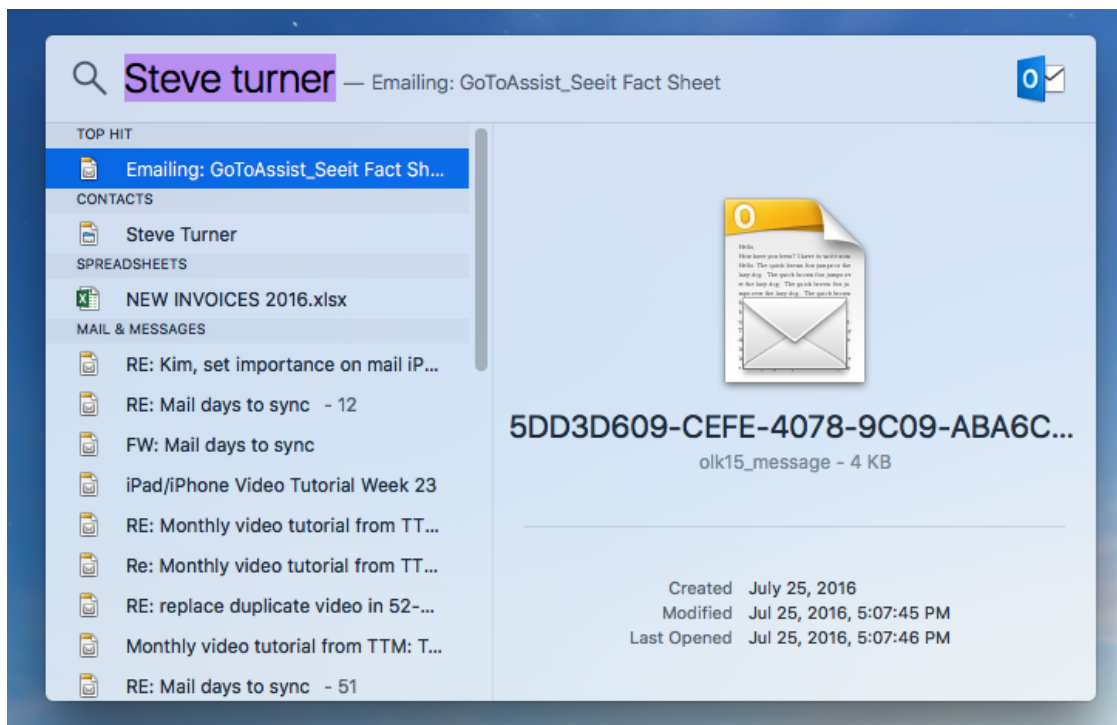
1. Click magnifying glass (spotlight search box will open center screen).
2. Type what you are searching for.
3. Refine search by

5:24 PM  

You will find the Spotlight Search Magnifying Glass in the top right corner of your Mac Screen. Click to open and search



The new Spotlight search system introduces "natural language" searching. This will make it easier to find items. Use phrases like "emails from Steve" or "photos from last December". Spotlight is integrated so you can use the same search phrases inside apps. The more detailed your search, the faster you will find what you are looking for. i.e. "find document I was working on last week".



Use Shortcuts to...

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Let your mouse out of it's cage (sometimes)

✓ Mouse shortcuts can help save you time too!



Most valuable mouse shortcuts:

- Double left click to select a word
- Triple left click to select line/paragraph
- Move text to new location with your mouse
 1. Highlight text to move.
 2. Left click highlighted text.
 3. Drag text to new location.
- Highlight large block of text
 1. Place cursor at beginning of text to highlight.
 2. Hold down SHIFT key.
 3. Left click at end of text to highlight (all text in between will be highlighted).
- Open Folder in new "Finder" window
 1. Command + Click on Folder
- Close all open windows
 1. Option + Command + Click "X" to close (all windows)

Use Shortcuts to...

QUESTIONS? 855-778-8463 or Steve@TurnerTimeManagement.com

6. Use shortcuts to save time and increase your efficiency Use the keyboard as much as is practical...

- ✓ No shortcuts w/mouse or touch pad
- ✓ Quickly open programs, files, new e-mails...
- ✓ 'Computer shorthand' for power users

One of the "Keys" to Keyboard Shortcuts is COMMAND

- ✓ Use your Control Key with many other keys to COMMAND control of your computer:
- ✓ Please Note: other Keys are used as well (not just CMD key)



Command Control of Files & Folders

Command Control of Text Formatting

Command Control of e-mail, Calendar, Contacts

Request from Turner Time your free hardcopy handout shortcut reference (see figure below)

The image displays a collection of keyboard shortcut reference sheets. On the left, there are sheets for 'General Shortcuts' (listing actions like 'Cycle through all open windows' with shortcuts like 'CMD + TAB') and 'Outlook Shortcuts' (including 'e-Mail "Speed Keys"' and 'Calendar' shortcuts). In the center, there is a promotional graphic for 'Turner Time Management' featuring an Apple logo and the text 'Apple/Mac Office 2011 Shortcut Reference'. On the right, there are sheets for 'Word' (listing actions like 'Create New Document'), 'MS Office 2011 for Mac Shortcuts' (with a note that some shortcuts may not work on MacBooks), and 'Excel' (listing actions like 'Create New Workbook'). A central box highlights 'Important Apple Keys' showing the Command (CMD), Control (CTRL), and Function (FN) keys.

60-Second Rule Tips

to handle interruptions and distractions

- ❑ 3D Touch (iOS) to bring up short menu of features (less distractions since you can get things done in 60 seconds or less).
- ❑ Consider using Dictation in Outlook for composing emails.
- ❑ Consider using Text Replacement (iPhone) and Auto-Correct (Outlook), Typing Shortcuts for frequently used text (common phrases, addresses, conference call numbers, e-mail addresses, etc.)
- ❑ From your smartphone, learn how to move an e-mail from the Inbox into another folder (instead of waiting until you are in front of a computer).
- ❑ To find contacts faster, search by last name (first 3 letters), followed by a space then first name (first 3 letters).
- ❑ Did you know...that you can quickly get a map and directions to any contact in your Outlook Contacts folder?
- ❑ Right Click Feature on Outlook
- ❑ Use Siri (iPhone/iPad) or Google Assistant (Android) to take down notes quickly.
- ❑ Uses Cortana in Outlook mobile for appointments, reminders, reading e-mails.

The Seven "Silos": Streamline to Save Time

"Pillars of Productivity": Only ONE place for:

 **Bing Chat = AI**
 ("Artificial Intelligence")

 **TURNERME**
 MANAGEMENT
 Seminars | Training | Coaching



<p>CALENDAR Outlook For ALL Business Related and Time Specific Meetings, Appointments and Tasks</p> <p>On PC/MAC: Outlook iPhone/iPad/Android: Outlook Mobile</p>	<p>EMAIL Outlook For ALL External (and some) Internal Communication</p> <p>On PC/MAC: Outlook iPhone/iPad/Android: Outlook Mobile</p>	<p>CRM Repfabric ALL Sales Activity For ALL Customer, Prospects & Leads</p> <p>On PC/MAC: Repfabric Add-In for Outlook iPhone/iPad/Android: Repfabric app</p>	<p>NOTES OneNote For ALL Business Related* Notes *Handwritten Notes added with Whitelines</p> <p>On PC/MAC: OneNote Desktop iPhone/iPad/Android: OneNote App</p>	<p>TASKS/PROJECTS To Do/Planner For ALL non-time specific Tasks & Projects</p> <p>On PC/MAC: Microsoft To-Do iPhone/iPad/Android: To-Do App</p>	<p>FILES OneDrive/SharePoint For managing all your files, documents and your PC Desktop</p> <p>On PC/MAC: OneDrive SharePoint iPhone/iPad/Android: OneDrive & SharePoint Apps</p>	<p>TEAMWORK Microsoft Teams The HUB for information related to specific depts. and projects.</p> <p>On PC/MAC: Microsoft Teams iPhone/iPad/Android: Microsoft Teams</p>
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Best Practices

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7. “Best Practices” to supercharge tech tools

Maximize your productivity/efficiency by using your smartphone and tablet

#1 Key belief/goal: You can still be productive when “on the road “examples:

1. Use voice recognition to take down notes quickly: Siri and/or Dragon Dictation (iPhone/iPad) or Voice Search/Google Now (Android)
2. Set up typing shortcuts for frequently used text (common phrases, addresses, conference call numbers, e-mail addresses, etc.)
3. Learn how and use move an e-mail from the Inbox into another folder (instead of waiting until you are in front of a computer)
4. Learn how and set up appointments or meeting requests (NOTE: can't create a private appointment on iPad/iPhone)
5. Use the “location” field in meeting requests to enable quick dialing of phone numbers or put address in location field to enable using “Maps” app for quick directions
6. Use Contacts notes section (synchs with on all devices) for notes you want to keep handy about your contact. If you do not have a CRM you can use this field to track
7. To find contacts faster, search by last name (1st 3 letters), then first name
8. At least once a month clear your drafts folder on your smartphone/tablet and make sure you put any regularly used phone numbers into Outlook Contacts
10. Use your home button to your benefit for app switching (iPhone/iPad) or App switching icon (Android)
11. Fill your Icon Dock with apps you use most
12. Use a Bluetooth in your car and/or headset— we recommend Plantronics Legend (“hands free” with 7 hour talk time and quick recharging)
13. Anytime you plug in a device for recharging, use a high quality surge protector (with rotating plug & multiple outlets).
14. For these and other recommendations AND a special discount, visit <http://www.mobileGear.com/TurnerTimeManagement>
15. Not using Bluetooth or Wi-Fi or GPS? Make sure to turn them off (lengthens battery's charge & increases battery lifecycle). Works with laptops too!

Some Laptop Tips:

- Consider using only one monitor. If you're like most so people, you simply use the second monitor to leave your email open all day long.
- Laptops: Set the right Power plan; “maximum battery” or “maximum performance”
- You can also configure Outlook so that you can call people directly from your computer via Skype (ask us for more details).

Strategy Tips

“Best Practices” to supercharge tech tools - CONT...

Calendar

- Calendar management - Start the day in your calendar - not your email.
- Turn on To Do Bar in Inbox/Email Window.
- Time Zones in Outlook Calendar (up to three if you are across time zones).
- Remove unused calendars in Outlook.
- Use the “location” field in meeting requests to enable quick dialing of phone numbers or put address in location field to enable using “Maps” app for quick directions
- Use 15 Saves 60; block time on your Outlook calendar (can set time as “Free” if needed).

Email

- Batch email management time into blocks of at least 15 minutes.
- At least once a month clear your drafts folder on your smartphone/tablet and computer Outlook.

Contacts

- Use multiple Contact folders if necessary.
- Use Contacts notes section (synchs with on all devices) for notes you want to keep handy about your contact. If you do not have a CRM you can use this field to track your communication with contacts.
- Make sure you put any regularly used phone numbers in your phone contacts into Outlook/Exchange/Microsoft 365 Contacts (right from your phone)
- At least once a month clear your drafts folder on your smartphone/tablet and make sure you put any regularly used phone numbers into Outlook Contacts

Strategy Tips

“Best Practices” to supercharge tech tools - CONT...

Laptop

- ❑ Set the right Power plan; “maximum battery” or “maximum performance”
- ❑ You can also configure Outlook so that you can call people directly from your computer via Microsoft Teams (ask us for more details).
- ❑ Consider using only one monitor. If you're like many people, we simply use a second monitor to leave email open all day long. (ALT + TAB) Is fastest way to change your “screen focus”.
- ❑ Set Nightlight “Sunset to Sunrise” (you may have to enable Location access)
- ❑ How to Set Up and Use the ‘Waiting for Answer’ Rule
- ❑ How to Use the ‘Quick Access Toolbar’
- ❑ How to Sort E-mail or Contacts By Multiple Columns in Outlook
- ❑ Turning On And Using the ‘Favorites’ Bar In Your Browser
- ❑ How to Show or Hide Folder Navigation Pane
- ❑ Set Up Custom Shortcuts To Open Your Most-Used Programs
- ❑ Optimize Your Notification Center and System Tray Icons
- ❑ LinkedIn - Outlook Integration
- ❑ Task Bar; What Icons to Pin

Strategy Tips

“Best Practices” to supercharge tech tools - CONT...

Smartphone

- ❑ Running "Your Phone" application on MAC will save you time and effort.
- ❑ Set up typing shortcuts for frequently used text (common phrases, addresses, conference call numbers, e-mail addresses, etc.)
- ❑ Use your home button to your benefit for app switching (iPhone/iPad) or App switching icon (Android).
- ❑ Fill your Icon Dock with apps you use the most.
- ❑ Night Shift (iOS) or Blue Light Filter (Android).
- ❑ At least once a month clear your drafts folder on your smartphone/tablet.
- ❑ Not using Bluetooth or Wi-Fi or GPS? Make sure to turn them off (lengthens battery's charge & increases battery lifecycle). Works with laptops too!
- ❑ From your phone, learn how to move an e-mail from the Inbox into another folder (instead of waiting until you are in front of a computer).
- ❑ Pre-format your Text message responses.
- ❑ Use a Bluetooth in your car and/or headset— we recommend the Poly V5220 Legend (“hands free” with 6 hour talk time and quick recharging)

Strategy Tips

“Best Practices” to supercharge tech tools - CONT...

Accessories

- Use a Bluetooth in your car and/or headset— we recommend Plantronics V5220 (“hands free” with 5 hour talk time and quick recharging)
- Portable Bluetooth speaker
- Thumb drive all ports type
- Consider using only one monitor. If you're like a number of people, you simply use the second monitor to leave your email open all day long.
- Anytime you plug in a device for recharging, use a high quality surge protector (with rotating plug & multiple outlets).

Apps

- Follow the Seven Silos or Pillars of Productivity:
 1. Outlook for Calendar
 2. Outlook for Email
 3. Repfabric for CRM
 4. OneNote for Note Taking & Organization
 5. Microsoft to Do for Non CRM-Related Tasks & Projects
 6. OneDrive and SharePoint for File Storage, File Sharing & Back-Up
 7. Microsoft Team for Collaboration & Communication
- OneDrive and SharePoint installed OR Google Drive or Dropbox
- OneNote Desktop installed
- Password Manager (KeyChain or RoboForm)
- Google Maps
- OneNote

Did you know...?

QUESTIONS? 855-778-8463 or
Steve@TurnerTimeManagement.com

Interested in continuing to become more effective, work fewer hours and achieve more? Our coaching program may be very valuable to you!

WEB COACHING:

- We work together via phone/web addressing specific time management/technology questions/challenges you have.
- The focus is to gradually help change your habits and/or improve your productivity.
- The program includes 30-minute sessions. You can call/e-mail anytime w/questions.
- We recommend once a week sessions (based upon your availability)

Available topics for coaching

- Manage E-mail in Less Time with Less Effort
- Find e-Mails & Files in Seconds. Every time.
- More Effectively Manage Your Calendar/Time AND Effectively Managing Interruptions
- Prioritize/Complete Action Items, Tasks & Projects Quicker (Microsoft To-Do/Tasks)
- Don't Type; Speak & Use Templates/Shortcuts Instead (Dictation, Siri, et al)
- Organize, Navigate, Share Files/Documents from Any Device (OneDrive/SharePoint)
- Customize/Optimize your Mac, Android or iPhone/iPad
- Improve/Optimize Note Taking & Organization (OneNote)
- Create Quicker/More Professionally in Excel, PowerPoint, Word or Publisher
- Reduce Internal Email up to 90% & Increase Productivity (Microsoft Teams/365)
- Time Saving Best Practices for Meetings, Webinars AND Communication Etiquette
- Realize Sales & Better Forecasting Through CRM Adoption/Training/Coaching
- Close More Sales & Prospects with "Social Selling"/Digital Marketing
- MAC/Microsoft 365 Best Practices Training
- Increasing your "Home Office" Efficiency & Increasing Productivity When Traveling
- Passwords/Private Data Management
- Executive/Management Coaching: Manage, Lead, Grow Your Team

Coaching 6-Pack (Six, 30-minute sessions for 1 participant) \$ 490

Executive Coaching (unlimited Coaching, 3 months for 1 participant) \$2,500


Did you know...?

QUESTIONS? 855-778-8463 or
Steve@TurnerTimeManagement.com

TurnerTime Recommends




- Office 365 and Comprehensive Custom IT Solutions.
- Supporting Your Entire IT Ecosystem.
- Provides all of the IT tools to meet current and future cybersecurity needs.

Click here to Sign up for 




- Manage your contacts and sales opportunities and help GROW your business.
- Keep salespeople in front of customers by eliminating CRM desk work completely.
- Manage multiple product lines

Click here to Sign up for 




- Record your video with computer screen recording.
- Send video messages to get more sales.
- Customizable call to action.

Click here to Sign up for 



- Add your company to your customers' phone.
- It can help you promote your products and services.
- Enhance client interaction.

Click here to Sign up for 




- Recall your best words. Instantly, Repeatedly.
- Type a short abbreviation - write long sentences
- Customize as you go with fill-in-the-blank style fields for names and more.

Sign up, today! 



- Everything you need to manage your passwords
- RoboForm is the best password manager that helps you create strong password.
- Helps you login anywhere securely with a single click.

Click here to Sign up for 

Please note: All the resources mentioned on this page are TurnerTime partners we get commission for successful referrals.