TurnerTime
MANAGEMENT
Seminars | Training | Coaching

Closing the Gap Between Technology & Performance

Technology Simplified & Optimized.
Do More, Work Less.

Time & Technology Training
"Strategies & Secrets"
(Gmail & Google Workspace)

Turner Time Management, LLC.
www.TurnerTimeManangement.com
Steve Turner,
Technology Tools Management
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(1-855-778-8463)
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1. Avoid information overload and maximize your time

2. Find e-mails, documents, files, ANY information in seconds

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

4. Consolidate all to do's, tasks, projects, etc. to ONE system

5. Effective File Organization

6. Use Shortcuts to...

7. The Seven Silos & Technology Best Practices

Additional Gmail Time Savers

Did you know…?

Two key insights from working with businesses on time management & technology for the past fifteen years. Many business professionals (before taking our training):

☑ 1.**…are in technology-driven "information overload".** Could benefit from additional training or coaching to help them more effectively manage e-mail, priorities and time. Could need help to exit "reactive mode". Bottom line: we've found that change can be good & productivity can increase quickly!

☑ 2.**Could benefit from every day taking a few minutes (15-30)** 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.**

Quick Shortcut Examples

☐ **Voice Transcription to e-Mail:**
   a) Google Assistant and/or Siri
   b) Windows Dictation or on an Apple (MAC) it is called "Dictation".

☐ **Windows/MAC Keyboard Shortcuts…**
The keyboard is faster than mouse/touchpad.
Windows: ALT + TAB *Hold down the ALT key and tap the TAB key to scroll through all open windows.*
Enlarge or reduce type: CTRL + Roll mouse track wheel

MAC: Command + Tab to open the "App Switcher"

☐ **Other Time Savers (available by request)**
   ✓ Using 'Email Templates' in Gmail (see page 52)
   ✓ …many more 'secrets' available (free & via membership)

Did you know…?

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 <u>before</u> 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:
3. Move Time-Sensitive/Time-Specific/Actionable Items to your calendar
4. 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.

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

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

Did you know…?

How to Set Chrome to Start in Your Google Calendar

You can set your Chrome to start in Calendar. It is very important for time management. In your Calendar:

1. Right-click to select the link to your calendar
2. Left-click "Copy"

This image shows the Google Calendar.
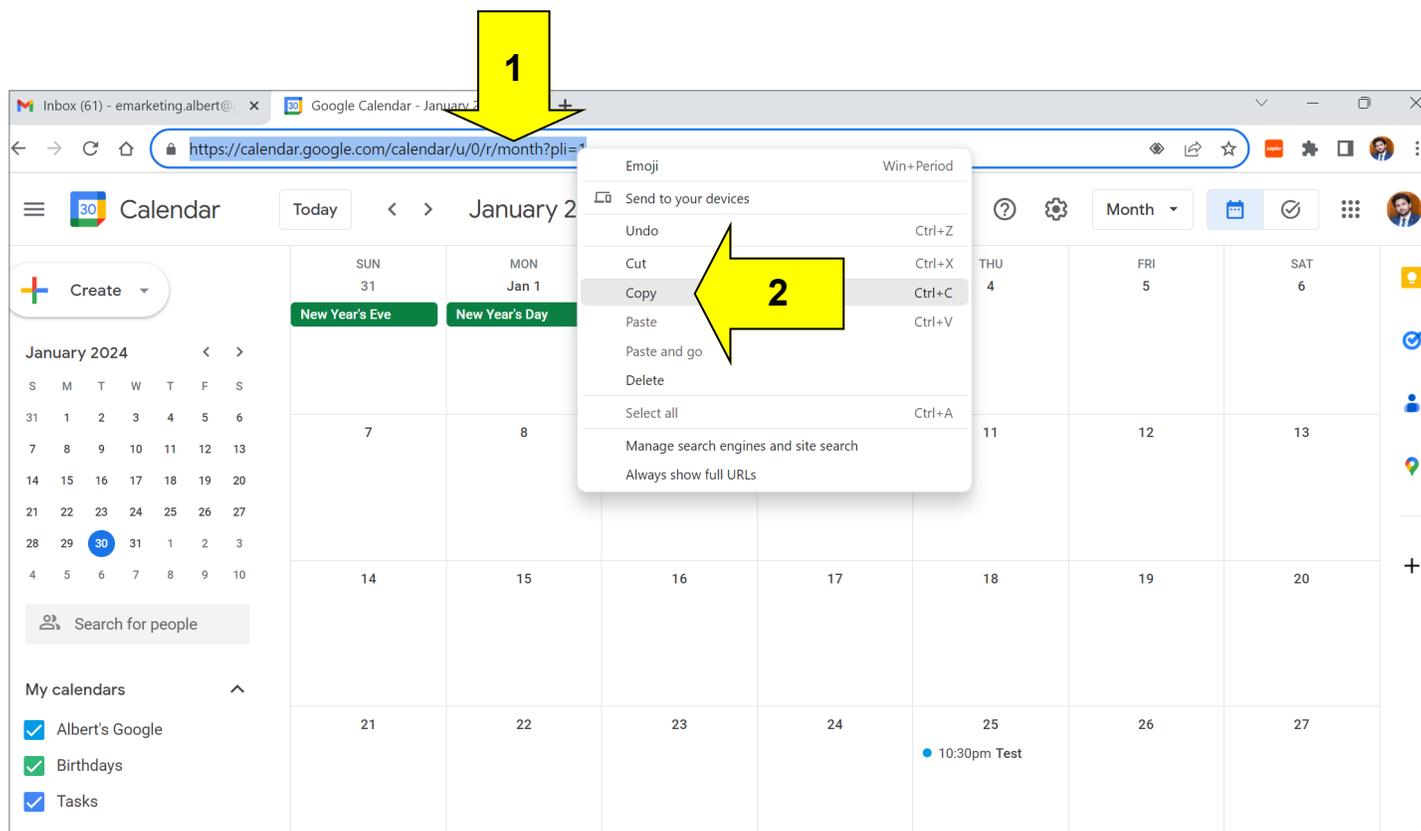
Did you know…?

How to Set Chrome to Start in Your Google Calendar...Continued...

3. Left-click the three dots in the top right section
4. Left-click "Settings"

Gmail Calendar Tips
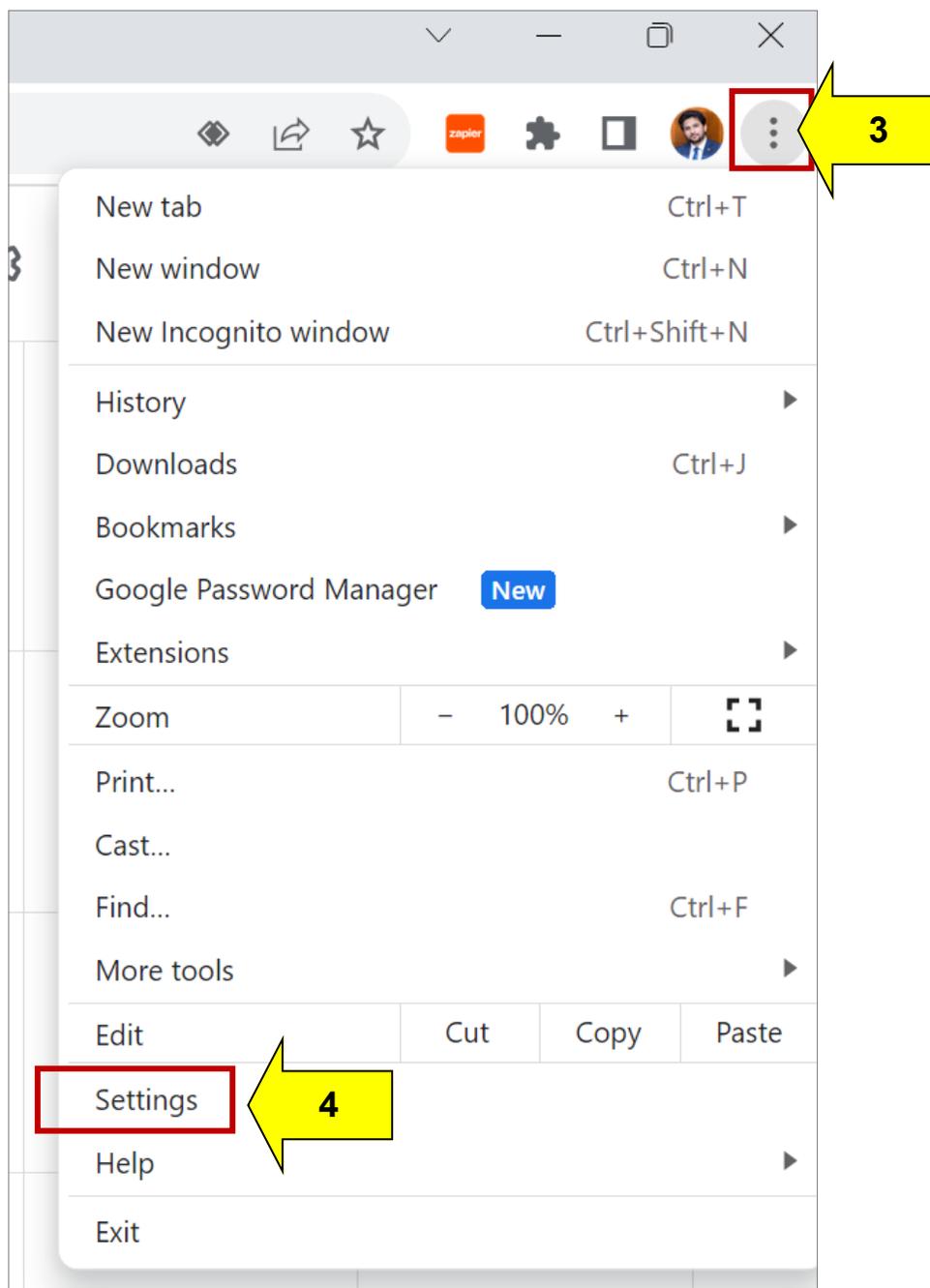
How to Set Chrome to Start in Your Google Calendar...Continued...

5. Left-click "On startup"
6. Select "Open a specific page or set of pages"
7. Left-click "Add a new page"
8. Paste your calendar link
9. Left-click "Add"

Settings

Search settings

- You and Google
- Autofill and passwords
- Privacy and security
- Performance
- Appearance
- Search engine
- Default browser
- **On startup**   5
- Languages
- Downloads

On startup

○ Open the New Tab page

○ Continue where you left off

● Open a specific page or set of pages   6

Add a new page   7

Use current pages

Add a new page

Site URL

8   https://calendar.google.com/calendar/u/0/r/month/2023/12/1?pli=1

Cancel   **Add**   9

You are all set! Going forward your Chrome will start in your Calendar.

Gmail Calendar Tips

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

How to Set Gmail on your Task Bar

It is good to have your Gmail in the Task Bar of your computer, so you don't need to open the browser for it.

1. Left-click on the "three dots" in the top right corner of your browser
2. Left-click "Save and share"
3. Left-click "Create shortcut"
   (a window will pop)
4. Left-click "Create"
5. Left-click "Yes" (If your Windows doesn't show this. Search "Gmail" and pin it to task bar.)

The images below show the process to set Gmail on your Task Bar
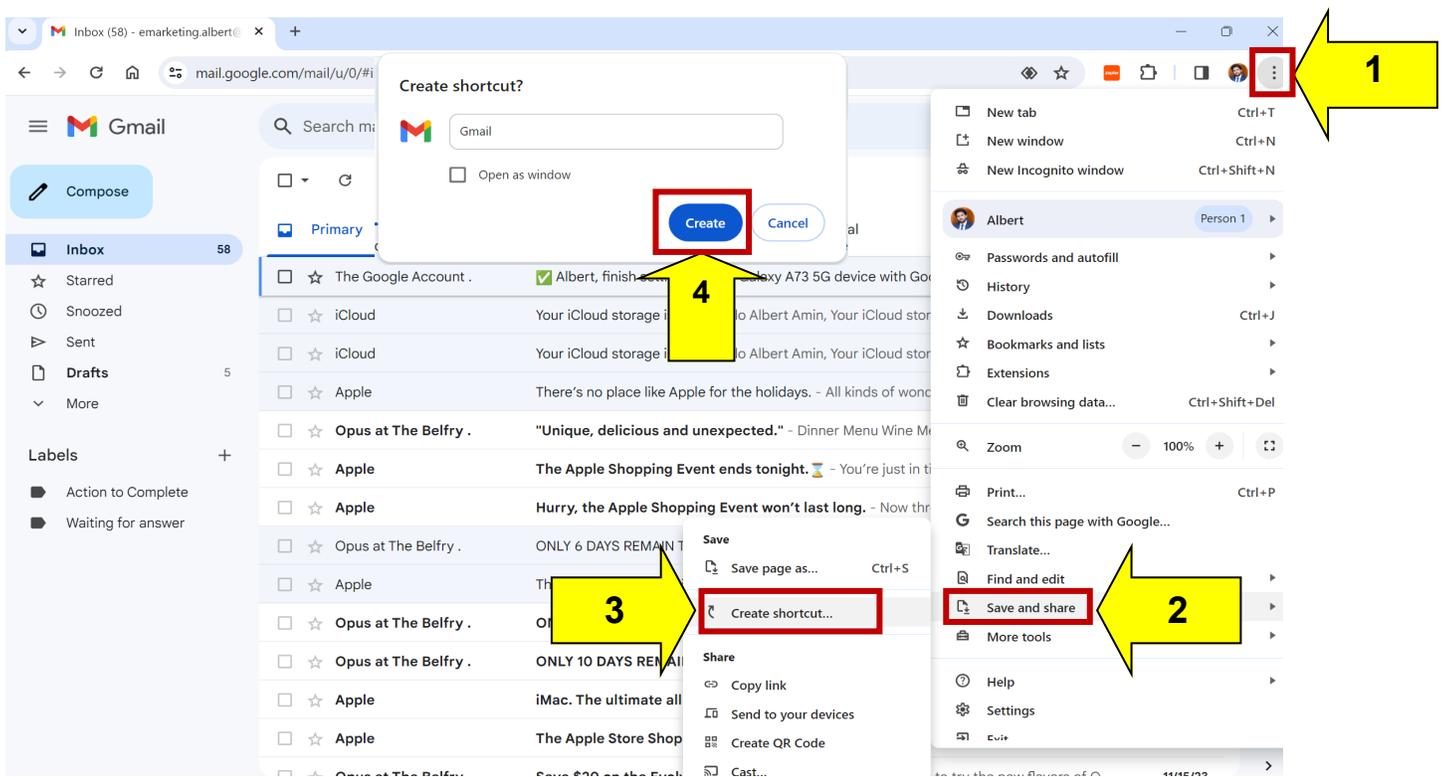
The image below shows how Gmail will will be permanently pinned on your task bar
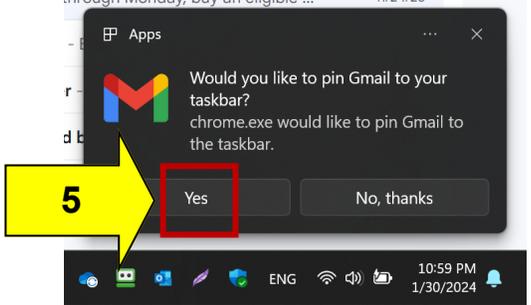
Avoid Information Overload

☐ ***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 60 seconds*
    <u>Then Do it Now</u>

☐ **b) Prioritize Remaining Information Only Once by Putting into 1of 6 "Buckets" using Labels.**
    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
    ✓ Things you are waiting a response on
    ✓ Actions you need to complete
    ✓ Notes
    ✓ Documents and files
  ☐ 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.

☐ **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) WITH-OUT going to Gmail, smartphone or tablet.
    Goal: Make taking notes/actions items on all your devices as quick as possible
    ☐ On Smartphone, slightly touch and hold the Gmail icon and tap "Compost". You can also use Siri on iPhone/iPad, Google Assistant on Android,
    ☐ Laptop/Desktop Computer: Dictation on Windows (Windows + H key on your keyboard).

☐ **Another key to dealing with Interruptions—**Is it necessary to <u>resolve </u>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)
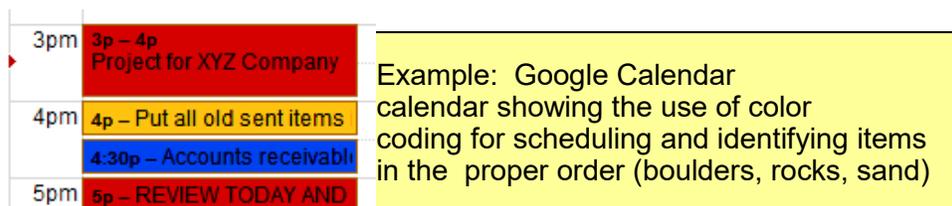
Avoid Information Overload

☐ **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.

☐ <u>The bottom line:</u> A lot of time on the computer/smartphone/tablet can be counterproductive

☐ **Maximize the use of your time through your daily calendar.** Schedule order:
- ✓ Sales/Revenue (Opportunities to bring in sales or additional revenue) (GREEN)
- ✓ Boulders (project, actions w/due dates, and RELATIONSHIPS) (RED)
- ✓ Rocks (What you do daily to keep things "running") (YELLOW)
- ✓ Sand (Quick & easy but usually "non-critical" action Items) (LIGHT BLUE-default color)

3pm **3p – 4p Project for XYZ Company**	Example: Google Calendar calendar showing the use of color coding for scheduling and identifying items in the proper order (boulders, rocks, sand)
4pm **4p – Put all old sent items**	
4:30p – Accounts receivabl	
5pm **5p – REVIEW TODAY AND**	

☐ <u>**15 minutes of planning saves an hour of work**</u> - 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 and 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)

Show me as ○ Available ● Busy
Privacy ○ Default ○ Public ● Private
Learn more about private vs public events
Publish event

Use Shortcuts to...

☐ Using Side Panel

On the right, under your profile picture, Gmail has a side panel that you can use for quick actions. Anytime, you can hide or unhide the panel.

Here is what is available on that side panel by default:

☐ Google Calendar 📅

☐ Google Keep (Notes) 💡

☐ Google Tasks ✓

☐ Contacts 👤

The image below show the side panel for quick actions in Gmail
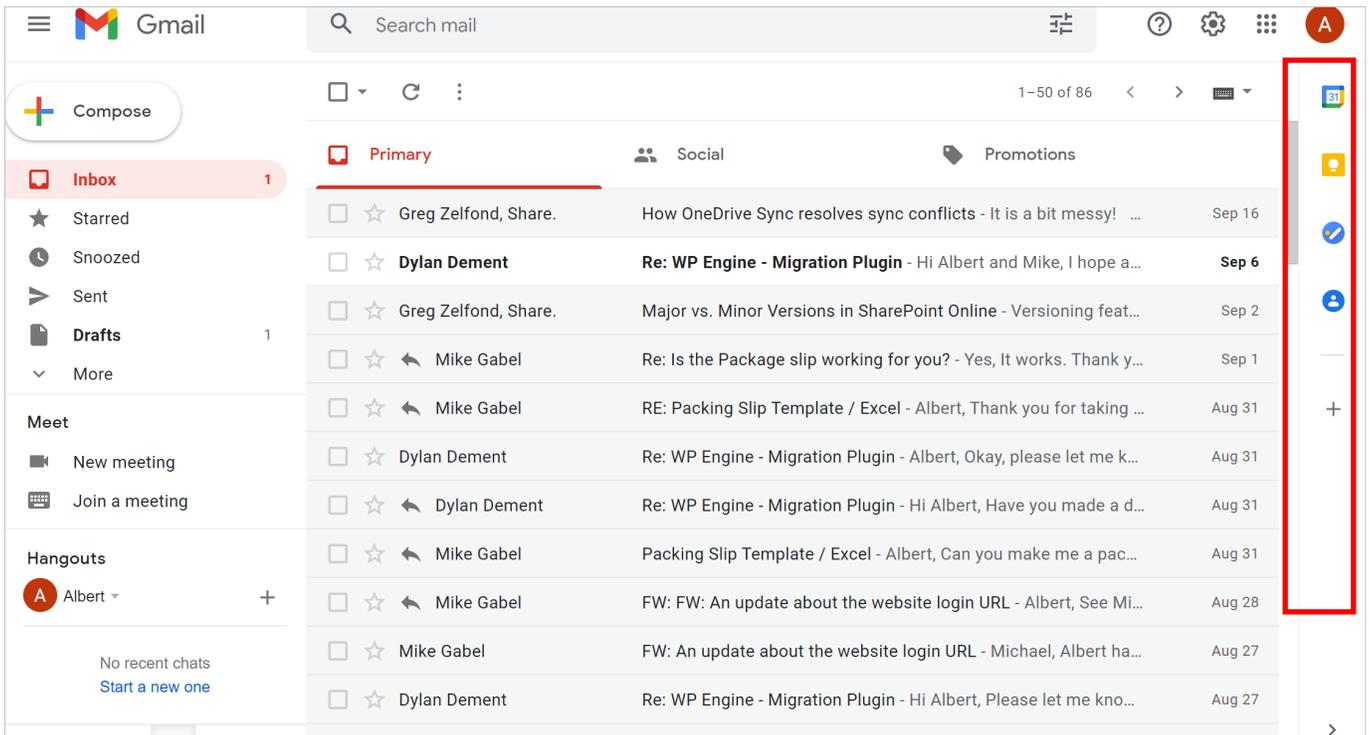
Gmail Calendar Tips

Using Smaller Time Increments in Calendar (Google Calendar)
You can NOT change the calendar in a Google Calendar 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 Google Calendar.

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. The two green events– one is from 2:30 to 2:45 and the other is 2:45 to 3:00.
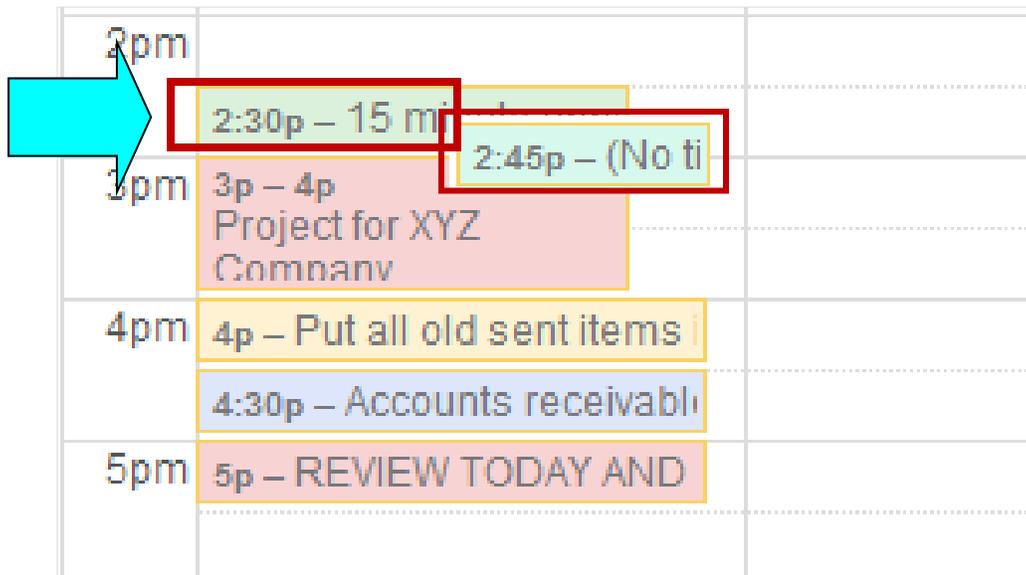
Gmail Calendar Tips

Copy an e-mail onto your calendar as an appointment:

You can create a calendar even from an e-mail message. This will allow you to set a reminder to follow-up on the e-mail.

Open the e-mail message (open in it's own window):
1. Left click three dots for more options.
2. Left click "Create event".
3. Change date and time of event (use date that you want to be reminded to follow up on this e-mail).
4. Save the event.

In the e-mail you have open, Left click arrow next to "More". Left click "Create event".
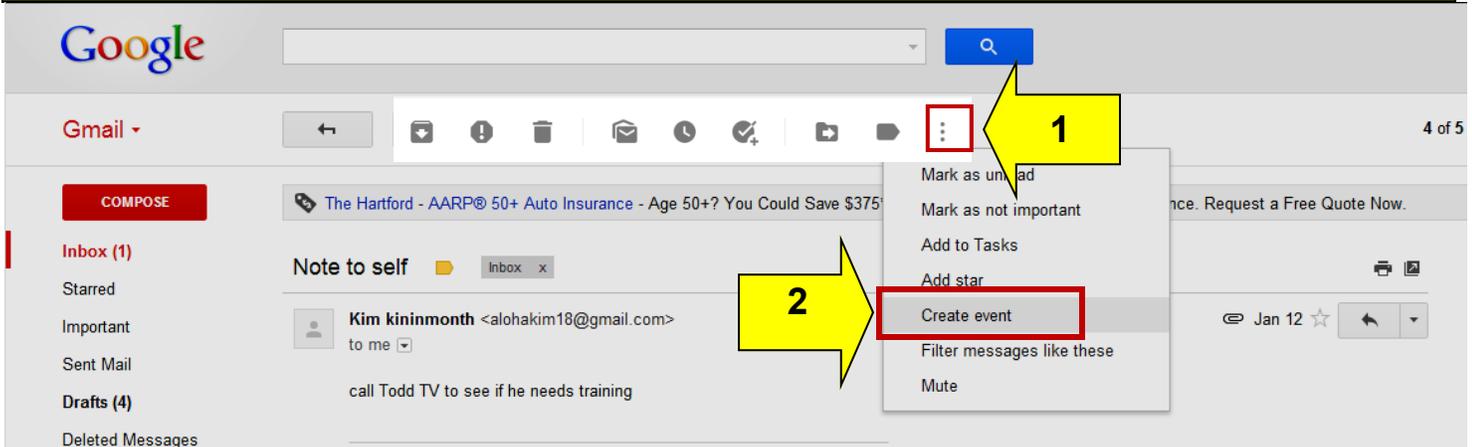
This image shows the even that will be created. The subject line is now the title of the event. The body of the e-mail is automatically entered in the description of the Calendar Event. You will need to
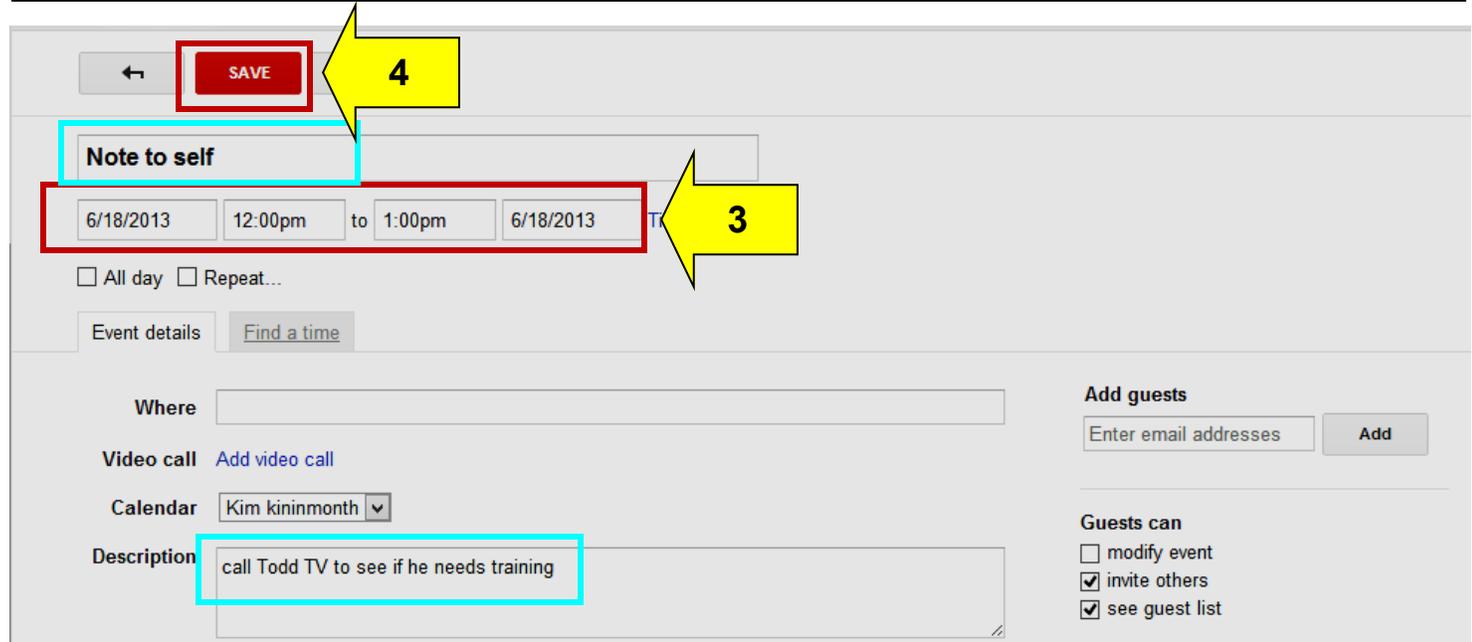
Gmail Calendar Tips

Copy an e-mail onto your calendar Google Calendar (continued**…**)

Most of the time when you receive a message that has a date and time in the message, it will be underlined, and you can quickly create a Calendar Event by clicking on the underlined date and/or time. Occasionally, the date and/or time will NOT be underlined, we have not determined the exact circumstances where the date and time are NOT underlined.

1. Hover cursor over the underlined date or time *(in this example if I select the date the event will show on the date only and I'd have to enter the time. If I select the time, the event will show the correct date AND time. So you may want to try clicking on the time when you are creating an event).*
2. Left click the underlined time.

This image shows the lightly underlined date and time. It is a very faint underline.

Kim,
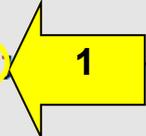
Are you free to grab lunch on Friday the 21st at 1:00 pm?   1   he know. We can meet at Giordano's on Algonquin.

Thanks,
Kay

This image shows the underlined time when I hover my cursor over it.

Kim,

Are you free to grab lunch on Friday the 21st at 1:00 pm?   2   me know.
meet at Giordano's on Algonquin.

Add to Calendar

Thanks,
Kay

Gmail Calendar Tips

Copy an e-mail onto your calendar Google Calendar (continued**…**)

       3. Left click "Add to Calendar".

This image shows the event that is automatically created. Left click "Add to Calendar".

Kim,

Are you free to grab lunch on Friday the 21st at 1:00 pm? Just let me know. We can meet at Giordano's on Algonquin.

Thanks,
Kay

Lunch date?	Fri, Jun 21, 2013
Fri, Jun 21, 2013	1pm Lunch date?
1:00pm	No events.

Add to Calendar　　**3**

Kim Kininmonth, Trainer | in Follow
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The information (and any attached files) contained herein may be confidential and is intended solely for the use...
recipient, you are hereby notified that any dissemination, distribution or copying of this communication, or any...

This image shows the event in my Google Calendar.

Thu 6/20	Fri 6/21
	1p – Lunch date?

Gmail Calendar Tips

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **Sending your calendar availability by e-mail (Gmail)**
You will have to create Appointment schedule firs. Here is how you will do that:

1. Left-click "Create"
2. Left-click "Appointment Schedule"
3. Review your working hours and all the details
4. Left-click "Next"

Gmail Calendar Tips
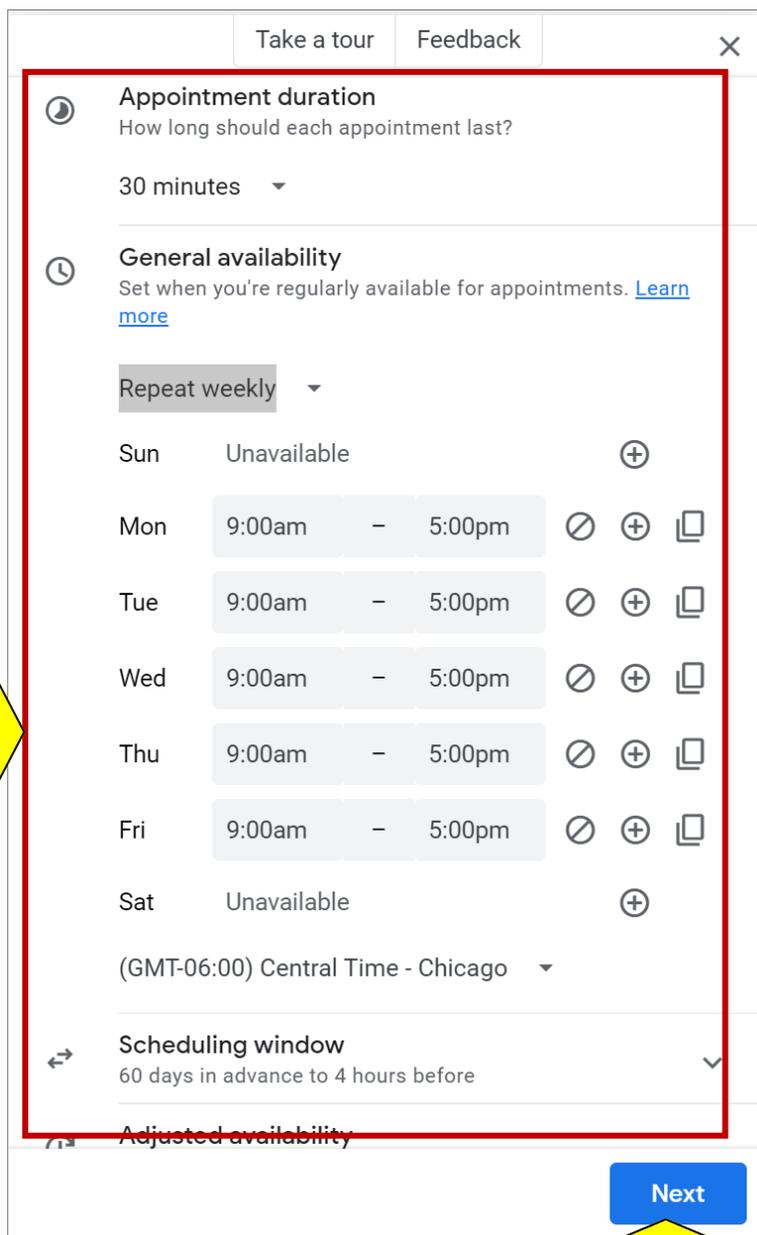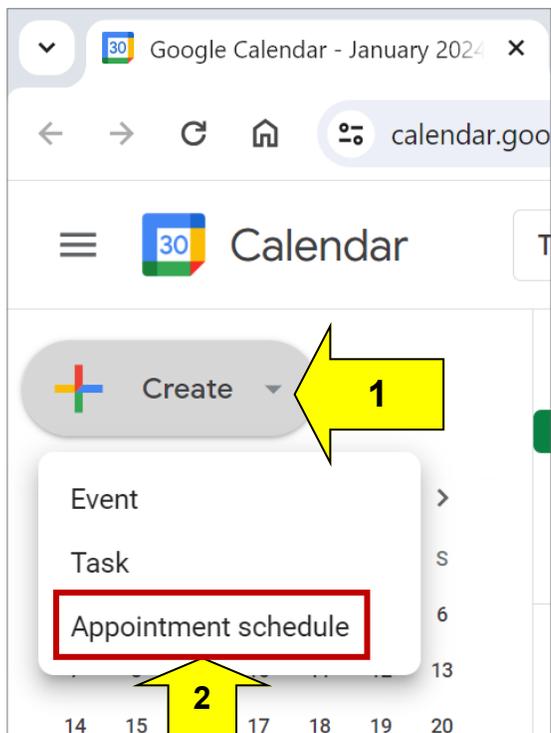
Sending your calendar availability by e-mail (Gmail)...Continued...

5. Review all the details on the second window of the panel
6. Left-click "Save"

We Recommend: Bookmark your *"Appointment Schedule"* page.

BOOKABLE APPOINTMENT SCHEDULE

Meeting with Albert

Booking page photo and name
See how your identity is displayed on the booking page

Location and conferencing
Would you like to meet in person, via phone, or video conference?

Select how and where to meet ▾

Description
Add a note that explains your service. This will appear on your booking page and in confirmation emails.

B *I* U̲ ≡ ≣ 🔗 ✕

5

Add description

Booking form
First name · Last name · Email address

Booking confirmations and reminders
Calendar invitation · Email reminder

Back   **Save**

6

How to Make Guests Optional for Google Calendar Events

Not everyone you invite to a meeting may be a required guest. There might be someone that you want to give the choice to attend. Google Calendar provides the ability to make attendees optional, but it's not obvious.

Here is how you can mark someone as an "Optional attendee".

Hover your cursor over the attendee you want to mark as Optional. You will see the "Avatar" on the right currently filled with black.

1. Left-click on "Avatar" to mark the attendee as "Optional"

   (it will become hollow)

Gmail Calendar Tips

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com
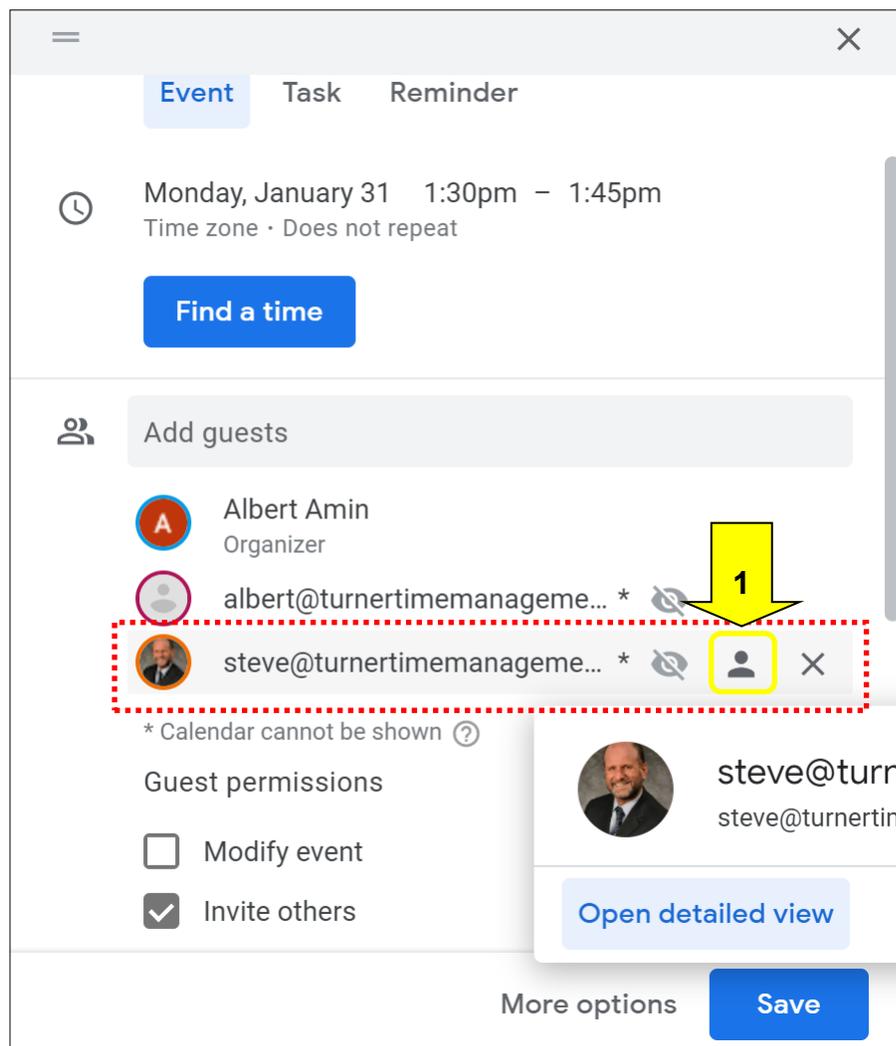
How to Make Guests Optional for Google Calendar Events… Continued

2. Left-click "Save"

> The image below shows the hollow Avatar after marking it as Optional
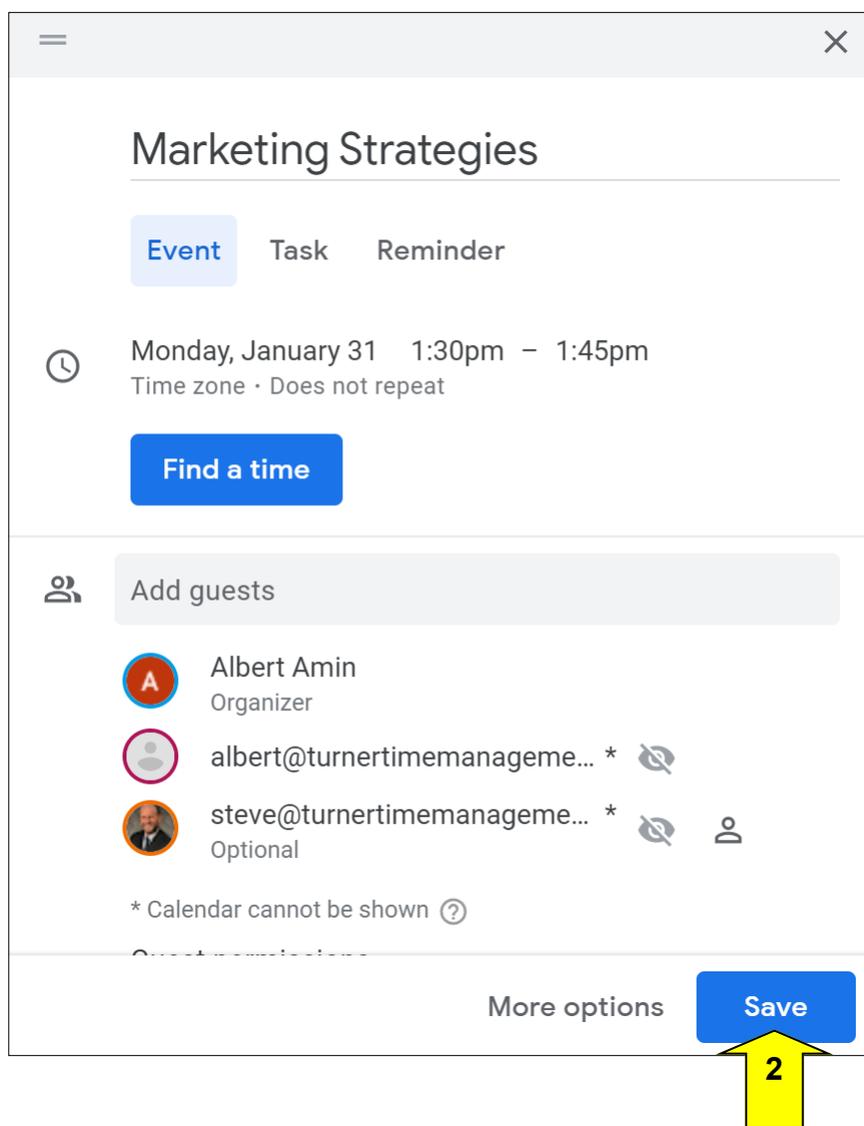
Marketing Strategies

Event   Task   Reminder

🕐 Monday, January 31   1:30pm – 1:45pm
Time zone · Does not repeat

Find a time

👥 Add guests

(A) Albert Amin
Organizer

albert@turnertimemanageme… * 🚫

steve@turnertimemanageme… * 🚫 👤
Optional

* Calendar cannot be shown ⊘

More options   **Save**

2

Gmail Calendar Tips

☐ **Color Coding appointments- "Event Color":**

1.In appointment Left Click on the color icon

2.Select your desired "Event color".

> This is where you will find the "Event Color" option when creating a new appointment.
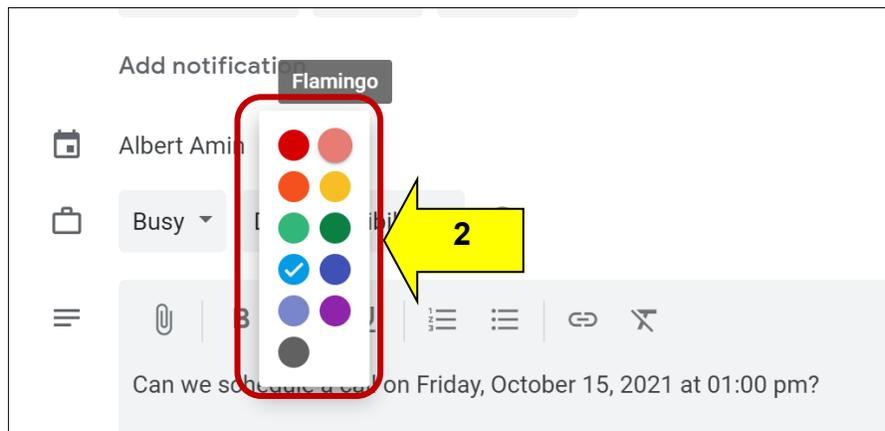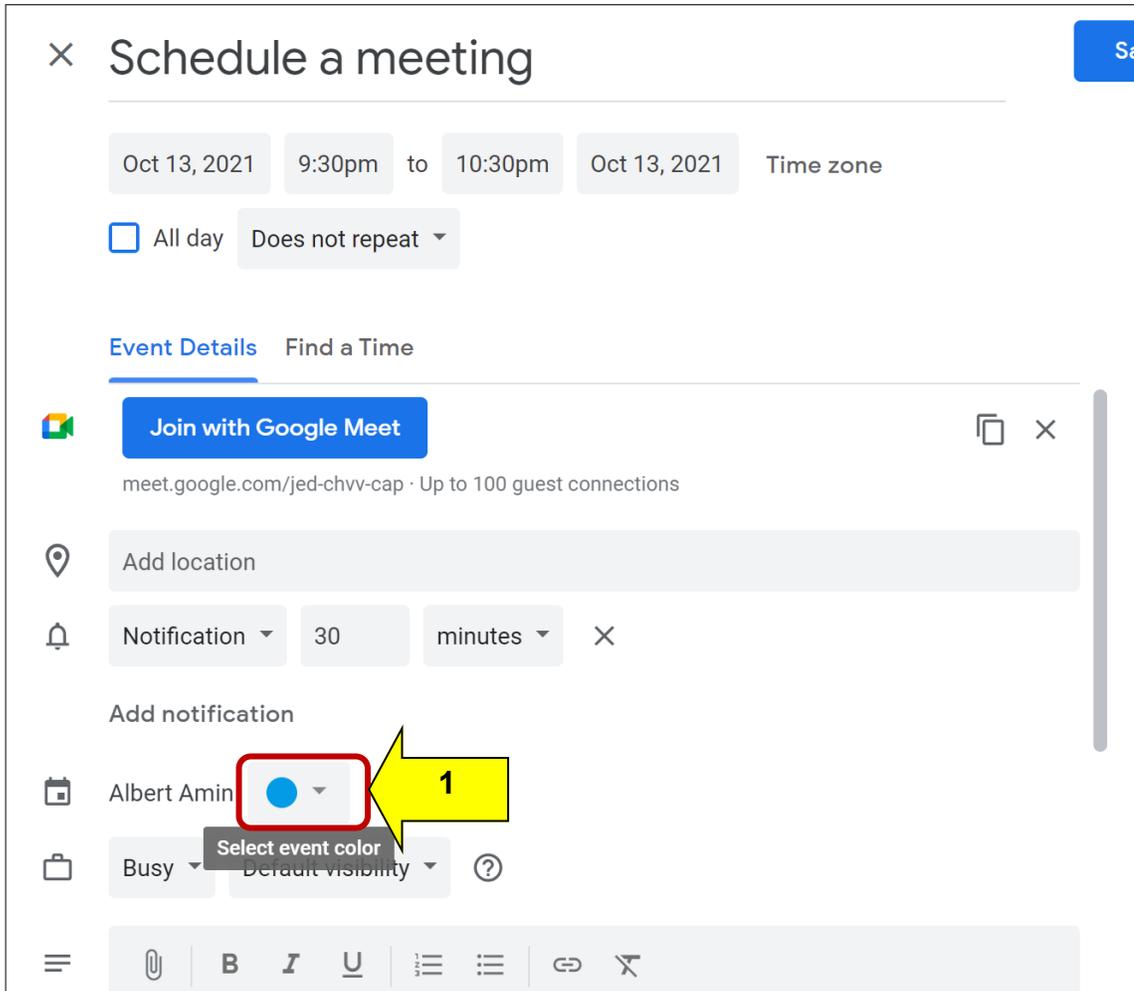
Gmail Calendar Tips

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

☐ **Tricks to Navigating your Google Calendar:**
Move a calendar appointment:
    1. Hold down left mouse button
    2. Drag appointment to new time and/or date

This is the appointment in its original position.

This is the appointment after it has been moved.

	Mon 6/17	Tue 6/18
Cali		
10am	10 – 11 Review e-mail inbox	
11am		
12pm		

	Mon 6/17	Tue 6/18
Cali		
10am		
11am		
12pm		11:30 – 12:30p Review e-mail inbox

☐ **Other Calendar Keys to Consider**
  ☐ Streamline: Use ONLY your Google calendar for planning schedule/action items
  ⊗ We don't recommend Google tasks, follow up flags or paper to do lists.
      ✓ Will insure you don't overschedule yourself
      ✓ Note: include "FLEX" and/or break time
  ☐ Insure your calendar syncs with all your devices

☐ **Calendar Keyboard Shortcuts**
  ✓ **Navigation shortcuts:**

K or P	Go to previous period
J or N	Go to next period
R	Refresh
T	Go to today

  ✓ **View shortcuts:**

1 or D	Day view	**4 or X**	4 Day view
2 or W	Week view	**5 or A**	Agenda view
3 or M	Month view		

  ✓ **Actions:**

C	Create calendar event	**CTRL + Z**	Undo last action
E	View event details	**ESC**	Back to calendar view
Del	Delete event	**CTRL + S**	Save event

  ✓ **Application:**

/	Search	**CTRL + P**	Print
Q	Delete event	**S**	Settings
CTRL + ?	Open keyboard shortcuts		

Find Information in Seconds

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

How to Change Days of Mail Sync in Gmail

By default Gmail is set to sync 30 days. However, you can change it:

This process is shown on Android phone.

1. Tap the menu option in the top left section
2. Scroll down and Tap "Settings"

How to Change Days of Mail Sync in Gmail...Continued...

3. Tap "Days of mail to sync
4. Slide up/down to select days
5. Tap "Ok"
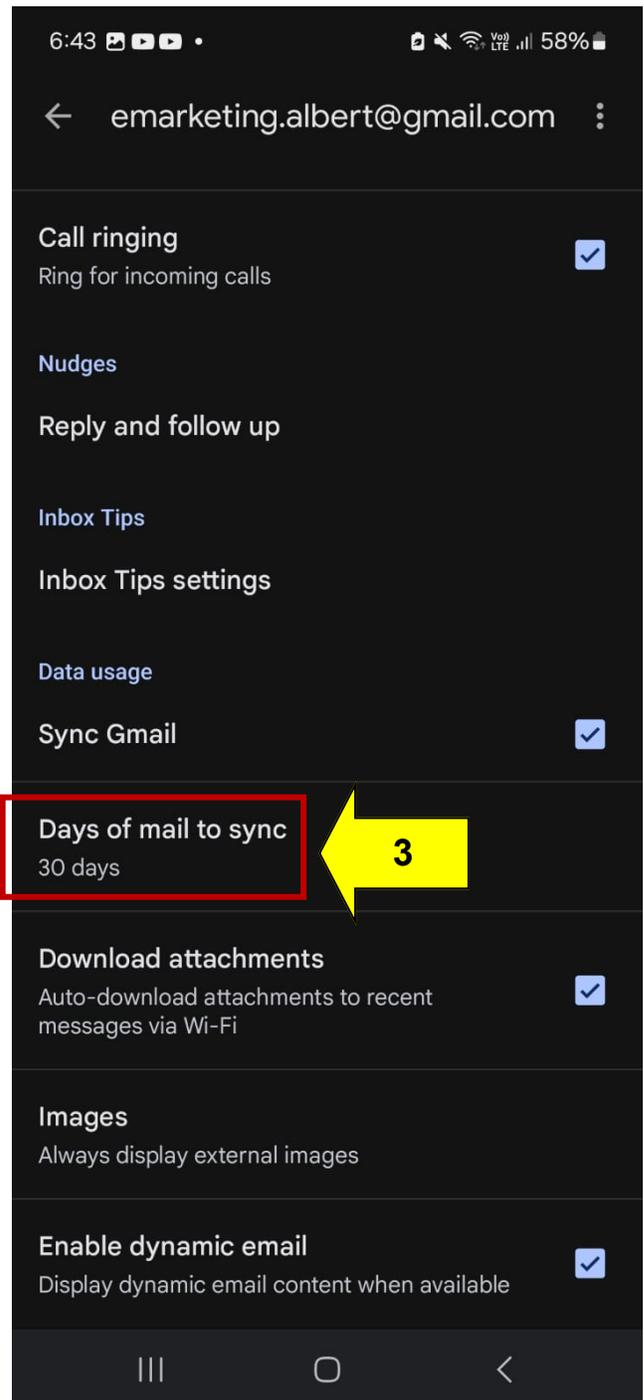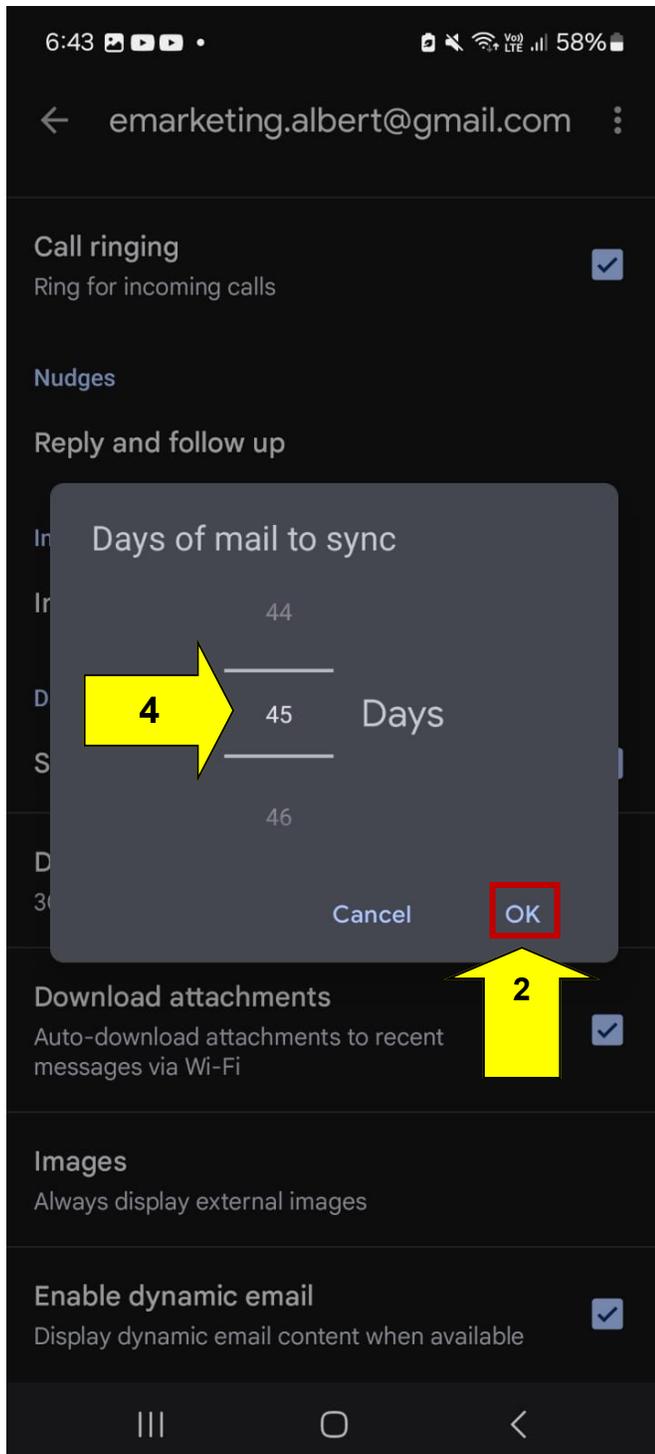
Find Information in Seconds

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **2 . Find e-mails, documents, files, ANY information in seconds**

Search for e-mails by:

✓ To: (Person's name) or From: Finds anything sent To or From person
✓ Subject: (type words to search in "Subject:" field)
✓ for more specific search can also use Advanced search options
✓ Put "quotes" around specific phrases or names

✓ Enter more information to help refine your search…
         Example: Bill Jones ABC Company Price List

✓ Has: attachment finds any message with attachment
✓ Filename: pdf finds any message with PDF attachment
✓ Has:yellow-star finds any message marked with a yellow star *(start by typing a color after has: and Gmail will make suggestions)*

Advanced search button

🔍 Search mail   ⚙️

☰ M Gmail   🔍 Search mail

✏️ Compose

📥 Inbox   65

☆ Starred

🕐 Snoozed

▷ Sent

📄 Drafts   5

⌄ More

Labels   +

🏷 Action to Complete

From
To
Subject
Has the words
Doesn't have
Size   greater than   ⌄   MB   ⌄
Date within   1 day   ⌄   📅
Search   All Mail   ⌄
☐ Has attachment   ☐ Don't include chats

Enter Search Criteria

Create filter   **Search**
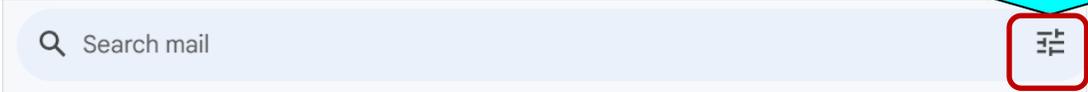
Process & Organize e-mails

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ ***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…)

☐ **a) Create new "top level" e-mail labels by priority NOT by subject.**

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 emails can get this label**
6 - Keeping Just in Case (vs. deleting when you may need it later)

Emails can have more than one label.

☐ **How to create new "top level" e-mail labels**

1. Left click the gear icon
2. Left-click "See all settings"
3. Left-click "Labels"
4. Left click "Create new label"
5. Enter label name
6. Left-click "Create"

☐ **b. Make sure you label everything in your inbox you've read**

❏ Recommendation: Only use your Inbox for:
   ✓ What you haven't read yet
   ✓ What you are going to work and why (labels)
❏ More recommendations for organizing your e-mail
   ✓ If you're finished with an email, delete it or if you may need it later, "Archive" it.
   ✓ Contact TurnerTime if you need archiving assistance

Gmail Calendar Tips

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐   **How to Save an Email into Document Folder on your Computer**

Open the email that you want to save into documents.

1. Left-click the three dots for "More" actions
2. Left-click "Download message"

The image below shows how you will save an email into documents

Process & Organize e-mails

Optimize Gmail for increased efficiency

STOP going back to Inbox after handling an email, change option to open next email after moving or deleting an open item. You will find this setting in "Advanced". Here is how you can enable this option:

1. Left-click gear icon.
2. Left-click "See all settings".

The image below shows how you will go into Advanced Settings
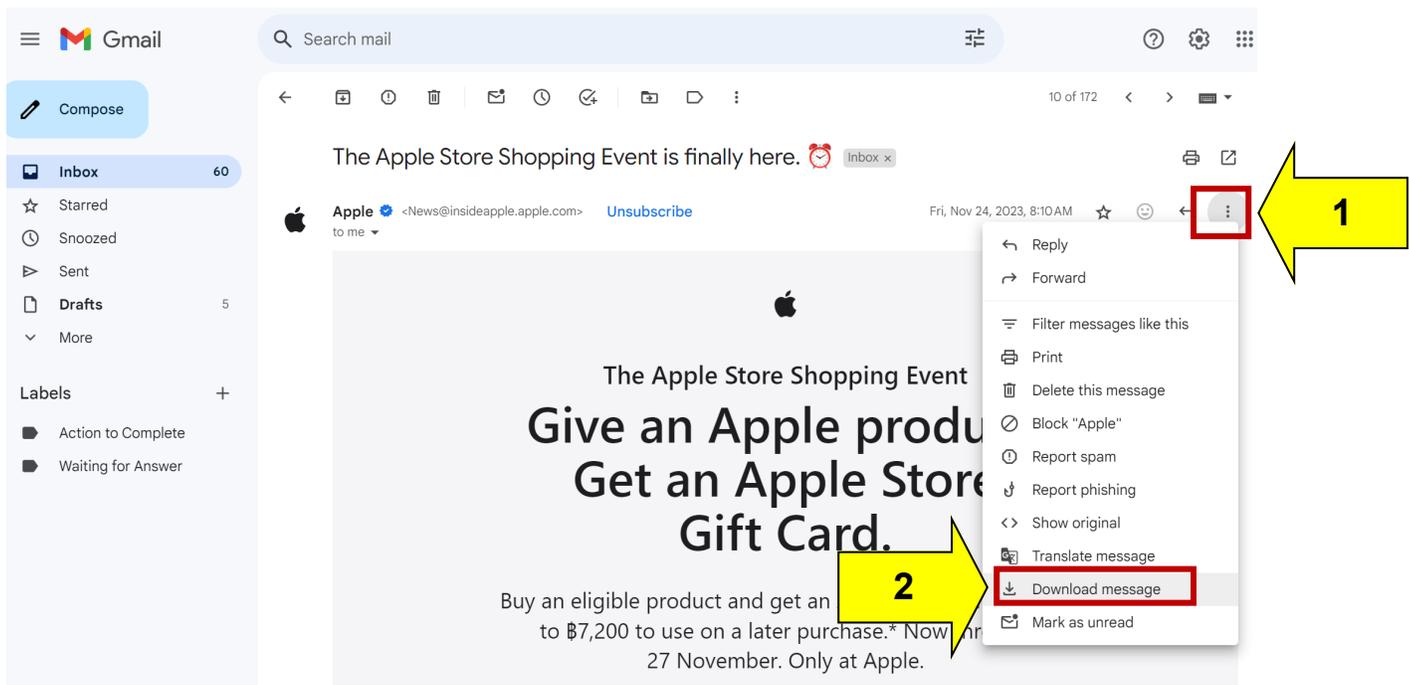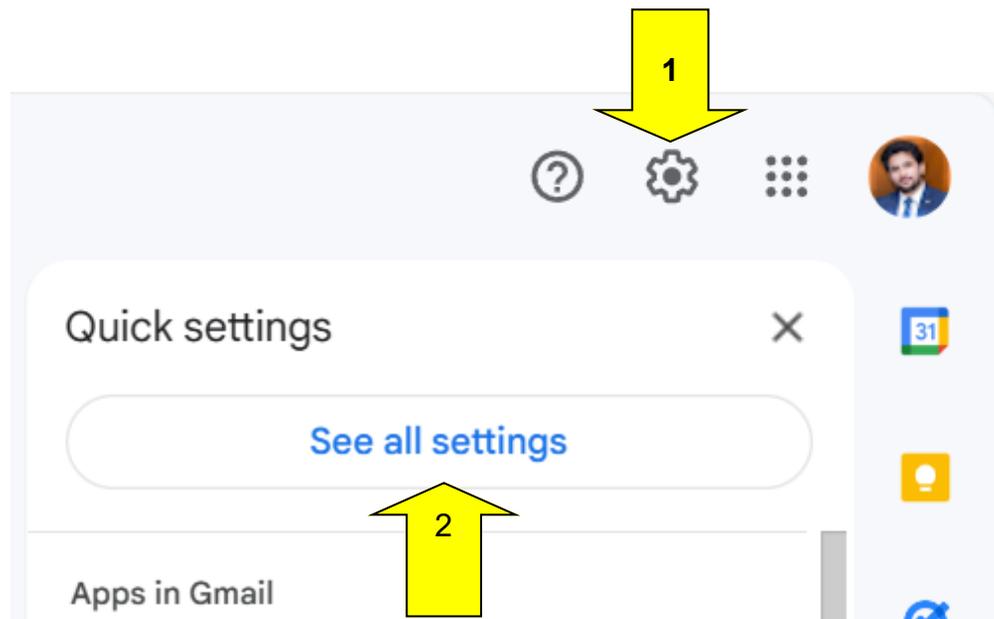
Process & Organize e-mails

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

Optimize Gmail for increased efficiency (continued…)

On the next window:

   3. Left-click "Advanced"
   4. Left-click "Enable" to checkmark
   5. Left-click "Save Changes"

The image below shows the window where you will see the option under Advanced settings

Settings

General   Labels   Inbox   Accounts and Import   Filters and Blocked Addresses   Forwarding and POP/IMAP   Add-ons   Chat and Meet   **Advanced**

Offline   Themes

3

Auto-advance
Show the next conversation instead of your inbox after you delete, archive or mute a conversation. You can s   whether to advance to the next or previous conversation in the "General" Settings page.   **4**   ⦿ **Enable**   ○ **Disable**

Templates
Turn frequent messages into templates to save time. Templates can be created and inserted through the "More options" menu in the compose toolbar. You can also create automatic replies using templates and filters together.   ⦿ **Enable**   ○ **Disable**

Custom keyboard shortcuts
Enable the ability to customize your keyboard shortcuts via a new settings tab from which you can remap keys to various actions.   ○ **Enable**   ⦿ **Disable**

Right-side chat
Move the chat box to the right side of the inbox.   ○ **Enable**   ⦿ **Disable**

Unread message icon
See how many unread messages are in your inbox with a quick glance at   ail icon on the tab header.   **5**   ○ **Enable**   ⦿ **Disable**

Save Changes   Cancel

Avoid Information Overload

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

How to Turn On Desktop Alerts in Gmail

Desktop alerts are turned off by default in Gmail. However, if you want to turn them on, you can do that in the settings. Follow the instructions number wise with arrows.

1. Left-click the gear icon in the top right section
2. Left-click "See all settings"
3. Scroll down and in the "Desktop notifications" section, left-click on "Click here to enable desktop notifications for Gmail."
   (A box at the top will pop up)
4. Left-click "Allow"
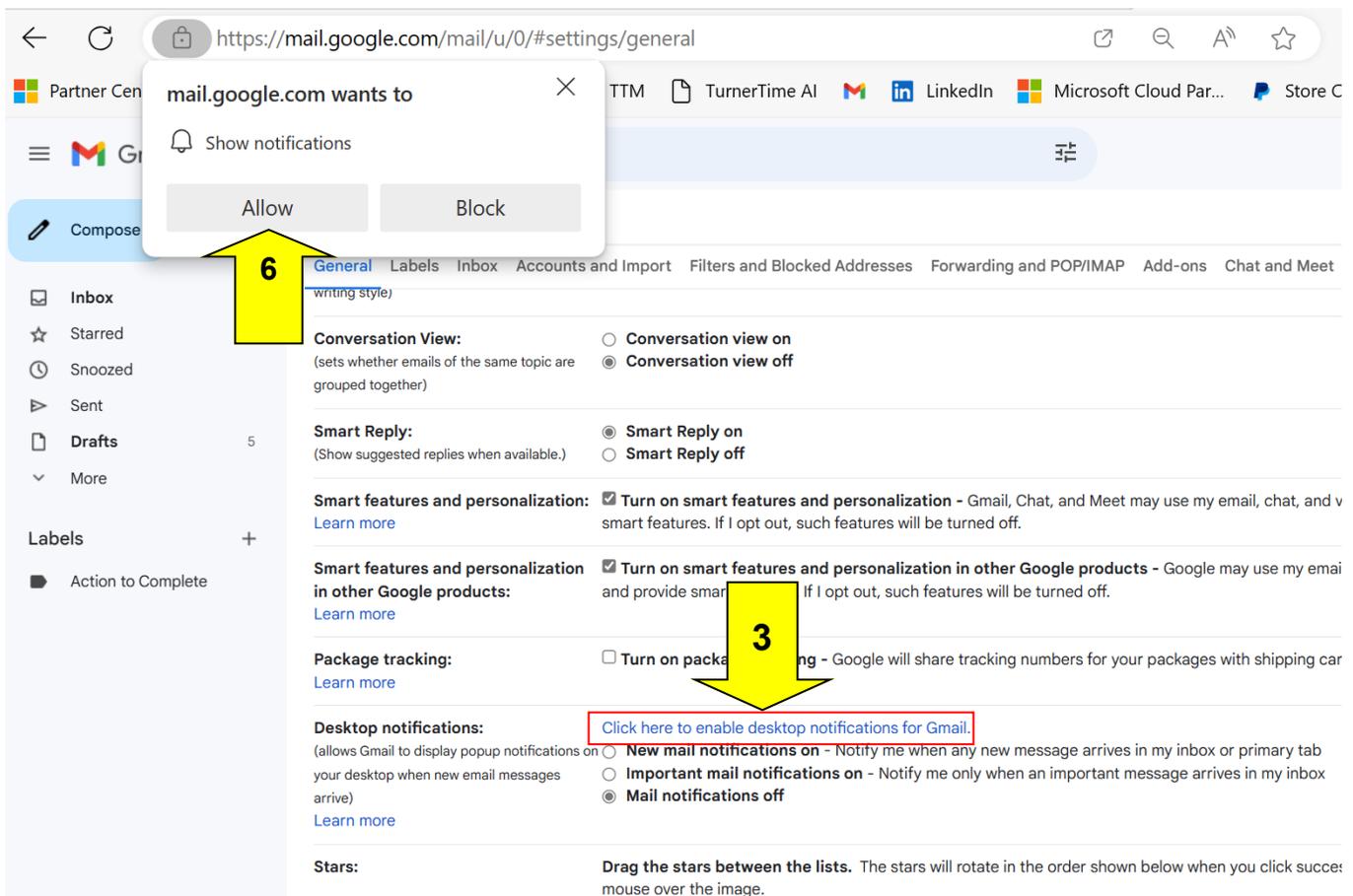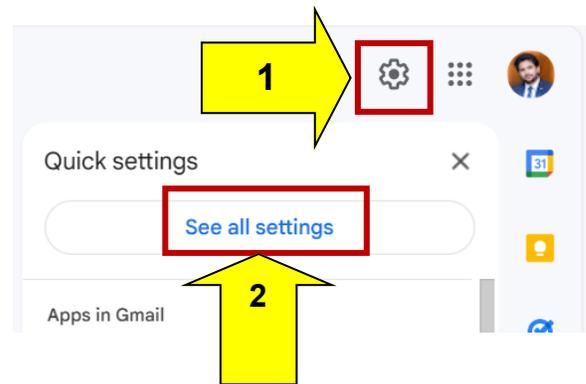
Avoid Information Overload

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

How to Turn Off Spelling and Grammar Check

In Gmail, Spelling and Grammar check is turned on by default. However, you can turn it off if you want. Here is how you will do that:

1. **Left-click the "Settings" icon in the top right section**
2. **Left-click "See all settings"**

> **In Gmail, Spelling and Grammar check is Turned on by Default.**
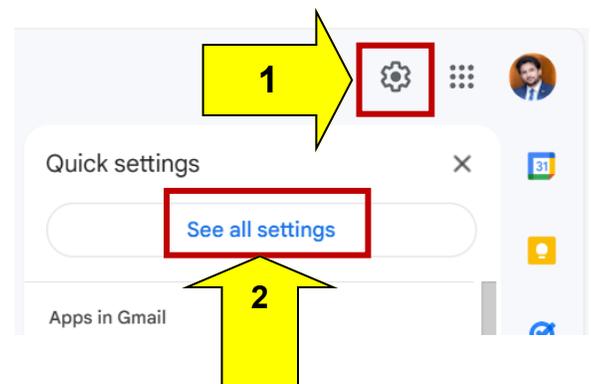
3. **In the General tab, scroll down and turn off the grammar suggestions and spellings suggestions which ever you want.**

Scroll Down and left-click "Save Changes"

Avoid Information Overload

☐ How to Open Replies/Forwards in the New Window

By default Gmail opens up replies and forwards in the same window. However, you can quickly open it in the new window using a keyboard shortcut.

Open the email:

Option 1:

Press (**SHIFT + R)** to reply an email
Press (**SHIFT + F)** to forward an email
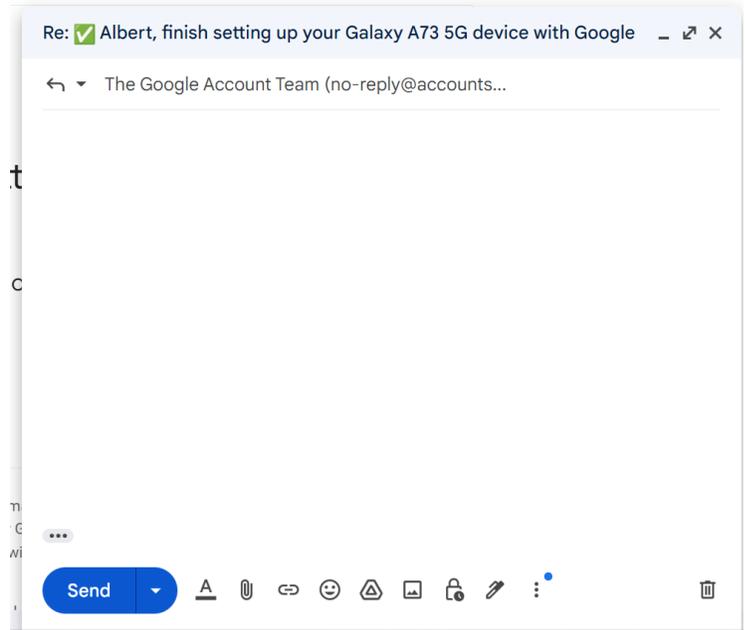
Option 2:

You can also use your Mouse and Keyboard Together.

Press SHIFT key on your keyboard and left-click "Reply" or "Forward".
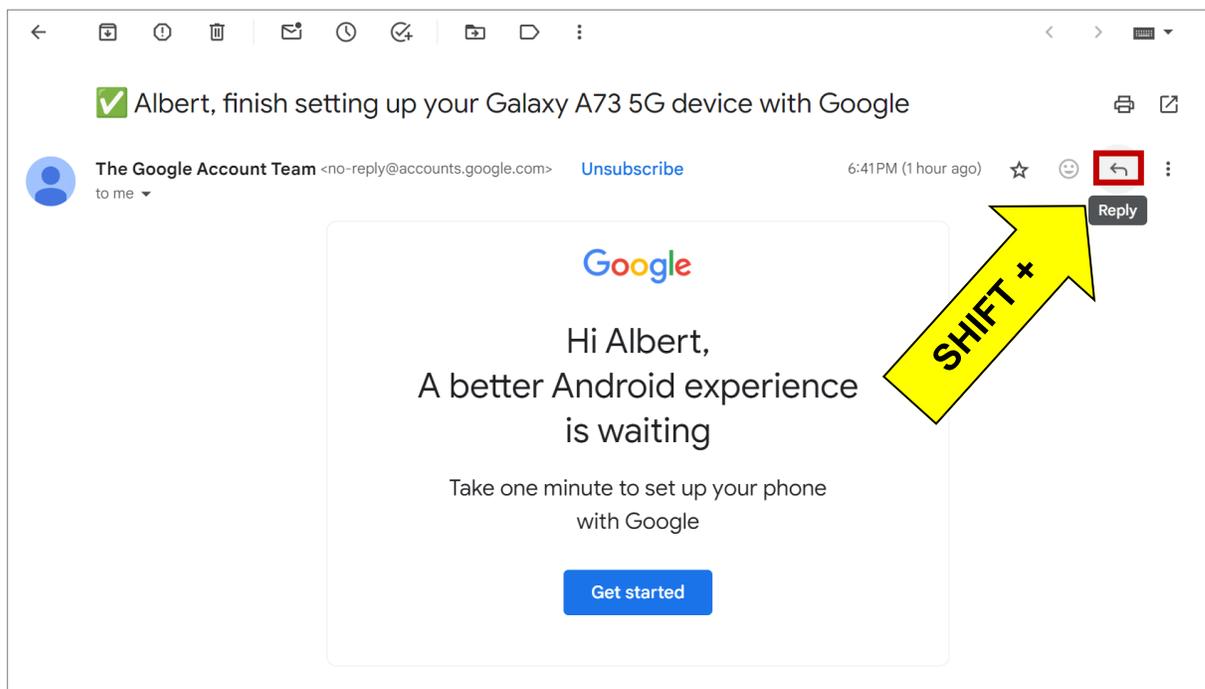
Process & Organize e-mails

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **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 =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
- ❑ Resend an email to save time. To resend, click "Reply" or "Forward) the email, change the recipient if needed and send it

☐ **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; Left Click the checkbox on the right of each email OR SHIFT + Left Click on first and last email in the range you want to select
   2. Delete all those e-mails at once (CTRL 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 <u>later</u> today?
      - ✓ **Leave it in the e-mail inbox and go to the next message**
   4. Going to address it sometime <u>after</u> 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

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

Using Email Templates

Using "Email Templates" for frequently used text, will help you save time when composing e-mail messages. You will want to use Email Templates for anything you find yourself typing repeatedly. You can always change information in the Email Templates (e.g. dates and times of meetings and calls). *You must first turn on "Email Templates" in Settings under "Advanced". (instructions start on next page).*

Commonly used phrases for "Email Templates":

❑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
   Bloomingdale, IL 60108

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

❑Conference call information:

   Our weekly call will be held on July 10th at 9 am CST
   Call hosts: Steve Turner, Bill Gates, Jim Smith
   Inside US dial in: 888-555-1234
   International dial in: 999-555-1111
   Conference ID: 378950483
   Link to meeting: https://join.me/

If you have any questions or suggestions for this week's call, please send me an e-mail.

Process & Organize e-mails

Email Templates (continued…)

☐ **Turn on "Email Templates" in Settings**
1. Left click gear icon.
2. Left click "See all settings'.
3. Left click "Advanced".
4. Under "Email Templates", left-click "Enable"
5. Scroll to bottom and "Save Changes".
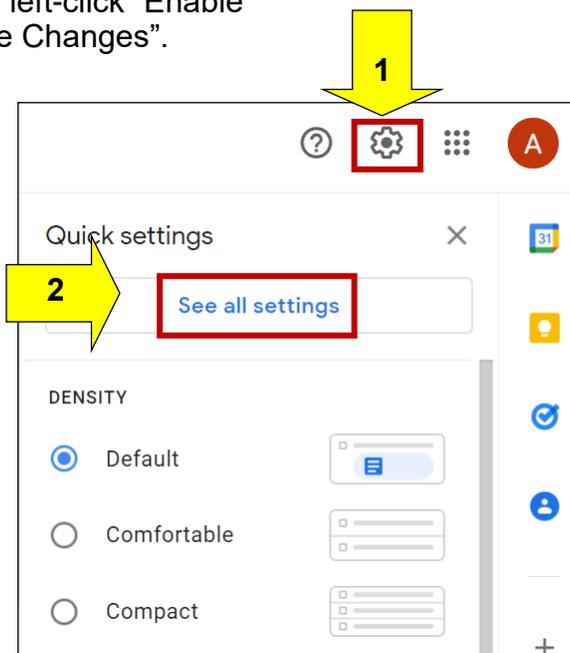
This image shows where you will find "Labs". Enable Email Templates.
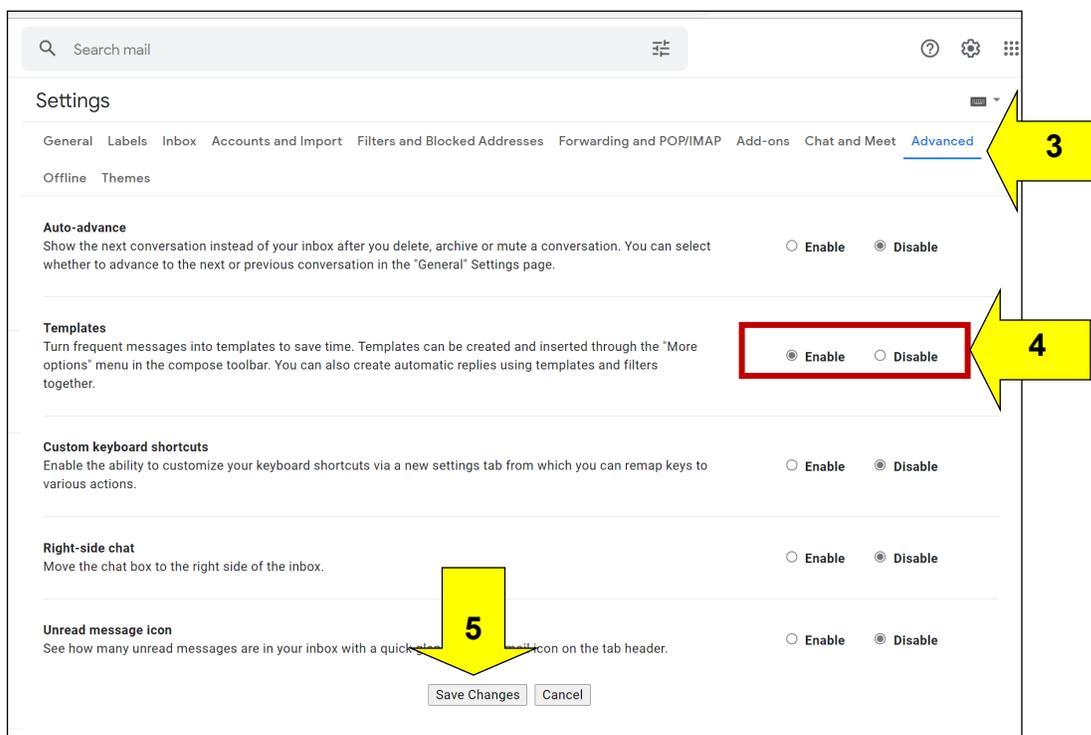
Process & Organize e-mails

Email Templates (continued…)

☐ **Create Email Template**

1. Left click "Compose".
2. Type body of the message.
3. Left click three dots in bottom right corner of message.
4. Hover cursor over "Templates".
5. Left click "Save draft as template".
6. Left click "save as new template"
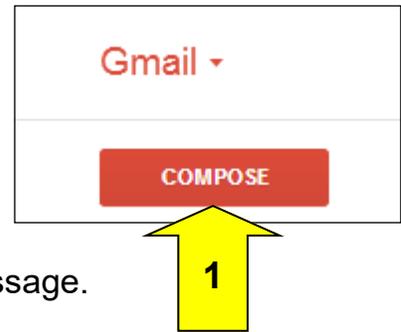
This image shows where you will left click the arrow in the bottom right corner of new message.
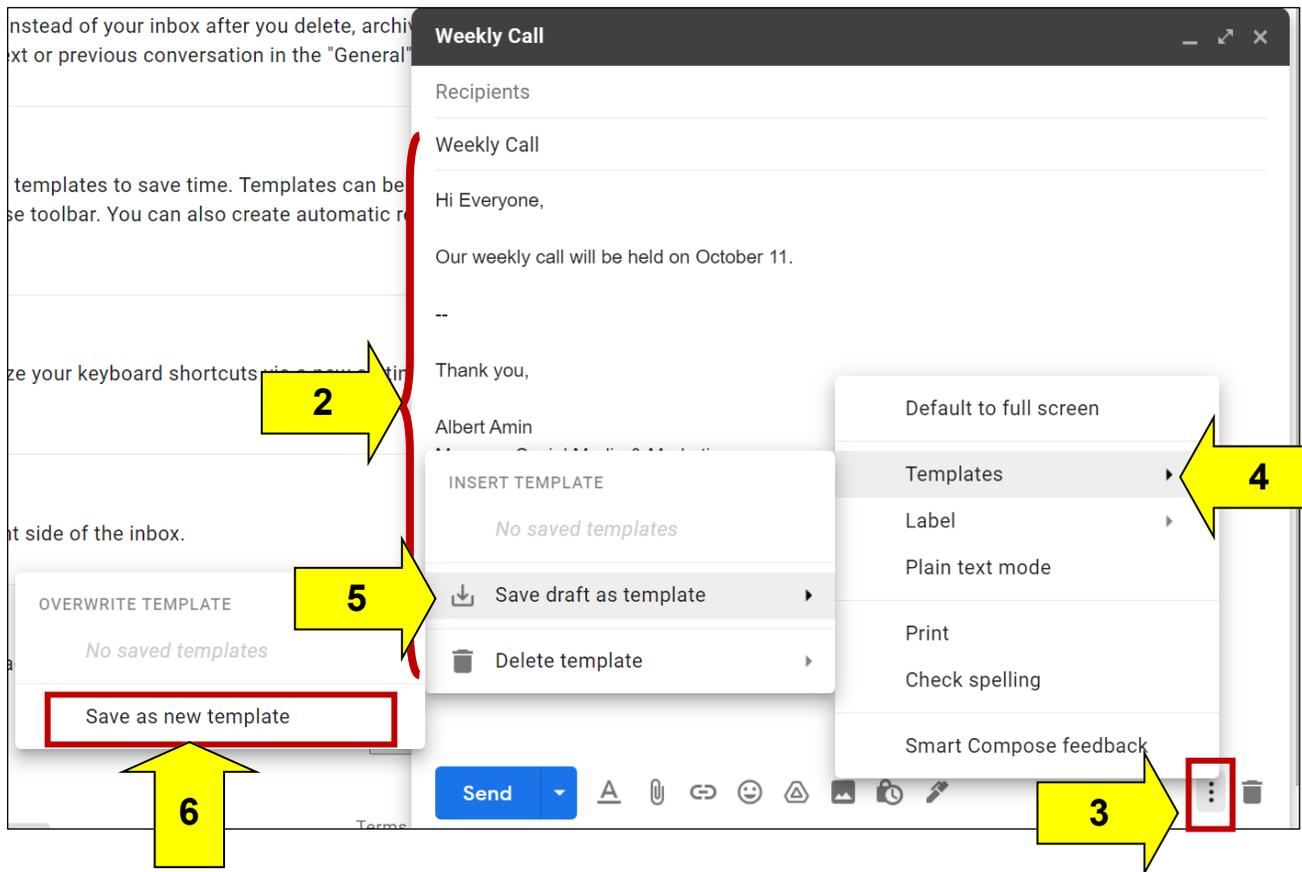
Process & Organize e-mails

Email Templates (continued…)

7. Type a name for the Email Templates.
. Left click "OK".

This image shows where you will name the new Email Templates.

7 →

Enter a new template name   ✕

Weekly Call

Cancel   **Save**   ← **7**
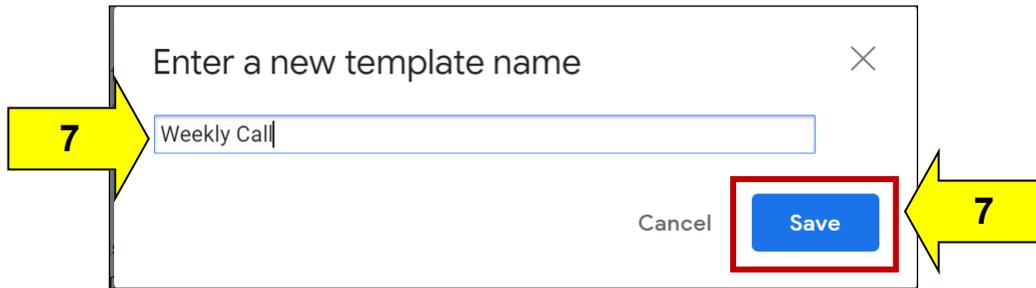
☐   **Use Email Templates**
1. Left click "Compose".
2. Left click three dots in bottom right corner of the message.
3. Hover cursor over "Templates".
4. Left click desired Email Templates (under "INSERT TEMPLATE")

Gmail ▾

1 →   COMPOSE

New Message   _ ⤢ ✕

To   Cc Bcc

Subject

--

Thank you,

Albert Amin
Manager Social Media & Marketing
Mobile: +1 (779) 2013-9066

INSERT TEMPLATE

Weekly Call   ← **4**

⤓ Save draft as template   ▸

🗑 Delete template   ▸

Default to full screen

Templates   ▸   ← **3**

Label   ▸

Plain text mode

Print

Check spelling

Smart Compose feedback

Send   ▾   A 📎 🔗 😊 ⚠ 🖼 🕐 ✏   **2** → ⋮ 🗑
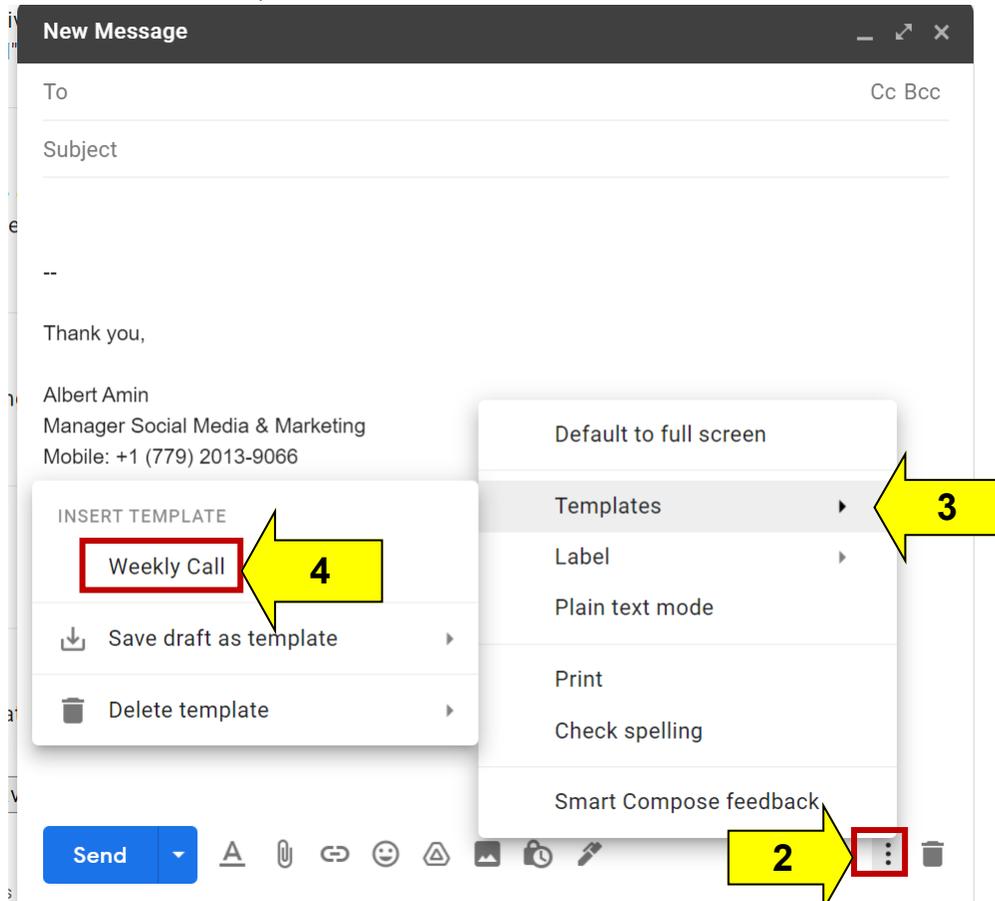
Consolidate All Tasks...

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

Create Auto Signature in Gmail

You will want to create a signature to use on all of your e-mail messages (New messages, Reply and Forward). Include important contact information in your signature; Contact info (Name, title, phone, fax, e-mail, website), Legal disclaimer, Any other information you want all customers to know - Link to your Linked In profile. It may be easiest to compose your signature in Word (or any other word processing app), and then copy and paste into Gmail.

1. Left click gear icon.
2. Left click "See all settings".
3. Scroll down to Signature and type in signature.
4. Left click "Insert this signature before quoted text in replies….." (this will put your signature immediately after you reply text and not at the very bottom of the email).
5. Scroll down and left click "Save Changes"

1

Quick settings

2

DENSITY

- ○ Default
- ○ Comfortable
- ○ Compact

Settings

General   Labels   Inbox   Accounts and Import   Filters and Blocked Addresses   Forwarding and POP/IMAP

Add-ons   Chat and Meet   Advanced   Offline   Themes

Signature:
(appended at the end of all outgoing messages)

Albert   ✏ 🗑

Thank you,

Albert Amin
Manager Social Media & Marketing
Mobile: +1 (779) 2013-9066

Sans Serif   ⌄   𝐓𝐓 ⌄   **B**   *I*   U   A ⌄   🔗   🖼   ≡ ⌄   ₁₂₃

3

+ **Create new**

Signature defaults

FOR NEW EMAILS USE   ON REPLY/FORWARD USE

| Albert ⌄ | | Albert ⌄ |

4

☑ Insert signature before quoted text in replies and remove the "--" line that precedes it.

Personal level   ● No indicators

5   **Save Changes**   Cancel

Effective File Organization

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **How to Move Emails to Archive**

There are ways you can archive emails.

☐ **Archiving Multiple Emails at Once:**

1. Left-click the checkboxes on the right of the each email
2. Left-click "Archive" button
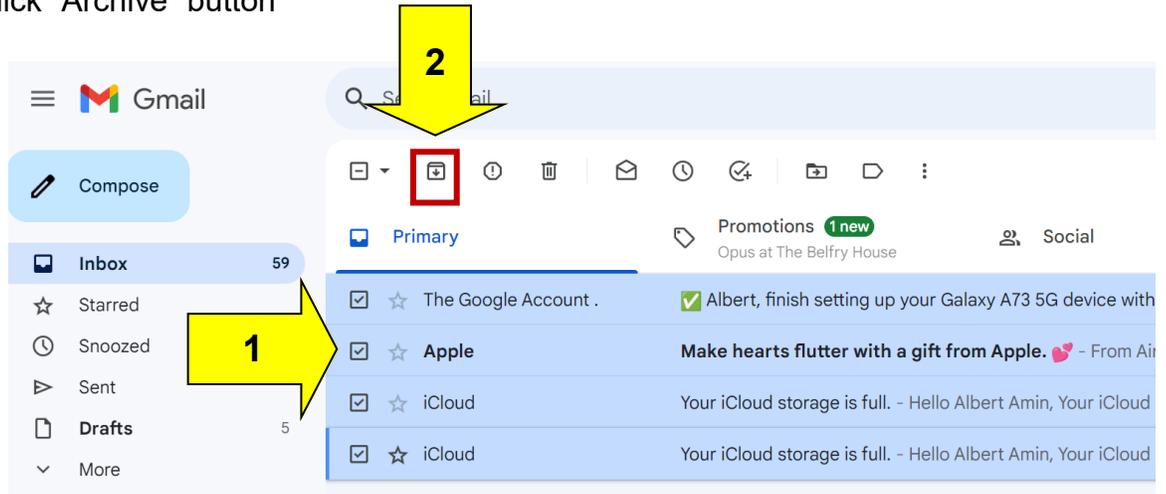
☐ **Archiving an Individual Email in the Inbox:**

1. Hover your curser over the email and on the right you it will show you some action items
2. Left-click "Archive" button
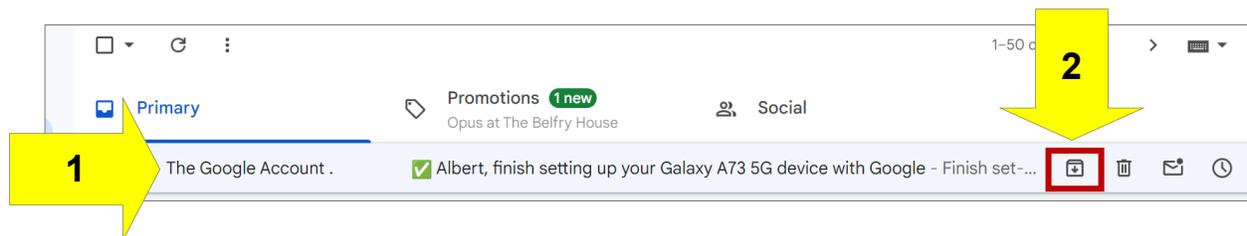
☐ **Archiving an Opened Email:**

1. Left-click "Archive" button
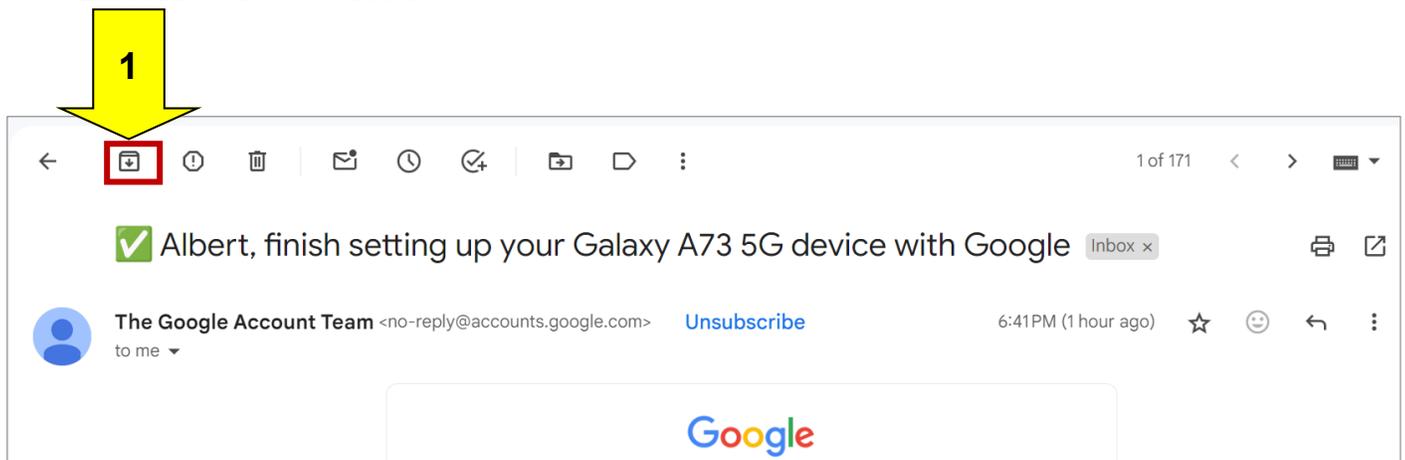
Effective File Organization

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

How to Create and Use "Waiting for Answer" Label

If you would like to keep track of e-mails you send that you are waiting for an answer on, you can create a special label in Gmail. This will allow you to assign a label to the e-mail before you send it out and do a follow up on e-mails that you needed a response for.

1. On the right of Labels, left-click **+** button
2. Enter label name "Waiting for answer"
3. Left-click "Create"

This images show the process to create new label.
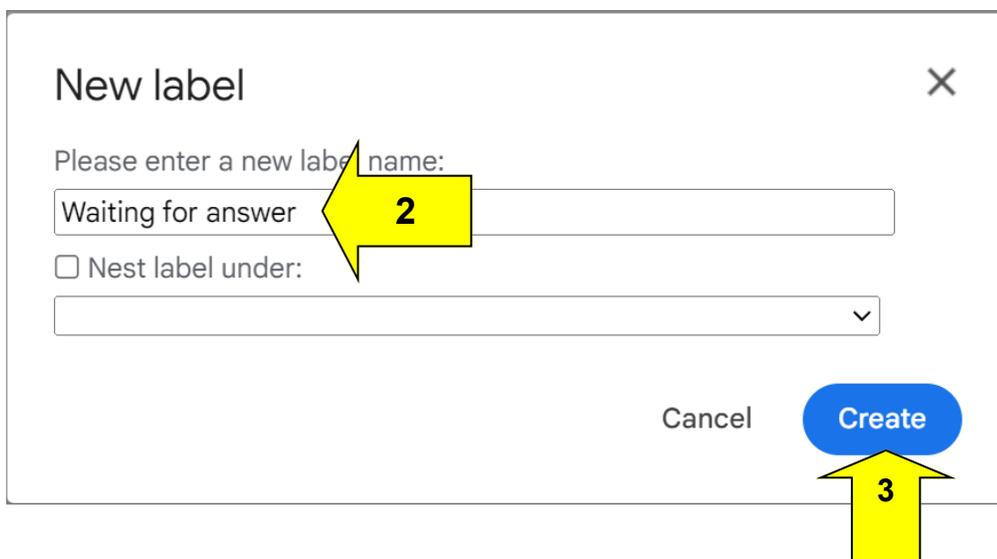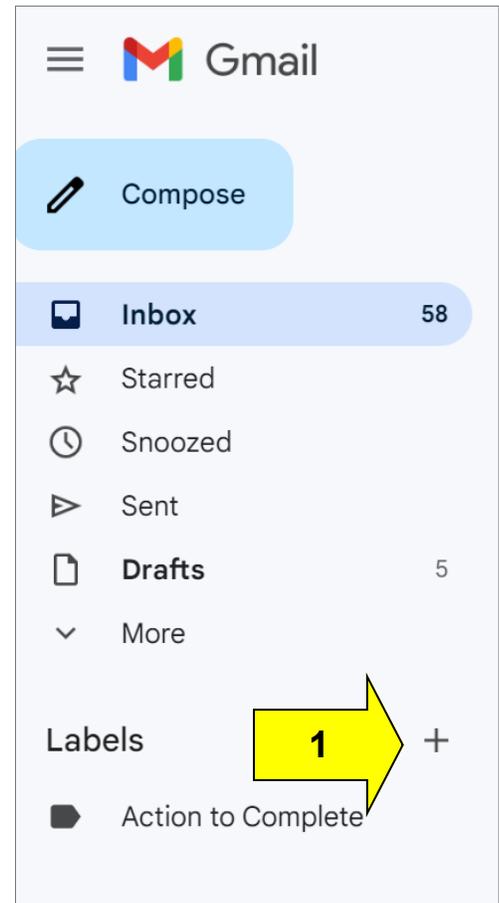
= **M** Gmail

✎ Compose

▢ Inbox   58

☆ Starred

◷ Snoozed

▷ Sent

▯ Drafts   5

⌄ More

Labels   1 → **+**

◆ Action to Complete

New label   ✕

Please enter a new label name:

Waiting for answer   2

☐ Nest label under:

⌄

Cancel   **Create**

3

Effective File Organization

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

How to Create and Use "Waiting for Answer" Label...Continued...

4. Before sending an email, left-click three dots
5. Left-click "Label"
6. Left-click the checkbox to assign cateogry

This images below show how you will assign a waiting for answer label before sending out an email.
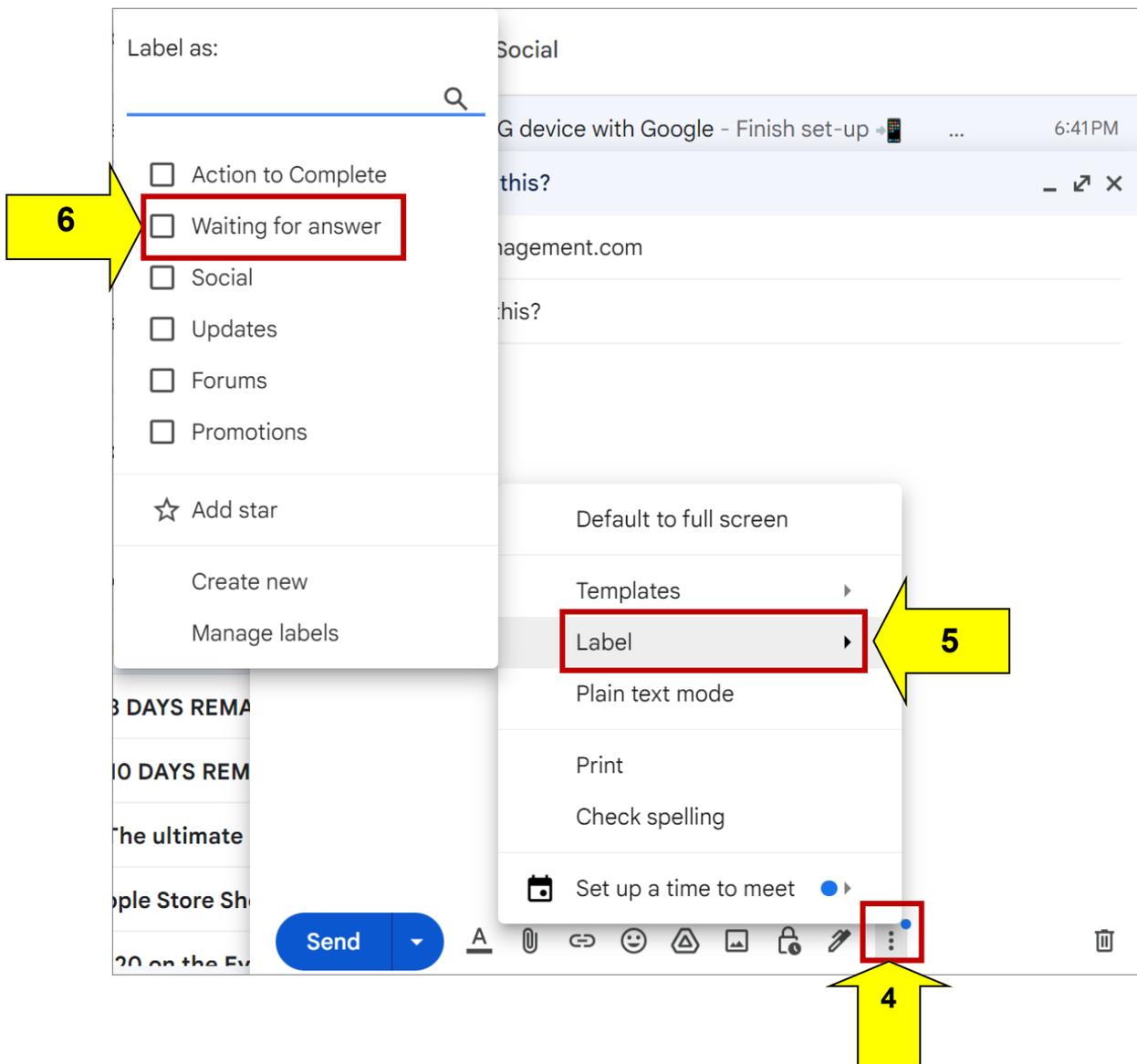
Consolidate All Tasks...

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **Use your Auto Signature and have useful information in it**
(For tutorial on how to create Auto Signatures, please go to page 101)

- ❏ 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

☐ **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 sent to yourself:
  - a) On smartphone, tap and hold Gmail icon and tap "Compose". You can also use Siri on iPhone/iPad or Google Assistant on Android Phone/Tablet.

☐ **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? Apply appropriate label
- ✓ Going to do it sometime after today?   Apply appropriate label

☐ **Once you've reduced your Inbox down to your "To Do list" for today:**

- ✓ Schedule remaining boulders/rocks on your calendar
- ✓ **Make sure you have time scheduled on calendar to review your "priority"** Label

☐ **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

Other Timesavers

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **Marking messages using Stars to prioritize e-mails**

You can create a system to mark the importance of a message by using "Stars". In other email programs we use a numbering system of 1-5 to mark the importance of a message on our "To-Do" list. In Gmail you can use different colored Stars to mark messages.

In "Settings" drag the stars from the bottom row to the top row to enable their use. You can click "all stars" to move all of them to the top row at once. Always make sure to scroll to the bottom and "Save Changes".

Use the search string: has:yellow-star
to search for all messages marked with a yellow star. *(start by typing a color after has: and Gmail will make suggestions)*

This image shows where to find "Stars" in Settings. I have dragged some additional Stars into the top row so I can use them.

Settings

General   Labels   Inbox   Accounts   Filters   Forwarding and POP/IMAP   Chat   Web Clips   Labs   Offline   Themes

This is what your body text will look like.

Conversation View:
(sets whether emails of the same topic are grouped together)
○ Conversation view on
● Conversation view off

Send and Archive:
Learn more
● Show "Send & Archive" button in reply
○ Hide "Send & Archive" button in reply

Undo Send:
☑ Enable Undo Send
Send cancellation period: [10 ▼] seconds

Preview Pane:
Mark a conversation as read: [After 3 seconds ▼]

Stars:
Drag the stars between the lists. The stars will rotate in the order shown below when you click succes your mouse over the image.

Presets: 1 star   4 stars   all stars

In use: ⭐ ⭐ ⭐ ⭐ ⭐ ⭐

Not in use: ! » ! ✔ i ?

[Save Changes]   [Cancel]

Gmail Calendar Tips

Marking messages using Stars to prioritize e-mails (continued…)

To assign a "Star" to a message:
1. Left click the empty star icon next to the message (left click more than once to use the "stars" in order).

> This image shows where you will left click to assign a "star".

1

	Primary	Social	Promotions	+
☆	Kim Kininmonth	Fwd: Love the Movie? Now Read the Book - Kim Kininmonth, Trainer	Inline image 1 Tu...
☆	Kim Kininmonth	Fwd: Medical Theories - Thanks, Kim Begin forwarded message: From: Beliefnet - Health
☆	Kim Kininmonth	Fwd: Boost performance & profitability with better planning & mobile reporting - Tha
☆	Kim Kininmonth	Fwd: General Guidelines for Building Effective Service Catalogs - Thanks, Kim Begin

> This image shows the "Stars" in the order that I will use them.

Settings

General **Labels** **Inbox** **Accounts** **Filters** **Forwarding and POP/IMAP** **Chat** **Web Clips** **Labs** **Offline** **Themes**

Conversation View:
(sets whether emails of the same topic are grouped together)
- ○ Conversation view on
- ◉ Conversation view off

Send and Archive:
Learn more
- ◉ Show "Send & Archive" button in reply
- ○ Hide "Send & Archive" button in reply

Undo Send:
- ☑ Enable Undo Send
  Send cancellation period: 10 ▾ seconds

Preview Pane:
Mark a conversation as read: After 3 seconds ▾

Stars:
Drag the stars between the lists. The stars will rotate in the order shown below when you cli...
Presets: 1 star   4 stars   all stars
In use: 🔴! ✅ 🟪? ⭐ 🔵 🟠 🔴 🟣 🟢 » ! ℹ️

Not in use:

Left clicking once will assign the red bang, twice = green check, three = purple question mark, and so on.

Gmail Calendar Tips

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **Benefits of Using Google Drive**

It is cloud-based storage and collaboration platform designed for businesses. It allows you to store, share, and collaborate on files and documents in real-time, from any device. Google Drive offers several benefits for businesses, including:

1. **Centralized storage**: Keep all your work in one place with secure access from your computer, phone, or tablet.

2. **Easy sharing**: Quickly invite others to view, download, and collaborate on any file – no email attachment needed.

3. **Automatic updates**: File updates are automatically saved and stored in Drive, so everyone can always have access to the latest version.

4. **Administrative control**: With centralized administration, data loss prevention, and Vault for Drive, you can easily manage users and file sharing to help meet data compliance needs.

5. **Smart search**: Drive uses Google AI to predict and surface what's important for you in real-time, making it easy to find what you need.

6. **No installation required**: Google Drive is a cloud-based service, so no installation is required, and anyone with a Google account can start using it right away.

7. **Quick Files Search:** You can use Google's huge processing power to immediately search the Drive and find the files you want to share or edit.

8. **Built-in Comments Feature:** You are working on a strategy and want the input of the whole team. Nothing easier than using Google Drive's comments to share your thoughts and get the final form that satisfies everyone.

9. **Microsoft Office Compatibility:** Another one of the advantages offered by Google Drive is the ease with which you can upload Microsoft Office files and continue editing them online, in the cloud. Google Drive can handle Word, Excel, and PowerPoint documents so you won't waste any time converting these docs to share them and collaborate on them. Simply upload in Google Drive and get ready to work together to achieve the best results.

Effective File Organization

☐ **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: Press Enter
  ✓Select multiple files/folders:
    1. Hold down Ctrl
    2. Left click on each item you want to select
  ✓Select range of files/folders:
    1. Left click first item
    2. Hold down Shift
    3. Left click last item
  ✓Go back to previous folder: ALT + ⬅
  ✓Go forward to next folder: ALT + ➔

In this example, inside "My Documents":
hit TAB key twice to move into list of folders & files, > tap P to highlight "Project files" folder, hit ENTER to open "Project files"
Hit A to highlight "ABC Company" folder, hit ENTER to open "ABC Company" folder
Hit M to go to "Microsoft Outlook Secrets" document, hit ENTER to open the document in Word

▸ My Documents ▸

| ▸ My Documents ▸ Project files ▸ | ▸ ABC Company |

h ▾   E-mail   Burn   New fo

Documents library
My Documents

Name
📁 BB FlashBack Movies
📁 BB FlashBack Pro 3 Updates
📁 BlackBerry
📁 Dell WebCam Central
📁 My RoboForm Data
📁 OneNote Notebooks
📁 Outlook Files
📁 **Project files**
📁 BlackBerry Simulator_7.1.0.355_9

▸ My Document ▸ Project files ▸

▾   E-mail   Burn   New fol

Documents library
Project files

Name
📁 **ABC Company**
📁 Einstein K-9
📁 Essential Title
📁 Smith & Sons Office Supply

▸ My Documents ▸ Project files ▸ **ABC Company**

ith ▾   Print   -mail   Burn   New folde

Documents library
ABC Company

Name
📄 Microsoft Outlook Secrets - Kitchens Session.pu
📄 Foster Parent Application 11-0603-V3.doc
📄 just go.docx
📄 Move your mouse to the middle on the right or l
📄 september newsletter.docx
📄 Shift key and mouse click.docx

Find Information in Seconds

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

Using "Quick Access" for most used folders/files (Windows 10 & 11)
To quickly access most used folders when opening/saving files or folders.

1. In any program (i.e. Word, Excel, PowerPoint) Press CTRL + O to open a file.
2. Navigate to desired file (or folder), and left click on it.
3. Scroll to top of folder list, Right click on "Quick Access".
4. Left click on "Pin current location to Quick Access".
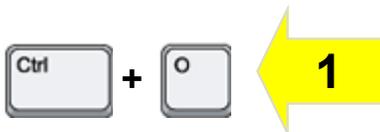
Ctrl + O   **1**

This image shows the dialog box that opens when saving a file. : CTRL + O.
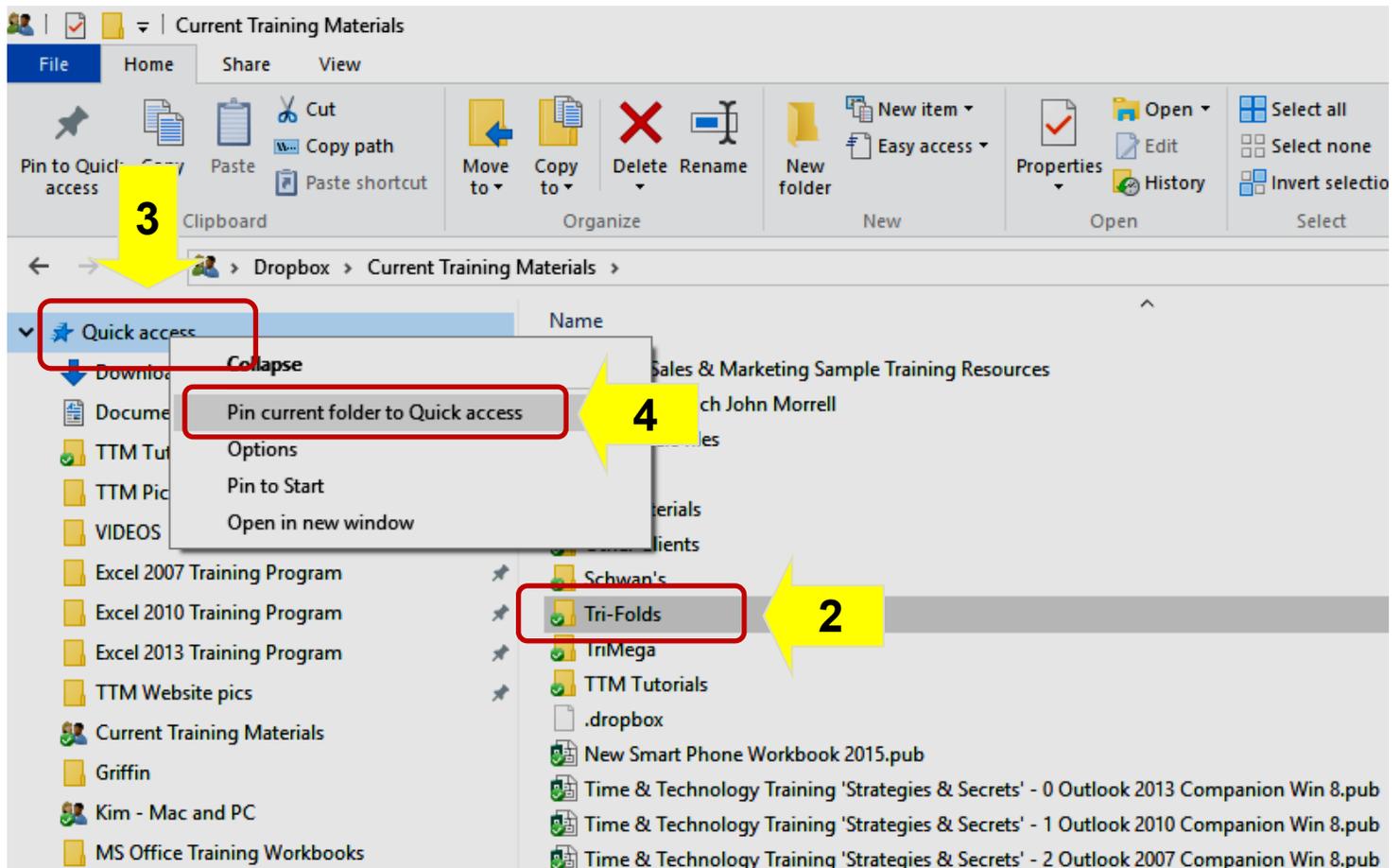
Find Information in Seconds

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

Using Search in Windows 10 & 11
With Windows Search you can quickly find files/folders, programs/apps, computer settings, or search the web. In this example we are searching with "File Explorer".

Search results are based on text in the file name, text underline inside the file, tags, and other file properties.

1. Type in text you are searching for.
2. Press ENTER.

1 Access File Explorer
Windows Key + E

2 Go directly to Search Box
CTRL + F

3 **Select a specific date range:** use arrow next to "Date Modified" to search for documents based on last day they were modified.

4 **Select specific type:** Use arrows next to column headers to refine search. Click box next to desired filters.

5 Use Details View
Left click arrow next to the list icon

6 **Show Preview Pane**
In order to see a preview (inside the actual document), turn on the Preview Pane in the top right corner of the Search Window. Alt+P

Open "View" tab

Remember, Windows is also looking INSIDE of documents for the words you type in the Search Box.
If you are looking for file names only, use **name:** followed by the file name you are looking for.

This is the Preview Pane, shows inside the document that is selected.
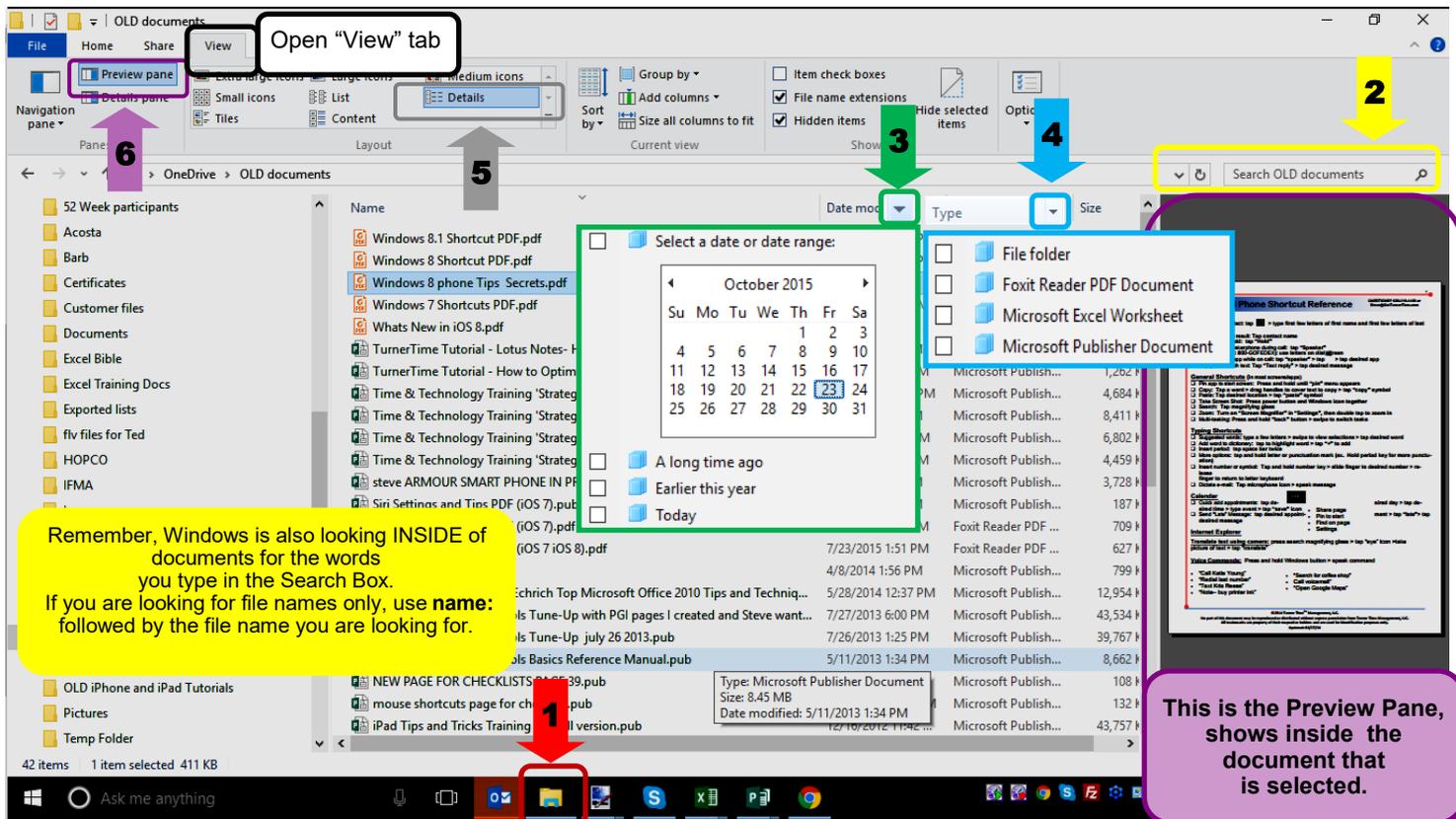
Use Shortcuts to...

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

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

❑ Hold down CTRL key and scroll mouse wheel to zoom in/out

❑ Move text to new location with your mouse
1. Highlight text to move.
2. Left click highlighted text.
3. Drag text to new location.

❑ Copy text to additional location
1. Highlight text to copy.
2. Hold down CTRL key.
3. Left click highlighted text.
4. Drag text to additional 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).

❑ Highlight text from left to right (image below)
1. Hold down ALT key.
2. Drag mouse down to include all desired lines of text.
3. Drag mouse to right/left to highlight block of text.

Bonus tip: Holding down the Alt key while dragging and highlighting text in a text editor will allow you to selectively highlight text.

This can be useful if your paragraph or other text is in a column.

Use Shortcuts to...

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

Gmail, Google Calendar
QUICK REFERENCE

GMAIL KEYBOARD SHORTCUTS

Turning on keyboard shortcuts

Before using keyboard shortcuts in Gmail, you must turn it on from the settings. Here is how you can do it:

1. Left click gear icon in top right corner of Gmail.
2. Left click "Settings" and General Tab.
3. Find "Keyboard Shortcuts".
4. Left click "keyboard shortcuts on".
5. Left click "Save changes" at bottom of the page

| Keyboard shortcuts: | ○ Keyboard shortcuts off |
| | ● Keyboard shortcuts on |

GMAIL SPEED KEYS

Open any Gmail item	**ENTER**
Brings up keyboard shortcut menu in Gmail	**?**
Compose new e-mail	**C**
Compose e-mail in new window	**SHIFT + C**
Reply to message	**R**
Reply in new windows	**SHIFT + R**
Reply to all recipients	**A**
Reply to all in new window	**SHIFT + A**
Forwards a message	**F**
Search	**/**
Returns to Inbox	**U**
Archive message	**E**
Save as draft	**CTRL + S**
Delete, moves message to trash	**#**
Mark message as Read	**SHIFT + i**
Mark message Unread	**SHIFT + U**

OPTIMIZE GMAIL

STOP going back to Inbox after handling an email, change option to open next email after moving or deleting an open item. You will find this setting in "Advanced". Here is how you can enable this option:
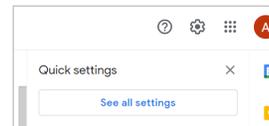
1. Left-click gear icon.
2. Left-click "See all settings".
3. Left-click "Advanced"
4. "Enable" Auto-advanced
5. Left-click "Save Changes"

Auto-advance
Show the next conversation instead of your inbox after you delete, archive or mute a conversation. You can select whether to advance to the next or previous conversation in the "General" Settings page.   ● Enable   ○ Disable

EMAIL TEMPLATES

You must first turn on "Email Templates" in Settings under Labs.

1. Left click gear icon.
2. Left click "See all settings'.
3. Left click "Advanced".
4. Under "Email Templates", left-click "Enable"
5. Scroll to bottom and "Save Changes".

Quick settings   ✕
See all settings

Templates
Turn frequent messages into templates to save time. Templates can be created and inserted through the 'More options' menu in the compose toolbar. You can also create automatic replies using templates and filters together.   ● Enable   ○ Disable

SEARCHING (& FINDING) EMAILS

🔍 Search mail

Left-click "Show search options".

From	
To	
Subject	
Has the words	
Doesn't have	
Size	greater than ▾ MB ▾
Date within	1 day ▾
Search	All Mail ▾
☐ Has attachment ☐ Don't include chats	
	Create filter Search

- **To OR From: Person's name** Finds anything sent To or From named person
- **Subject:** type words to search in "Subject:" Field
- **Put "quotes"** around specific phrases or names
- **Enter more information to refine your search**
  Example: Bill Jones ABC company price list
- **Has:attachment** finds any email with attachment
- **Filename:pdf** finds any e-mail with PDF attached

Use Shortcuts to...

GOOGLE CALENDAR SHORTCUTS

Create calendar event	**C**
Open Create Event Bubble	**Q or Shift+C**
View event details	**E**
Delete event	**DEL**
Undo last action	**CTRL + Z**
Return to calendar from event	**ESC**
Save event	**CTRL + S**
Go to a specific date	**G**
Go to today	**T**
Go to Settings	**S**
Go to previous date range	**P or K**
Go to next date range	**J or N**
Go to Add Calendar	**+**
Refresh	**R**
Search	**/**
Print	**CTRL + P**

CREATE MEETING FROM EMAIL

This will allow you to set a reminder to follow-up on the e-mail.
Open the e-mail message (open in it's own window):

1. Left click the three vertical dots to the right of the Labels icon (upper left corner)
2. Left click "Create event".
3. Change date and time of event (use date that you want to be reminded to follow up on this e-mail) and any other details necessary.
4. Left click on the blue "SAVE" button at the top

CALENDAR NAVIGATION

Move a calendar appointment:

1. Hold down left mouse button
2. Drag appointment to new time and/

Streamline: Use ONLY your Google calendar for planning or scheduling all meetings

COLOR CODING APPOINTMENTS

In appointment Left Click on desired "Event color".
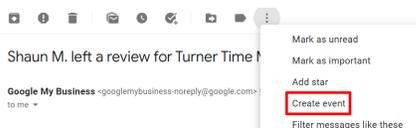
USING SMALLER TIME INCREMENTS

Try scheduling the start time as 2:00 and the end time as 2:15. Manually entering the start and end time of the meeting allows you flexibility. Then calendar event length will be reflected in the size and placement of that event

CONTACTS

Open contact details	**ENTR**
Save changes to contact	**CTRL + ENTR**
Undo last action	**Z**
Search	**/**

MOUSE SHORTCUTS

- Double left click to select a word
- Triple left click to select a sentence or paragraph
- Hold down CTRL key and scroll mouse wheel to zoom
- Highlight text and drag with mouse to move text
- Highlight text, hold down CTRL key, and drag to copy text to new location
- Hold down ALT key while highlighting text, this allows you to highlight columns of text

The Seven "Silos" or Pillars of Productivity
Streamline to Save Time

TurnerTime™
MANAGEMENT
Seminars | Training | Coaching

CALENDAR Google	EMAIL Gmail	CRM (Repfabric)	NOTES Google Keep	TASKS by Google	FILES Google Drive	TEAMWORK Google Meet
For ALL Business Related and Time Specific Meetings, Appointments and Tasks	For ALL Business-Related e-Mail	For ALL Customer, Prospects & Leads	For ALL* Business Related Notes *Handwritten Notes added with Rocketbook	For ALL non-time specific Tasks & Projects	For managing all your files, documents and your PC Desktop	Secure video meetings for teams and businesses.
On PC/MAC:	On PC/MAC:	On PC/MAC: Add-In for Gmail	On PC/MAC: OneNote 2016	On PC/MAC: Tasks	On PC/MAC: Google Drive	On PC/MAC: Microsoft Teams
iPhone/iPad/ Android: Calendar App	On iPhone/iPad/ Android: Gmail App	iPhone/iPad/ Android: Repfabric App	iPhone/iPad/ Android: Keep App	iPhone/iPad/ Android: Tasks App	iPhone/iPad/ Android: Drive Apps	iPhone/iPad/ Android: Meet App

Best Practices

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ 7. "Best Practices" to supercharge tech tools

Maximize your productivity/efficiency by using your smartphone and/or tablet and know that You can still be productive when "on the road "examples:

1. Siri or Google Assistant

2. Set up email templates (Gmail) or Text Replacement (iPhone/iPad) for frequently used text (common phrases, addresses, conference call numbers, e-mail addresses, etc.)

3. Learn how and set up appointments or meeting requests.

4. 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

5. 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

6. To find contacts faster, search by last name (1st 3 letters), then first name

7. At least once a month clear your drafts folder on your smartphone/tablet and make sure you put any regularly used phone numbers into Gmail Contacts

8. Use your home button to your benefit for app switching (iPhone/iPad) or App switching icon (Android)

9. Fill your Icon Dock with apps you use most

10. Use a Bluetooth in your car and/or headset— we recommend Poly V5220 Bluetooth headset with six hours of talk time and quick recharging.

11. Anytime you plug in a device for recharging, use a high quality surge protector (with rotating plug & multiple outlets).

12. 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"

Use Shortcuts to...	**QUESTIONS? 1-855-778-8463** **Steve@TurnerTimeManagement.com**

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

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 (Indistractability)
❑ Prioritize/Complete Action Items, Tasks & Projects Quicker (Tasks)
❑ Don't Type; Speak & Use Templates/Shortcuts Instead (Windows Dictation, Siri, et al)
❑ Organize, Navigate, Share Files/Documents from Any Device (Google Drive)
❑ Customize/Optimize your Windows, Mac, Android or iPhone/iPad
❑ Improve/Optimize Note Taking & Organization (Google Keep)
❑ More Professionally in G-Suite Apps
❑ Reduce Internal Email up to 90% & Increase Productivity (Google Chat)
❑ Time Saving Best Practices for Meetings, Conference Calls, Webinars AND Communication Etiquette
❑ Realize Sales & Better Forecasting Through CRM Adoption/Training/Coaching
❑ Close More Sales & Prospects with "Social Selling"/Digital Marketing
❑ Windows 10 & 11/G-Suite Best Practices Training
❑ Working at Maximum Efficiency from Home & Increasing your Productivity When Traveling
❑ Passwords/Private Data Management
❑ Executive/Management Coaching: Manage, Lead, Grow Your Team

Employees Upskilling Boot Camp Training (Four, One-Hour Webinar) $450
Executive Coaching (unlimited Coaching, 3 months for 1 participant) $2,500

Did you know…?

TurnerTime Recommends

repfabric®
Connecting the threads of multi-line selling

- 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 repfabric®

Dubb

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

Click here to Sign up for Dubb

INPHONE

- 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 INPHONE

---

textexpander

- 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! textexpander

RoboForm

- 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 RoboForm

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

Process & Organize e-mails

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐   Using Labels

Apply your label
You can add a label to your messages in several ways:

- When viewing your Inbox, select the checkbox next to those messages, click the **Labels** 🏷
  button, and click the label you want. (Or check the boxes next to several labels and click **Apply**.)
- When viewing a message, click the **Labels** button to add a label to the message. You can also
  click and drag a label from the left side, and drop it on the message.
- When writing a new message, use that button to add a label before sending your message.

Tips for Labels
- To remove "inbox" label: check box next to message and then hit archive while viewing list of
  messages with labels. This will move the message to "All Mail" and will remove inbox label. It
  will leave any other labels that may be assigned to the message.
- Only you can see your labels, so when you mark a message with a label, only you will see it.
- Note that **one email can be under multiple labels simultaneously**. This is the primary differ-
  ence between labels and folders.
- **To change a label's name or properties**, go to *Settings > Labels* and click the *Edit* link that cor-
  responds with the desired label.
- **To manually remove labels**, simply check the boxes to the left of the desired emails, click the
  Label button, and uncheck the applied label.

This image shows where you left click "Archive" to remove the Inbox label from a message.
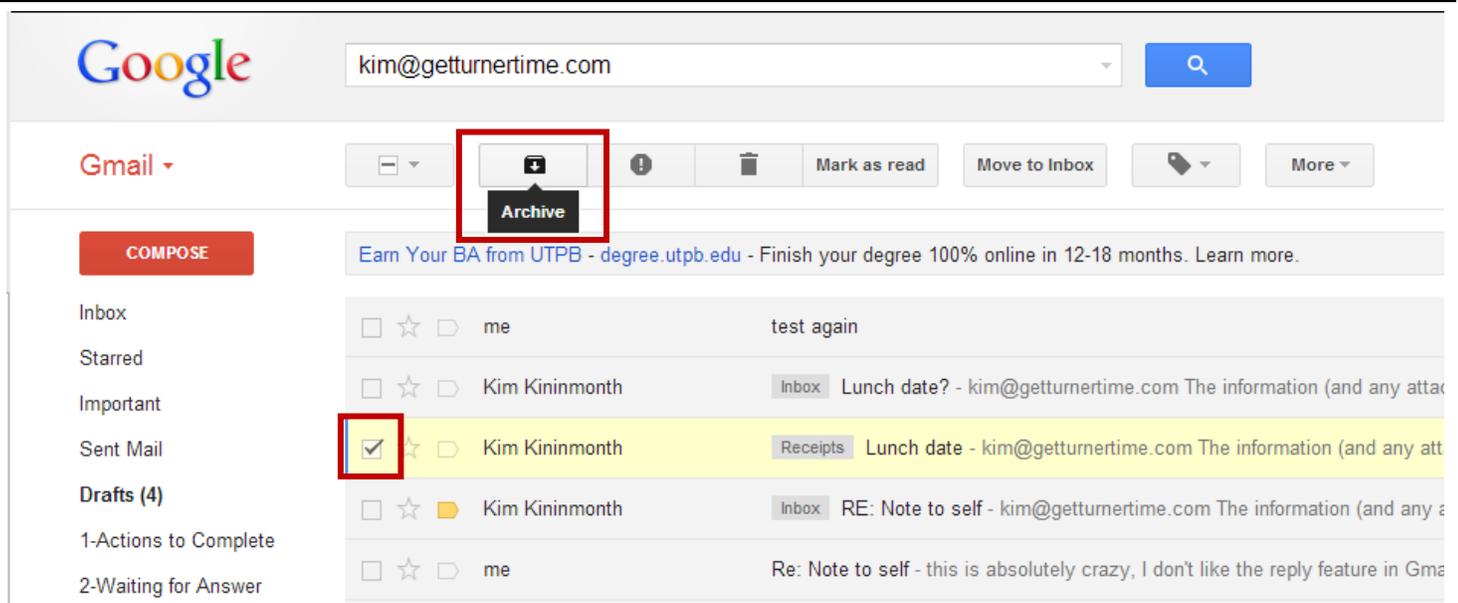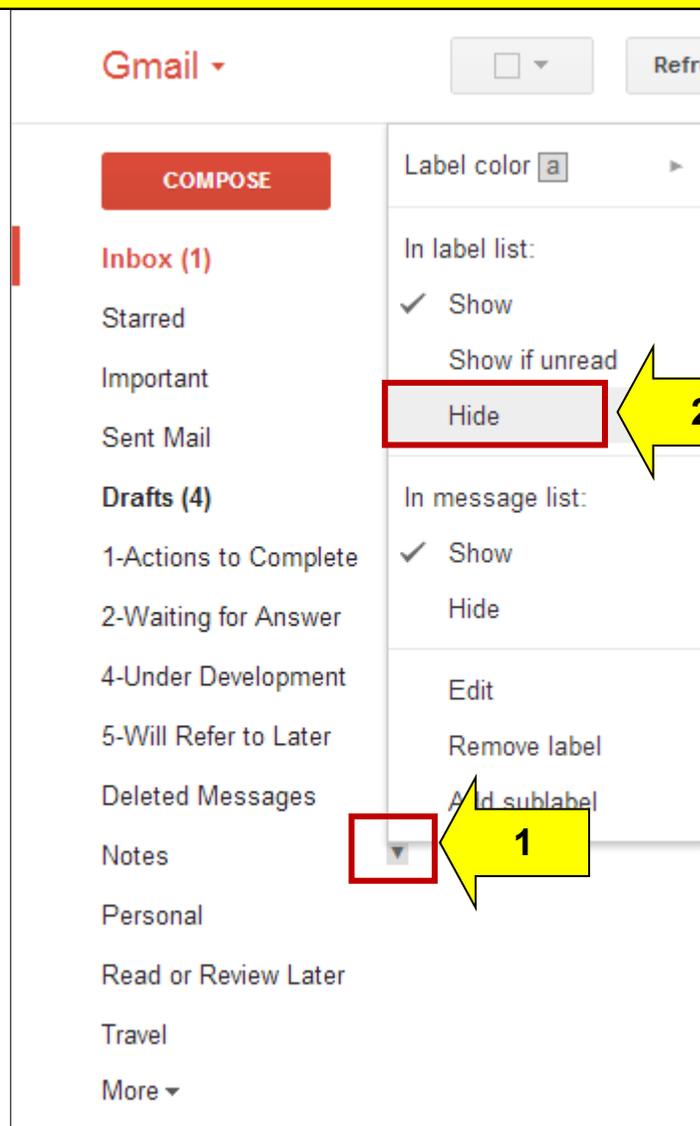
Other Timesavers

Hiding Labels Not in Use

There are some default labels that already exist in Gmail. You can hide the labels that you don't use. You can still use a label to categorize an e-mail even if it is hidden from the list. If you have a large list of labels you may want to hide the ones you don't use very often, this will help the list of displayed labels at a minimum.

1. Hover cursor over the arrow at the end of the label.
2. Left click "Hide" under "In Label list".

This image shows where you will left click the arrow on the label and select "Hide".
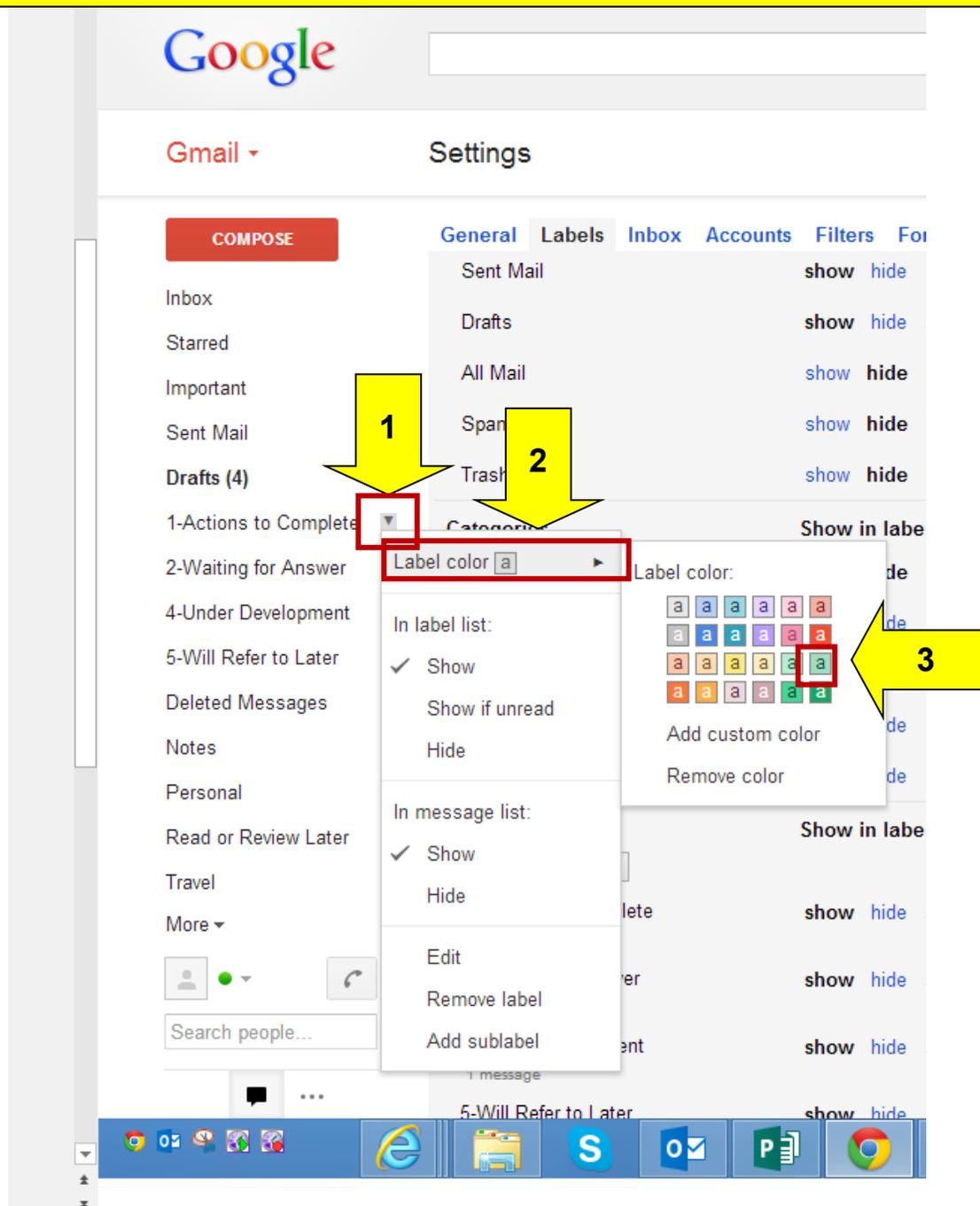
Other Timesavers

Coloring Labels
You can color labels to quickly identify which label is assigned to a message.

1. Hover cursor over arrow at the end of the label name.
2. Hover cursor over "Label color".
3. Left click on desired color.

This image shows where to find the arrow for the label and the "Label Color" choices.
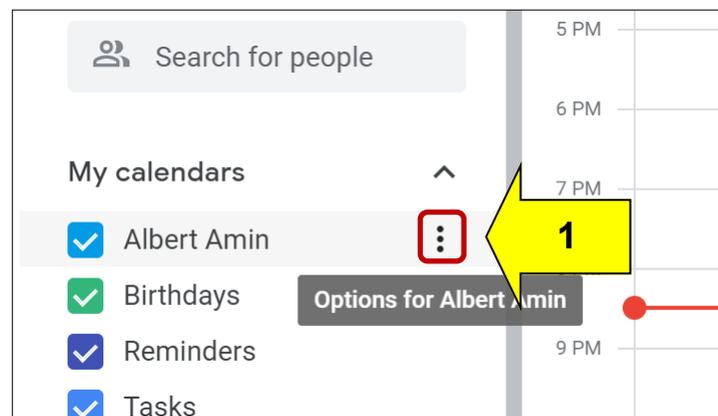
Gmail Calendar Tips

☐ How to Share a Google Calendar (Gmail)

If you are trying to set up an appointment with another individual, you can share your calendar with them. You can share with others who use Google Calendar, and you can send a link to those who use Outlook or other e-mail programs.

**To share an existing calendar with other Google user:**

1. Hover cursor over calendar name and Left click three dots for "Options".
2. Left click "Settings and sharing".

These images show where you will expand "My calendars" to see all your calendars, and hover over a calendar to make the three dots visible for that calendar.

This image shows where you will left click "Settings and sharing"
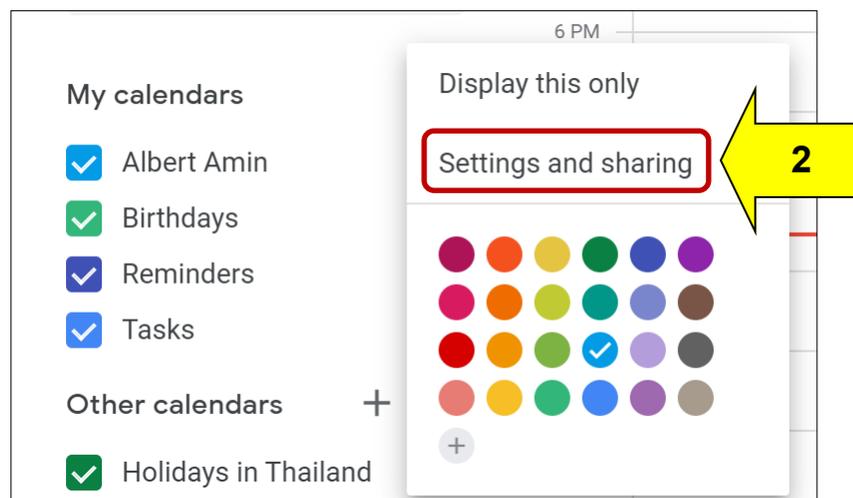
Gmail Calendar Tips

How to Create and Share a Google Calendar (Gmail) (continued…)

       3. Scroll down and left click "Add people"
       4. Fill in Gmail address for new person.
       5. Set permission settings.
       6. Left click "Send".

Now all of the approved people can log in to Google (or Gmail), click on "Calendars", and view the shared calendar. They can add events and perform other operations based on their permission settings. Left click "Add Person" button and repeat steps 4 and 5 to add more people.

This image shows where you will fill in the appropriate information for the person to share the calendar.
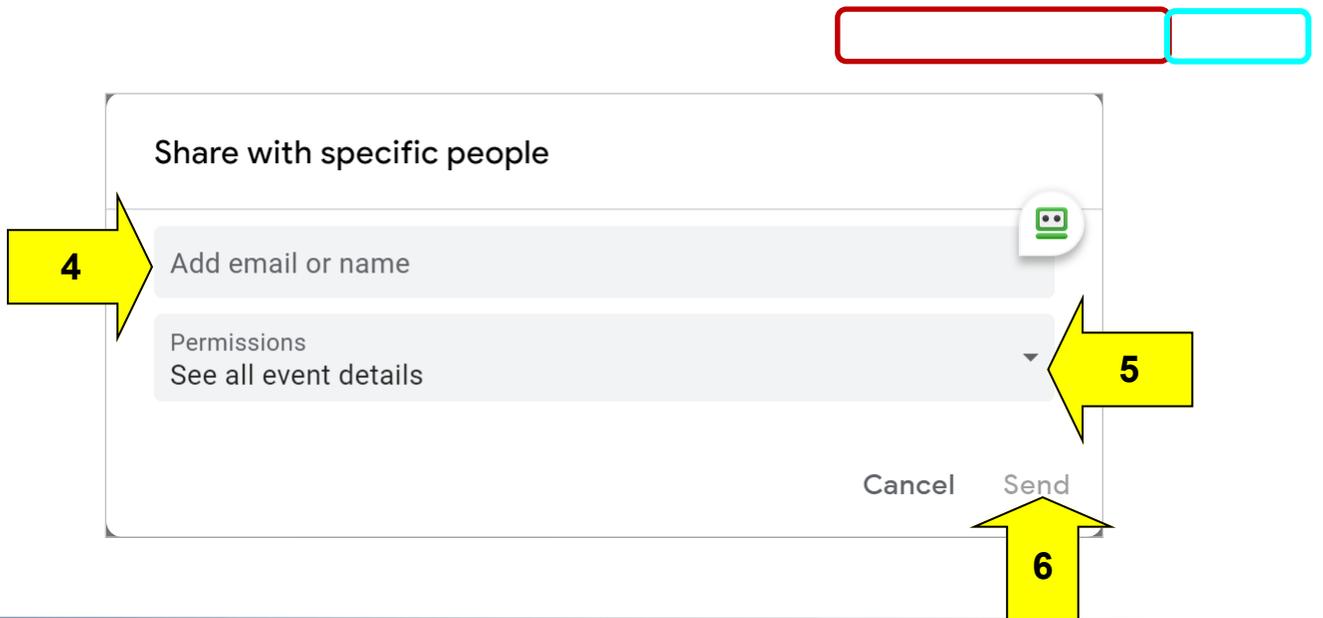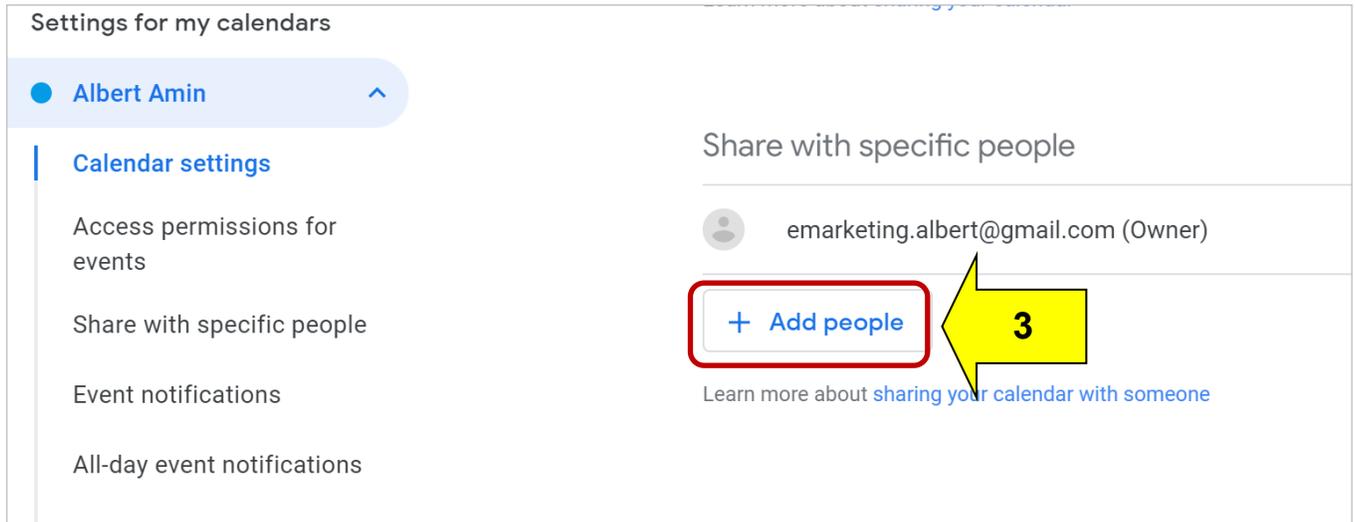
Gmail Calendar Tips

How to Create and Share a Google Calendar (Gmail) (continued…)

☐ **Sharing Calendar via link** will allow you to share your calendar with people who don't' use Google Calendar. You will have to make your calendar "Public" before you share the link. You can limit the amount of details displayed in your "Public" calendar view.

Make calendar public:
1. Left click the three dots next to calendar name.
2. Left click "Settings and sharing".

This image shows where you will left click on the arrow next to your Calendar name.
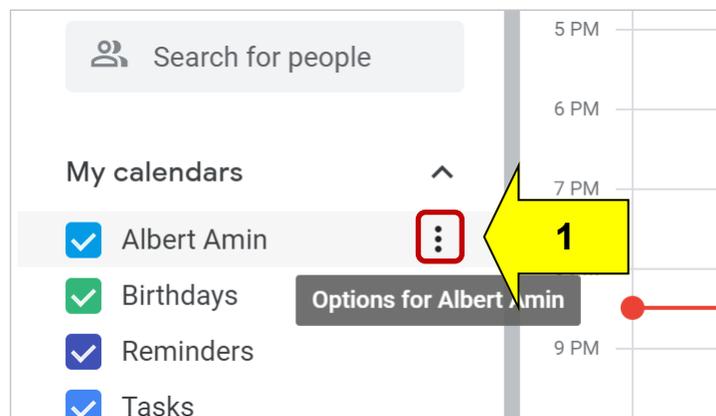
This image shows where you will make your calendar public.
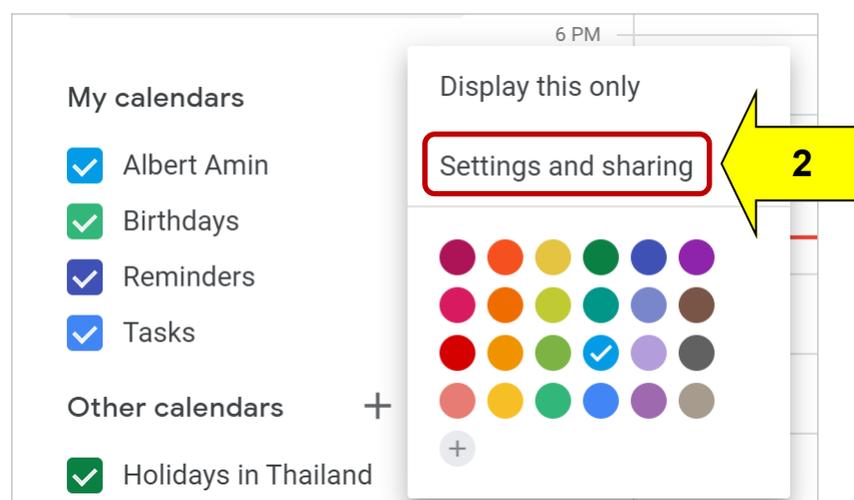
Gmail Calendar Tips

How to Create and Share a Google Calendar (Gmail) (continued…)

Share the calendar link:
    3. Check box next to "Make this calendar public".
    4. Left-click the down arrow on "See all event details" and select "Share only my free/busy information (Hide details)".
    5. Left click "Get shareable link".
    6. Left click "Copy link".

This image shows where you will left click "Calendar Details".

4

Access permissions for events

3   ☑ Make available to public

See all event details ▾

Get shareable link   **5**

Learn more about sharing your calendar
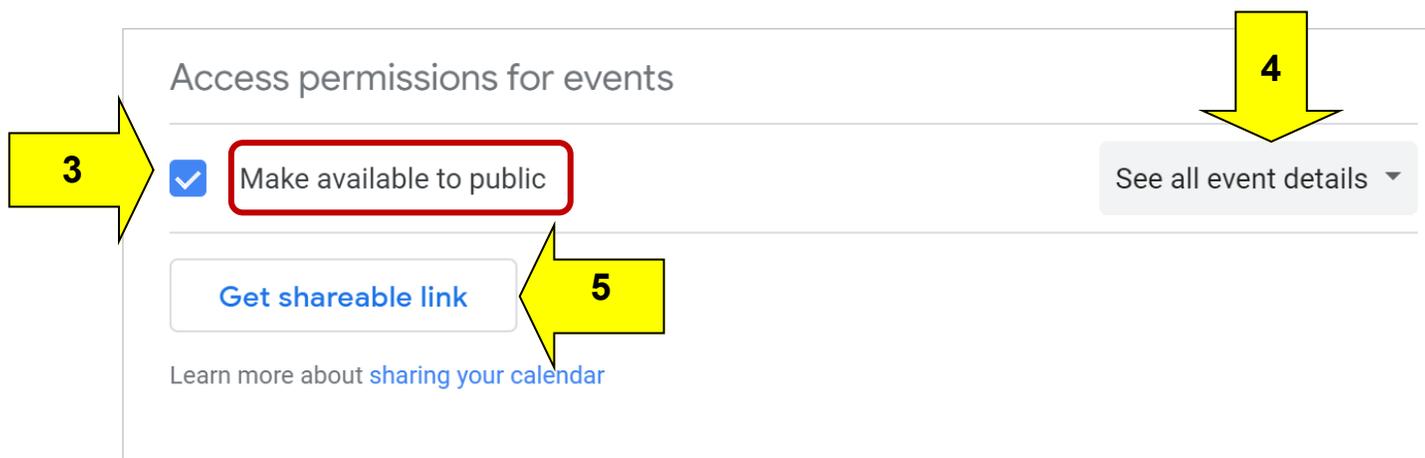
This image shows where you will left click on to get the link.
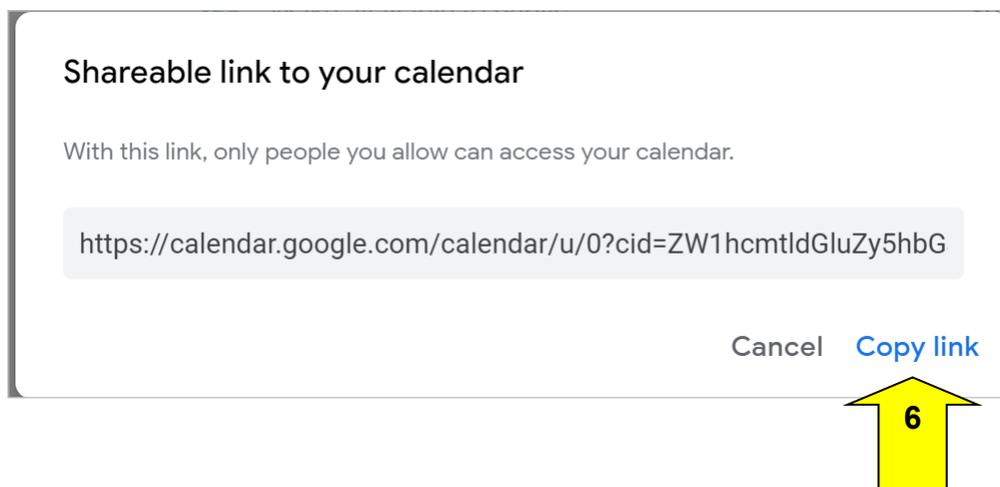
Shareable link to your calendar

With this link, only people you allow can access your calendar.

https://calendar.google.com/calendar/u/0?cid=ZW1hcmtldGluZy5hbG

Cancel   Copy link

6

Gmail Calendar Tips

Gmail Settings

You will want to scroll through all the Gmail Settings and change the selections to options that will help make Gmail more efficient and effective for you. Always make sure to **"Save Changes"** before exiting Settings.

1. Left click gear icon.
2. Left click "See all settings".
3. Left click "General".
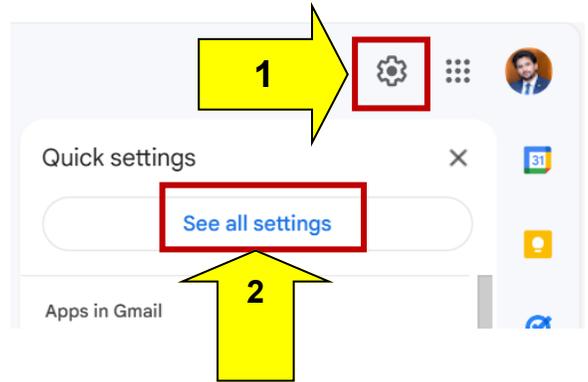
Settings

General   Labels   Inbox   Accounts and Import   Filters and Blocked Addresses   Forwarding and POP/IMAP   Add-ons   Chat and Meet   Advanced   Offline   Themes

Language:	Gmail display language: English (US) ▾ Change language settings for other Google products
	☑ Enable input tools - Use various text input tools to type in the language of your choice - Edit tools - Learn more
	◉ Right-to-left editing support off
	○ Right-to-left editing support on
Phone numbers:	Default country code: Thailand
Maximum page size:	Show 50 ▾ conversations per page
Undo Send:	Send cancellation period: 5 ▾ seconds
Default reply behavior: Learn more	○ Reply ○ Reply all
Hover actions:	◉ Enable hover actions - Quickly gain access to archive, delete, mark as read, and snooze controls on hover. ○ Disable hover actions
Send and Archive: Learn more	○ Show "Send & Archive" button in reply ◉ Hide "Send & Archive" button in reply
Default text style: (Use the 'Remove formatting' button on the toolbar to reset the default text style)	Sans Serif ▾ ⊤T ▾ A ▾ ✗ This is what your body text will look like.
Images:	◉ Always display external images - Learn more ○ Ask before displaying external images
Grammar:	◉ Grammar suggestions on ○ Grammar suggestions off
Spelling:	◉ Spelling suggestions on ○ Spelling suggestions off
Autocorrect:	◉ Autocorrect on ○ Autocorrect off

You can increase the number of messages you can see in your Inbox. (if you don't use the preview pane)

You may have occasion to "recall" a message.

This is good option, as you can take actions on email without opening or selecting an email.

This button will make Archiving messages easier.

Gmail Calendar Tips

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

Gmail Settings (continued…)

Smart Compose:
(predictive writing suggestions appear as you compose an email)
- ◉ Writing suggestions on
- ○ Writing suggestions off

Feedback on Smart Compose suggestions

Smart Compose personalization:
(Smart Compose is personalized to your writing style)
- ◉ Personalization on
- ○ Personalization off

Conversation View:
(sets whether emails of the same topic are grouped together)
- ○ Conversation view on
- ◉ Conversation view off

> "Conversation view" can make it confusing when viewing messages.

Smart Reply:
(Show suggested replies when available.)
- ◉ Smart Reply on
- ○ Smart Reply off

Smart features and personalization:
Learn more
- ☑ Turn on smart features and personalization - Gmail, Chat, and Meet may use my email, chat, and video content to personalize my experience and provide smart features. If I opt out, such features will be turned off.

Smart features and personalization in other Google products:
Learn more
- ☑ Turn on smart features and personalization in other Google products - Google may use my email, chat, and video content to personalize my experience and provide smart features. If I opt out, such features will be turned off.

Package tracking:
Learn more
- ☐ Turn on package tracking - Google will share tracking numbers for your packages with shipping carriers. You'll get status updates here in Gmail.

Desktop notifications:
(allows Gmail to display popup notifications on)
Click here to enable desktop notifications for Gmail.
- ○ New mail notifications on - Notify me when any new message arrives in my inbox or primary tab

Keyboard shortcuts:
Learn more
- ○ Keyboard shortcuts off
- ◉ Keyboard shortcuts on

Button labels:
Learn more
- ◉ Icons
- ○ Text

> It's easier to tell what a button does if there is text instead of an icon.

My picture:
Learn more
Your Google profile picture is visible across Google services.
You can change your picture in About me.

Create contacts for auto-complete:
- ◉ When I send a message to a new person, add them to Other Contacts so that I can auto-complete to them next time
- ○ I'll add contacts myself

> It's helpful to allow Gmail to add Contacts, that way you don't have to remember to save the Contact if you are busy.
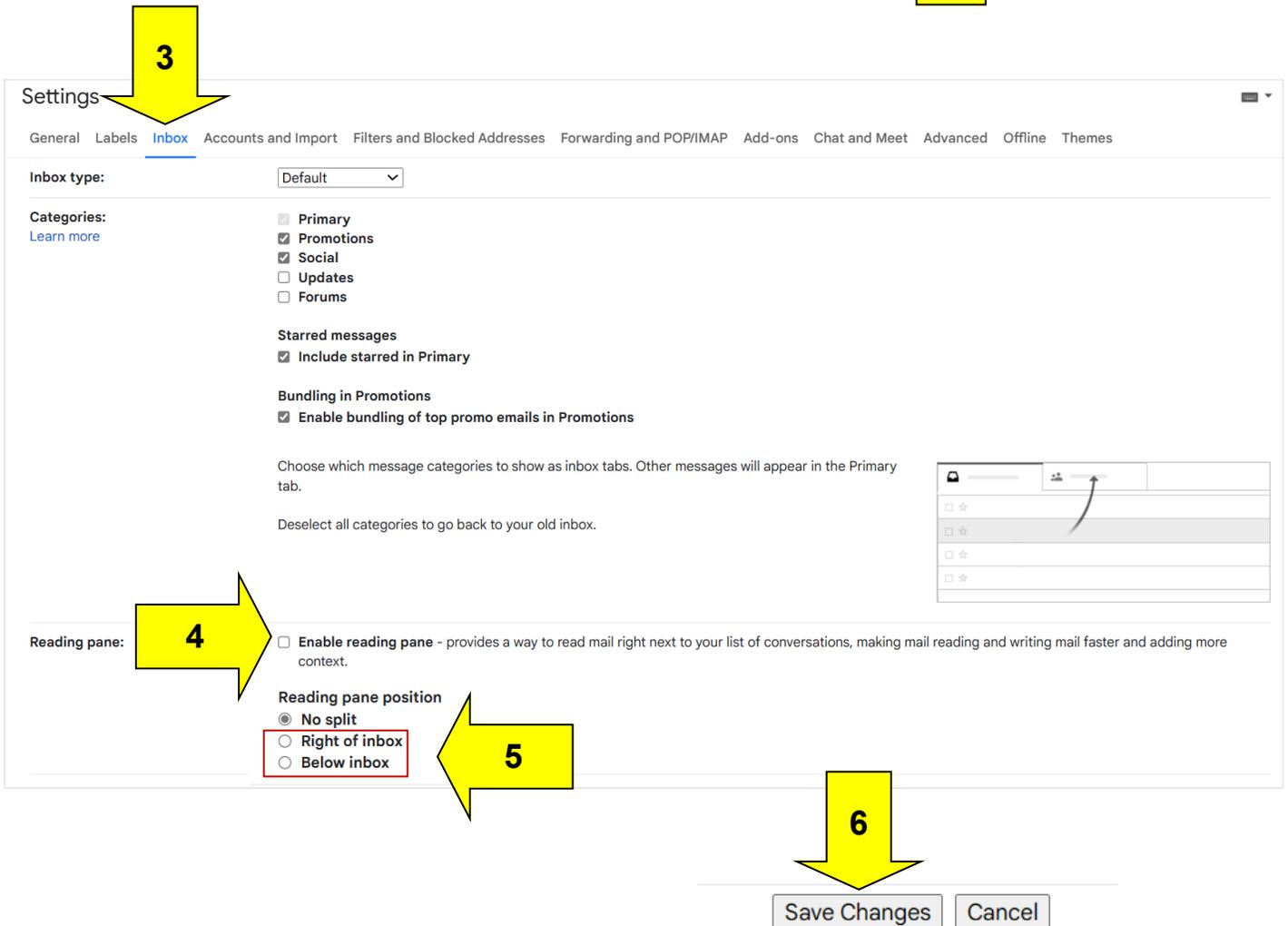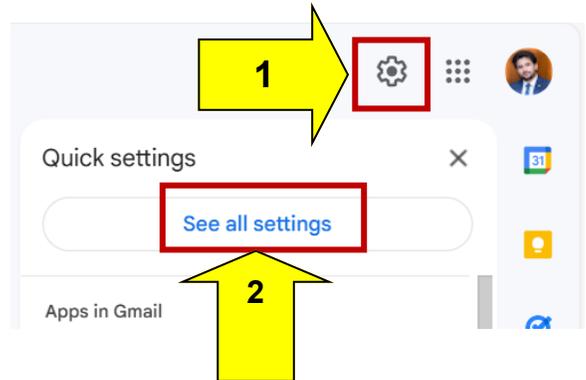
Gmail Calendar Tips

QUESTIONS? 1-855-778-8463
Steve@TurnerTimeManagement.com

☐ **Viewing your Inbox with Preview Pane**
This will allow you to change how you look at Gmail. You can read the message next to your list of messages, without having to open the message.

1. Left click on the "Settings" icon
2. Left click "See all settings"
3. Left-click "Inbox" tab
4. Checkmark "Enable reading pane"
5. Select where you want the reading pane to appear
6. Scroll down and at the bottom, left-click "Save Changes"

1

Quick settings   ✕

See all settings

2

Apps in Gmail

3

Settings

General   Labels   **Inbox**   Accounts and Import   Filters and Blocked Addresses   Forwarding and POP/IMAP   Add-ons   Chat and Meet   Advanced   Offline   Themes

Inbox type: Default ▾

Categories:
Learn more
☐ **Primary**
☑ **Promotions**
☑ **Social**
☐ **Updates**
☐ **Forums**

Starred messages
☑ Include starred in Primary

Bundling in Promotions
☑ Enable bundling of top promo emails in Promotions

Choose which message categories to show as inbox tabs. Other messages will appear in the Primary tab.

Deselect all categories to go back to your old inbox.

Reading pane: **4**   ☐ **Enable reading pane** - provides a way to read mail right next to your list of conversations, making mail reading and writing mail faster and adding more context.

Reading pane position
⦿ **No split**
○ **Right of inbox**
○ **Below inbox**

5

6

Save Changes   Cancel

Gmail Calendar Tips

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Vacation responder

You can have Gmail automatically send a response to anyone who sends you a message when you are on vacation, or not going to have access to e-mail for some reason. Using the "Vacation Responder" lets people know that you are unavailable and unable to respond for a specific amount of time.

1. Left click gear icon.
2. Left click "See all settings".
3. Left click "General" and scroll to bottom.
4. Type in message.
5. Left click "Save Changes".

1

Quick settings   ✕

See all settings

2

Apps in Gmail

Settings

General   **3**   ox   Accounts   F
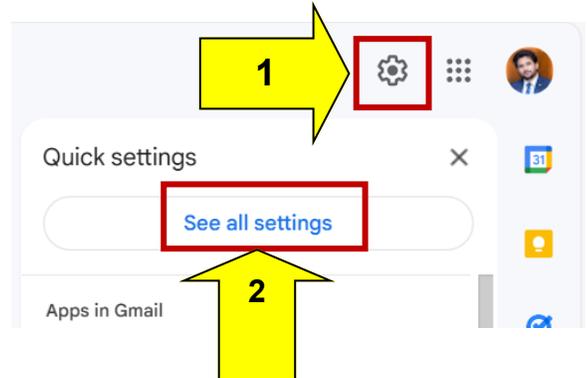
This image shows the 'Vacation Responder"

○ **Vacation responder off**
◉ **Vacation responder on**

First day: | July 4, 2013 | ☐ **Ends:** (optional)
Subject: | Out of Office
Message: | I will be out of the office from July 1 to July 8th, with no access to e-mail.
I will respond to your e-mail when I return to the office on July 8th. If you need immediate assistance, please contact

4

☐ Only send a response to people in my Contacts

◉ **Use default text encoding for outgoing messages**
○ **Use Unicode (UTF-8) encoding for outgoing messages**

5   Save Changes   Cancel