

31 tips to simplify your work life:

1. Email: Use the **4 D's** of email management: If it takes less than 2 minutes, **Do** it. If someone else can do the task, **Delegate** it. If it pertains to a future appointment or task, or, you need to retain the email **Defer** it to your calendar, task list or document folder. Finally, if there is no action attached **Delete** it!

2. Email: Process Email with Outlook Short Cut Keys:

Ctrl+F = Forward

Ctrl+M = Send/Receive

Ctrl+N = New Message

Ctrl+R = Replies to the sender

Ctrl+Shift +G = Follow-up Flag

3. Email: Navigate using Outlook Short Cut Keys:

Ctrl + 1 = Inbox

Ctrl + 2 = Calendar

Ctrl+ 3 = Contacts

Ctrl + 4 = Task List

4. Email: Discipline yourself to process email in batches once or twice a day as well as to open an email one time only. Avoid the trap of opening multiple emails and taking action on none of them; having to re-invest focus a second time on the same task.

5. Email: Drag and drop an email from your Outlook Inbox to Calendar, Tasks or Contacts. The program will automatically open a new Calendar, Task or Contact window with the email content imbedded within.

6. Email: Save an email to a Document Folder by using the F12 key and choosing the "save in Outlook Format" '**save as**' command.

7. Email: Create a rule to divert low priority email such as a newsletter from your inbox directly to an email folder you create and label '**Newsletters**'. Process all of those emails once or twice per month. Use the same concept for online receipts or confirmations.

8. "To Read": Unsubscribe to newsletters that do not provide high priority, future value content. Ask to be taken off distribution lists that no longer apply to your work responsibilities.

9. "To Read": Overwhelmed by your "To Read" pile? Ask yourself if you are reading something because you enjoy it or it will benefit your work in some way. If the answer is "**no**" re-prioritize your reading and see what can be eliminated.

10. Paper Management: Unsure whether to retain a paper document? Ask yourself the following:

1. Does this require action?

2. Can I identify a specific use for this?

3. Is it impossible to obtain or create this again?

4. Is this recent enough to be useful?

5. Are there tax or legal implications?

If you answered "no" to all of the above; chances are it is safe to discard or shred the document.

11. Paper Management: Categorize your papers 3 ways:

1. Action: Papers associated with projects or tasks you are working on at the present time.

2. Reference: Papers you refer to in the course of work or business; client files or insurance papers for example.

3. Archive: Papers you retain for tax or legal purposes.

12. Paper Management: Keep your categorized papers in separate areas of your office:

1. Action files on or near your desk; within arm's reach.

2. Reference files in a nearby file cabinet.

3. Archive files in a file cabinet (as space allows), banker boxes or off-site secure storage area.

13. Paper Management: Studies indicate that 85% of the papers we keep we never refer to again. Therefore, be ruthless with the papers you toss (shred or recycle). Refer to the questions outlined in Tip #10, above.

14. Paper Management: The use of a good tickler file system is invaluable for the effective management of paper. Find out more at <http://www.simplified.com>

15. Paper Management: Clutter is postponed decisions. There are only three options when a document/paper arrives in your workflow system; 1) **File**, 2) **Act**, or 3) **Toss**. Think of it as trimming the F.A.T. and act accordingly!

16. Managing Interruptions: Saying “no” to unscheduled phone calls or visits allows you to focus on high priority tasks. When someone asks; “*Do you have a moment*” artfully respond with a statement such as “*I can spend 10 minutes talking this over at 3:00 this afternoon; I will call you at 3.*” Set the stage for a brief conversation by beginning as follows: “*I have a few minutes and wanted to talk with you...*”

17. Managing Interruptions: It takes 64 seconds to regain workflow momentum following an email interrupt; disconnect your email notifications via the tools – options and email options menus in Outlook.

18. Managing Interruptions: Establishing goals will solidify your priorities and provide a benchmark for what you say “yes” to and what you say “no” to. When your goals are clear and actionable you will be less likely to allow yourself to be deterred or interrupted.

19. Mail: Junk Mail is produced at a rate of 4.5 million tons per year, so stand ready and open your mail over the trash can, shredder or recycle bin! Open bills and throw out the inserts, shred the credit card solicitations and move truly actionable items to your calendar, action files or tickler file.

20. Telephone Calls: 70% of business phones are answered by voicemail; be prepared to leave a brief, succinct message. Bullet point your message, speak slowly and state your name and phone number at the beginning and end of each message.

21. Telephone Calls: To effectively deal with a rambling associate ask “*Is there anything else I can help you with?*” This will usually result in a “no” response at which point you can tactfully (and quickly) bring the conversation to an end.

22. Telephone Calls: For discussion purposes, a scheduled telephone call is far more effective than an email exchange.. Schedule phone calls with a hard start and hard stop time into your calendar.

23. Your Workspace: Don’t underestimate the value of a well designed and well organized workspace. Having physical space to spread out and work allows for mental space to think and create. Consider working with a professional organizer to develop a space that supports your workload, learning style and aesthetic preferences. Contact the National Association of Professional Organizers. <http://www.NAPO.org> for a list of professional organizers and their areas of expertise.

24. Your Workspace: In addition to a desk, chair, computer and writing utensils, office basics should include an Inbox, Outbox and To File Box, a desktop (or desk drawer) to hold current project/action files, wastepaper basket, shredder and recycling bin, drawer organizers and a clock that is easily viewable from anywhere in your office. Add decorative items such as photos, artwork and live plants to personalize the space.

25. Your Workspace 'Inbox': The inbox is where to contain all the paper that comes in to your work life. Unread mail, bills, memos, notes, etc. Process by selecting an item and choosing to file, act or toss (Refer to # 15, above). Use the ‘**handle one time**’ rule; making a decision about each paper you pick up at the time you pick it up.

26. Your Workspace 'Outbox': The Outbox is where to contain all paper or documents to be mailed or passed on to another person.

27. Your Workspace 'To File': As the name implies, the ‘**To File**’ box contains papers to be filed. Perform filing functions in batches; once per week.

28. Your Workspace; Buried in Paper? The most effective methodology I have ever found for paper management is called iPEPOffice Find out more at www.simplified.com

29. Clutter: Clutter can be defined as whatever gets in your way including stuff that needs to be thrown away or put away as well as commitments or responsibilities you may need to let go. Pick one area of your life to start with and create a next step action item. Incorporate the use of mind maps in your planning sessions.

31. File Structures: Use the same file structure for both paper management files as well as electronic files. When they mirror each other your mind won’t have to take two paths of logic when looking for similar types of information; client folders for example.

31. Maintenance: Whatever system you establish for paper and electronic file management keep in mind that your system will need to be maintained in order to keep it functioning effectively. Set aside (in your calendar) specific times to maintain your system on a weekly, monthly and annual basis.