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# **WORK SMART WITH OUTLOOK 1:**

## MANAGING YOUR TASKS & INBOX

# TRAINING PLAN

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## 1. Theory:

This training session on **Tasks** and **Inbox**  
*It's on the Portal!*

## 2. Practical:

Hands-on 1on1 at your desk

## 3. Future:

Calendar and Teams training



# WHY THIS MATTERS TO DYTERRA

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# THE VISION

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We are committed to following through and doing what we said we would do when we said we would do it.

We want work practices that are consistent for all of us.

And we want to be **intentional** in our work.



# intentional

in · ten · tion · al

Adjective: Done on purpose; deliberate.

# HOW DO WE GET THERE?

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# BY USING THE TOOLS IN OUTLOOK!

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## Today we'll learn:

1. What the **To-Do Bar** is
2. What your **Daily Tasks List** is
3. What a **Task** is and how to make one
4. How to create a **File System** for your inbox
5. How to keep a **Clean Inbox**



# IT'S NOT JUST FOR EMAIL

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**Outlook is much more than just email.**

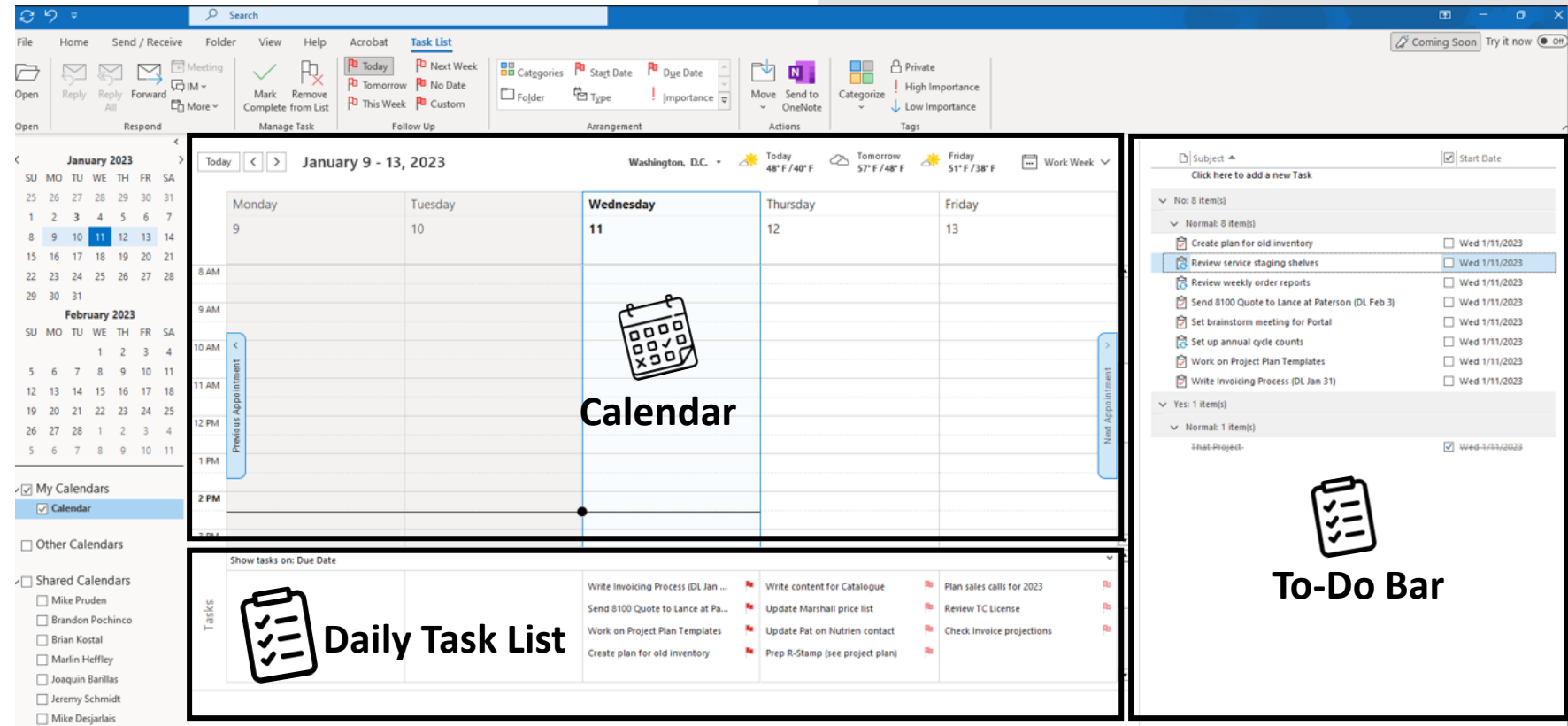
- Your Outlook is customized with settings for inbox and tasks management
- All office and warehouse employees are trained in the *DyTerra Way* of using Outlook

**And...  
it's not optional.**

***It's the DyTerra Way,  
after all.***

# AT A GLANCE

Your Outlook  
opens to this  
view instead of  
your email  
(on purpose!)



# EVERYTHING IN ONE PLACE

It's about  
being able to  
see all your  
events,  
activities and  
tasks  
in one place.

The screenshot displays a software interface with a blue header bar containing a search field and navigation tabs: File, Home, Send / Receive, Folder, View, Help, Acrobat, and Task List. The main content area is divided into three sections:

- Calendar:** A central calendar view for January 9 - 13, 2023, showing a grid of days. A calendar icon is overlaid on the Wednesday, January 11th.
- Tasks:** A section at the bottom left showing a list of tasks with a clipboard icon. The tasks include: "Write Invoicing Process (DL Jan ...)", "Send 8100 Quote to Lance at Pa...", "Work on Project Plan Templates", "Create plan for old inventory", "Write content for Catalogue", "Update Marshall price list", "Update Pat on Nutrien contact", "Prep R-Stamp (see project plan)", "Plan sales calls for 2023", "Review TC License", and "Check Invoice projections".
- To-Do Bar:** A section on the right side showing a list of tasks with a clipboard icon. The tasks include: "Create plan for old inventory", "Review service staging shelves", "Review weekly order reports", "Send 8100 Quote to Lance at Paterson (DL Feb 3)", "Set up annual cycle counts", "Work on Project Plan Templates", and "Write Invoicing Process (DL Jan 31)".

**NOT THIS...  
OR THIS...  
OR THIS...**



# THIS HELPS YOU!

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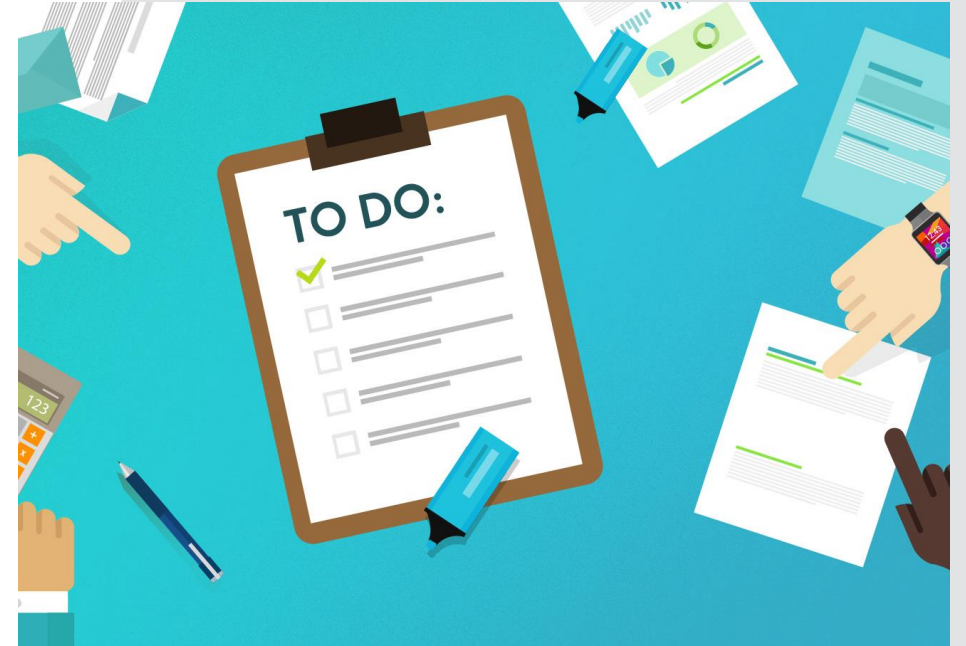
- **Relieves stress** – You don't have to spend your brain's energy on constantly remembering things
- **Enables efficiency** – helps manage your workload so you don't feel swamped
- **Time management** – helps you tackle bigger projects or long-term goals



# AND THE TEAM

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- **Builds Trust** – Others will trust you'll get it done, and you'll be able to trust others too.
- **Saves Time** – one forgotten step or missed deadline can have a ripple effect. (*Everything matters!*)
- **Communication** – everyone is on the same page and rowing in the same direction.



# DEFINITIONS: WHAT'S WHAT

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# SO, WHAT IS A TASK?

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An **ACTION ITEM** to complete.

- **It may have come about from a conversation or phone call.**  
*“Hey Sue, Can you write a new process for how we invoice, including all the new rates? I’d like to see that by end of the month.”*
- **It might be an email to act on.**  
*“Hi Joe, can you send a quote on an 8100 to Lance at Paterson by Friday?”*
- **It could be part of your duties you need to remember to do.**  
*“Review customer pickup shelf and handle any items.”*
- **It may be a reminder to follow up with someone on their action item.**  
*“Check with Joe on status of Paterson 8100 quote.”*

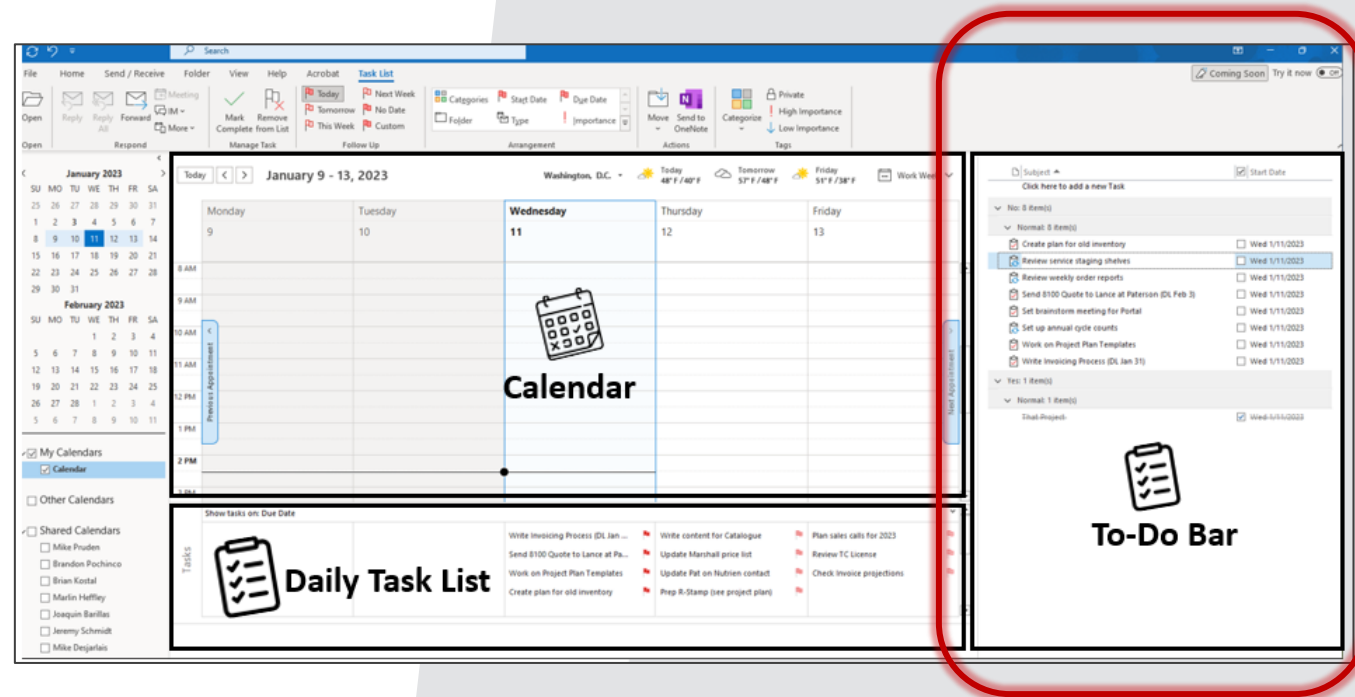


# WHAT'S THE TO-DO BAR?

- Just right of your calendar
- Shows your **Tasks** for **TODAY**
- Think of it as your To-Do list for the day

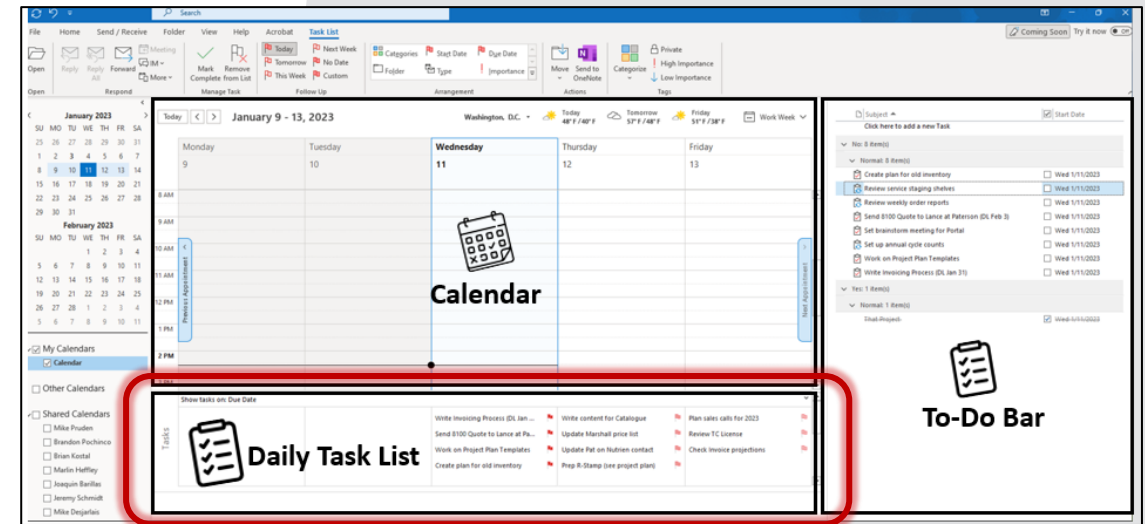
Check this first thing every morning and watch it throughout the day.

*Won't have time for everything?*  
Reschedule tasks whenever needed.

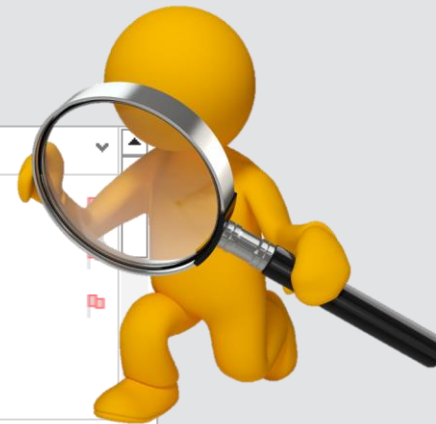


# WHAT'S THE DAILY TASK LIST?

- Just below your calendar
- Shows your **Tasks** for **THE WEEK**
- Helpful to look at when planning your work for the week
- Helpful to look at when rescheduling a task to another day



Write Invoicing Process (DL Jan ...	Write content for Catalogue	Plan sales calls for 2023
Send 8100 Quote to Lance at Pa...	Update Marshall price list	Review TC License
Work on Project Plan Templates	Update Pat on Nutrien contact	Check Invoice projections
Create plan for old inventory	Prep R-Stamp (see project plan)	



# HOW DO WE DO ALL OF THIS?

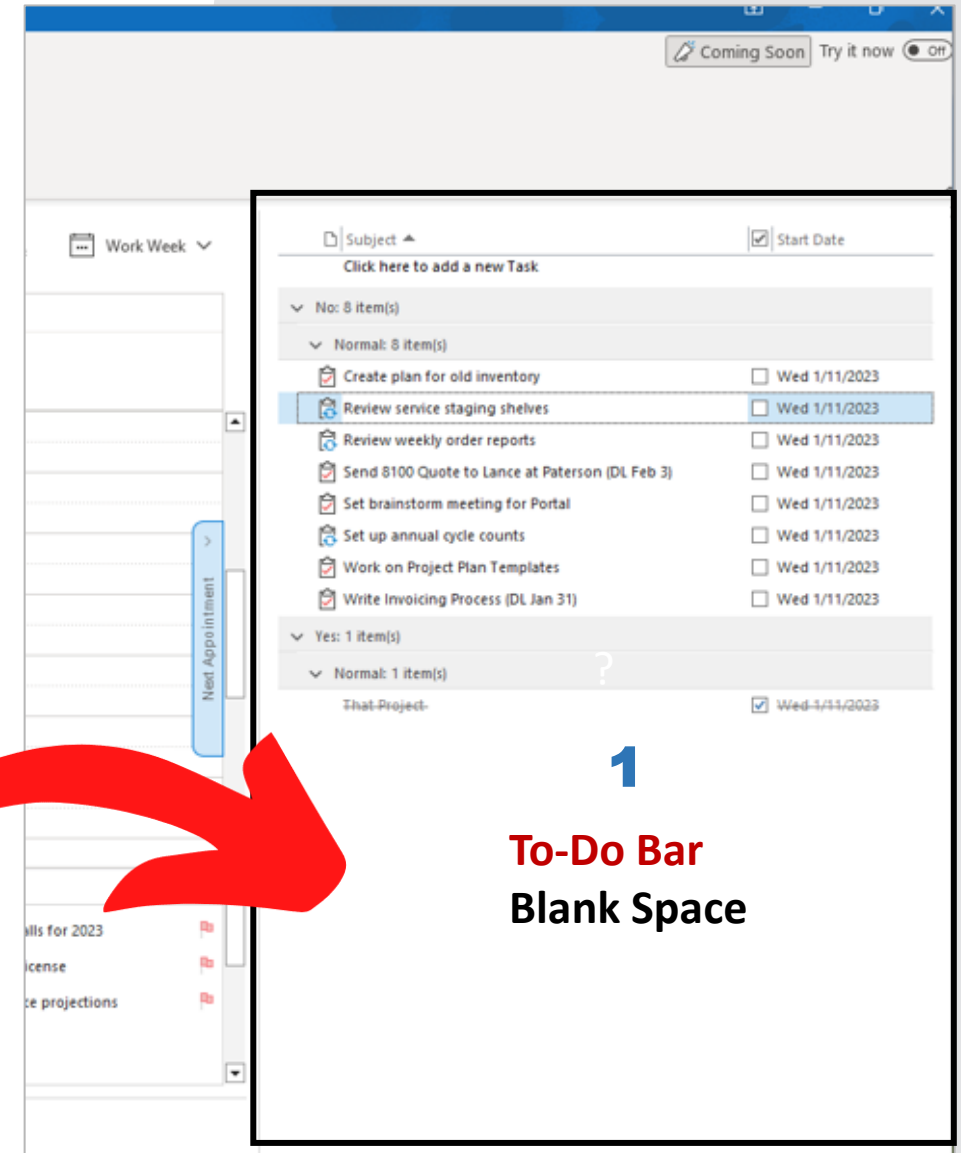
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*Don't get too overwhelmed... all of this will be on the Portal!*

# CREATING A TASK

From the Calendar section of Outlook...

1. Double-click anywhere inside the blank space of your **To-Do Bar**.



# CREATING A TASK

## 2. Subject:

Enter a clear description of the task, including deadline if necessary (DL Dec 15)

## 3. Start Date / Due Date:

Set the start date to the date you want to start the tasks. The due date will fill in with the same date – don't change it! Make sure they are the SAME.

\* For deadlines, we use the subject line instead.

## 4. Task Body:

Add more details if you need to!

## 5. Save & Close

5

Send 8100 Quote to Lance at Paterson (DL Feb 3) - Task

File Task Insert Format Text Review Help

Save & Close Delete Forward Show Mark Complete Assign Task Send Status Report Recurrence Tags Immersive Reader

Save & Close Save Undo Redo Previous Item Next Item Quick Print

Subject **2** Send 8100 Quote to Lance at Paterson (DL Feb 3)

Start date **3** Mon 2023-01-30 Status Not Started

Due date Mon 2023-01-30 Priority Normal % Complete

☐ Reminder None Reminder Time None Owner

Jan 16 – Lance called us asking for a quote – he wants standard build with LC meter. Promised to have it back to him by Feb 3. Hoping to buy for spring season – also, check if we will have one ready by then!

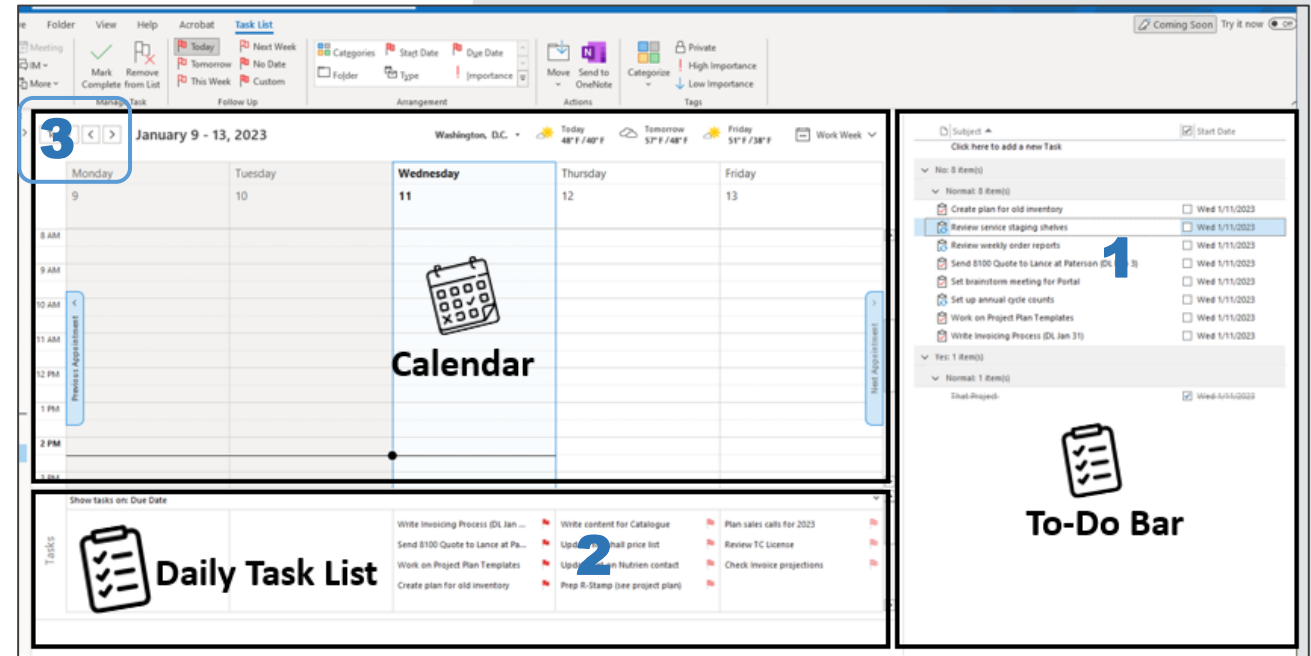
**4**

# WHERE'D IT GO?

If you chose to work on your task **1** today, it will show up in the **To-Do Bar**.

If you chose to work on it another day this week, it will show up in the **2 Daily Task List**.

If you are working on it in the future, click through the weeks in your calendar to see it on the bottom of the **3 Daily Task List** for the day you scheduled it.

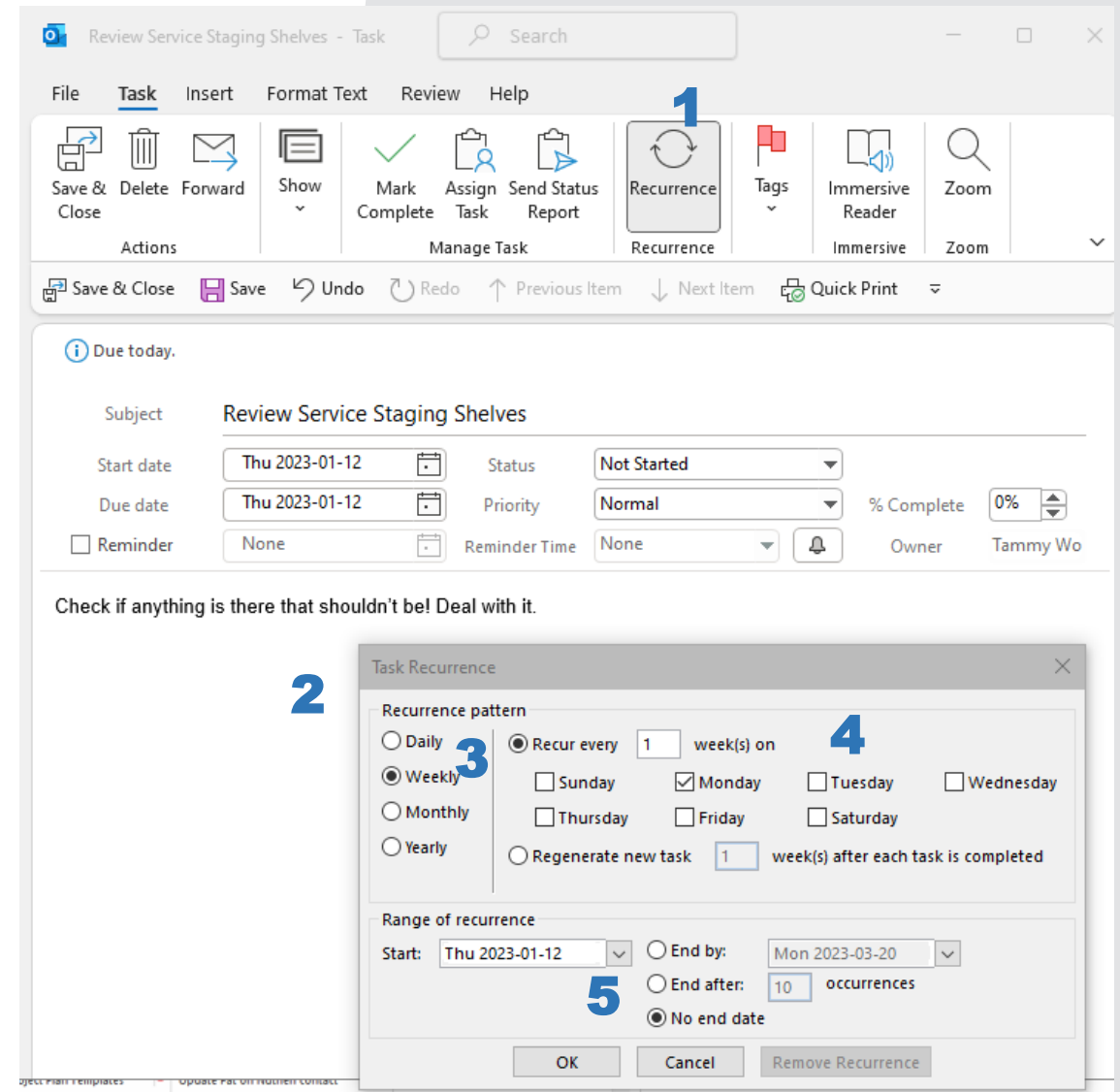


# MAKE IT RECURRING

Need your task to happen daily, weekly, monthly, yearly?

1. Before you Save & Close, click the Recurrence button.
2. A box pops up.
3. Choose *Daily*, *Weekly*, *Monthly*, or *Yearly*.
4. Choose what day of the week or month or year.
5. Choose *No End Date* if it's ongoing. Or set a date if only a short time. Click OK.

Now you can save and close!



# RECURRING TASK EXAMPLES

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## Daily:

- Cycle Count
- Update Sales Assignments Sheet
- Check Nutrien project plan and handle outstanding items

## Weekly:

- Review weekly order reports
- Review service staging shelves
- Send out weekly sales email to team

## Monthly:

- Update MicroCote price list (Choose every 3 months in the recurrence)
- Review and update Quarterly Conversation
- File all packing slips and job files

## Annually:

- Book performance reviews
- Set up annual cycle counts
- Plan sales calls for the year

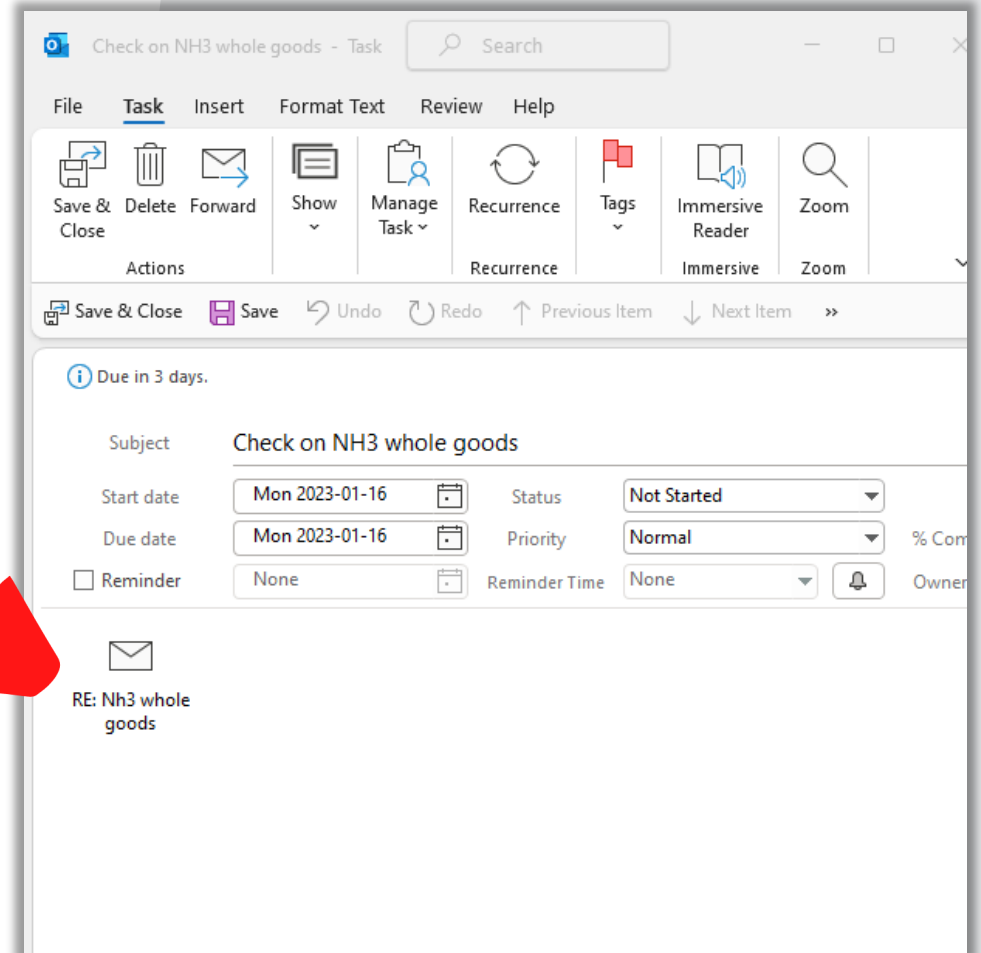


# CREATING A TASK FROM EMAIL

Rather than typing a **Task** right into the **To-Do Bar**, you can just drag an email over!

## **BONUS:**

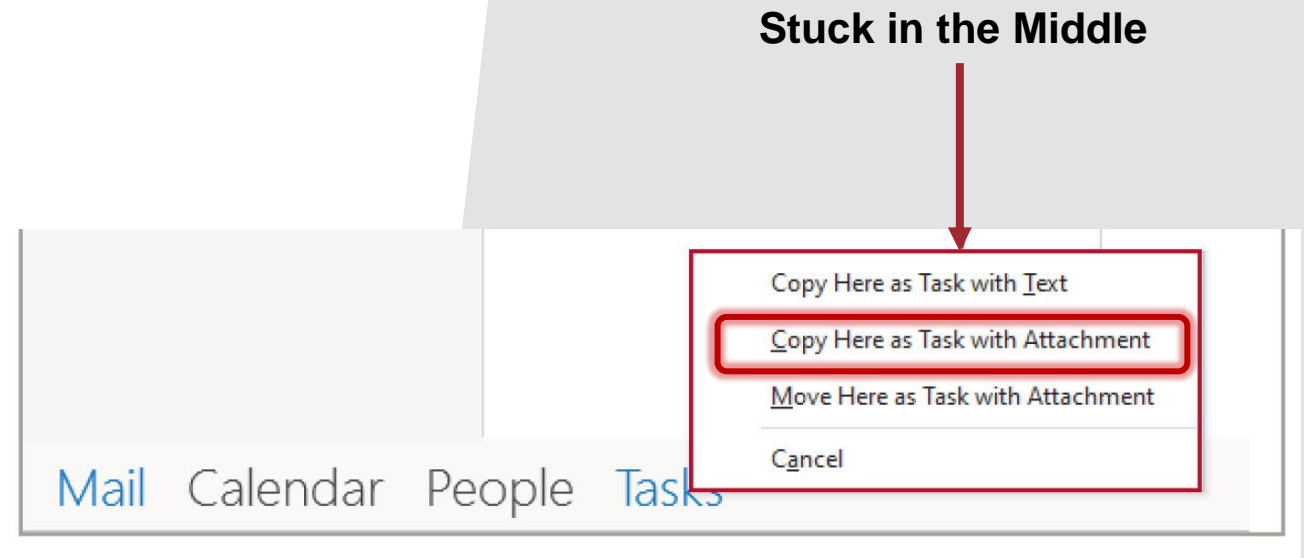
It will keep all the important info in the **Task** and make it easy for you to read and reply in the future.



# CREATING A TASK FROM EMAIL

1. Go to your email inbox.
2. RIGHT-click, keep your mouse button held down, and drag your email over to your **Tasks** button.
3. Choose the **MIDDLE** option.
4. Release your mouse and finish the rest of the standard **Task** steps (subject, start date).

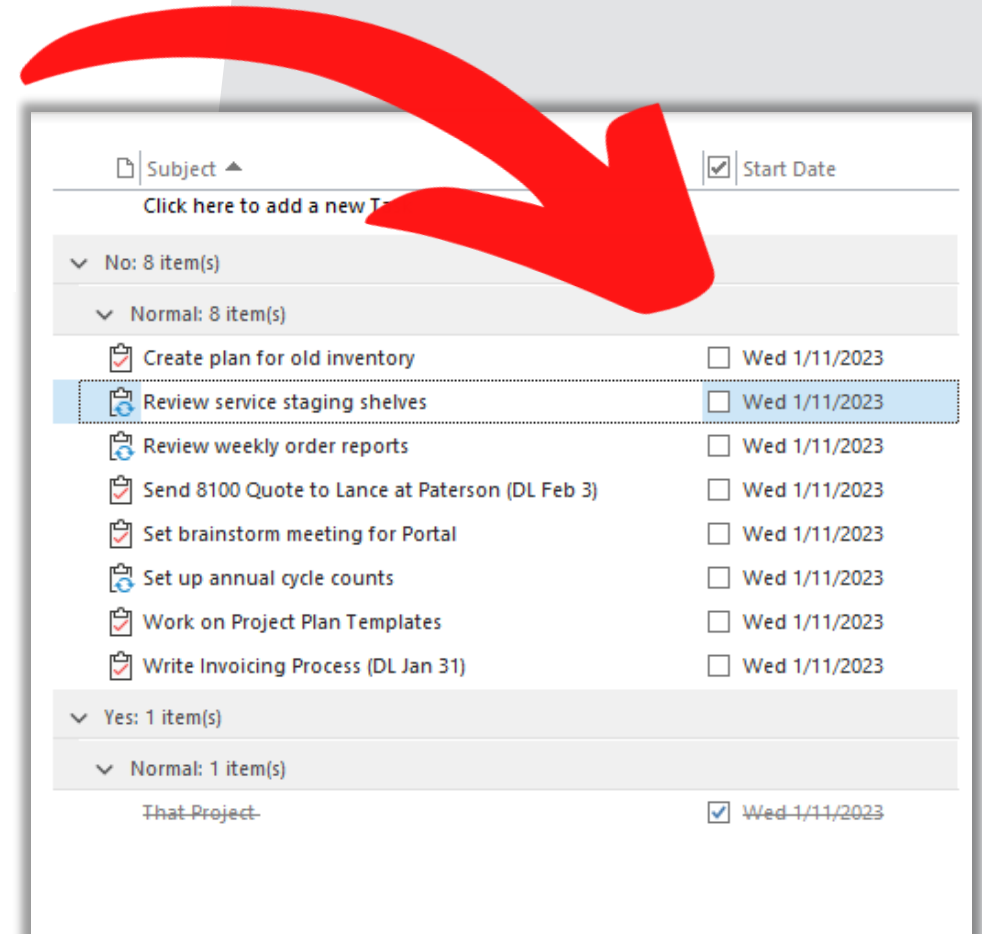
*(We'll practice this in your practical training session.)*



# MY TASK IS DONE!



1. Go to your **To-Do Bar**.
2. Click the little checkbox before the date.
3. This will mark your **Task** complete and move it to the bottom, showing it crossed out.
4. If it was **Recurring Task**, it will do the same but also create a new one for the next day/week/month/year.



# ADVANCED LEVEL TIPS

## 1. Got a project plan for something?

Don't double up and add every task – just create a recurring **Task** to review the plan daily!

**Due today.**  
Starts every day effective 2023-01-20 until 2023-04-14.

Subject	Check Remount Project Plan		
Start date	Fri 2023-01-20	Status	
Due date	Fri 2023-01-20	Priority	
<input type="checkbox"/> Reminder	None	Reminder Time	

Review daily and handle items

## 2. Have a bunch of quick related items to do?

Create a recurring **Task** that lists those quick checks and do them all at once.

**Due in 3 days.**  
Starts every Monday effective 2020-08-31.

Subject	Weekly Checks (OPEN)		
Start date	Mon 2023-01-16	Status	
Due date	Mon 2023-01-16	Priority	
<input type="checkbox"/> Reminder	Mon 2023-01-16	Reminder Time	

1. Warehouse Checklist
2. Fulfilled but not Invoiced Report
3. Open Orders Report
4. Panatrack Portal

## 3. Need to keep track of agenda items?

Here's Tammy's... Create a **Task** with no start/end date and keep a running list as a low priority task to jot notes and open for your meeting agenda. Tammy can help you set these up.


Low: 9 item(s)

<input checked="" type="checkbox"/> BRANDON	<input type="checkbox"/> None
<input checked="" type="checkbox"/> BRIAN	<input type="checkbox"/> None
<input checked="" type="checkbox"/> COURTNEY	<input type="checkbox"/> None
<input checked="" type="checkbox"/> JEREMY	<input type="checkbox"/> None
<input checked="" type="checkbox"/> KARIE	<input type="checkbox"/> None
<input checked="" type="checkbox"/> MIKE D	<input type="checkbox"/> None
<input checked="" type="checkbox"/> MIKE P	<input type="checkbox"/> None
<input checked="" type="checkbox"/> PAT	<input type="checkbox"/> None
<input checked="" type="checkbox"/> PATTI	<input type="checkbox"/> None

when it opens

Subject	PATTI		
Start date	None	Status	
Due date	None	Priority	
<input type="checkbox"/> Reminder	None	Reminder Time	

1. Marketing Plan
2. Design Benefits cards
3. Portal kaizen coming up – probably will book
4. SK art update
5. Website – next steps / any changes
6. Videos – Fiver?

 SK ART - call if it doesn't ma...

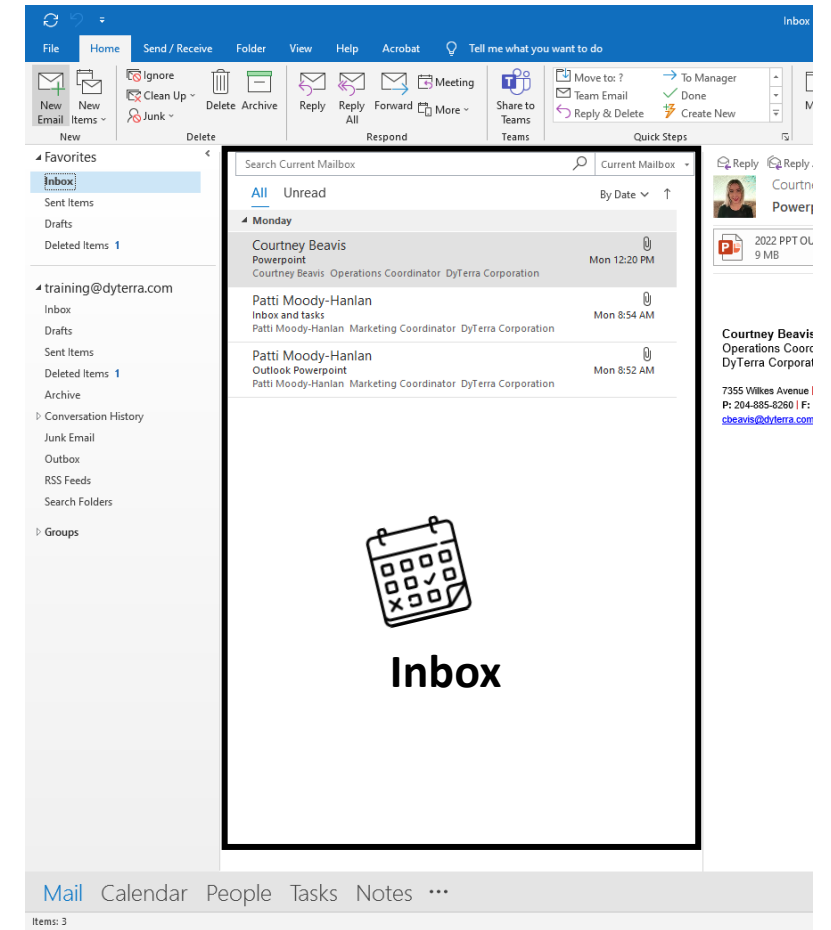
**YOUR INBOX IS NOT  
YOUR TASK LIST**

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# HOW MANY EMAILS ARE IN YOUR INBOX?

Keep only as many emails in your **Inbox** as you can see without scrolling.

Sort the rest into your **File System**!



# WHAT FILE SYSTEM?

The **File System** lives just inside your Inbox on the left of your Outlook.

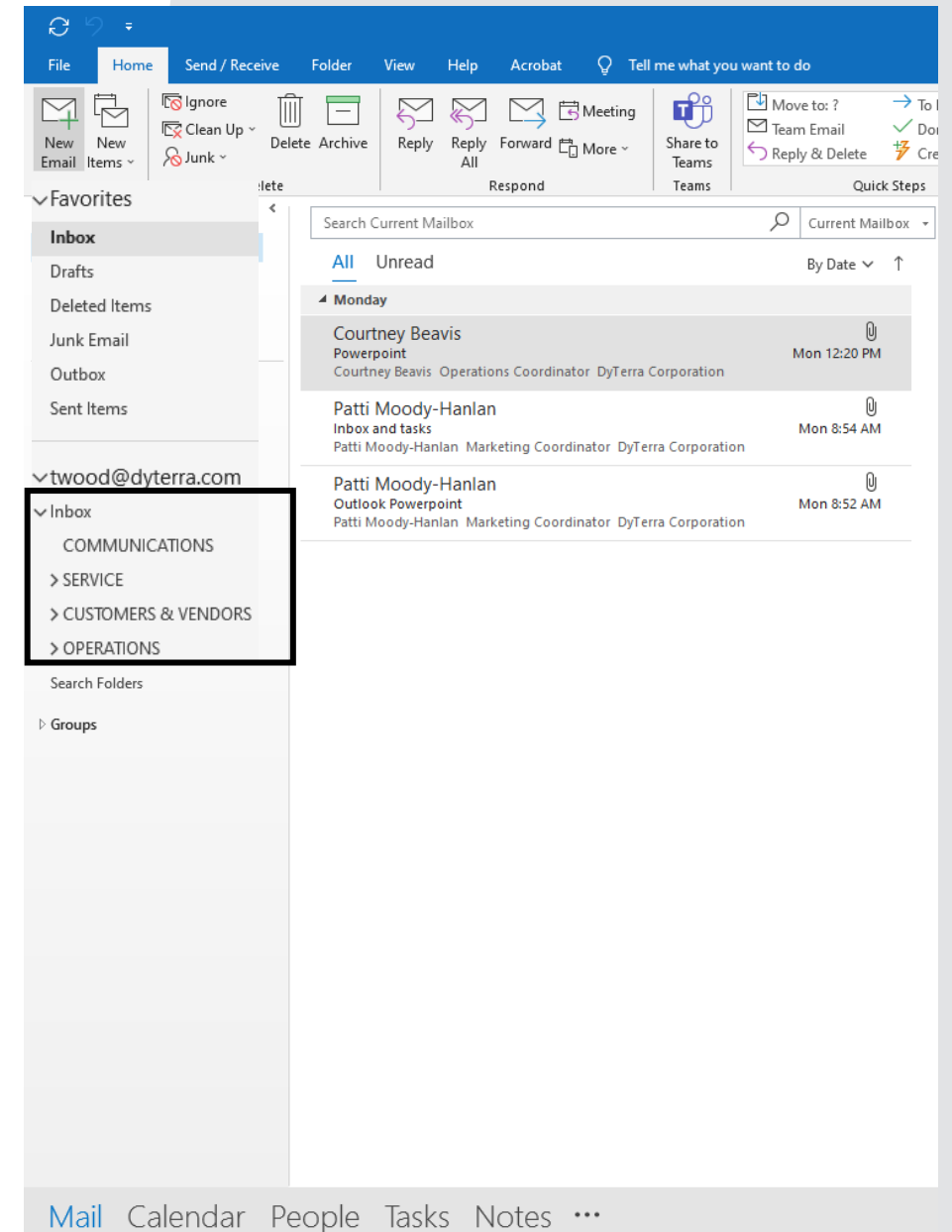


**Your goal is to ensure you can find an email quickly when you need it.**

This will vary depending on role and how your brain works – how you think!



**File  
System**



# A FEW IDEAS

- ▼ Inbox
  - PATERSON
  - NUTRIEN
  - ▼ RICHARDSON PIONEER
    - Carrot River
    - Starbuck
    - Dundonald
    - MicroCotes
  - METRO PROPANE
  - FCL
  - INTERNAL

## BY CUSTOMER

- ▼ Inbox
  - 2023
  - 2022
  - 2021
  - 2020
  - 2019
  - 2018

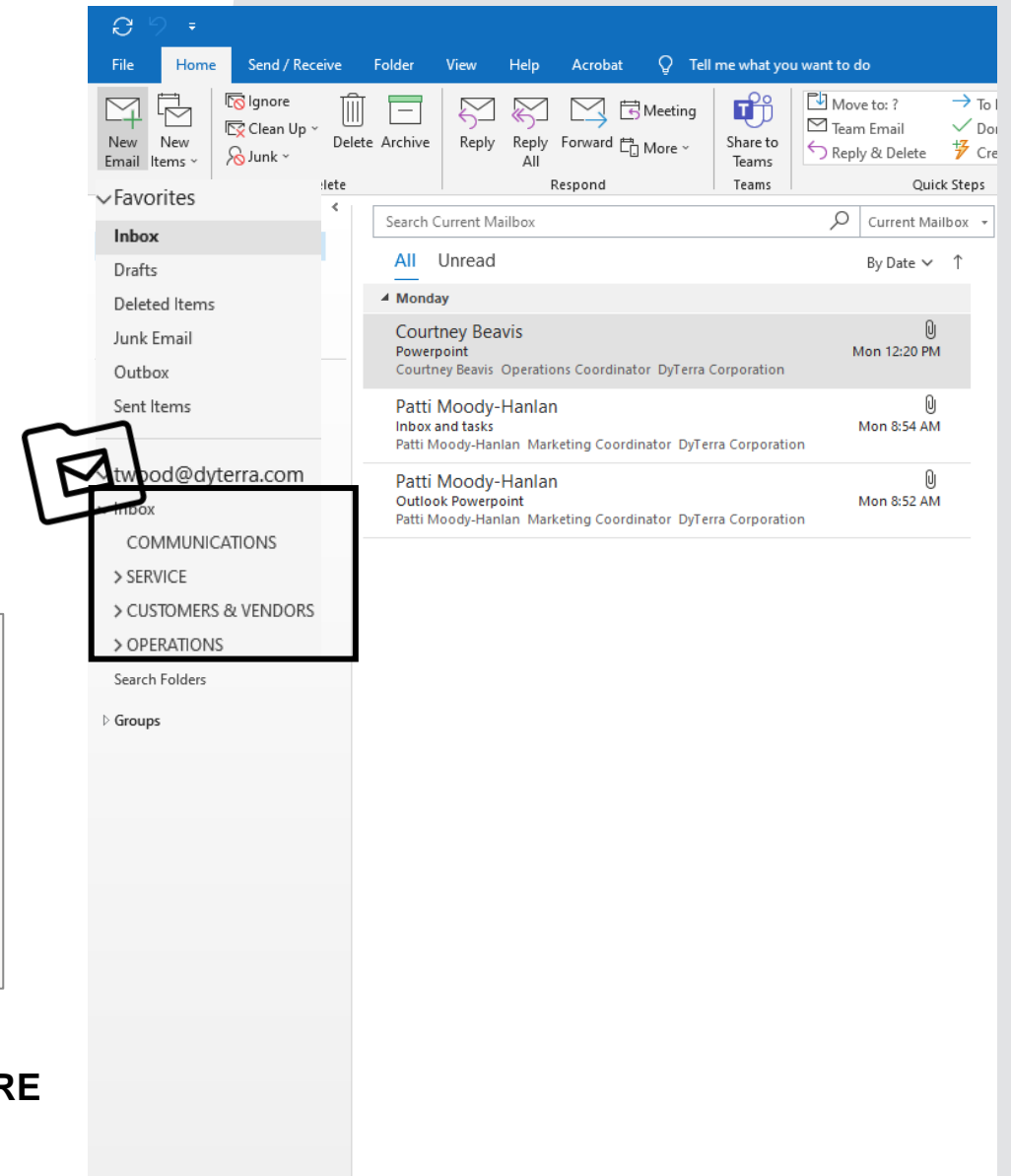
## BY YEAR

- ▼ Inbox
  - OPERATIONS
  - SERVICE
  - ACCOUNTING
  - STAFF
  - FINANCE
  - CUSTOMERS

## BY DEPARTMENT

- ▼ Inbox
  - PAT
  - TAMMY
  - COURTNEY
  - KARIE
  - BRIAN
  - PROJECTS
  - PROCESS IMPROVEMENT

## BY EMPLOYEES, PROJECTS AND MORE



# **DEALING WITH EMAIL AS IT COMES IN**

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# THE 4D SYSTEM

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*Only keep as many emails in your inbox as you can see without scrolling.*

Use the 4D system throughout the day.

At the end of the day, deal with what's left.



DELETE



DELEGATE



DO IT AND DRAG IT



DATE ACTIVATE  
AS A TASK

# DELETE

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**Action:**

Immediately delete unnecessary emails.

**Time Commitment:**

Mere seconds

**Examples:**

- Meeting acceptances
- Donuts in the lunchroom!
- FYIs you won't need again
- CCs you don't need



# DELEGATE

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**Action:**

Forward the email to someone else more suitable.  
Provide more detail if needed.

**Time Commitment:**

Couple minutes

**Follow Up:**

An option is to drag the sent email into your own  
Tasks to check on it when you need to.



# DO IT & DRAG IT

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## Action:

Read or work on an email that takes up to a few minutes to complete. Then drag it into your **File System**.

## Time Commitment:

Couple minutes

## Examples:

- A chain of customer emails you need to keep
- A vacation request – calendar, record and file
- Forward a sales sheet to a customer
- Reply to your manager with a project update



# DATE ACTIVATE AS A TASK

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## Action:

You'll have emails that include action items that aren't quick or urgent. Create a **Task** to complete them at a later date. Then file as needed.

## Time Commitment:

Couple minutes

## Examples:

- Send a quote to Joe at Nutrien by end of month
- When you get a chance, please check our stock on hose barbs and let me know. Not urgent.
- Can you start working on a project plan for 4725s?



**OKAY, NOW HOW  
DO I PUT IT INTO  
PRACTICE?**

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# START YOUR DAY...

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1. Look at your Calendar and To-Do Bar.  
*What's on for the day?*
2. Can you do everything? What's due today?  
What's due soon?
3. Move anything that isn't due or you can't handle today to another day. *(Just change the start date!)*
4. Now read your emails.

***Wrap your head around your whole day  
before you jump into responding to emails.***



**BE INTENTIONAL  
WITH YOUR TIME,  
ENERGY, AND  
FOCUS**

# A FEW FINAL TIPS!

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1. Start now! Go back to your desk to think through what you already know should be on your **Tasks**, and how you could create a **File System**.
2. After a meeting with notes in your notebook, take the time to be **intentional**.
  - Read your notes and transfer action items into your **Tasks**.
  - If you can do them right away, do them right away.  
(Practice 4Ds even here!)
3. When you're in a video meeting, pop open your **Tasks** and jot your action items down right away.



# NEXT STEP

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## Practical:

Hands-on 1on1 at your desk – setting up a few tasks together, including recurring tasks, and setting up your inbox and inbox folder system. After that, we'll have ongoing audits.

### REMEMBER!

This is the **DyTerra Way**,  
and the whole team needs to be on board.



# QUICK QUIZ

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1. What's a **Task**?
2. What's the **To-Do Bar**?
3. Which option do you choose when creating a task from email (top, middle or bottom option)?
4. What are the 4 Ds?
5. What inbox folders should you create?
6. What will happen after this training?
7. Is using tasks and keeping a clean inbox optional?



# QUESTIONS?

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