

### Unit 1 – Being Productive

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At the end of this unit the student will be able to describe the Productivity Process and its application to Workload Management by:

- Establishing their learning objectives.
- Starting their own Campaign for WorkingSm@rt.
- Describing key components of effective Workload Management.
- Identifying their major Productivity Pirates and possible solutions.
- Identifying criteria for using tools effectively.
- Applying the Productivity Formula.
- Applying the “4D” formula to help them decide and plan.

### Unit 2 – Setting Yourself Up to Work Sm@rt

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At the end of this unit the student will be able to configure features within Outlook to enable them to work smart with enhanced focus, increase their productivity and eliminating unhelpful habits by:

- Setting up and configuring Outlook to help them Work Sm@rter.
- Identifying the Outlook tools for managing their time and to do's.
- Identifying the Outlook tools for managing their communication and digital data.
- Configuring their Tasks Folder for productivity.
- Identifying and capture their To-Do's.
- Organizing their workload with categories.
- Creating tasks in Outlook.

### Unit 3 – Manage Your Emails Effectively

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At the end of this unit the student will be able to manage email and stay with their priority regardless of the volume of email traffic by:

- Applying ten best practices for managing email effectively.
- Emptying their Inbox daily using the 4Ds to process email.
- Converting emails into tasks, appointments and meetings.
- Creating contacts from email.
- Creating rules to help them unclutter their Inbox and deal with non-urgent email.
- Creating folders to help them organize and retrieve emails.
- Utilizing the search functions to locate items efficiently.

### Unit 4 – Managing Commitments to Enable a Sense of Achievement

At the end of this unit the student will be able to demonstrate the importance of the Outlook Calendar and how to avoid becoming a victim of “planning fallacy” by:

- Describing the role of the calendar in the planning process.
- Scheduling time for important projects and tasks.
- Accurately and efficiently scheduling appointments and meetings.
- Anticipating and allowing for unplanned events and interruptions in their day.
- Using the Calendar to organize their time, plan their day, and maintain a work-life balance.

### Unit 5 – Achieve Better Results through Effective Communication

At the end of this unit the student will be able to plan, capture and follow up effectively on important communications and delegations by:

- Effectively planning and managing all their communications and reducing “mind traffic”.
- Capturing cycling thoughts and ideas.
- Planning their communication.
- Recording notes from conversations and easily retrieving those notes when needed.
- Effectively delegating and following-up on delegated tasks.

### Unit 6 – Priority Planning for Results

At the end of this unit the student will be able to apply the planning process and – become more strategic in their daily choices. Through consistent on time delivery they will be able to have a greater sense of accomplishment individually and as a team member by:

- Describing the planning process and the importance of this essential skill set.
- Applying a strategy to maintain their Work/Life balance and close the “values gap”.
- Incorporating their annual or monthly goals into their daily work plan to help maintain a strong Work/Life balance.
- Applying a five-step daily planning process.

For more information and to see how Priority Management can help you work smarter, contact us at: 425-822-8761 | [info@sharedvaluesassociates.com](mailto:info@sharedvaluesassociates.com) | [www.sharedvaluesassociates.com](http://www.sharedvaluesassociates.com)