

OUTLOOK RULES AND ALERTS TOOLS FOR EFFECTIVE E-MAIL MANAGEMENT

PMI Honolulu

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Introduction and Overview



- Communication Management Processes
- Outlook Rules and Alerts
- Examples, Discussion and Notes
- Resources

Communication Management Processes



- Identify Stakeholders
- Plan Communications
- Distribute Information
- Manage Stakeholder Expectations
- Report Performance

Communication Management Processes



- ID Stakeholders
 - ▣ E-mail groups
- Plan Communications
 - ▣ Set-up tasks/reminder e-mails
 - ▣ Do not deliver before option

Communication Management Processes



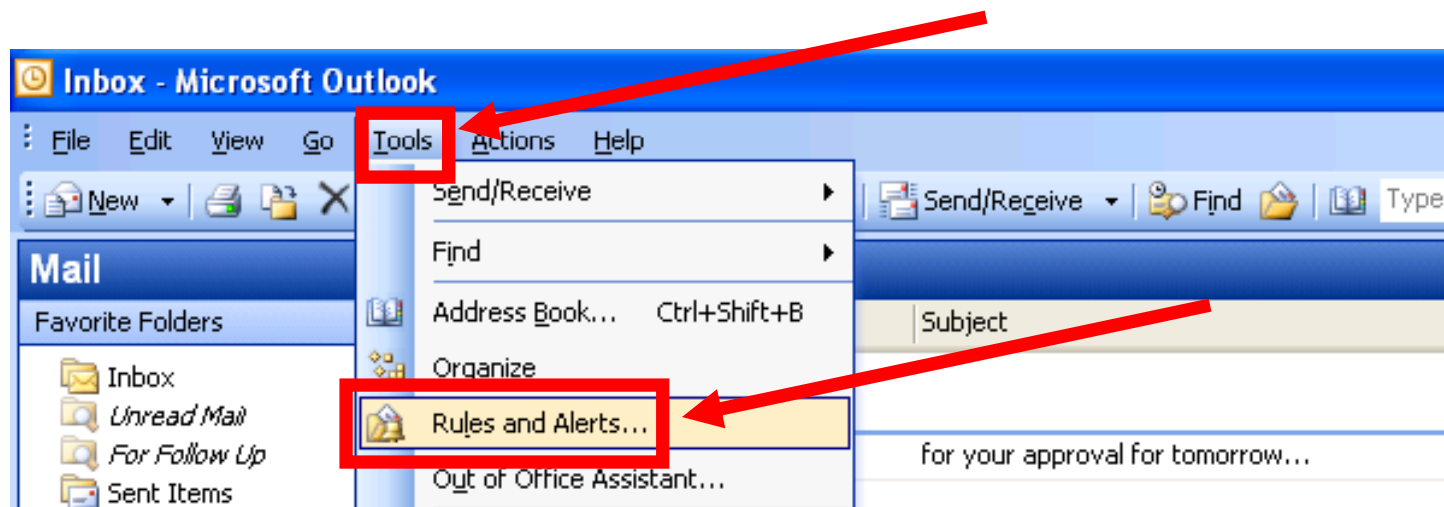
- Outlook Rules and Alerts can help with
 - ▣ Distribute information
 - ▣ Manage Stakeholder Expectations
 - ▣ Report Performance

Rules and Alerts

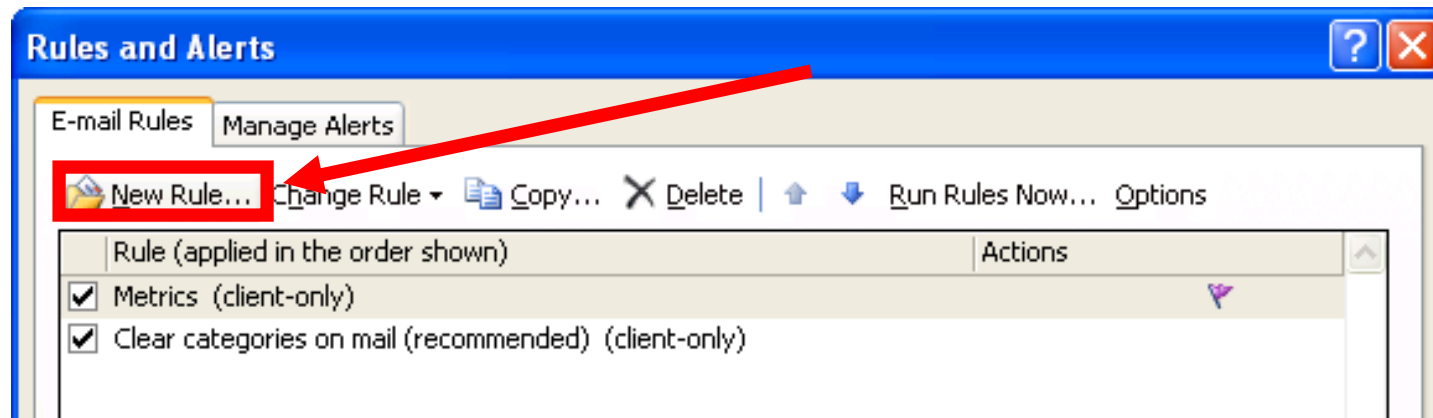


- Rules fall into two general categories:
 - Notification
 - Send alerts to self or others
 - Organization
 - Move or flag

Rules and Alerts - Create Rule



Rules and Alerts - Create Rule



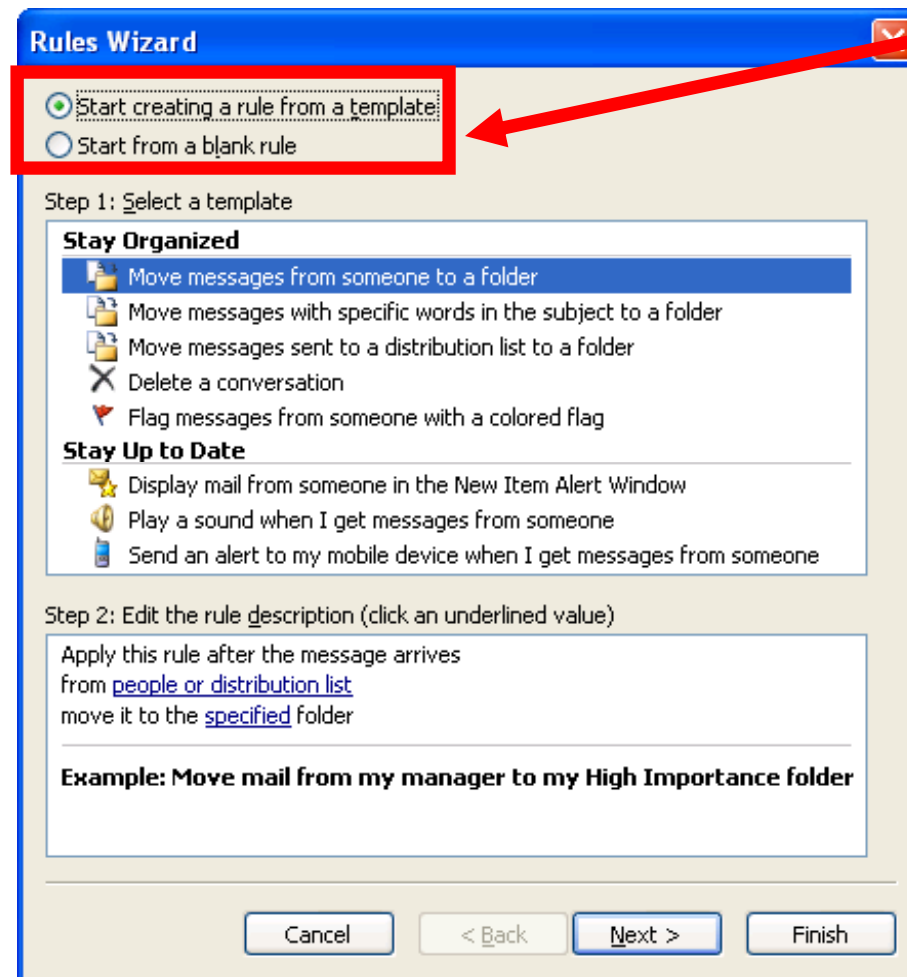
Rules need the following defined:

Conditions

Actions

Exceptions

Create Rule - Select Template



Create Rule - Conditions

Rules Wizard

Which condition(s) do you want to check?
Step 1: Select condition(s)

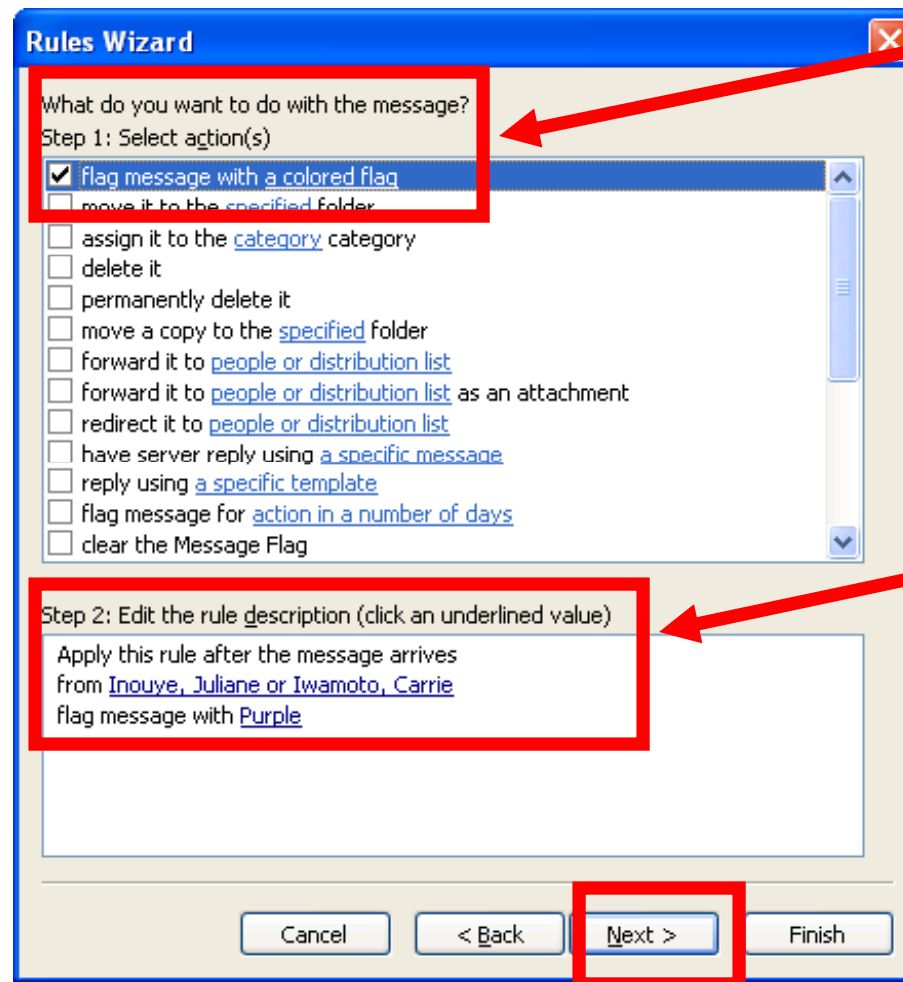
- from people or distribution list
- with specific words in the subject
- through the specified account
- sent only to me
- where my name is in the To box
- marked as importance
- marked as sensitivity
- flagged for action
- where my name is in the Cc box
- where my name is in the To or Cc box
- where my name is not in the To box
- sent to people or distribution list
- with specific words in the body

Step 2: Edit the rule description (click an underlined value)

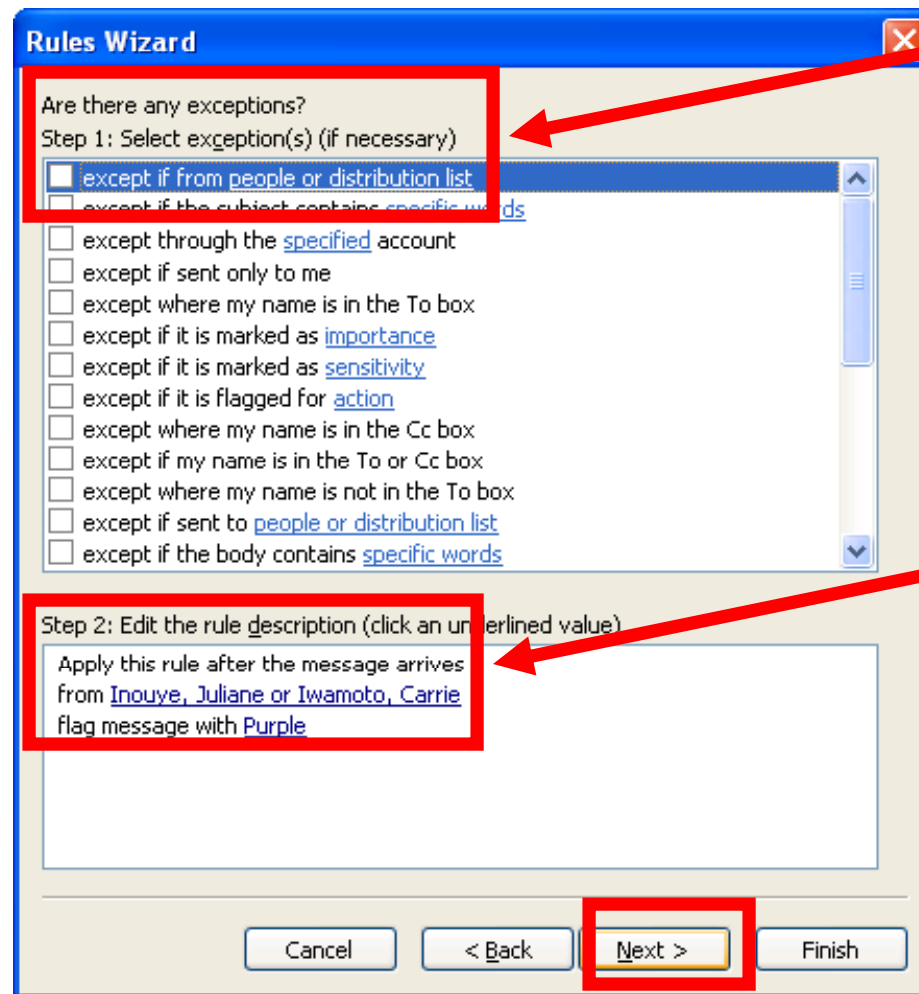
Apply this rule after the message arrives
from people or distribution list
flag message with a colored flag

Cancel < Back **Next >** Finish

Create Rule - Actions



Create Rule - Exceptions



Create Rule – Finish

Rules Wizard

Finish rule setup.

Step 1: Specify a name for this rule

Metrics

Step 2: Setup rule options

Run this rule now on messages already in "Inbox"

Turn on this rule

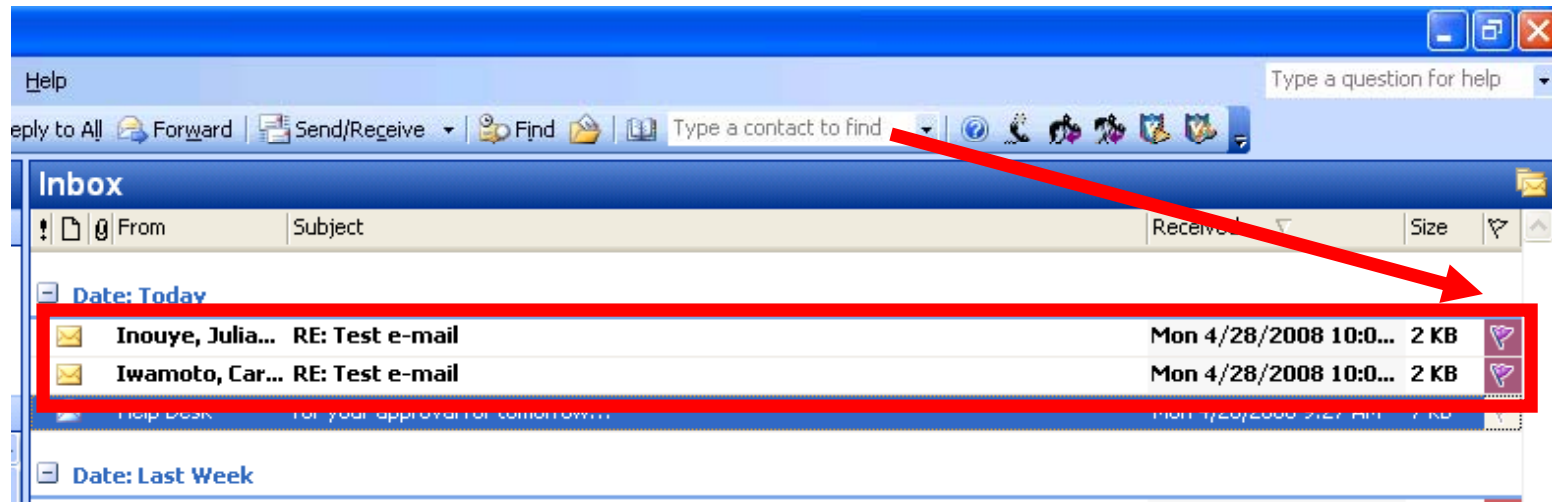
Create this rule on all accounts

Step 3: Review rule description (click an underlined value to edit)

Apply this rule after the message arrives
from Inouye, Juliane or Iwamoto, Carrie
flag message with Purple

Cancel < Back Next > Finish

Rules and Alerts - Results



Examples



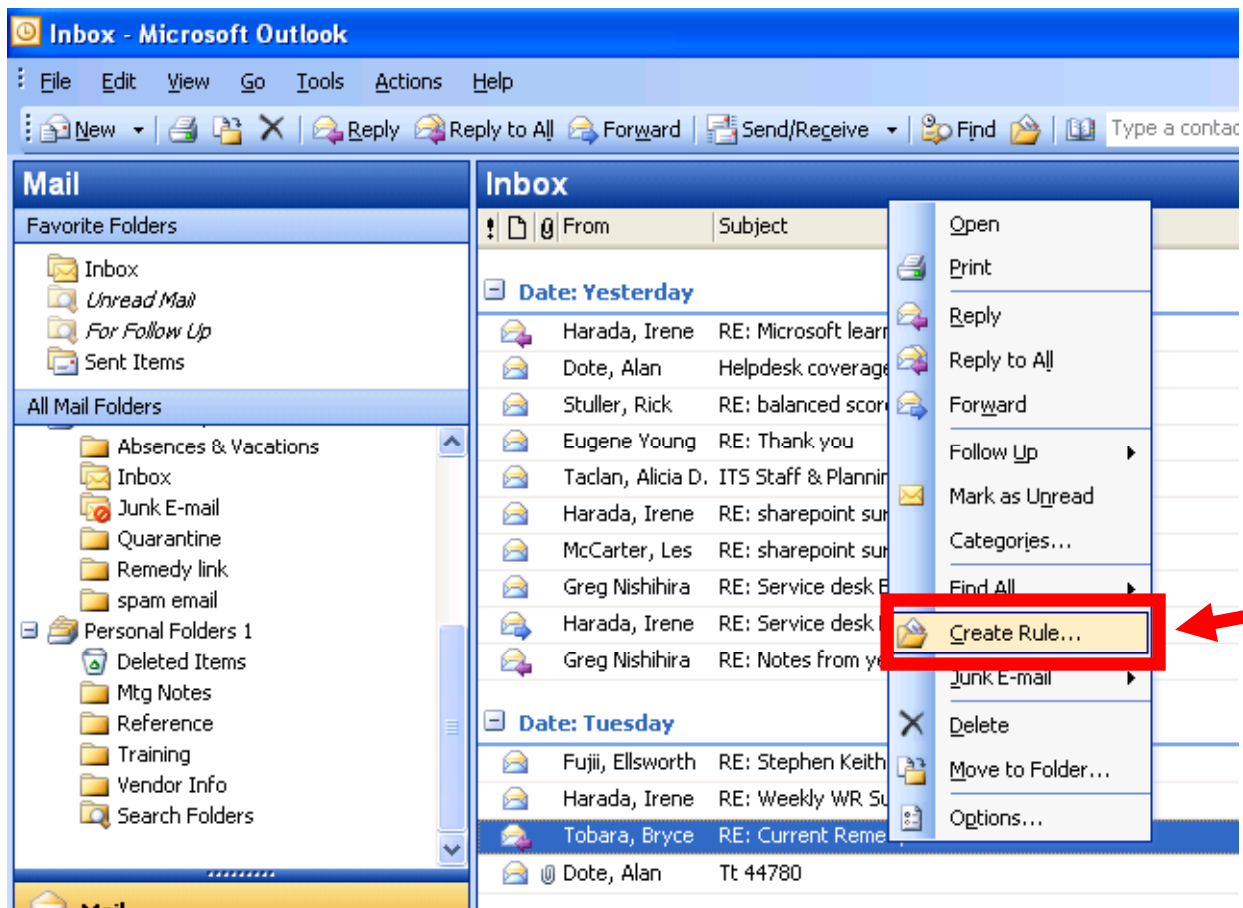
- Move project related e-mail to a folder to review as a group
- Flag e-mails sent only to you (or where you are just cc'd)
- Create an alert for e-mails from your boss with the word URGENT in them
- Forward or redirect messages to delegated staff or team members

Discussion

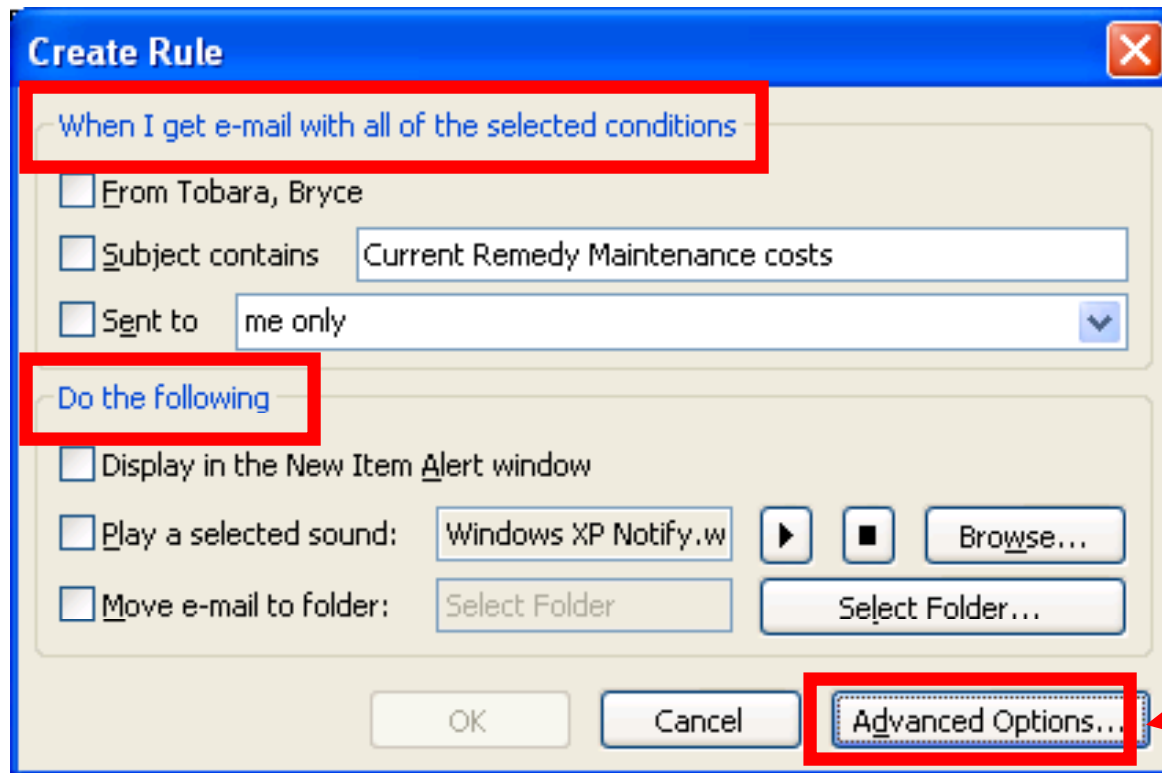


What rules do you use, or think you could use, to organize your inbox?

Rule Set-up Shortcut



Rule Set-up Shortcut



Additional Notes



- Client Only rules vs. Server Rules
 - Cannot be combined
 - Forward and Redirect

- Limit depends on complexity

Additional Notes



- Multiple conditions and exceptions
- All items in In-box are messages
 - Delivery Receipts
 - Read Receipts
 - Voting Responses
 - Out of Office Notices

Bonus Tools and Tips



- Linking to tasks/appointments
- Color coding messages

Effective E-mail Reminders



- Subject lines are headlines
- Make one point per e-mail
- Specify the response you want
- Be a good correspondent
- Use simple English
- Formatting and font matter

Final Tools and Tips



- Commit to new rules and behavior
- Turn off your e-mail pop-ups
- List of Conditions, Exceptions and Actions

Final Thoughts



- Use tools to free up time for other communication needed
- Involve team member to establish norms and expectations
- Helps you distribute information proactively
- Need active management of messages
- Revisit rules and alerts throughout project and when changes occur

Resources



- *PMI PMBOK – 4th edition, 2008*
- *Take Back Your Life! Using Microsoft Outlook to Get Organized and Stay Organized, by Sally McGhee, Microsoft Press, 2005*

Resources (continued)



- Effective E-mail – How to communicate powerfully by e-mail, www.mindtools.com
- Tips for writing effective e-mail, www.thinksimplenow.com
- Microsoft Outlook on-line help at: <http://office.microsoft.com/en-us/outlook/default.aspx>

Questions and Answers

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