

# How to work efficiently

My work Project work

l execute it	I delegate to others	Others delegate to me	Shared Task List	Linked Tasks ☑
DO NOT make task lists in multiple places	DO NOT send emails for delegation	DO NOT flag tasks in Inbox	DO NOT use Excel	DO NOT use Excel to link tasks & create Gantt charts
Add all work in Outlook <b>Tasks</b> folder - not the To-Do List	Add new Task. Click <b>Assign To</b> Button Add email id.	<b>Right Drag</b> Mail to Task Folder	Create shared task list in Planner. Delegate and monitor.	Save MS Project files to <b>Project Online</b> directly - no more MPP files.
<b>Drag tasks to Calendar</b> & block time.	Automatic update when work is completed.	Choose <b>Move</b> here with Attachment option	<b>My Tasks</b> shows tasks across projects. Link to Outlook calendar.	Assign resources centrally. Task update on browser by resources.
This is called Time Management. Better Planning & Execution.	Monitor delegated work in View – Change View – Assigned.	More convenient than managing Flagged mails.	Live Kanban board. Eliminate review meetings.	Automatic and Live consolidation across projects.
Handle Tasks folder before Inbox and Calendar.	Better Accountability, Faster Execution.	Single place to monitor all pending work.	My work and Project work visible in Outlook	Live reporting with Power Bl.
O			Fü	P
	Tasks folder Microso desktop app on n		Shared Plan Planner and Teams	Linked Tasks Project Online

Bonus: Link Meetings to Notes 🖻





## Execute Tasks efficiently



- Make a master list of work Find time to do the work 2 Add all work to Outlook Tasks. Drag tasks to Calendar & block time. Plan well in advance. Add meeting action points as well. ✓ Subject Due Date Categories OME SEND / RECEIVE FOLDER Click here to add a new Task HOME SEND / RECEIVE Mon 17/9/... Upgrade Outlook Forward Meeting Invite Search Tasks (Ctrl+E) Create PPT for AGM Tue 18/9/2... Notes Attendees Meeting Notes | Attendees Drag a column header here to group Finalize SEO vendor Mon 15/10... □ SUBJECT 23 - 27 December Click here to add a new Task Send report - with compete a... Mon 15/10... Delegated t You can also type a keyword to MONDAY TUESDAY Refine targets for Q3 Wed 19/9/... Recruitmer Skype e-mail verification 23 🤦 🗌 delegation by using tasks Wed 15/8/... Delegated t Negotiate AMC When you click Online Video. ✓ Few notes Initiate Cust Sat survey None Mail >>> Task Connect on Lin ✓ Save time in Word with new b Fri 10/8/20... Analyze Attrition data Submit monthly review ppt list areas of potential cost say Thu 9/8/20... Send detailed report marshal: M-W's Word of the I ✓ demo Change Tyres Fri 28/9/20... Personal 🕵 🗌 task is used for delegation submit report 尸 Retrofit Tables in Planning data Sun 8/7/20... Submit monthly review ITEMS: 99 ⊗ wor Review sales pricing ppt Fri 29/6/20... Learn all transitions Sun 23/12/...
- 3

4

Install Microsoft To Do app on Android / iOS phones. Sync work from Outlook tasks to mobile.

Do the work. There is no technology for that! 😂





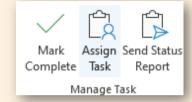
# Delegate work efficiently





DO NOT send mails to delegate work. Monitoring is difficult. Delays are likely.

Create a new Task (Ctrl Shift K) and use Assign Task button. Enter only ONE person's email. Sent as Task request with Accept / Decline buttons.



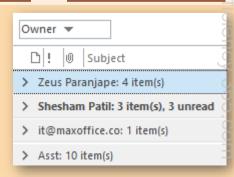
🛱 🗌 My work Wed 04/03/2020 Even if the other person forgets, you To Delegated work - icon is different Mon 02/03/2020 can see it in your task folder. 👸 🗌 Delegated work Fri 21/02/2020 Delayed work is shown in red. 🖒 🗌 My work Wed 22/01/2020 Task also in You assign X receives Task X accepts the Task your task Request task folder to X The entire workflow is built-in New task in X X finishes the You receive Task marked as task folder notification complete task



Install To Do app on mobile

Monitor delegated work – View tab – Assigned View. See work grouped by person.

Better monitoring, faster execution. Standardize across your company.





### Shared Task List using Planner

#### Excel? No!



Excel is **inefficient** for task lists

Too many copies, updates
No reminders, manual reporting

#### **Use Planner**



Create a plan, add people, on browser or mobile app Add external vendors as well New Plan

Monthly Review Action Items

Add to an existing Office 365 Group

Privacy

Public - Anyone in my organization can see plan contents

Private - Only members I add can see plan contents

Create Plan

Due 14/03

Analyze LinkedIn data

Dr. Nitin Paranjape

Add Task

#### Add Tasks



Add Tasks with **Deadline**, and delegate
Add a checklist of subtasks

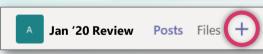
#### .





Click + sign to add Plan to Team

Plans can be added to multiple Teams



#### **Live Status**





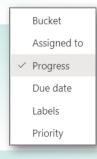
To see **Kanban board,** Group by Progress Live graphical summary





Single list of **my tasks** across all projects

Sync with Outlook calendar









### Linked Tasks with MS Project



#### Excel? No!



Excel is **inefficient** for linked tasks

Complex formulas, Manual Gantt

True Resource allocation not possible

#### **MS** Project



Link Tasks, lag time, people, material, costs, custom calendars

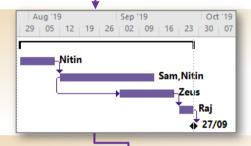
vks 29	Jul '19 0	<b>7 Sep '19</b> 9 Aug '19
vks 12	Aug '19 1	3 Sep '19
vks 02.5	Sep '19 20	0 Sep '19
vk 23 9	Sep '19 2'	7 Sep '19
lavs 27	Sep '19 2'	7 Sep '19
		· · · · · · · · · · · · · · · · · · ·

12 Aug '19 | 19 Aug '19

#### **Add Tasks**



Task **dependencies**, milestones, assign resources, save Baseline, save to Project Online (not MPP)



19 Sep '19

|23 Sep '19

#### **Timeline**



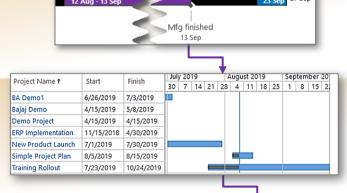
Customizable Timeline
Add milestones and tasks
Paste to PowerPoint

#### **Project Online**



### Status across Projects

Common resource pool Easy monitoring



#### **Live Reports**



Power BI based live dashboard Customizable and Interactive Live monitoring and reporting







# Flag mails > Convert to Tasks



Inbox

When do we flag?



... as a reminder to do something

... someone delegated a Task by mail

Don't Flag Emails



Tasks belong in the **Task folder** Why create another task list in Inbox?

Convert Mails to Tasks



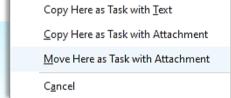
**Right drag** mails from Inbox to Tasks icon



Move Don't Copy



**Single copy** with attachments "Single source of truth"



Delegate Task



Add a deadline

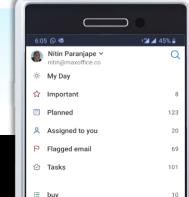
Delegate using **Assign Task** 



To Do app



Free Microsoft **To Do** mobile app **(a) (c)** Tasks, Delegations & Planner Tasks







# Linking Meeting to Notes

### SOLVED



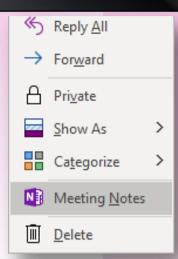


Laptop



Right click on meeting -Meeting Notes.

Choose OneNote notebook & section.



Paper Notes



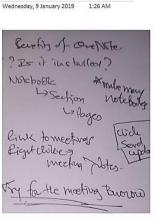
New page with meeting details added. Type notes. Auto saved.

To find the notes later, find meeting, choose same option -Linked notes will open automatically.



Take notes using mobile OneNote app

Notes will sync with OneNote on laptop automatically.





Link the page to the meeting. Home tab - Meeting Details choose related meeting

> Now the page is linked to the meeting.

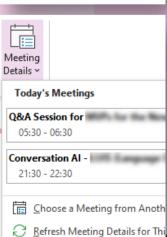


Notepad



Create new page on mobile. Insert photos of the paper notes.

Page will sync to desktop OneNote





Open the synced page on desktop OneNote

Use Meeting Details as shown above to link it