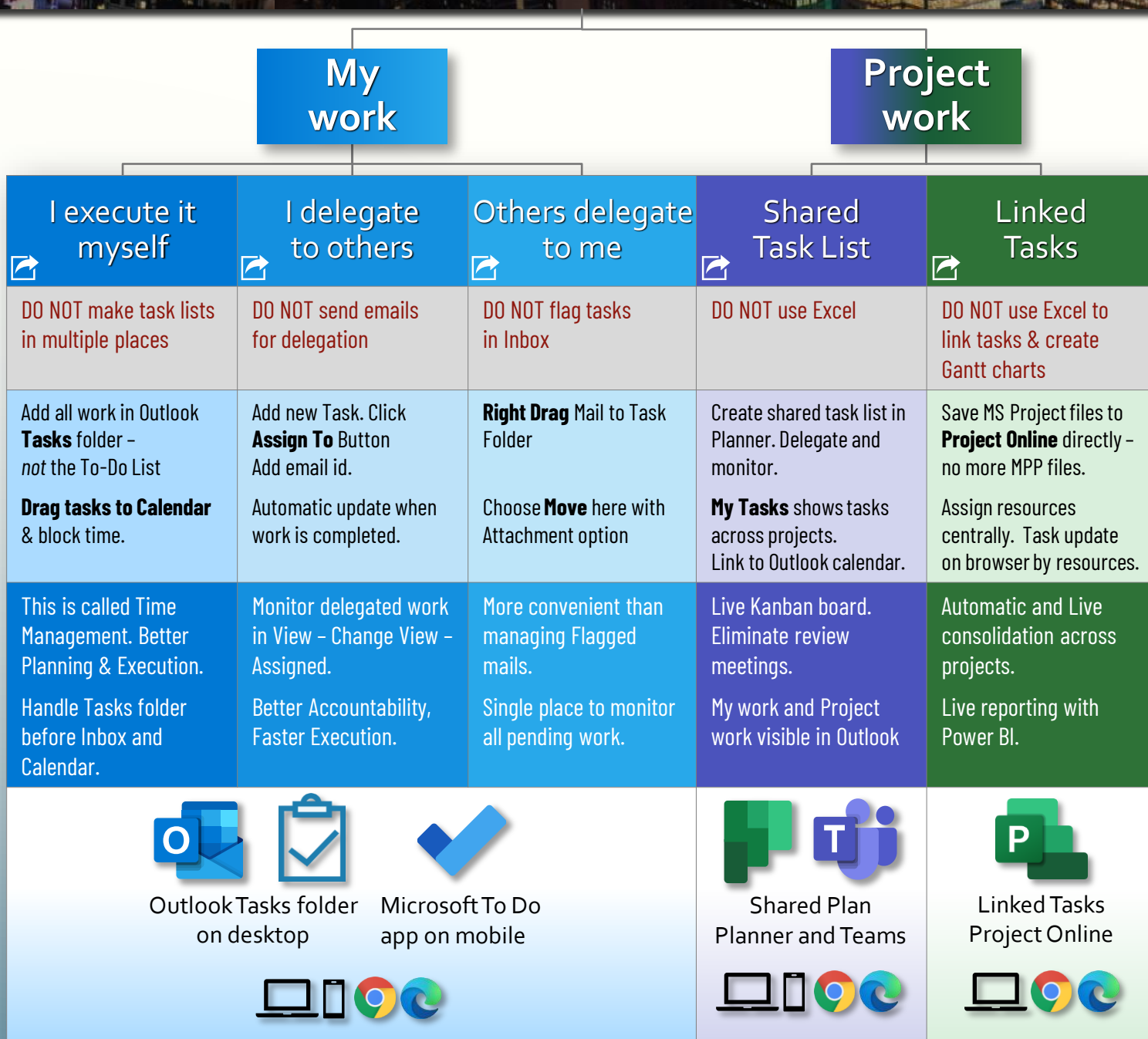




How to work efficiently



Bonus: Link Meetings to Notes 



Execute Tasks efficiently



1 Make a master list of work

Add all work to Outlook Tasks.
Add meeting action points as well.

	<input checked="" type="checkbox"/>	Subject	Due Date	Categories
		Click here to add a new Task		
	<input type="checkbox"/>	Upgrade Outlook	Mon 17/9/...	
	<input type="checkbox"/>	Create PPT for AGM	Tue 18/9/2...	
	<input type="checkbox"/>	Finalize SEO vendor	Mon 15/10...	HR
	<input type="checkbox"/>	Send report - with compete a...	Mon 15/10...	Delegated t
	<input type="checkbox"/>	Refine targets for Q3	Wed 19/9/...	Recruitmer
	<input type="checkbox"/>	Negotiate AMC	Wed 15/8/...	Delegated t
	<input type="checkbox"/>	Initiate Cust Sat survey	None	
	<input type="checkbox"/>	Analyze Attrition data	Fri 10/8/20...	
	<input checked="" type="checkbox"/>	Send detailed report	Thu 9/8/20...	
	<input type="checkbox"/>	Change Tyres	Fri 28/9/20...	Personal
	<input type="checkbox"/>	Retrofit Tables in Planning data	Sun 8/7/20...	Sales
	<input type="checkbox"/>	Review sales pricing	Fri 29/6/20...	
	<input type="checkbox"/>	Learn all transitions	Sun 23/12/...	

2 Find time to do the work

Drag tasks to Calendar & block time. Plan well in advance.

3



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

4

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

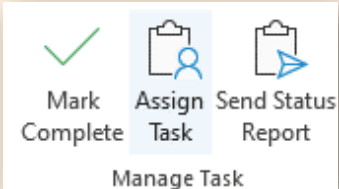


Delegate work efficiently



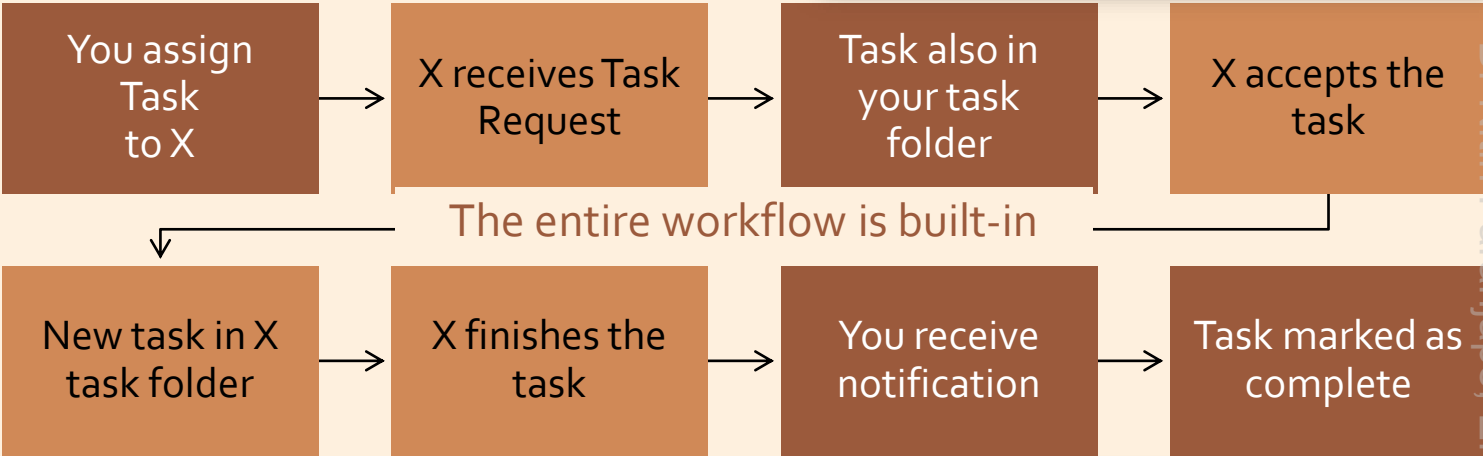
DO NOT send mails to delegate work.
Monitoring is difficult. Delays are likely.

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.



Even if the other person forgets, you
can see it in your task folder.
Delayed work is shown in red.

<input checked="" type="checkbox"/>	My work	Wed 04/03/2020
<input type="checkbox"/>	Delegated work - icon is different	Mon 02/03/2020
<input type="checkbox"/>	Delegated work	Fri 21/02/2020
<input checked="" type="checkbox"/>	My work	Wed 22/01/2020



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.

Owner
Subject
> Zeus Paranjape: 4 item(s)
> Shesham Patil: 3 item(s), 3 unread
> it@maxoffice.co: 1 item(s)
> Asst: 10 item(s)



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

Add Tasks



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

Add to Teams



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

All MY tasks



Single list of **my tasks** across
all projects
Sync with **Outlook** calendar

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

☐ Analyze LinkedIn data

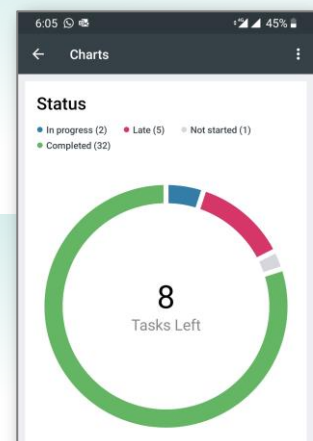
Due 14/03

Dr. Nitin Paranjape

Add Task

A Jan '20 Review Posts Files

Bucket
Assigned to
✓ Progress
Due date
Labels
Priority





Linked Tasks with MS Project



Excel? No!



Excel is **inefficient** for linked tasks
Complex formulas, Manual Gantt
True Resource allocation not possible

MS Project



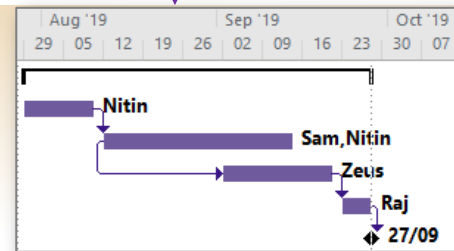
Link Tasks, lag time,
people, material, costs,
custom calendars

Task Name	Duration	Start	Finish
Product Delivery	45 days	29 Jul '19	27 Sep '19
Raw material ordering	2 wks	29 Jul '19	09 Aug '19
Manufacture	5 wks	12 Aug '19	13 Sep '19
Delivery	3 wks	02 Sep '19	20 Sep '19
Clearance	1 wk	23 Sep '19	27 Sep '19
Finish	0 days	27 Sep '19	27 Sep '19

Add Tasks



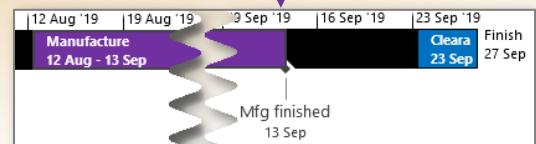
Task dependencies, milestones,
assign resources, save Baseline,
save to Project Online (not MPP)



Timeline



Customizable Timeline
Add milestones and tasks
Paste to PowerPoint



Project Online



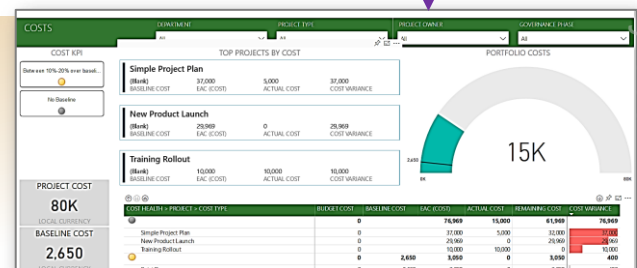
Status across Projects
Common resource pool
Easy monitoring

Project Name	Start	Finish	July 2019	August 2019	September 2019
BA Demo1	6/26/2019	7/3/2019			
Bajaj Demo	4/15/2019	5/8/2019			
Demo Project	4/15/2019	4/15/2019			
ERP Implementation	11/15/2018	4/30/2019			
New Product Launch	7/1/2019	7/30/2019			
Simple Project Plan	8/5/2019	8/15/2019			
Training Rollout	7/23/2019	10/24/2019			

Live Reports



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





~~Flag mails~~ → Convert to Tasks



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



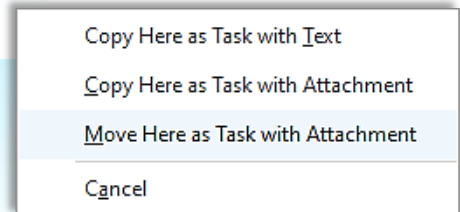
Right drag mails from Inbox to Tasks icon



Move Don't Copy



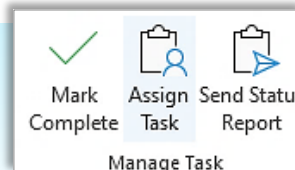
Single copy with attachments
"Single source of truth"



Delegate Task





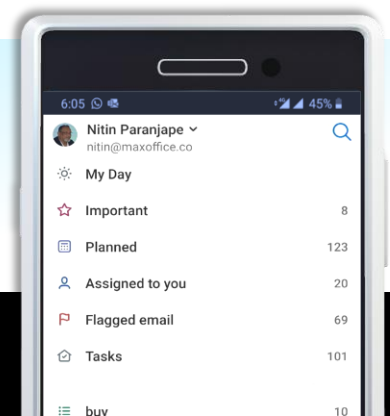
Add a deadline
Delegate using **Assign Task**



To Do app



Free Microsoft **To Do** mobile app  
Tasks, Delegations & Planner Tasks





Linking Meeting to Notes

SOLVED

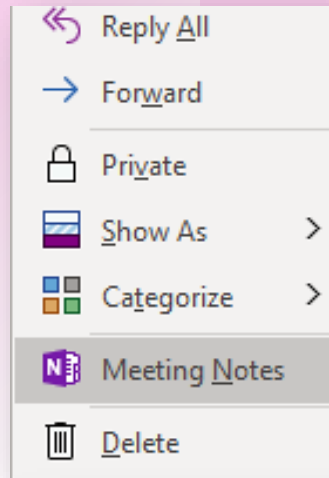


Laptop



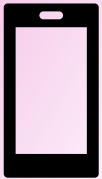
Right click on meeting - Meeting Notes.

Choose OneNote notebook & section.



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.

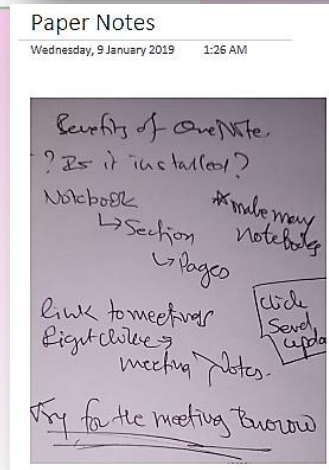


Mobile



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.

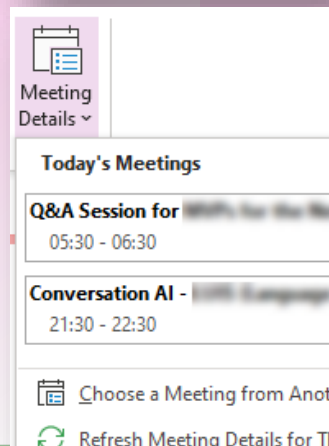


Notepad



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