Course Overview

The Personal Information Management Program is a one-to-one, desk-side coaching program. The course is designed to enable participants to dramatically increase their personal productivity while improving the quality of their lives. The course supports participants in creating an Integrated Management System using Microsoft® Office Outlook®. This system manages a constant stream of incoming electronic and voice mail communications, objectives and projects and is centrally located, accessible and flexible.

By the end of the one-day coaching program, participants will experience a sense of relaxed, focused control, with all objectives, projects, plans, action steps and information organized in Outlook. Key issues addressed include: e-mail overload, e-mail protocol, digital communications, filing, managing multiple objectives and projects, dealing with interruptions, tracking delegated items, reading material, and integrating personal and professional priorities.

A 30-minute pre-call is conducted prior to the eight-hour coaching day to assess roles, objectives and appropriate customization. The program takes place on-site in the client's office.

> *"The skills that I learned from McGhee Productivity Solutions have allowed me to stay on top of both large and small professional projects while executing the personal objectives I once thought were an unapproachable dream."*
>
> *—Stacy McDonald*
> *Owner*
> *Mile High Real Estate Valuations, LLC*

Course Outline

Introduction
- Program overview
- Assessment of current objectives and challenges
- Review the MPS Workflow Model

Collecting
- Setting up an effective Collecting System
- Collecting commitments and agreements into the Outlook TaskPad

Processing and Organizing
- Setting up an effective Action System
- Creating Planning and Action categories
- Review the MPS Workflow Model
- Processing e-mail, voice mail, papers and the Outlook TaskPad using the MPS Workflow Model
- Creating a Total Life To Do list in the Outlook TaskPad
- Setting up an effective Reference System using the Outlook Personal Folder list and My Documents
- Using the MPS Four Ds to process e-mail:
  - Delete It
  - Do It
  - Delegate It
  - Defer It
- Establish an e-mail protocol:
  - Define the To, Cc, and Subject lines
  - Create meaningful e-mails
- Define a communication protocol – which digital devices to use when and where
- Integrate handheld devices, SharePoint™ and other related Microsoft productivity technologies

Prioritizing and Planning
- Set up an effective baseline calendar
- Prioritize and plan the Outlook TaskPad
- Plan the week against objectives and priorities
- Maintain an Integrated Management System
- Establish boundaries and routines that support productivity