

Plan Like an Entrepreneur

“Effectiveness is a habit.”
Drucker

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This download is an explanation of how to use Microsoft Outlook 2003 ® to run the weekly planning processes detailed in pages 101 to 104 of *Think Like an Entrepreneur*. I have also added material for Outlook 2007.

The first part of this download will teach you how to customize Outlook to run the processes. You will only need to do this once. The second part will show the processes at work.

You don't have to be a computer wizard to set this system up and operate it, although you do need a familiarity with computer-users' basics like highlighting, using drop-down menus etc. The steps below may look complex and slightly obscure, but they do work – believe me!

If you do get stuck, show the section to a computer person and get them to set it up for you.

Before you start, open Microsoft Outlook on your computer and click on the 'task' section (on the bottom left of the page are six icons: 'tasks' is the third one along, the clipboard with a tick on it). Then add all your current pending tasks to this section: load them one by one into the 'subject' table via the 'click here to add a new task' box, keeping the names simple: if 'Call Joe' is a task, then just enter 'Call Joe'.

Section 1 - Customizing Outlook

We are going to create four lists:

- An 'All task' list, with every task listed on it.
- A Project Only List, of all your projects
- A 'This Week's Tasks' List
- A Daily List

1) The All Task List

The first process is to set up a list for all your tasks.

- 1) Go to Tasks (Click 'Tasks' on the bottom left hand side of the screen)
- 2) Select 'View' from the menu item along the top of the page. Click: View>Arrange By>Current View>Define Views. (Note: In Outlook 2007, the sequence is: View>Current View>Define Views.) A box called 'Customer View Organizer' should appear.
- 3) In this box, click 'New' and choose 'Table'. 'New View' appears highlighted in the box at the top. Give this the list a name, for example '*Your name* All Task List', then

click the 'OK' button. Another box called 'Customize View: *Your name* All Task List' should appear.

- 4) Click 'Fields' and another box appears, with two boxes with lists of fields in them, ('Available fields' on the left and 'Show fields in this order' on the right).
- 5) Remove all the fields in the right hand box by highlighting them then clicking the '< Remove' button.
- 6) From the drop-down box at the top left ('Select fields from'), choose 'Frequently used fields'.
- 7) Select the following fields from the left-hand box: 'Categories' 'Complete' 'Due Date' and 'Subject'. If you highlight them then click the 'Add >' button, they should now appear in the right hand box.
- 8) Click 'OK'. The 'Customize View' box should appear again.
- 9) Click the 'Group By' button and a 'Group By' Box should appear. The top item is 'Group Items by'. Chose 'Categories' from the drop-down menu and click 'OK'.
- 10) You should be back to the 'Customize View' box. Click the 'Filter' button – the Filter Box should appear. Click the 'Advanced' Tab.
- 11) Use the 'Remove' button to delete any fields or comments in the box at the top.
- 12) Click the 'Field V' button and a drop-down menu should appear. Choose 'Frequently Used Fields' and then choose 'Complete'.
- 13) 3 small boxes should appear: 'field', 'condition' and 'value'. Set these to [complete] [equals] [no]. Click 'Add to list' button at the bottom right. Click the OK button, then, in the next box, the OK button again, and finally in the next box 'Apply view'.

Well done; you have now made an All Task List.

2) The Project Only Task List

Choose View > Arrange By > Current View > *Your name* All Task List from the Task Menu in Outlook (No 'Arrange By' in 2007 Outlook). Any of the tasks which you decide are projects (items with many steps to complete) change the category of that task to 'Project'.

Your second job is to set up a list of these projects. The easiest way to do this is to make a copy of your All Task List and amend it, which is how we will start.

- 1) Go to Tasks (Click 'Tasks' icon on the bottom left hand side of the screen)

- 2) Click View>Arrange By>Current View>Define Views. A box called 'Customer View Organizer' should appear. (Note, in Outlook 2007, it is: View>Current View>Define View.)
- 3) Highlight the '*Your name* All Task List' and click 'Copy'. A small box with 'Copy of *Your name* All Task List' should appear highlighted. Overwrite this and call it 'Projects'. Click the 'OK' Button.
- 4) Another box called 'Customize View: Projects' should appear. Click the 'Filter' button – the Filter Box should appear. Click the 'Advanced' Tab.
- 5) Click the 'Field V' button and a drop-down menu should appear. Choose 'Frequently Used Fields' and then choose 'Categories'.
- 6) 3 small boxes should appear. Set them to [categories] [contains] [projects] (the last box may be blank: just type in the word 'projects'), then click the 'Add to list' button at the bottom right. Click OK > OK > Apply View – and you now have a project list.

3) The Weekly Task List

Next you will make a weekly list of tasks. This will contain tasks where the 'Due Date' is:

- within the next 7 days
- anytime in the past, or
- where you did not bother to put in a date.

Dates which are set for a week or more in the future will not appear on the list. This means that if you have a task you cannot realistically do this week, you can put forward to the future and it disappears from the list. If this worries you, can always find it again on the your All Task list!

- 1) Go to Tasks (Click 'Tasks' on the bottom left hand side of the screen)
- 2) Click View>Arrange By>Current View>Define Views. A box called 'Customer View Organizer' should appear. (Note, in Outlook 2007, the sequence is: View>Current View>Define View.)
- 3) Highlight the '*Your name* All Task List' and Click 'Copy'. A Small box with 'Copy of *Your name* All Task List' should appear highlighted. Overwrite this and call it '*Your name* Weekly Task List'. Click the 'OK' Button. A box called 'Customize View: *Your name* Weekly List' should appear.
- 4) Click the 'Filter' button in this box. The Filter Box should appear. Click the 'Advanced' Tab
- 5) Click the 'Field V' button and a drop-down menu should appear. Choose 'Frequently Used Fields' and then choose 'Categories'.

- 6) 3 small boxes should appear. Change the middle box to 'Doesn't Contain', and type 'Projects' into the right-hand box. Click 'Add to list' button at the bottom right.
- 7) Click the 'Field V' button and a drop-down menu should appear. Choose 'Frequently Used Fields' and then 'Due Date'.
- 8) 3 small boxes should appear. Change the middle box to 'Does Not Exist' (the last item on the drop-down menu) and leave the value box blank. Click 'Add to list'.
- 9) Again, click 'Field V' > 'Frequently Used Fields' > 'Due Date'
- 10) This time, you want the 3 small boxes to read [Due Date] [In The Next 7 Days] [] When this is the case, click 'Add to list'.
- 11) Once more, click 'Field V' > 'Frequently Used Fields' > 'Due Date'
- 12) This time, you want [Due Date] [On Or Before] [Today]. Click 'Add to list', then 'OK' > 'OK' > Apply View.

Well done; you have now made a Weekly List.

4) The Daily Task List

This uses a different part of Outlook, called Task Pad. It is reached via the Calendar icon.

- 1) Go to Calendar (first icon in the row at the bottom left of the Outlook page) and click on it.
- 2) Choose: View>Task Pad (In Outlook 2007 Choose: View>To Do Bar > Normal)
- 3) The Task Pad should appear on the left hand side of the screen (if it doesn't, repeat step 2 and it should appear). Put your cursor on the top part of the task pad and right mouse click. A menu should appear. Choose 'Customize Current View'
- 4) The 'Customize View' box should appear. Click 'Fields' and another box appears, with two boxes with lists of fields ('Available fields' and 'Show fields in this order') in them.
- 5) Highlight the fields in the right hand box and click the '< Remove' button until all the fields in the right hand box have gone.
- 6) From the drop-down box at the top left ('Select available fields from') choose 'Frequently used fields'.
- 7) Select from the left hand side box ('Available fields') using the 'Add >' key and choose the following fields: 'Categories', 'Complete', 'Due Date' and 'Subject'. These fields should now appear in the right hand box.

- 8) Click 'OK'. The 'Customize View' box should appear again.
- 9) Click the 'Group By' button and a 'Group By' Box should appear. The top item is 'Group Items by'. Chose 'Categories' from the drop-down menu and click 'OK'.
- 10) The 'Customize View' box should appear. Click the 'Filter' button – the Filter Box should appear. Click the 'Advanced' Tab.
- 11) Click the 'Field V' button and a drop-down menu should appear. Choose 'Frequently Used Fields' and then choose 'Categories'.
- 12) 3 small boxes should appear. Set these to [categories] [Doesn't Contain] [Projects]. Click 'Add to list' button at the bottom right.
- 13) Click the 'Field V' button and a drop-down menu should appear. Choose 'Frequently Used Fields' and then choose 'Due Date'.
- 14) 3 small boxes should appear. Set these to [Due Date] [Does Not Exist] []. Click 'Add to list' button.
- 15) Click the 'Field V' button and a drop-down menu should appear. Choose 'Frequently Used Fields' and then choose 'Due Date'.
- 16) 3 small boxes should appear. Set them to [Due Date] [On Or Before] [Today]. Click 'Add to list' button at the bottom right and click the 'OK' button.

That's it. You have now set up a daily Task List.

If you put the Due Date forward until tomorrow, the task disappears and reappears the next day.

Section 2 – Weekly Planning using your four lists

I prefer to do weekly planning on Friday evening, Sunday evening – and usually end up doing it early on Monday morning!

I've found that having a routine makes planning much easier and more effective: it forces me to follow a procedure rather than getting sidetracked and 'jumping on' whatever is urgent. My routine is listed below – it is similar to that found on page 102 of the book:

1. Take out the Seven Parallels and review them. This should align you to what is important to you.
2. Add any goals (or dreams) you come up with to your All Task list with a 'Project' category.
3. Take a look at 5 day view of your diary and get a sense how much discretionary time you have this week.
4. Open Outlook > Tasks and view your projects: View>Arrange By>Current View>Projects (No 'Arrange By' in Outlook 2007).
5. For each project – open the project and make a list within the large box of the various steps you need to make. An example is at the bottom of page 102 of the book. The I-D-EA-S process (pages 55 to 58 in the book) will help you think of the necessary steps.
6. If you think you have time to do some of these steps over the coming week, make new tasks for each of these steps. From the example in the book, you could make a new task called 'Review accounting products on the net'.
7. View your previous week using the five day view in Outlook Calendar. Are there any tasks from meetings or follow-ups you want to add to your All Task list?
8. View the coming week with a five day view. Are there any meetings or events that create preparation tasks that you want to add to your list?
9. Now go to The Weekly List: View>Arrange By>Current View> Weekly List (No 'Arrange By' in Outlook 2007).
10. Put forward the Due Date of any task you cannot realistically start this week. I often move tasks forward two months. Spread the tasks evenly over the week, avoiding very busy days. You will now have a realistic weekly task list. You can also delegate tasks to others (see Appendix below). Lastly, don't forget to delete tasks that you know you will never really do (should is not a good word in NLP!)
11. Go to the Calendar Section in Outlook and take a look at your tasks as daily view. Put a few tasks forward or change them into projects as necessary. Put a few tasks forward so you are left with a realistic list you can complete today. It improves your

morale to have a list which you can complete and then go home having finished your work.

12. Lastly schedule around 2 to 7 hours of these tasks in your diary over the coming week. (You can then move the Due Date for the task you decide to schedule for the day after). I call this making a date with yourself. If you had lunch with someone you would show up; have the discipline to make a date with yourself and 'show up' too. I would recommend reading the section of the Four Quadrant model of important and urgent tasks in the *Seven Habits of Highly Effective People* by Stephen Covey. Get into the habit of making dates with yourself to execute the important and non-urgent tasks on your list.

And that's it!

Finally, remember the learning cycle on page 19 of the book. When you try something new, conscious incompetence is a common response. The first time I learnt this, I found it confusing and unpleasant. However, once you do this on a regular basis it becomes easy – you will soon achieve unconscious competence.

Appendix – Using Outlook on an Exchange Server to manage a team.

If you have a server system, I suggest that everyone on that server set up this system on their computer and that you or a manager can then manage their tasks. (Tip: you can look at other people's task lists using the 'Other Users Folders' feature. It is first necessary for the individual being managed to set you up as a delegate under the Outlook 'Options' menu.) I implemented this system during one of the big disasters mentioned in the book. Within three weeks, everything was 'shipshape' again.

You can also delegate tasks to someone else using the 'Assign Task' feature. This keeps the task on your list but also adds it to the list of the person you are delegating it to. During my weekly planning, if I wanted to delegate a task to someone called Jim, I would make the Category of that task 'Jim' and then delegate that task. When I next see Jim, I would look at my 'Jim' Category tasks and ask him for updates on each task. When Jim completes the task you get an email, but it remains on your list until you mark the task complete.

If you wish to get help on setting up and operating such a system, please contact me on robert.steinhouse@coachingconsultancy.com.