

## Personal Information Management for Executives

### Course Overview

The Personal Information Management Program is a one-to-one, desk-side coaching program. The course is designed to enable Executives and their Administrators 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.

*“Results of this session exceeded my expectations. The personal consulting allowed me to use my time management and organization tools more efficiently.”*

– Former CIO,  
Major Financial Institution

By the end of the one-day coaching program, Executives and their administrators will experience a sense of relaxed, focused control with all objectives, projects, plans, action steps and information organized in Outlook. Key issues addressed include: managing objectives against time and resources, creating the appropriate people architecture to support objectives, creating communication structures to report on results, leading versus managing, delegating, tracking delegated items, prioritizing time, preparing for one-on-one and staff meetings, managing the calendar, e-mail overload, e-mail protocol, and filing and find data easily.

A 30-minute pre-call is conducted prior to the eight-hour coaching day to assess roles, objectives and appropriate customization. In addition, we conduct 360° interviews with peers, superiors, and staff of the executive prior to the program. The program takes place on-site in the client’s office. Following the program, three one-hour follow-up conference calls are held. This program is facilitated by MPS Executive Consultants.

### 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