

## Personal Information Management for Sales and Customer Service

### Course Overview

The Personal Information Management Program is a one-to-one, desk-side coaching program. The course is designed to enable Sales and Customer Service employees 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, Sales and Customer Service employees 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 multiple accounts, tracking data in Outlook and a CRM system, maintaining an organization system while traveling, being proactive in a reactive environment, creating personal boundaries, response times, e-mail overload, e-mail protocol, filing and finding information, dealing with interruptions, tracking delegated items, and prioritizing.

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

*“Outside of first grade reading, third grade multiplication, and high school typing, your class yesterday proved to be the most beneficial and rewarding class I have taken.”*

— Kathleen Sullivan  
Major Financial Institution

### 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