

Take Back Your Life™ for Sales and Customer Service Employees

Course Overview

This course enhances the productivity of Sales and Customer Service employees by teaching them to create and maintain an Integrated Management System. This system uses Microsoft® Office Outlook® and MPS tools to process a constant stream of incoming electronic and voice mail communications, next actions and projects.

Sales and Customer Service personnel learn how to focus effectively on the job without being hindered by the non-stop flood of required—but not necessarily urgent—input, decisions and actions. Employing a three-phase workflow method, they immediately apply the concepts taught to their current work. The system is flexible to adapt to each participant's work style and workload. By the end of the one-day seminar, 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: 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, dealing with interruptions, tracking delegated items and prioritizing. A pre-call is conducted prior to the eight-hour seminar to assess roles, objectives and appropriate customization. The seminar takes place in a computer lab, classroom or conference room with a combination of PC's and laptops. If possible, these computers are connected to the server so participants can work real-time.

"It really hit the mark! This should help translate into better organization, higher job satisfaction, and ultimately higher customer satisfaction."

—Anonymous

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