

Chapter 1

Changing Your Outlook on Managing Business

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Managing any business is about doing your job better, not harder. It's about mastering your business, not being a slave to it. That's where Outlook comes in. You can write down and achieve your goals with Outlook. You can create simple and effective solutions to your daily problems.

Businesses of all kinds share common issues revolving around employee relations, planning, and training. Using Outlook as a dashboard or control panel, you can improve the way you confront and manage these issues. With Outlook, you can shrink unnecessary demands and even downsize your anxiety and preoccupation to a realistic level, thus balancing your business and your life. In this chapter, I cover what you need to know to organize and keep track of your goals.

Going Above and Beyond with Outlook

Outlook can increase your productivity by helping you control your objectives, actions, tasks, time commitments, and team workflow. Other *Enterprise Resource Planning (ERP)* systems — computer software that help you manage

your business — typically only include accounting, invoicing, financial management, and inventory control and don't delve into organizing personal activities, team relationships, or communications skills. ERP systems range from inexpensive and effective tools like Peachtree to multimillion-dollar corporate systems, such as SAP or Oracle. Some of the things that Outlook can do for you include the following:

- ✔ The Calendar's collaborative tools can increase your company's productivity by providing tools for working in teams. Teams can share commitments, schedule activities in unison, and track participation. Read more in Chapter 10.
- ✔ You can assign tasks to increase commitments and reduce quarrels by allowing people to accept and respond to automated task requests via e-mail (See Chapter 10.)
- ✔ The Tasks list helps you organize all your pending actions and select list them by priority or due date. Read more in Chapter 2.
- ✔ The Recurrence tool can remind you again and again of anything you need as often as you need it. For example, you can set reminders for weekly reports, monthly payments, or daily tasks. Read more in Chapter 2.
- ✔ The Contacts list lets you record any information about your relationships and even create a customer profile. Read more in Chapter 4.
- ✔ The Outlook automation works to save you time when you make your phone calls, send faxes, or organize and clean your messages. Read more in Chapter 3.
- ✔ You can use e-mail rules to surf over the e-mail tides, eliminating unwanted e-mails and automatically filing e-mails in the right folder for you. Read more in Chapter 8.
- ✔ Mail merge between Contacts list and Word can turn any campaign from impersonal to very personal form letters to electronic messages. Read more in Chapter 16.
- ✔ Dialup properties, used with the Contacts list, allow you to customize your own telemarketing center and increase the productivity of your campaigns. Read more in Chapter 16.
- ✔ The Business Communication Manager (BCM), a free add-in for Office Small Business and Professional versions, allows you to control your customers' and prospects' activities from the first point of contact to the close of a deal. Read more in Chapters 7 and 8.
- ✔ Customizing forms to suit your business can improve your company's workflow. Chapter 5 explains how to customize and create forms.



The most powerful Outlook tool is the on-screen reminder. The alarm produces on-screen messages, which reminds you to take action. Whether it's reaching your quarterly business forecast or simply reminding you, year after year, to order your spouse an anniversary gift, this feature makes life much more manageable.

Looking Out for All Parts of Your Business

The purpose of business is to create and keep customers. Without customers, there is no business. But without profit to recover your investment and pay expenses, no business can survive. Marketing, sales, and financial control are all key issues, but you also need to innovate — not only in the product or service but also in the general procedures of your business. Outlook is an additional tool for your current sales and accounting systems that can help you achieve your goals and objectives with innovative solutions.

Customers

No business exists without customers, and you create customers through relationships. Therefore, relationships are perhaps the most important part of any business. Unfortunately, companies all too often think about their products or services, but forget how to develop customer relationships or understand and solve their customers' problems.

You can develop your customer relationships one by one if your business allows you to do so. But people in businesses that have thousands of customers who don't require daily attention often forget that they can still develop relationships with their customers. They can take actions and communicate with customers in groups. Outlook categories allow you to group your customers for various needs. (Read more about categories in Chapter 4.)

Businesses that work with customers in large groups, such as credit-card companies, newspapers, and the phone company, know customer addresses and names. You may have the intelligence to sell mass products, but the customers are still just names in your databases. While you have an understanding about what it takes to work with groups of people, rather than single individuals, you still don't know your customers' wishes or desires to fulfill one by one. You can use Outlook Categories to classify your customer base and work by company type, territory, or vertical markets (see Chapter 4).

Likewise, businesses that work with individual customers must develop a personal and continuous relationship. In order to understand their wishes and desires, you must know these people well and understand their preferences, tastes, and moods. You may forget or neglect information written in a notepad or stored in your head. Outlook contacts can help you collect, record, and organize any information about your customers. Recording customer wishes can be a good way to improve your product or service and increase your customer satisfaction. Customer care and attention is the successful key to any personal business relationship (see Chapter 4).



Do you want to send a compliment to your customers when their baseball or basketball team wins a game? Just select your contact by team and send them an e-mail. Classify them by importance, like Platinum, Gold, and Silver, and set up the reminder to touch base twice a week or once a month. Read more in Chapter 14.

Marketing and sales

Marketing is the strategies, tactics, and activities involved in getting your message to intended target markets. The focus is usually on selling or facilitating the introduction of a product or service. Can you send, in a few clicks, a Happy New Year card to your customer base? With your customer base updated with Outlook Contacts, not only can you send a card, but you can also group customers by categories and take different actions for each group. You can even design a telemarketing program that includes automatic dialup from your PC. Chapter 16 explains the use of checklists for marketing programs, events, and communications.

When it comes to the sales side of things, “Hey, where is my order?” is an oft-dreaded follow-up question for many salespeople. If the customer has to ask this question, it can create an unpleasant feeling in the customer or even cause him to send his order to a competitor. The successful salesman focuses not on the customer but on what the customer is looking at and makes that the common starting point for building a relationship. Not only can Outlook help you get to know your customers and their goals better, but it can also help you take the proper actions on time. For more on what to do when, see Chapter 14.

Innovation

Innovation is not only about new products or services. It’s also about improving the way you work — better, easier, faster. It’s even about shrinking your costs. Using Outlook, you can increase your productivity with less stress by using the applications explained throughout this book.

If your entire team uses Outlook's collaborative tools and reminders, your company can be more productive, and you can build a stronger and closer team. Collaborative tools and reminders can improve the way you work in several key areas:

- ✓ **Personnel and productivity:** Using Outlook Tasks and Calendars can increase your staff's productivity. Sending Tasks or Invitations can help decrease internal quarrels and solidify commitments. For more on facilitating teamwork, see Chapter 10.
- ✓ **Financial and material resources:** You may think that an ERP would take care of the whole business, and if you're concerned with only the financial numbers, you're probably correct. But Outlook can help eliminate those painful phone calls asking for forgotten payments. It can also help you avoid sending your own collection notices to your customers. The Reminders alarm prompts you to take the right action, on time, and avoid disorganization and unwanted phone calls. For more on minding these important details, see Chapter 17.
- ✓ **Profit:** The result of improving relationships with your customers and teams with Outlook will be increased productivity by a stressfree team of professionals.

Business goals and objectives

Management by objective works — if you know the objectives. What is your business objective in five years? Write the objective and steps to achieve your goal, even if you're not sure about them. Write them in an Outlook Tasks because you may forget about a piece of paper in your drawer. Turn on the task alarm to pop up in your face as scheduled, check the steps completed, and then start the next ones. Did you change your goals? Rewrite them. No matter what kind of objective you want to achieve, the Outlook Tasks feature is ready to accept any goal, like doubling your company income in five years, closing the best order of the week, planning for a baby, receiving your master's degree or Ph.D., increasing your customer base, moving to a new house, moving your office, changing your profession, receiving a deserved promotion, launching a new product, losing weight, winning the Olympic games, taking your next vacation . . . whatever you want!

Writing your objectives for next month, next year, or for the next five years is the path to accomplishing them. Outlook Tasks reminds you of key steps along the way and gives you the chance to adjust according to your priorities (see Chapter 2).

Customer contact and education

Outlook Contacts is more than a telephone black book; it's an information center to track your relationships and activities. You can attach related documents to the Contact record for easy access, record recent phone call highlights, create anniversary reminders, store personal information about clients, and even build an active telemarketing application. It also has 18 one-click actions, including dialing the phone for you, to save you time. For more information on working with contacts, see Chapter 4.

Sales and fulfillment activities

Analyzing lost orders can, for many companies, reveal where follow-up has been neglected. When calls come into the inside sales department or when outside salespeople come back to the office, they often don't record a customer's pending issues. Later, when the order comes in, the issues may be overlooked. Salespeople aren't paid merely to send quotations to customers but also to follow up on their needs and to understand what's required to get a customer to commit and the deal closed. But salespeople often get bogged down under the flow of everyday activities and lose their focus on the customer, which reduces the number of incoming orders. Opening a Task for each pending quotation and setting pop-up Reminders for next actions can help keep salespeople on track. You can use Reminders for an internal request or just to touch base with customers. For more on tracking sales activities, see Chapter 14.

Procurement

Procurement for office supplies is easy. You can order through the Internet or catalogs or simply go to a store or a supplier's warehouse. But besides these simple orders, how do you control a step-by-step order from an international supplier? How do you control a project being developed by a new supplier? Outlook Tasks can help remind you to place a new order, even if you're working in a corporation with tracking software. Tasks can help you track special projects or actions. Associating the appropriate contacts for each action, you can easily call or send an e-mail while you're working with the task on-screen.

Financial and organizational control

Mailing a check is a task often put off or delayed by something else, causing the unpleasant "Hi, did you send the check?" phone call. You can remember to make monthly payments by using recurring reminders.

Making Outlook Your Control Panel

The huge amount of information you receive, process, and store in your brains nowadays increases stress levels and slows you down like a computer with the hard drive full. Everyone was taught since kindergarten to retain information because information is unchangeable. That's no longer compatible with today's paradigm: that knowledge evolves . . . and quickly. You need to discover how to critique, select, and filter information before it even occupies your brain. To be productive, you need to filter and select valued information to help you achieve your goals. Without some training, most people find it difficult to keep up with the information avalanche and end up trapped beneath it. Understand the problem and start using Outlook to organize the incoming information flow according to your priorities, thus increasing your quality of life.

Making Outlook your control panel means managing your time and tasks by writing or downloading your information and organizing it by priorities, thus achieving your goals (see Chapter 2 for details).

Downloading your memory

Don't tie a string around your finger or place a sticky note on your PC screen anymore. Instead, tell Outlook to remind you. Are you leaving the Office? Print the reminders list or synchronize it with your cell phone or PDA.

Many people wake up daily and inhale their breakfast because they don't have time to sit down and eat it, and they're always late. An ambulance driver doesn't drive 24 hours a day, 7 days a week. He has to rest. So why are people running around as if they were working in an emergency room? Anxiety, stress, and lack of priorities are the roots of this kind of behavior. Downloading your memory into an agenda or daily planner doesn't remind you of your commitments unless you open and read it. Outlook allows you to turn off your ambulance-driver behavior so that you can achieve your commitments and priorities. You can set up pop-up alarms and reminders for events, deadlines, meetings, or anything at all.

Time commitments and to-do commitments aren't the same thing. You can adjust to-do commitments according to the due date and your priorities, but time commitments aren't so easy to change.

✔ **Time commitments:** The 5 p.m. tea at Shelley's house begins at 5 p.m. sharp, so don't be late. Any planned arrangement at a specific time is a commitment. You can use the Calendar to schedule your arrival and leaving time. For more on scheduling, see Chapter 12.

- ✔ **To-do commitments:** It's Monday, and you need to send a sales proposal Friday. You have more than four days to choose when to write the proposal. You can write when and where you want according to your priorities. Simply write each new job on the Tasks list and adjust the Reminder to pop up according to your will.

Planning your goals and activities

Archimedes taught us his physics principle over 2,000 years ago: No two objects can occupy the same space at the same time. By analogy: No two commitments can be done at the same time by the same person. So how do you prioritize your commitments and accomplish them all? If you have your list ready, you have many ways to choose which comes first:

- ✔ **Choose fun first:** If you like it, you tend to do it first. Often, the unpleasant tasks are the ones that you tend to put off and you start them only when you receive complaints.
- ✔ **Process by incoming dates:** Prioritize by doing the first task in, first task out, also known as FIFO (first in, first out). However, if a priority change occurs, this system doesn't work.
- ✔ **Prioritize by due dates:** Adjust a task list according to the delivery date.
- ✔ **Handle by importance:** Look at your most important goals first. Which is the most important job? Start doing it.
- ✔ **Choose important versus urgent tasks:** Downloading all your tasks and time commitments and setting the Reminder alarm with no planning can cause conflicts. You may end up having to "Be at the board meeting" and "Deliver a proposal for your Gold customer" at the same time. To avoid this type of conflict, you need to understand how to distinguish important from urgent tasks. *Important* is what brings results. *Urgent* is the pressure for something to get done.

For more on managing your Tasks, see Chapter 2.