

Control Your Day™

A New Approach to Email and Time Management

Using Microsoft® Outlook

and the concepts of

Getting Things Done®

By Jim McCullen

Legal

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Preface to 2nd Edition

The first edition of Control Your Day was released in January of 2013 in the past 8 months I received hundreds of emails from active users of the system. I used their feedback to make improvements to the book for your benefit.

1. Added a new troubleshooting chapter to share some of the issues I have helped users overcome.
2. Added an appendix with just the step by step content for easy reference. This information is now at the end of the book and is available at www.controlyourday.net as a PDF file.
3. Removed the @Context categories that were in the original version, this was a feature I had started to work on but later decided to abandon.
4. Cleaned up the formatting of the book.
5. Expanded on the Email Management Tips section

Here are a few of the comments I have received when I asked users how CYD has helped them with email management.

It's been about 3 months now, and I love it! I'm still adjusting to some of the settings and how it affects my work flow, but this is by far the best system I've tried. The use of search folders is brilliant! I love being able to look at my list of things to-do without scrolling through all my completed items that I never had time to file. Dumping all my processed messages into a single folder rather than filing individually is liberating! As I said, I'm still adjusting, but this is by far the longest I've gone in trying a new email management system, and I'm still satisfied!

Since Feb or March and have not looked back. I check email now less, have less in my Inbox (currently my CYD folder = 14 messages) and have a true system to delegate, follow up and track tasks.

For a few years now after listening to the VSG podcast. I downloaded and reviewed the book more out of support than need! The entire system helped me bring GTD into my work situation. I was sold on GTD but was struggling with the workflow - CYD made me realise that I could manage the entire process in Outlook.

If you find this book of value, please consider writing a review on amazon.com. If you are interested in publishing on Amazon, check out my latest book “Publishing an Ebook - A Quick Guide to Publishing on the Kindle”

Foreword

When Jim first presented his Control Your Day method on the GTD® Virtual Study Group podcast in February 2009, I had no idea the impact his approach would have. Hundreds of people have requested the slide deck from that presentation and the episode remains one of the most popular we've ever done. I know that hundreds of Outlook users have already benefited tremendously from Jim's approach and I'm excited to see that he's gone on to write this eBook.

People come to me all the time trying to stay on top of handling all their email and, at the same time, manage their tasks. Control Your Day gives solid, practical guidance on how to do both--with less effort and with much greater effectiveness. Instead of worrying about moving back and forth between two (or more) tools, CYD allows you to manage everything from the place where you already spend so much time: your email inbox.

I've heard users rave about CYD for years and it's exciting to celebrate this new eBook launch. I've no doubt that Jim and his CYD method will impact so many people's lives and help them get their work done with greater ease.

Tara Rodden Robinson, Ph.D., ACC
Executive Productivity Coach and Host of the
GTD® Virtual Study Group
Productivity HQ
Corvallis, Oregon
January 4, 2013

Introduction

Are you ready to Control Your Day?

The Control Your Day(CYD)TM methodology uses built-in features of Microsoft Outlook to keep your email messages organized and help you focus on priorities. Ask yourself the following questions to see if, CYD is the right system for you.

- Do you spend a large amount of time moving messages from your inbox and sent folder to subject based folders?
- Does your inbox contain hundreds or thousands of messages that might need your attention?
- Do you struggle with multiple points of focus between your inbox, task list and other tools you use to manage your daily priorities?
- Do you lose track of requests you have delegated?
- Does your email system stress you out?

If you answered yes to any of the questions above, this book will help you learn how to:

- Simplify filing your email.
- Manage incoming emails and tasks.
- Eliminate lost messages by using a series of virtual search folders in Outlook.

The key to the approach is grounded in the simplicity of implementation and use. If you can relieve yourself from using folders and begin to manage tasks directly from your email messages the advantages of CYD will offer positive results.

Benefits of the CYD System, you will:

- Manage all active emails/tasks from one view.

- Eliminate filing messages in subject folders.
- Get to Inbox Zero.
- Receive alerts when delegated tasks are not completed on schedule.
- Lower your Email Stress Level (ESL).

A bit about me

People know me as a productivity hacker. I started with simple index cards, moved to various paper systems and then to hardware/software systems to help organize and control my workload. Reading David Allen's book *Getting Things Done (GTD)* was a turning point for me. I became an instant GTDer and never looked back. If you have not read his books, I highly recommend ordering *Getting Things Done* from Amazon TODAY! You will find many of David's concepts applied in my system including Inbox Zero, using one collection point, contexts, next actions and the weekly review.

Just to be clear I don't spend my days building systems, well at least not email productivity systems. I design supply chain systems for top retailers across North America. The CYD system is a part of my everyday life to stay organized. It works for me, it can work for you.

This E-Book includes everything you need to setup and run CYD. I setup a companion website with videos and printable step by step guides to support the book at www.controlyourday.net. Sign up as a CYD forum member and you can post any questions you have about CYD.

Outlook Versions Supported

The CYD methodology works in versions of Outlook from 2007 forward. It works in both standalone and Exchange installations. The step-by-step instructions in this book are based on Outlook 2010 screens, if you are using an older or

newer version of Outlook the steps may vary slightly.

How to use this book

Read chapters 1 and 2 to get a basic understanding of the benefits of CYD and the steps it will take to implement your new email management system.

Before opening Microsoft Outlook and beginning implementation of CYD, read the rest of the book and review the step-by-step instructions. I want you to be able to visualize how your new email system will work before you begin the implementation.

At that point, open Microsoft Outlook and go through the step-by-step guidelines and setup CYD. The content is organized so that the changes will not affect how you use Outlook today. One of my early beta testers suggested that I make it possible to run CYD and still allow you to use Outlook as you have in the past so you can run a parallel test of CYD before fully implementing it. Once you are comfortable with the way CYD works, you can then make the switch.

Additionally, the last chapter offers email management tips and best practices for email and time management.



If you are a corporate user of Outlook, check with your IT department before you make any changes to Outlook and implement CYD.

I would like to thank my wife, Suzanne, for all of her support and great feedback along the way and my two boys, who put up with me while I locked myself away nights and weekends to write this book.

Maggie, thank you for the edit and your suggestions to improve the chapter intros. As a long time CYD user, you provided constructive feedback that added focus and clarity to the concepts covered in this book. Thanks to Joan and Sharon for the proofreading efforts and to my beta users that implemented CYD directly from the book to make sure I didn't miss anything.

Tara, thank you for the wonderful Foreword and for all your help and support over the years through your GTD Virtual Study Group. (www.tararobinson.com)

Author and productivity guru Augusto Pinaud suggested to restructure the step-by-step chapters with a basic and advanced section. The basic features will get you up and running with CYD. The advanced sections do require a bit more technical skills and possibly some assistance from your IT department if you are a corporate user to make a few configuration changes to Outlook and your Windows registry.

1. CYD - The Big Picture

Chapter Plan

- Explain the concepts of CYD

What is CYD and why do I need it?

The concept of CYD is a methodology to improve the use of Microsoft Outlook so that you keep attention on priorities, eliminate time wasted on random and not important messages and actually feel like you have control over your email.

You need it because you are overwhelmed by the number of emails sitting in your inbox, you are tired of carrying around the burden of trying to respond to them, and you are stressed about the possibility that you missed an important email.

Several years ago I faced my old inbox with frustration and fatigue. The feeling of never getting control of the numerous emails streaming in wore me out. Older mail kept getting pushed down further and further. I started to ignore older messages and would only focus on new messages, losing the ability to respond to important messages previously received. At the same time, I tried to create tasks to track commitments and work I had delegated. My workload management system became a two-window view, my task list and my inbox. This didn't work. The inbox always had my attention and my task list took a back seat. With the speed and volume of email, tasks quickly became outdated and so was this process.

Time for a change

As for many others, Outlook email is my primary tool to manage commitments and communications. In order to manage my tasks and action items, I send myself emails with the work or task listed in the subject field. I send these messages from any device I am using; laptop, mobile phone or Ipad. I found a great smart phone application called **eMemo** that allows you to send emails to yourself in just one step. Open the app, type a task into the subject (such as @NA Book flight to Tacoma) and hit send.

I came up with the idea of the “Control Your Day” virtual search folder. This folder shows messages from my Inbox and Sent folder that require follow-up (my workload). It allows me to see all new and overdue messages (sent and received) in one folder. I set the folder to sort on due date instead of date received. This gave me control in reviewing the sequencing of messages and focused my attention in the right place. Outlook automatically color codes messages that are past due in red, a clear indicator for my attention. Thus CYD was born.

!CYD Virtual Search Folder

	Due D...	From	Subject	Next Action
Flag: Due Date: Today				
	28-Dec...	Bike Nashbar	Save Up to 72% On What You Re...	@Web Chk for Shoes
	30-Dec...	TechSmith	Get started with Camtasia Studio i...	@Web Watch tutorial
	1-Jan-13	auto-confirm@a...	Your Order with Amazon.com	@Call Joe, package arri..
	1-Jan-13	Bike Nashbar	Get Ready for 2013 With An Extra...	
	1-Jan-13	Getting Things ...	[2] discussions and [7] comments...	@Read GTD article
	2-Jan-13	iStockphoto-Tra...	Welcome to iStock. Here's what y...	@NA load graphics
	2-Jan-13	vacycling@goo...	VAcycling: Abridged summary of ...	
	2-Jan-13	Amazon.com Re...	How many stars would you give '...	
	3-Jan-13	Getting Things ...	[4] discussions and [31] comment...	
Flag: Due Date: Tomorrow				
	4-Jan-13	Gazelle	Here's \$10 to help you with your ...	
	4-Jan-13	Amazon.com	Your Amazon.com order of "TRE...	
Flag: Due Date: This Week				
Flag: Due Date: Next Week				

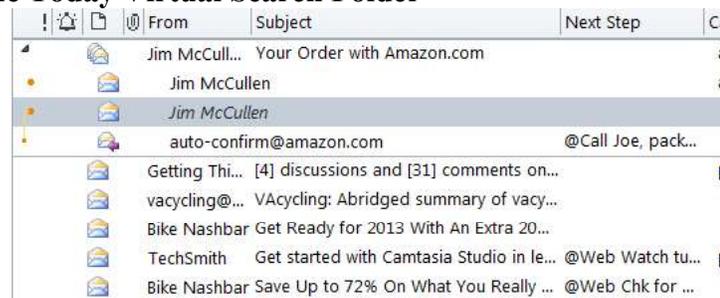
New messages appear in the center of the view in bold (unread) and anything that has a due date in the future is pushed forward in the **CYD folder**. At times I have hundreds of messages that are due at a future date. I no longer stress out over those messages since they have already been pushed forward, and my attention is on overdue messages (red) and new emails arriving today.

The **CYD folder** worked great for me except when on the road or tied up in multi-day meetings. Just a few days away from my email and I would end up with hundreds of messages in the red and it would take me weeks to dig myself out. I recently added two additional folders to the system to help tread water during these times. This has been a great solution while traveling or unable to commit time required to keeping my email in order.

Introducing... The “Due Today” and “Today’s Focus” folders

The virtual folders concept simplifies email management, especially while traveling or away from your computer. The **Due Today folder** contains Inbox and Sent messages that have a Due Date of today. An additional function is involved where this folder is sorted by date received and the Outlook Conversation Thread feature is turned on. The end result is a listing of all messages due today (just received or due date previously set to today). The Outlook conversation thread feature expands the current message and contains all other messages that are part of the same thread. If you wanted to send a response to the thread, you would respond to the latest message sent and ultimately create efficiency in your response. This also allows you to delete all previous messages in the same thread keeping only the last email containing the entire thread.

!Due Today Virtual Search Folder



The **Today's Focus** folder is a list of action items that require attention today, it shows messages with a follow-up flag that are due today and have the category **!Today** assigned. This folder works well if you like to plan your day before you dig into the workload. Look through your active folders and highlight messages you want to focus on and assign the **!Today** category to them.

You can use one, two or all three of these folders as you work through the day. Since they are virtual search

folders in Outlook, if you clear out a message in one (by clearing the follow-up flag), it is removed from all three.

It would be great if you could process and complete each message immediately upon reading the email. Unfortunately for most of us, this is impossible. Next Actions and Contexts track action items you were not able to complete at the time of receiving the email. This way when you do come back to that message, you will see the action item without having to read the entire email again.

Tracking your “Next Action” in Outlook

While designing CYD, I needed a free form text field in Outlook that could easily be referenced and updated. I found a field called Contacts that is stored with each email message. Outlook uses this field to manually link an email message to a contact. I have never seen it used this way, and it works for my Next Actions methodology. The Contacts field is edited from the Message Options dialog box. It can be accessed from a number of views in Outlook. The step-by-step instructions are demonstrated in chapter 9.



Now we have a place to store our Next Actions, we need to place Next Actions into contexts. David Allen talks extensively about Next Actions and contexts in his book *Getting Things Done®*, a book I highly recommend reading. The goal is to define a Next Action for each message that requires additional work and place it into a context or group for future action. The @NA context is a generic group that can be used to capture any next actions. It is up to you whether or not you want to break the contexts beyond the @NA context. Using the @ symbol and a brief prefix makes it very easy to setup a search folder that includes all messages associated to a context.

Action Context Examples
@Agenda Bill – discuss stats
@Call <u>BellCo</u> about invoice
@NA Submit expense report
@Read article on supply chain
@Web research leadership courses

One search folder can be created for each context defined. This ensures all messages with the same context to be visible in one folder. Chapter 6 explains how to setup your @Context folders.

Components of the CYD System

There are some aspects that may seem somewhat technical. My goal is to provide a high level understanding of how CYD works within Microsoft Outlook. If you are feeling a bit confused or overwhelmed, keep reading. Once you understand the methodology of CYD and the value it will bring to your everyday life, implementation will make sense after you begin to work on it.

CYD uses three physical Outlook folders to store your messages. They are Inbox, InboxPro (Processed) and Sent. An active message is a message that has a due date and still requires work on your part. Once you complete that work, you clear the due date which then designates that message as completed in your CYD folders.

Outlook Folder	Purpose
Inbox	Active messages
<u>InboxPro</u>	Completed messages
Sent	All sent messages

In order to tag your emails by topic (a client, project name, family activity, etc.), CYD uses the Category function (not personal folders). Messages can be assigned one or more categories. This allows you to group and organize messages in your InboxPro and Sent folders under multiple topics, if necessary. The Outlook rules engine is a perfect way to auto-assign categories as messages are received. The rules engine can also aid in automatically moving completed messages from Inbox to InboxPro. A manual move of emails is an option and can be a part of your daily or weekly cleanup. The beauty of CYD and one of its major benefits to you is that all received emails are stored in your InboxPro folder and future searches are simple and easy.

CYD greatly simplifies message archiving. At the end of the calendar year, it is recommended to move the InboxPro and Sent folders to an archive PST file for easy storage. If you are an exchange user, you may need to archive those folders more often, especially if your IT shop limits the amount of space you can use on Exchange.

Use Outlook virtual search folders to build

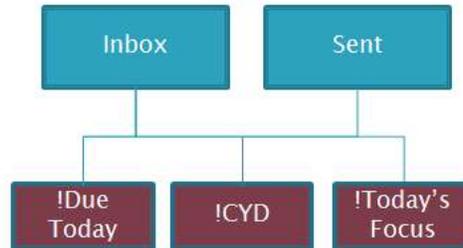
work spaces

Outlook Search Folders are virtual folders that can be created with preset criteria. Your messages are stored in the Inbox, InboxPro and Sent folders. The search folders are just a way to group messages by subject, project, or any other criteria. You have complete flexibility in viewing and working messages in Outlook. Personally, I make extensive use of the search folder feature in CYD. Each CYD folder searches your Inbox and Sent folder for any messages that have a due date assigned.

CYD Folder	Purpose
!CYD	Overdue, current and future active messages
!Due Today	Messages due today
!Today's Focus	Messages flagged by you for today's focus

The heart of CYD is based on the !CYD, !Due Today and !Today's Focus virtual search folders. Outlook uses a Due Date field to manage its follow-up flag feature and is used to prioritize messages across the CYD folders. Chapter 5 provides the step-by-step instructions to setup the CYD follow-up flag rule.

Here is a graphical representation of the CYD folder structure. Again, the Inbox and Sent folders are physical folders that hold all of your messages. The “! Folders” are virtual search folders that show active messages from Inbox and Sent.



Are you convinced that CYD is for you? Can relate to any of the following:

- I lose track of messages, especially if I do not address them immediately.
- My boss, peers or other contacts have to send multiple emails requesting the same thing.
- I have hundreds of unprocessed emails in my Inbox.
- I have too many action item lists and struggle to get anything accomplished on time.
- I can't keep track of work that I have delegated to others.
- I never have time to properly file my messages.
- I say to myself "I hate email"!

I truly believe that CYD can improve the way you manage email and your workload. If you are feeling a bit overwhelmed at this point, don't give up, keep reading. This book will walk you through every step of the process and explain the benefits and value along the way. Support videos are available on the CYD Forum at www.controlyourday.net.

Making CYD a part of life management

You are just 6 important steps away from implementing CYD. The steps are discussed in greater detail throughout the rest of the book.

- Setup Outlook categories to replace your existing

folders.

- Create each of the virtual search folders you will need in CYD.
- Setup rules to flag inbound messages for follow-up and to auto-categorize messages
- Setup a process to move completed message to your InboxPro folder
- Move your existing Inbox to an archive folder (this is the scariest part)
- Start processing and managing your workload with CYD

The chapters ahead cover basic changes needed to implement CYD. At the end of each chapter, I cover features that are more advanced and may require access to administrative features of your computer. These are not required to implement CYD, however they will give you more control over how you setup and configure the CYD system.