



MICROSOFT OUTLOOK TRAININGS

Find our lesson plans and the competencies summary taught in our trainings.



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Competencies Table

Targeted competencies	OTL-101	OTL-102	OTL-104	OTL-203	OTL-301	OTL-302
Use Outlook to create and reply to your emails.	✓					
Adjust the inbox display as needed.	✓					
Create and customize automatic signatures.	✓					
Organize your emails using folders and categories.	✓					
Adjust the options for sending messages (Priority, reminders, confirmations).	✓					
Quickly find emails using filters and search folders.	✓					
Use Outlook to schedule appointments, meetings, and events.		✓				
Adjust calendar options according to your needs.		✓				
Understand the management of requests and responses to meetings in order to use it properly.		✓				
Create visual cues in your calendar using categories.		✓				
Facilitate scheduling meetings using the scheduling wizard.		✓				
Select the right type of communication according to the situation (email, call, in person, text, etc.).			✓			
Understand and properly use the To, Cc, and Bcc fields.			✓			
Recognize what a clear object is.			✓			
Apply a writing technique for more effective email communications.			✓			
Know the tools and options for cleaning emails in the inbox.			✓			

Competencies Table

(More)

Targeted competencies	OTL-101	OTL-102	OTL-104	OTL-203	OTL-301	OTL-302
Work more efficiently using automation tips and tools in Outlook				✓	✓	
Apply a convention for writing clear objects.				✓	✓	
Use Outlook to manage your tasks.				✓		
Clean up by archiving Outlook items.				✓		
Explore different methods of email ranking.				✓	✓	
Apply Sylbert's M3Z method to manage and track your emails, tasks, and priorities.					✓	
Process and empty your inbox daily.					✓	
Do not forget anything by planning the follow-up of the requests sent.					✓	
Identify your short-, medium- and long-term goals.						✓
Achieve your goals using planning, prioritization and execution techniques.						✓
Improve your quality of concentration by managing interruptions and the work environment more effectively.						✓
Stop procrastinating.						✓
Prioritize value-added activities.						✓
Improve your work-life balance.						✓

OTL-101-365

Learn how to manage your Inbox



Objectives

At the end of the training, learners will be able to:

- Control their email environment
- Create and customize their email signatures
- Make it easier to manage their attachments
- Learn how to find all their emails quickly
- Organize the filing of their messages with categories and their personal folders

Practical information

Duration	3 hours
Level	Beginner
Number of participants	7 participants
Languages available	English - French

Prerequisites

General knowledge of the Windows environment.

Target audience

Managers, administrative staff, and new Outlook user

Content

1 - Know how to use the interface

- File tab
- Getting to know the ribbons, groups, and commands
- Contextual tabs
- Mini toolbar
- View and customize the Quick Access Toolbar
- View and customize the ribbon
- Show accelerator keys
- Add a command group or new tab

2 - Inbox

- Folder pane
- Message list
- Reading pane
- Taskbar
- Navigation bar
- Contact pane

3 - Auto-signature

- Create a default signature
- Insert a signature manually

4 - Manage messages

- Message format (HTML, rich text, plain text)
- Change the message format (default, for a message)Receive and send a message
- Show BCC field
- Remove an address from the autofill list from the "To" field
- Reply or forward a message
- Forward the message as an attachment
- Save a draft message
- Group messages (by date, by conversation)
- Change groups
- View, ignore, or clean up a conversation
- Use follow-up flags

5 - Message options

- Specify the importance of a message
- Change the read status of a message
- Apply and edit a category
- View by category
- Create a folder
- Move a message
- Select and delete messages
- Empty the deleted items folder
- Manage spam
- Empty the junk folder

6 - Insert items into a message

- Attachment
- View, save one or more attachments
- Outlook item
- Business card
- Calendar

7 - Confirmations

- Confirmation of receipt
- Read receipt
- Follow-up of confirmation requests

8 - Turn messages into other Outlook items

- Move a message to another folder (tasks, appointments)
- Recall and resend a message
- Search for a message
- Use search folders (default or custom)
- Custom search folders

Included with the training



Complete manual with
step-by-step explanations



Exercise worksheets
seen in class



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Post-training follow-up
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OTL-102-365

Manage your time better with the Calendar



Objectives

At the end of the training, participants will be able to:

- Plan their time using the calendar
- Organize meetings according to people's availability
- Schedule recurring appointments, events, and meetings
- Send their availability to external people and share their calendar
- Manage multiple calendars simultaneously

Practical information

Duration	3 Hours
Level	Beginner
Number of participants	7 participants
Training Languages	English, French

Requisites

Have completed the OTL-101 workshop or have equivalent knowledge.

Target audience

Managers, administrative staff, or anyone using Outlook as part of their work

Content

1 - View calendar

- Show panes (folders, appointments, or reading pane)
- Daily Task list
- Navigation buttons

2 - Calendar items

- Create and edit appointments and events
- Disable default Reminder
- Copy or delete an appointment
- Insert elements (file, hyperlink, etc.)
- Turn an email into an appointment
- Organize a meeting at work or online with Teams
- Propose a new time and cancel a meeting
- Respond to a meeting request
- Edit and track a meeting
- Contact participants
- Print the list of participants
- Change the priority of an item
- Mark an item as private

- Create a recurring calendar item
- Edit, delete an item or series of periodic items
- Assign a category
- Edit the list of categories
- Show or disable a category
- Find an appointment, event or meeting

3 - New calendars

- Create a shared calendar
- Add members to a shared calendar
- Add an item to the shared calendar
- Create and view a calendar group
- Delete or rename a calendar group

4 - Share a Calendar

- Share a calendar by email
- Share your calendar with a colleague

5 - Print a calendar

Included with the training



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OTL-104

Email Writing Ethics and Best Practices



Objectives

With this training, participants will be able to:

- Select the right mode of communication for a given situation
- Apply the principles of ethical email writing
- Reduce the number of emails exchanged by communicating effectively

Practical information

Duration	1,5 hours
Level	Beginner
Number of participants	7 participants (online) 15 participants (face-to-face)
Languages available	French - English

Prerequisites

None

Target audience

Managers, Administrative staff, Customer service employees or anyone who needs to communicate with internal or external customers by email.

Content

1 - Select the right mode of communication for a given situation

- Identify if email is the right mode of communication for a given situation

2 - Apply the principles of ethical email writing

2.1 - Apply the principles of ethical email writing

- Use To, CC and BCC fields correctly
- Use a convention for writing subject lines
- Structure a message to make it easier to read
- Create a communication template with the Quick Part

2.2 - Make a review before sending

- Perform a language revision
- Selecting how to send attachments

2.3 - Reply efficiently to emails

- Determining a reasonable response time
- When to put your away message
- How to manage multiple email exchanges

Included with your training



Complete manual with step-by-step explanations



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OTL-203

Manage your Emails Efficiently, from Sending to Archiving



Objectives

With this training, participants will be able to:

- Use the red flag properly and understand its impact
- Use an efficient process to manage your Inbox
- Organize of your messages filing in personal folders
- Save time with automatic filing and archiving
- Customize new message notifications

Practical information

Duration	3 hours
Level	Intermediate
Number of participants	7 participants
Languages available	English - French

Prerequisites

General knowledge of the Windows environment

Target audience

Managers, administrative staff, or any person with difficulties in managing its workload

Content

1 - *Optimizing the Outlook Interface*

- Making the right alert choices
- Using the Reading Pane
- Managing Contacts

2 - *Methods, conventions, and options for sending emails*

- Creating a complete and structured header
- Creating, edit, and locate a Contact group
- Sending a message to a Contact group or part of a Contact group
- Conventions for writing subjects (project management, email reading management)
- Send Options (drafts folder, attachments, priorities, confirmations, and follow-ups, resending)

3 - *Sorting and search*

- Sort and group
- Search for emails
- Search Folders (standards, personalized, from people, from specific words)
- Enable Out of Office Manager for Exchange or Microsoft 365

4 - Email Management Process

- Prioritizing message reading
- Management discipline (objectives and filing methods)
- Marking a message for follow-up and complete it
- Creating a quick task
- Transform messages into tasks or appointments
- Insert hyperlinks or Outlook elements

5 -Categories

- Assign Categories
- Display by Categories

6 -Quick Steps

- Creating and editing a Quick Step
- Managing Quick Steps

7 - Rules and Archives

- Using Rules and Alerts wizard (types of rules, conditions, actions, exceptions)
- Archiving (automatic and personalized archiving, manual archiving)
- Display or hide the Archives folder

Included with your training



Complete manual with
step-by-step explanations



Exercise worksheets
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OTL-301

Take Control of your Workday with the « M3Z » Method



Objectives

With this training, participants will be able to:

- Keep control of your emails to end your workdays with an « empty inbox »
- Effectively organize your day centralizing all your tasks in one place
- Facilitate the priority of your urgent tasks
- Focus on your work according to your priorities and timing
- Provide better track of your delegated tasks
- Increase your efficiency and save at least 20% of your time

Practical information

Duration	6 hours
Level	Advanced
Number of participants	Online: 5 participants In-company: 7 participants
Languages available	English - French

Prerequisites

Managers, administrative staff, or any person with difficulties in managing its workload.

Target audience

Managers, administrative staff, or any person with difficulties in managing its workload

Content

1 - Become familiar with the « 3 Zones Method »

- Symptoms of poor management tasks
- Benefits of good management tasks
- Why is this method effective
- Difference between an urgent task and a major task
- The skyline concepts
- Define the « 3 Zones Method »
- Analyze the process of the « 3 Zones Method »

2 - Optimize the taskbar configuration in connection with the « 3 Zones Method »

- View and define the taskbar functions
- The « tasks » form
- Start date or due date?
- Create a task from the taskbar
- Mark a task as completed from the taskbar
- View completed tasks
- Configure the taskbar
- Test the new taskbar settings

3 - Apply the « 3 Zones Method » in Outlook

- Use a drafting convention of the task object
- Follow up on delegated tasks
- Review, edit and postpone tasks

4 - Optimize the tasks file configuration in relation with the « 3 Zones Method »

- Read the tasks file
- Use predefined Outlook views
- Create custom views

5 - Become familiar with the email management process

- The impact of emails in our work reality
- Analyze the email management process

6 - Apply the email management process

- Turn your emails into tasks
- Insert an email in a task
- Insert hyperlinks in a task
- Use trace flag « Flag » to mark a message
- Keep track of sent messages
- Use the « processed message » file
- Group your Outlook items by category
- Use the quick actions
- Create rules

Included with your training



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OTL-302

Improve time and activity management with the Outlook agenda



Objectives

With this training, you will be able to:

- Analyze time management to identify areas for improvement.
- Identify strategies to effectively organize and prioritize your activities.
- Apply techniques and methods to plan your activities using Outlook.

Practical information

Duration	3 Hours
Level	Advanced
Nombre de participants	7 participants
Languages taught	English-French

Prerequisites

Have completed Workshops OTL-301, OTL-102 or knowledge equivalent.

Target audience

Managers and administrative staff, or anyone having difficulties managing their workload.

Content

1 - Analyze what should be part of your planning

Using a planning template, the participant will be asked to:

- Clearly define your role and responsibilities.
- Identify priorities related to responsibilities.
- Set SMART goals for the next month/quarter.
- Identify other high-return activities to plan.

2 - Effectively planning workload in Outlook agenda

- Establish your time budget.
- Effectively plan your time in Outlook in line with your previously identified month/quarter goals.
- Learn techniques to manage your time budget on a weekly basis.
- Identify opportunities to optimize your schedule.
- Save time with Outlook planning tools

3 - Achieve your plan

- Gather the winning conditions for the realization of your plan.
- Identify and process the main time-consuming tasks at work.
- Learn tips to create a work environment conducive to concentration.
- Stay focused on your priorities – work on your big rocks first (Covey's principle) and apply methods to avoid recurring procrastination.

4 - Improve planning techniques

- Set up your planning routine using templates given to participants.
- Analyze the use of your time using an Excel tool offered to participants (activity log).
- Learn how to create different views in Outlook to make it easier to schedule daily and weekly task lists.

Included with your training



Complete guide with explanations and step-by-step



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