

Personal Excellence Series

Personal Excellence Workshop



Personal Excellence Workshop

High Performing Teams Need High Performing People

- Successful team efforts require individuals to be highly motivated and self managing
- People can develop the necessary skills by focusing on their foundation, work organization, and action execution

Do you identify with these people?

- **Addicted to the Urgent** – I work on what's in front of me now.
- **Happy to Help** – I'm always working on other people's agendas.
- **Organization is for the Weak** – I don't have time to get organized, I'm too busy.
- **Pack Rat** – Don't touch my piles, I know where everything is.
- **Organization is too Left Brain** – I'm a free spirit, I work on what moves me.

Feel more organized and manage the details confidently

The Personal Excellence workshop is targeted at individuals motivated in discovering better ways to achieve life balance and demonstrate excellence in every facet of their life, professional and personal.

The workshop will help you to:

- Understand why organizational techniques are difficult to make into habits
- Discover ways of changing perception and shifting your center to gain more from the workshop techniques
- Understand life's pressure points and identify methods to clearly articulate the goals and projects focused on creating balance
- Identify daily organizational techniques that help you focus on your goals and manage the firestorm of activities and expectations

The Workshop includes:

- Workshop booklet and worksheets
- The 7 Habits of Highly Effective People by Stephen R. Covey book
- Getting Things Done: The Art of Stress Free Productivity by David Allen
- A free copy of the Ceptara Organizer 2007 Outlook Add-in
- Six Sigma Black Belt Instructor

Agenda

- **Introduction**
 - Understanding your key objectives for the workshop
 - Introduction to the topics
- **Change Your Perspective**
 - An inside out approach
 - Discovering your role in your personal growth
 - Articulating your Personal Mission Statement
- **My Goals as a Whole Person**
 - Understand the pressure points
 - Clearly articulate goals in each life area
 - Put in place organized action to achieve your goals
- **Managing the Details**
 - Establish a personal management execution model
 - Identify daily organizational techniques & tools
- **Recap**
 - Review of the topics
 - Walk away execution plan
 - Additional resources

Contact Information

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Personal Organizer Add-in



The Personal Organizer Add-in is an Outlook 2007 or 2010 application that was designed to help the individual achieve greater focus. It builds on the practices and techniques discussed in the Personal Excellence series training by focusing the individual on their personal objectives through the creation and management of projects and action.

Key Features

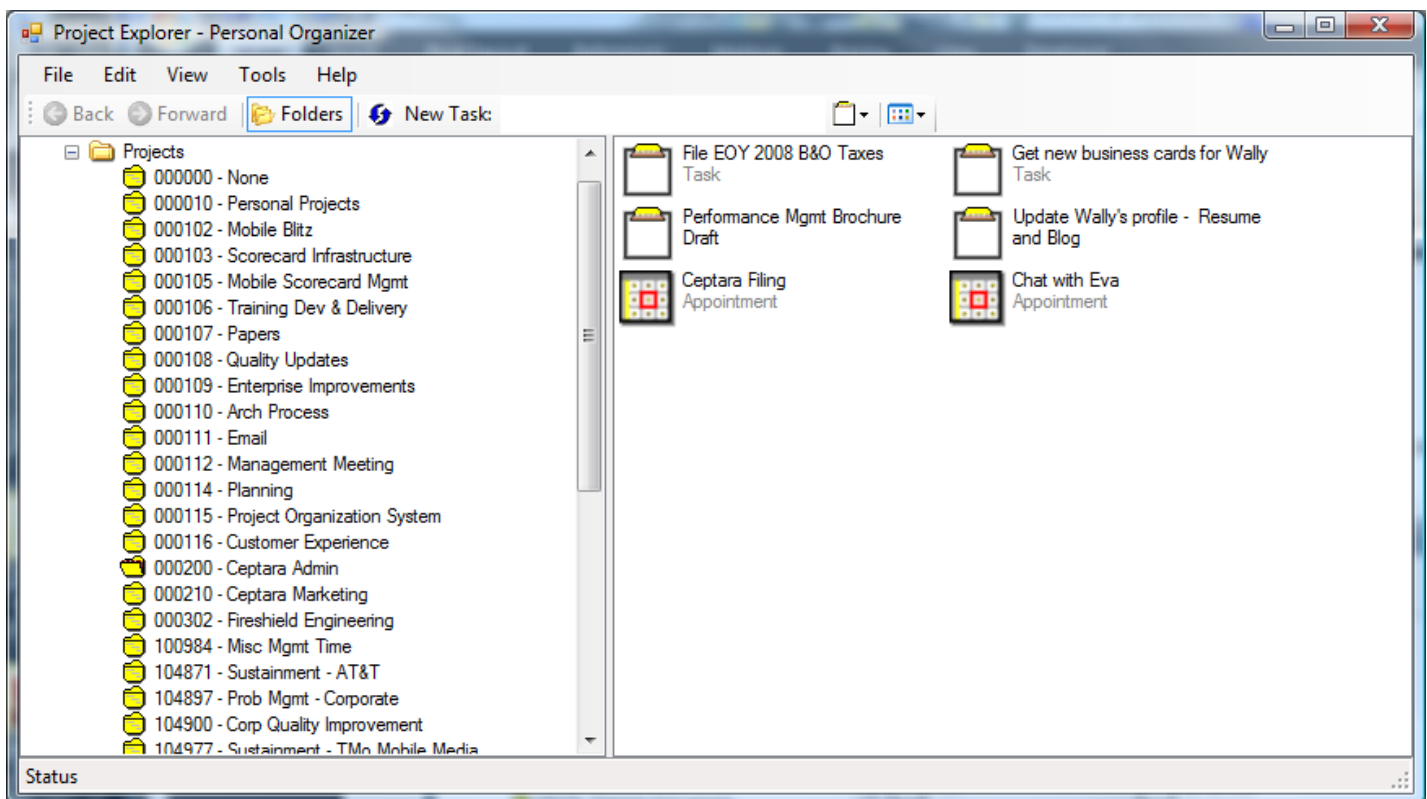
The organizer adds three new user interfaces to Outlook, the **Project Explorer**, the **My Organizer** planner, and new Ribbon buttons for each Outlook item.

Project Explorer

The Project Explorer enables organizing communications, action and reference material by project. This helps the individual assure their information is aligned to the projects that enable achieving their goals.

Key Capabilities

- Manage project properties such a title, category name, color, code, and time distribution
- Promotes managing items by project
- Enables adding tasks and sub-tasks by project
- Promotes the quick management of action through extensive context menus and drag & drop capability
- Enables the ability to export, import, save and report project information.



My Organizer Planner

By adding a new folder home page, the organizer features a one screen view of all of the information necessary to facilitate action.

Key Capabilities

- One screen view for calendar, organized tasks, metrics and messages. Action and work time is the focus with messaging included but not emphasized.
- A task pane has been added with key statistics such numbers of tasks in a workflow, number of tasks past due, etc. with added charting to facilitate quick recognition of what requires focus.
- By tagging calendar items, the task pane presents time spent on different projects supporting time reporting and more informed task work estimation.
- Ability to filter on a project or by focus to clearly present actions that are to be accomplished
- Quick buttons for creating new Outlook items and analyzing recorded project time
- Extensive uses of right click context menus to facilitate quick action for marking completion, changing status, changing project, or scheduling work.

The screenshot displays the 'Planner - Microsoft Outlook' window. The main area shows a calendar for October 24-26, 2008, with tasks like 'Updated: JDE Project Time Tracking due today' and 'Dylan Lindstrom's Birthday'. The 'To-Do Bar' shows a calendar for October and November 2008. The 'Tasks' pane lists tasks such as 'Publish Monthly Blog' and 'Get emissions test for the truck'. The 'Organizer' pane features a pie chart for 'All Projects' and a weather forecast for Bothell, WA.

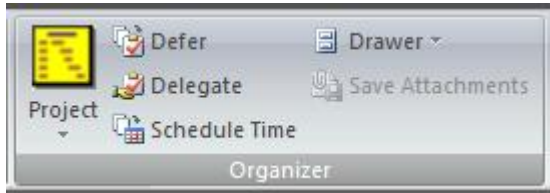
Task Subject	Due Date	Status
Purchase new receiver	None	Not Started
get a new battery for 8525	None	Not Started
Get emissions test for the truck	Sat 10/25...	Not Started
Get the mantle clock fixed	None	Not Started
Consider a wall safe in the Den	None	Not Started

Ribbon Interface Additions

Each supported Outlook item has additional buttons and menus on the main ribbon.

Mail Read

Ribbon controls to categorize an incoming message to a project, create action (Defer to task or Schedule Time), save message to the drawer (a journal item, a Windows or Outlook folder) or save just the attachments.



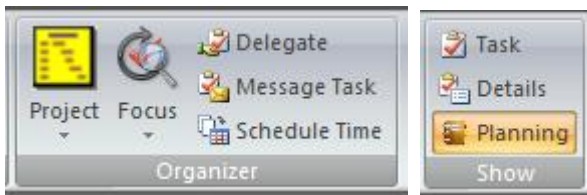
Mail Compose

Send an e-mail as a task request or set the Follow Up flag to create a task to remind you to follow-up in the future. Task requests are delegations to team members, follow ups are task reminders for you to take action.



Task

Ability to categorize a task to a project, assign a Focus, delegate a task, create a communication, or create a work appointment. Adds a planning tab to manage delegations, create sub-tasks, or set a timer to track and log work time.



Calendar

Ability to categorize an appointment to a project, create an action item, or in the case of individuals with conference rooms in the Global Address List, the ability to find an open conference room.



Journal

Ability to categorize a journal item to a project, create action or log work time spent on the journal topic.



Contact

Ability to categorize a contact to a project, create a task referencing the contact, or delegate a task to the contact. Adds a planning tab to help manage delegated tasks, great for one on one meetings with team members.

