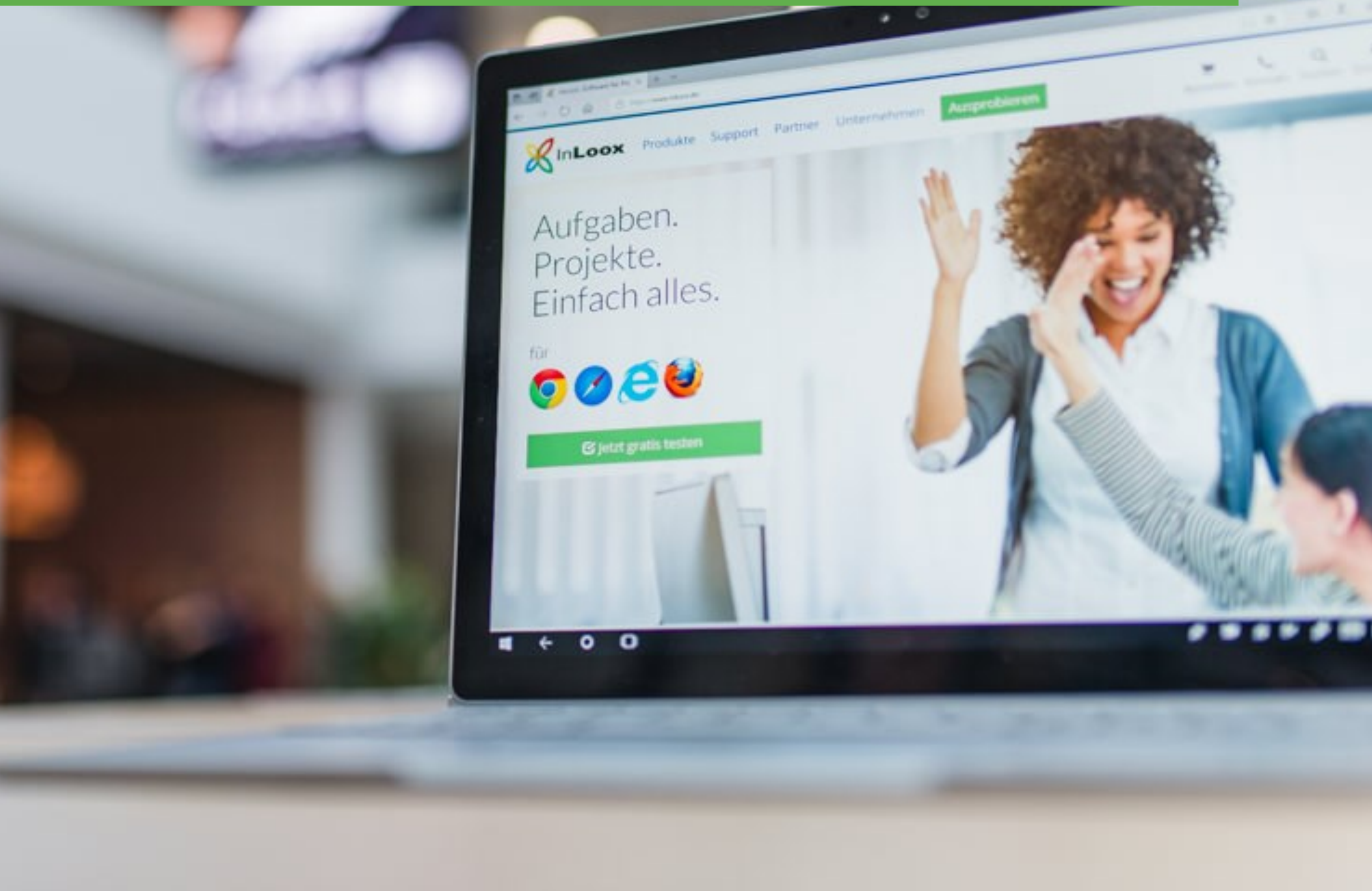
How to Focus in Your Daily Work with InLoox



An InLoox Whitepaper

Inhalt

1. Focus instead of multitasking

It is often difficult to focus on the really important tasks. The telephone rings, the colleague is standing in the room with a question or you are getting new tasks in nearly every minute. This me-ans you quickly lose track of what's going on. Without any structure, you jump from one task to the next so quickly and ask yourself at the end of the working day what you acutally did all day. InLoox can help you to prevent this.

In the **second chapter** you will learn how to concentrate on the **important tasks** and work through your to-do's according to their **priority.**

The goal is to organize you daily work with this simple approach:

- Structure tasks according to their priority
- Quickly, compile an individual task view
- Complete the most important tasks first

In the **third chapter** we will change perspective and we will have a closer look on the scenario of **team meetings** and **team work.**

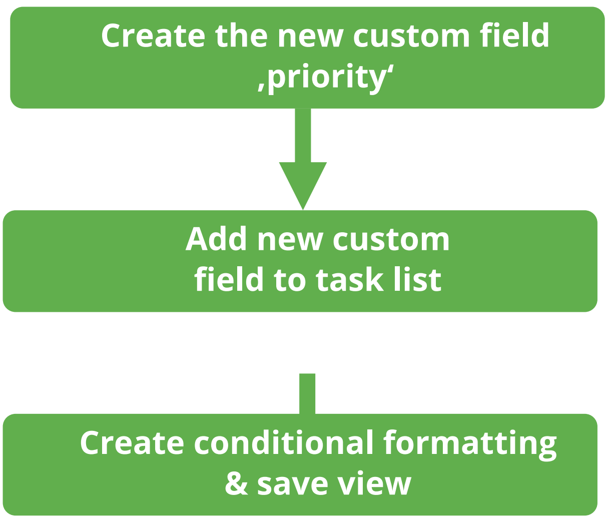
2. Focus in your daily work routine

Constant swichting between different tasks and a lack of focus – that seems familiar to you? InLoox can support you in structuring you daily work routine.

With the help of a quickly compiled view, you can always complete the most important tasks first. You then prioritise all new incoming work assignments according to the same pattern and can see at a glance what you should deal with first.

How to simply prioritize tasks

To easily prioritize tasks using InLoox, we proceed as follows:

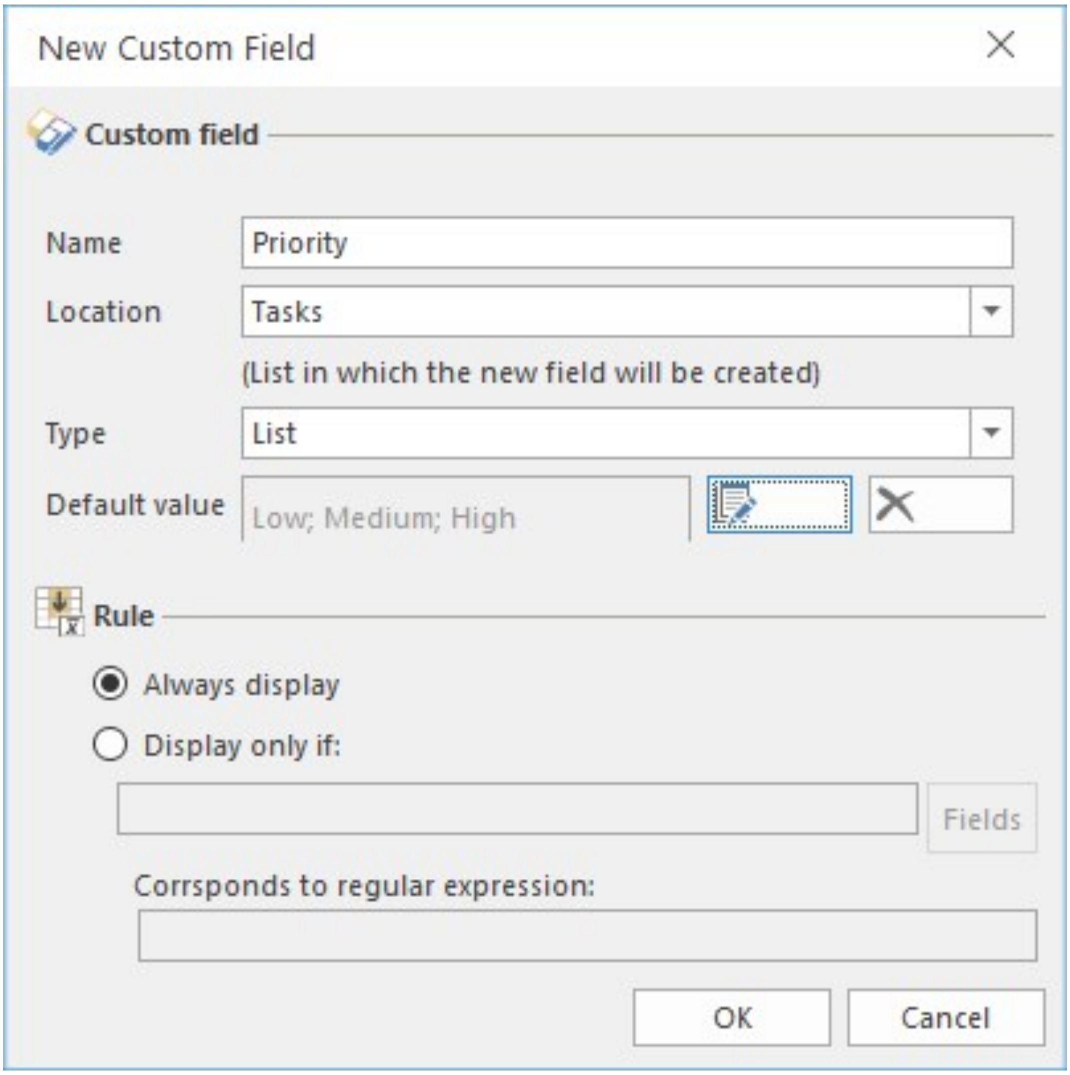


2.1 Create a new custom field

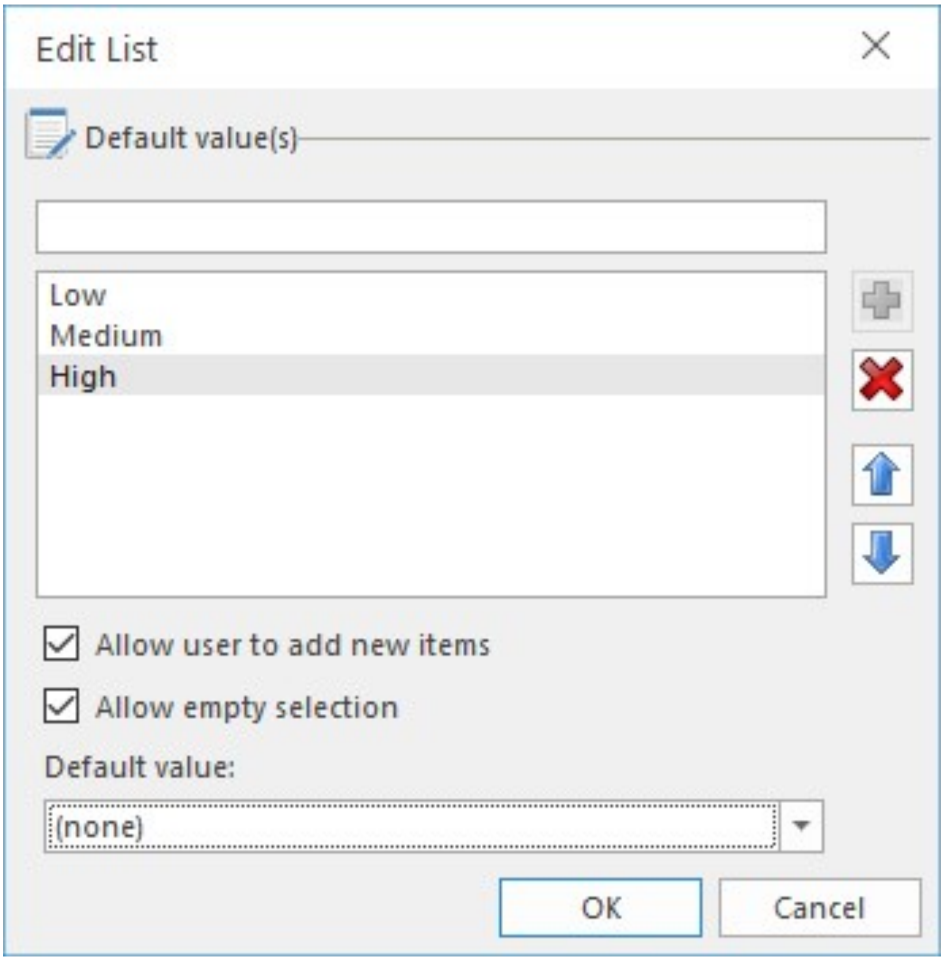
In the first step we create a new custom field for the priority of tasks in the **InLoox options**:

1. In Outlook, open the InLoox Options by clicking on **File** and on **InLoox Options** .

2. Click on **Custom Fields** and then on **New** to create a new type of custom fields.



- **Name**: Priority
- **Location**: Tasks
- **Type**: List (= dropdown field)
- **Default value**: Edit



- **Default values**: Low, Medium, High
- **Allow users to add new items**: The custom field can be edited later
- **Allow empty selection**: You can allow InLoox users to leave the custom field empty by setting a mark.

4. Click on **OK** >> **OK.**

5. The new custom field has been created. Click on **Apply** and **OK.**

2.2 Add a new custom field to task list

1. Open the global task list by clicking on **Tasks** in the InLoox ribbon.

2. Open the context menu with the right mouse button and click on **Select Fields**.

3. A list with all available fields opens. This includes both native fields, which are available by default in InLoox, and fields created by the user.

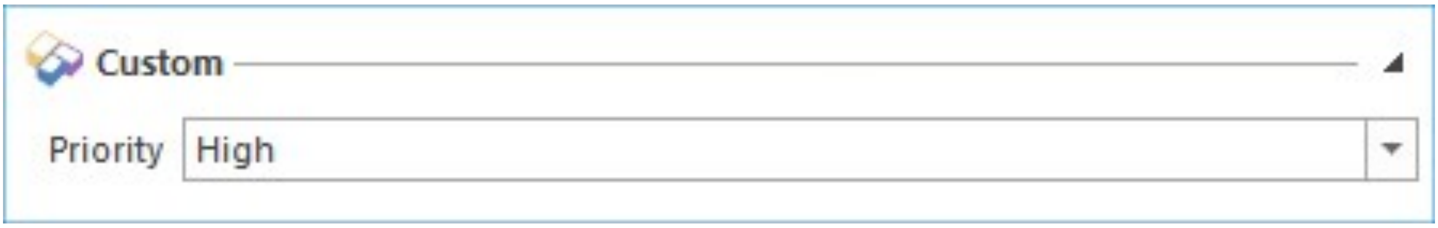
4. Find the new **Priority** field and drag and drop it to the desired location.

In the next step, we will create a conditional formatting for the priority field. So that the result is immediately recognizable, you can now set the priority for some tasks.

1. Double-click on the respective task in the task list to open the sidepanel.

2. In the area custom fields, select low, medium or high for the new priority field.

3. Do this for about three to five tasks.



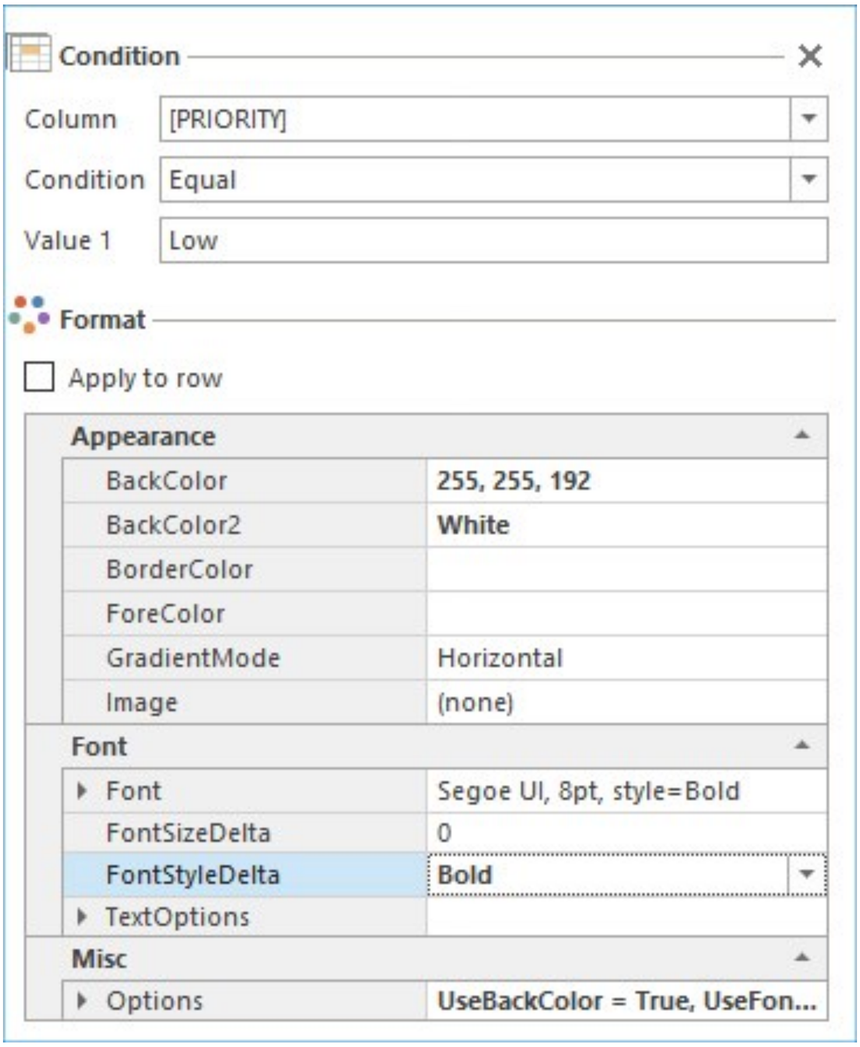
2.3 Create conditionl formatting

Conditional formatting allows you to format both native and custom fields.

1. In the task list: Click **Start** and **Conditional Formatting.** From the dropdown list, choose **Add Simple Formatting.**

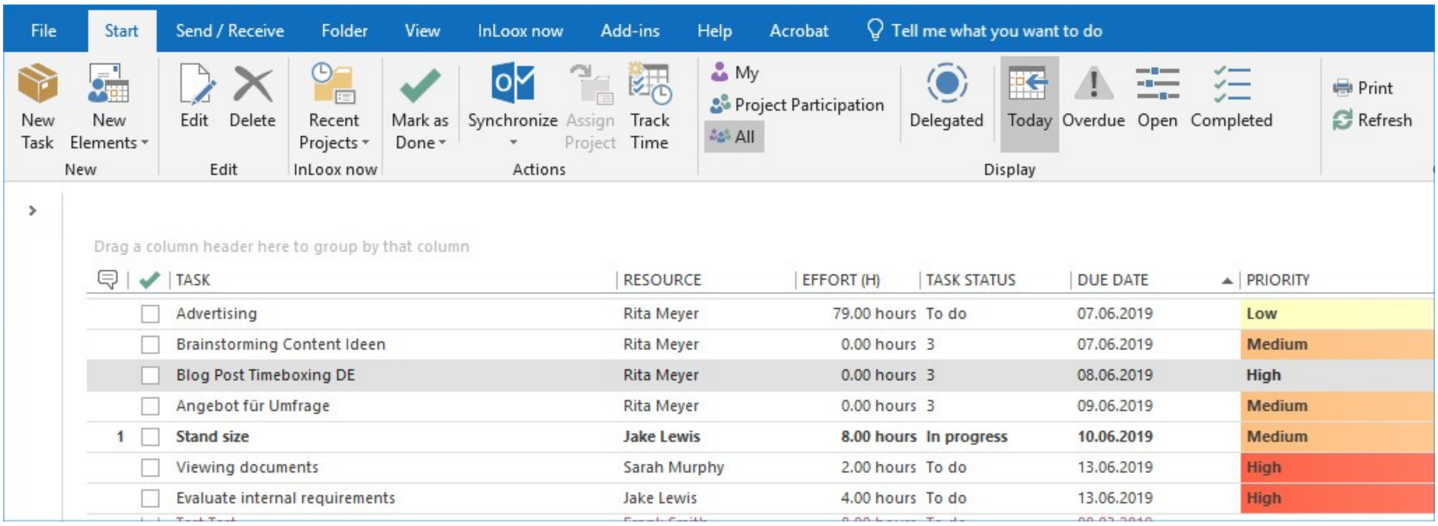
2. Define the settings for formatting via the page panel:

- **Column:** Priority
- **Condition:** Equal
- **Value 1**: Low
- **BackColor**: Select a color e.g. yellow
- **Font**: Edit font size, color, stlye



3. Repeat the second step for the priorities medium and high. The only differences will be in the field **Value 1** (Medium or Low) and in the field **BackColor** (e.g. for medium you select orange & for high you select red).

4. After you have done this, your global task list may look like this:



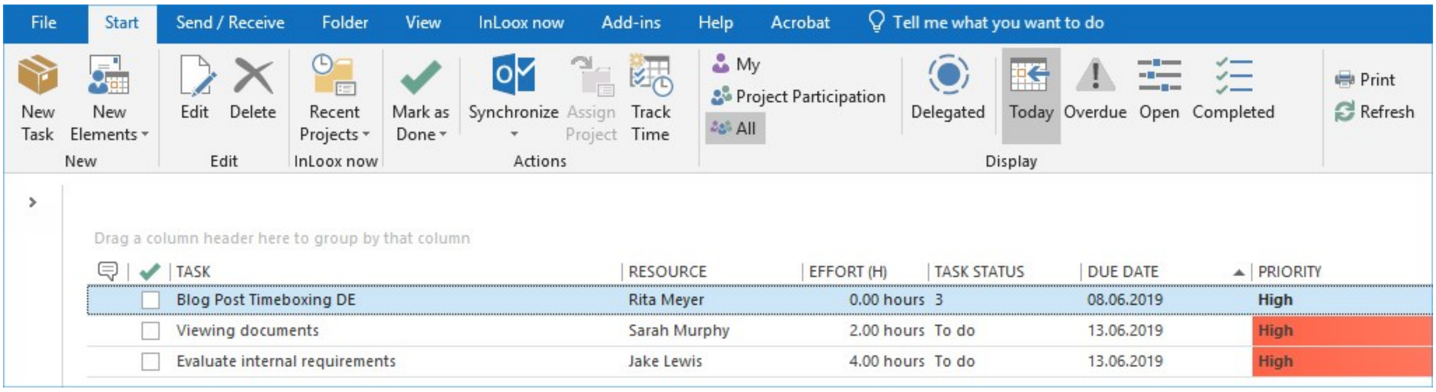
2.4 Create and save view for high-priority tasks

To get an overview of the tasks with the highest priority, it is best to create your own view for the global task list:

1. Click on the **funnel** icon in the **Priority** column and set the filter to **High**.

2. Click on the **Due date** field to sort by it.

3. Now only the high-priority tasks are displayed in the correct order :



4. To access this view at any time with just one click, click **Start** >> **Save** >> **Save current view.**

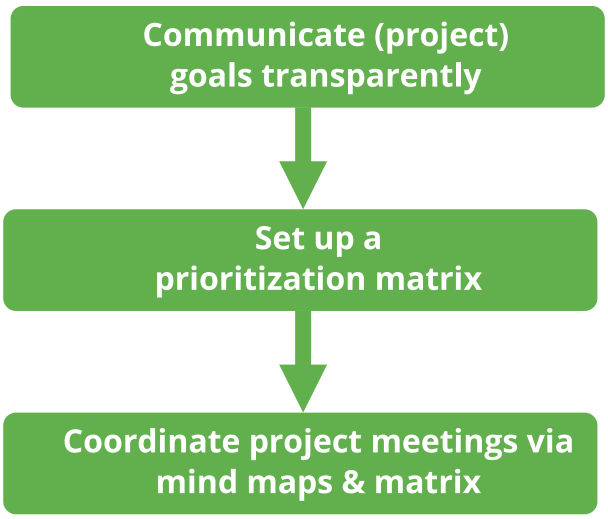
5. Name the view: e.g. "**High Priority Tasks**". And decide whether you want to make the view available to your colleagues or whether you only want to use it for yourself.

6. The view now appears in the tree structure on the left side under Tasks and can be called up at any time.

3. Focus together as a team

Now that we have dealt with possibilities for focused work in the personal everyday life, we take a closer look at the different options for working more focused as a team.

Here we will focus on the scenario of team meetings later on. Everyone has certainly been to unstructured meetings where thousands of new tasks have emerged out of the sudden. In the end, everyone leaves the meeting room stressed and overloaded, not knowing which task to start with. Below you will find an easy way to solve this problem with InLoox.

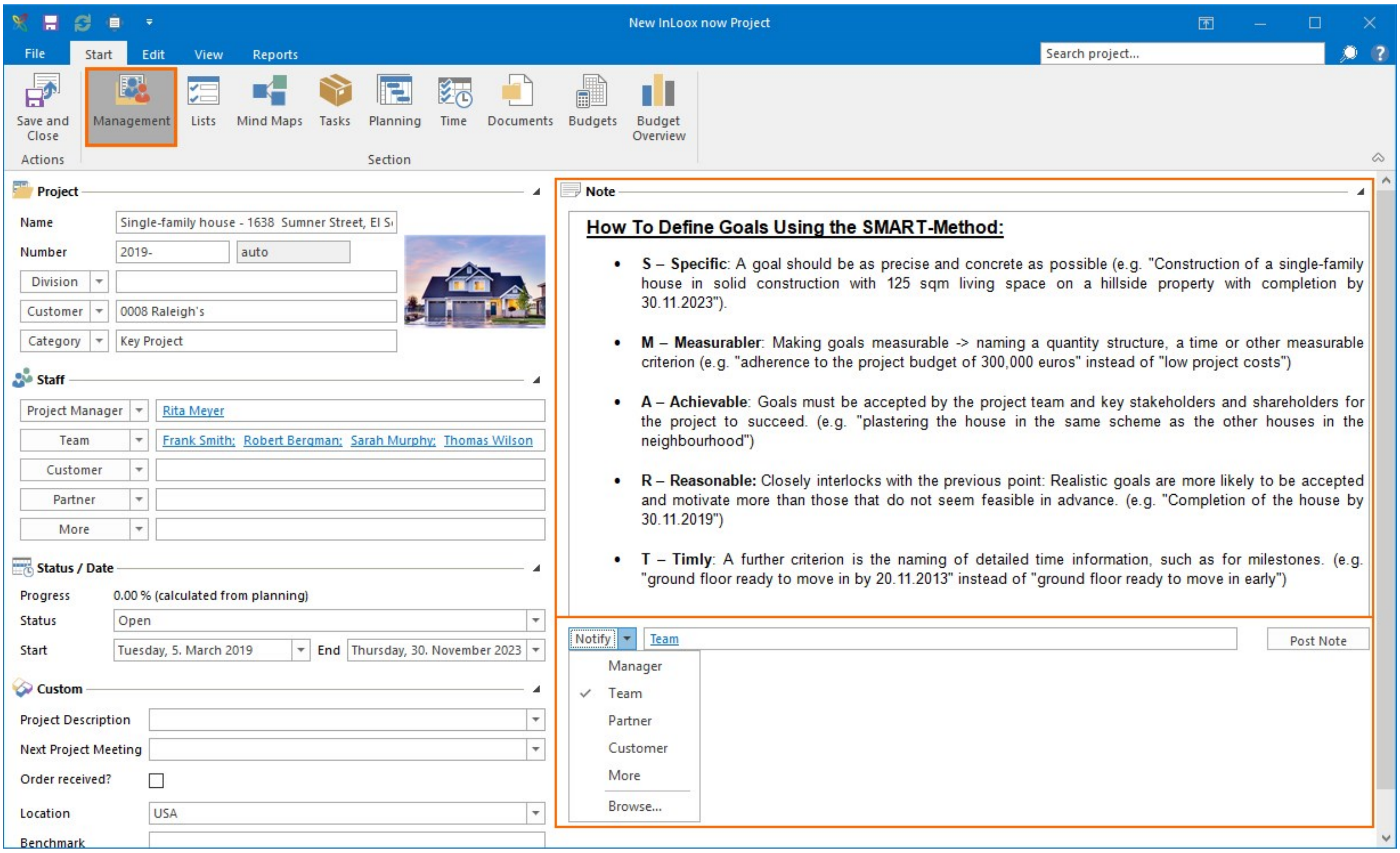


3.1 Communicate goals transparently

The first step towards being able to work in a focused way is to set goals. Especially in larger teams it is important that everyone knows about the goals of the project. In order to keep goals comprehensible and visible for everyone, we recommend the note function on the support page of the InLoox project. The project team has access to these notes at any time. A quick notification can be easily sent for new notes. The notification function saves an enormous amount of time. Instead of informing everyone about the new note by e-mail, you simply notify them directly with InLoox.

Goals can, for example, be defined using the SMART method:

- **S – Specific:**:A goal should be as precise and concrete as possible (e.g. "Construction of a single-family house in solid construction with 125 sqm living space on a hillside property with completion by 30.11.2023").
- **M – Measurable:** Making goals measurable -> naming a quantity structure, a time or other measurable criterion (e.g. "adherence to the project budget of 300,000 euros" instead of "low project costs").
- **A – Achievable:** Goals must be accepted by the project team and key stakeholders and shareholders for the project to succeed. (e.g. "plastering the house in the same scheme as the other houses in the neighbourhood").
- **R – Reasonable:** Closely interlocks with the previous point: Realistic goals are more likely to be accepted and motivate more than those that do not seem feasible in advance. (e.g. "Completion of the house by 30.11.2019").
- **T – Timly:** A further criterion is the naming of detailed time information, such as for milestones. (e.g. "ground floor ready to move in by 20.11.2013" instead of "ground floor ready to move in early").



This is how you proceed to note goals in the project:

1. Open the project from the project list by double-clicking.

2. **Support** page opens: In the note area on the right side, store the most important goals.

3. If necessary, format the text using the **Format** tab and highlight important points.

4. Notify about the new note: Here it is possible to notify different project roles (project team, project manager, customer, partner, etc.). These correspond to the resources stored on the left under **Responsible.** Of course, it is also possible to notify individual persons. They are selected via the address book.

3.2 Set up a priorization matrix

In the next step you build a simple matrix - similar to the global to-do list (see 2nd chapter of the whitepaper). The difference is that we now create it in the Kanban-Board, i.e. in the task area, of the project. Thus, the matrix does not serve for personal self-organization, but for the general organization in the team.

1. Switch to the **Task** area in the project.

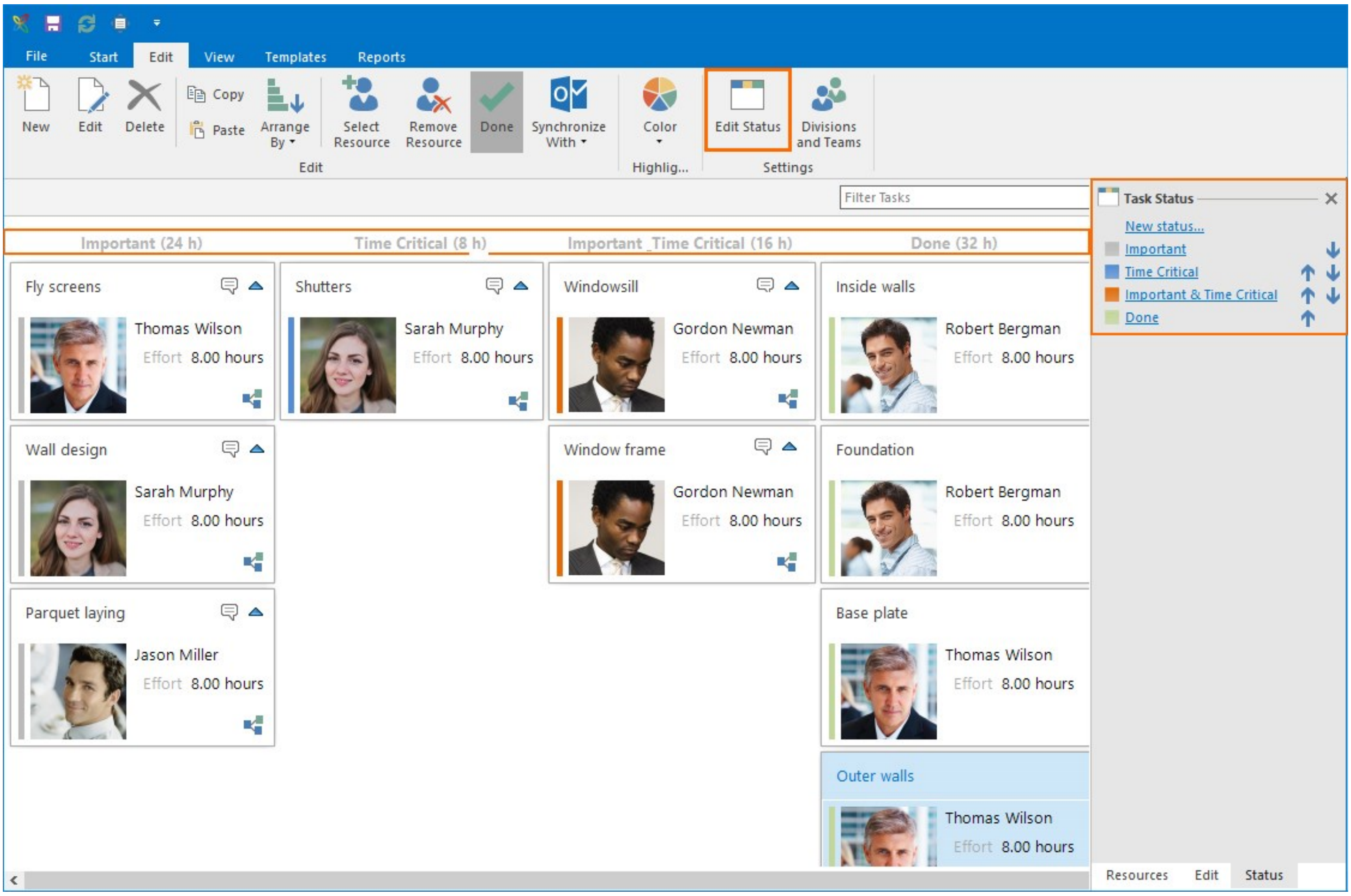
2. Here we individualize the status in order to prioritize tasks better. To do this, click on **Edit** >> **Edit status.**

3. Adjust the current status and add more until you have the following columns:

- Important
- Time critical
- Time critical & important
- Done

4. Note that InLoox always recognizes the last status on the right as "Done". I.e. no matter what you call this column, the tasks you drag here will be marked as done by InLoox.

With the help of this matrix, you can now work in the team on a prioritized basis. The importance of the tasks can thus be defined together in the team and the to-do's are processed according to priority.



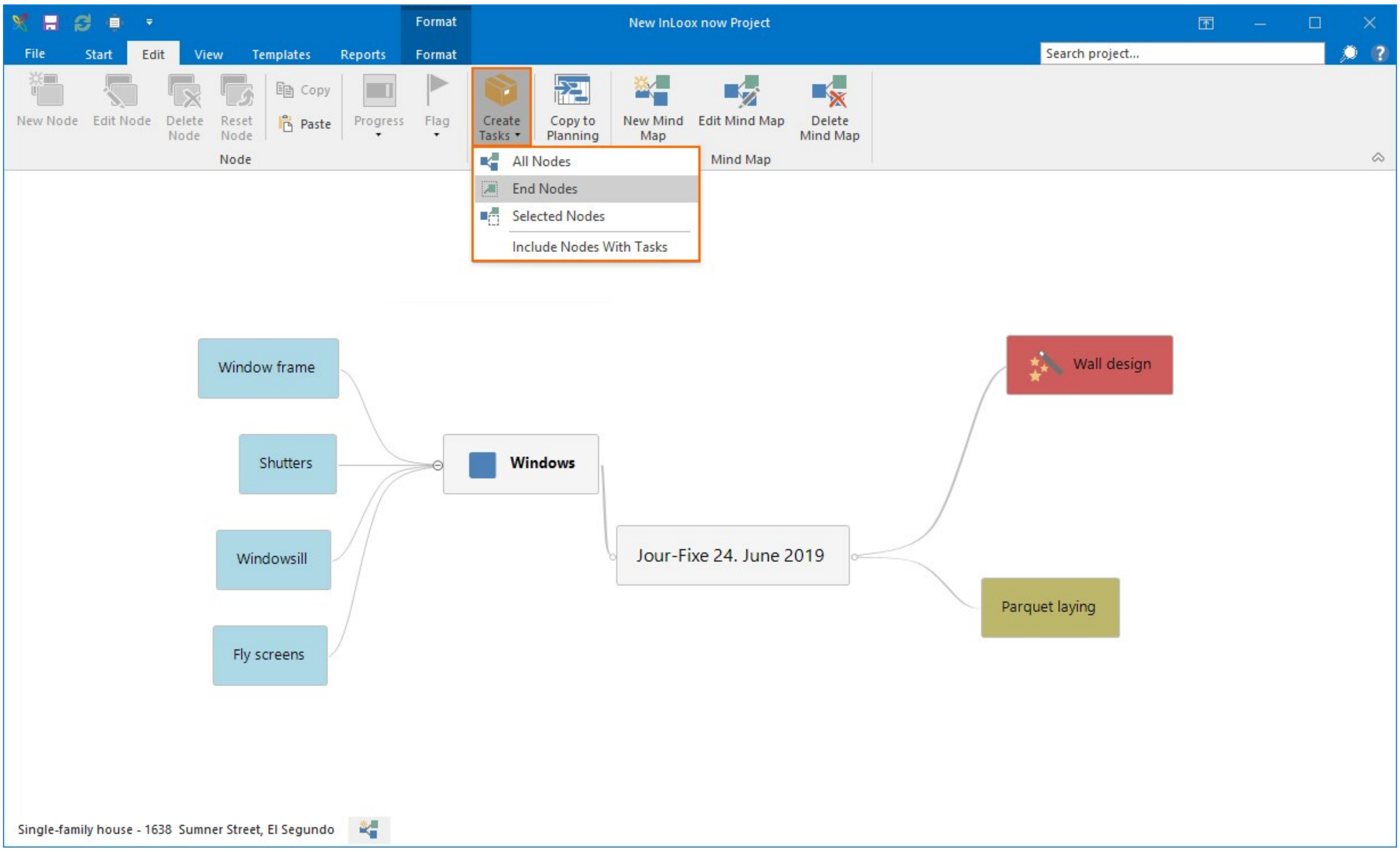
3.3 Coordinate project meetings via mind maps & matrix

How do you use this matrix in everyday project work? The matrix is particularly useful for structuring meetings. The best way to do this in a meeting is as follows:

1. Use the mind map during the meeting to record and structure important points.

2. Some new tasks will certainly arise during the meeting. These will also be recorded in the mind map.

3. At the end of the meeting, you can select the nodes that you want to use as project tasks and transfer them to the kanban via the tab **Edit** >> **Create tasks** >> **Selected nodes.**



4. In the task area you enter the resource that will take over the task.

5. Now you can define the priority of the new tasks together with your team.

At the end of the meeting, everyone will leave the room and knows exactly which tasks they still have to complete and which task they need to do first. So you make sure that there is no complete chaos in meetings and that your staff and colleagues leave the meeting motivated at the end.

Very important tasks can then be synchronized with the Outlook calendar. To do this, select the corresponding task in the Kanban board and click on Edit >> Synchronize with >> Outlook Calendar.

You can set the task status individually for each individual project or globally for all projects using the InLoox options.

About InLoox

InLoox was founded in 1999 and develops project management solutions integrated in Microsoft Outlook that simplify and accelerate business processes. The convenient Outlook integration makes InLoox the central platform for project and day-to-day business. Its ease of use makes everyday work easier and project managers, teams and decision-makers can rely on InLoox's powerful planning, controlling and monitoring functions - on the desktop, on the web and on their smartphones.

More than 60,000 users in over 65 countries trust InLoox. InLoox customers include AVIS, CHRIST Wash Systems, German Red Cross, LIEBHERR, Novartis, Pentax Europe, STOROpack, SEAT, Siemens, US Airways, Verizon and many more. InLoox is based in Munich, Germany and has offices in San Francisco, USA and Stans, Switzerland.

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