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Effexis Software

Outlook Users: Frustrated by the
Limitations of Outlook's Task List?

Discover How to Create a Task List that
Really Works and Helps You Get Things
Done!

*How Sub-Tasks, Prioritization, and Scheduling
Help You Become More Productive*

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1 A Perfect Complement for Microsoft Outlook

If you use Microsoft's Outlook program for keeping track of your tasks and your schedule, you know how convenient it is to manage all your to-do's from one central place.

It makes it simple to keep track of everything and know what your priorities are for each day. Or, at least it should.

However, Outlook's task list lacks some important and convenient features:

- It doesn't support sub-tasks, making it difficult to break down big tasks into smaller steps
- It doesn't support easy prioritization and organization of tasks
- It doesn't really distinguish between projects and tasks
- It doesn't keep track of tasks associated with a specific project (unless you do it manually)
- It can be awkward to schedule project blocks in the calendar
- It doesn't help you connect your daily actions to your mission, vision, and goals

If you are not careful, you can end up with a long, disorganized Task list with hundreds of items that overwhelms you rather than truly helping you get things done.

Achieve Planner takes Outlook's convenience and control over your schedule and tasks to a completely new level.

With advanced planning, prioritizing, scheduling and goal-setting features, Achieve Planner is more than just a personal information manager — it's a true life management tool that enables you to define your goals in every area of life and connect them to your daily actions.

It is a perfect companion for Microsoft Outlook users who want to take their productivity and effectiveness to the next level.

2 Easily Plan, Manage and Track All Your Projects & Tasks

Say 'goodbye' to your old, disorganized, mile-long Task lists!

Now you can capture, organize, prioritize and manage your projects and tasks so that you can make sense of them and use them to get things done.

Separating the concepts of projects and tasks allows you to view and track your high-level outcomes (projects) independently from your low-level actions (tasks).

Project (📁) – A project represents any high-level outcome that you want to track, whether it includes a single or multiple steps. Projects give you an overview of everything that you are working on at any given time.

Projects can be complex multi-step sequence of tasks, like developing a product, organizing an event or preparing a presentation, but they can also be something as simple as paying a bill, responding to an e-mail or taking the dog to the vet.

With a hierarchical project list, each project can include sub-projects using as many nested levels as you need.



NS	A1	AllAround Routers, Inc.
NS	A1	T1 Config Guide
NS	A2	E1 Config Guide
NS	A2	Irish Mail, Inc.
NS	A1	Quick Start Guide
NS	A2	User Manual
NS	A3	Help File
NS	A3	Neighborhood Associates
NS	A1	August Newsletter

Your master projects list will be shorter and easier to manage, and it will give you an overview of all the outcomes you are working on. You can store all the details as tasks and have easy access to them whenever you need them.

Task (📝) – Tasks are the action steps associated with a project.








Tasks are usually things like "Call Fred," "Read the XYZ file," or "Write outline for Masterson memo."

Like Projects, Tasks also have a hierarchical structure using as many levels as you need.

	NS	A3	 Neighborhood Associates
	NS	A1	 August Newsletter
	NS	A1	 Inform contributors and advertisers of submission deadline
	NS	A1	Review past contributors and advertisers list
	NS	A2	Prepare email and send
	NS	A3	Prepare postcard and send
	NS	A2	Follow up with contributors and advertisers
	NS	A3	Provide copy to advertisers for their approval
	NS	A4	Edit all documents and copy

The master outline puts all your to-do's at your fingertips, making it your home base for managing your work and getting things done.

Increase efficiency, productivity and accountability for all your projects:

-  Plan large projects in greater detail, with sub-projects and tasks, including recurring projects and tasks
-  Attach notes, documents, URL's and resources to individual projects and tasks and access them directly from Achieve Planner
-  Track estimated and actual work hours and costs for each project
-  Prioritize projects and tasks using four primary priority categories (ABCD) and, if you need it, a numeric sub-priority system (A1, A2, etc.). Prioritization helps you focus your time and energy on the tasks that are most important.
-  Set deadlines and track progress with status fields and automatic notifications for each project — Receive alerts when you're projects get behind schedule!
-  Generate project plan reports to save in Microsoft Word®, PDF, and HTML format, or print project and task information directly from Achieve Planner
-  Automatic scheduling computes the start and end dates of your projects and tasks based on expected effort, priorities, and weekly schedule

100% - 100% (17 items)

A1	Projects rep
A2	Some are c
A	ACMEA
A	Project pro
B	Prepare m
C	Develop r
A	Steve's retire
B	Other pr
A1	Respond
A3	Send Stat
B	Renew D
C	Someda
B	You c

Use Color-Coded ABCD Priorities to Focus on What's Most Important

☑ The Task Chooser is a user favorite because it displays a list of your most important and relevant tasks across all your projects using a combination of priority, focus, and dates to select and sort the tasks.

Result Areas Projects Tasks Weekly Schedule Notes Outline Task Chooser

View: Best in Project Block Settings... Show Less 10 of 31 Show More Date: None

Project: August Newsletter

State	Pr	Name	Effort Left	Deadline	Status
1 NS	A5	Check expiration date on passport	1 h	06/14/2006	Overdue
2 NS	A1	Inform contributors and advertisers of submission deadline	15 min	06/30/2006	Overdue
3 NS	A1	Review past contributors and advertisers list	0 h		Not Scheduled
4 NS	A2	Prepare email and send	0 h		Not Scheduled
5 NS	A3	Prepare postcard and send	0 h		Not Scheduled
6 NS	A1	List of volunteers with assignments	1 h		On Schedule
7 NS	A2	Food and Beverages	1 h		On Schedule
8 NS	A3	Transportation	1 h		On Schedule
9 NS	A5	Public radio announcement	1 h		On Schedule
10 NS	A6	Channel 19's For Goodness' Sake	1 h		On Schedule
11 NS	A7	University newspapers (IAH, A&M, Calhoun, Oakwood, Athens)	1 h		On Schedule
12 NS	A8	Sisters' Tea Shoppe	1 h		On Schedule
13 NS	A9	Lady's Fitness Centers	1 h		On Schedule

Parents

- Work
 - A3 - Neighborhood Associates (On Schedule)
 - A1 - August Newsletter (Overdue)
 - A1 - Inform contributors and advertisers of submission deadline [6/30/2006] (Overdue)

You can use different views to filter the tasks you want to display in various ways.

☑ You can also estimate when you can expect to complete your various projects & tasks based on your effort estimates, your prioritization, and your weekly schedule.

This process is called “automated scheduling” because it determines the target start/end dates of your active projects and tasks based on information that you provide.

Some benefits of automated scheduling include:

- Get a quick estimate of when you’ll be able to complete your various projects & tasks via the target end date, which is based on your own effort estimates, priorities, and project blocks.
- Determine ahead of time if you might be unable to meet a deadline. The schedule status will warn you (with a **Behind Schedule** status) so that you can take corrective actions such as increasing the priority of a project/task, or delaying work on non-essential projects.
- Determine if you are trying to do too much at the same time based on the target end dates for your various projects.

3 Scheduling is Simple, Quick & Thorough

Just drag your task or project to the calendar to schedule time for it using a “project block.” The scheduling algorithm uses these project when determining the start and end dates for your various projects.

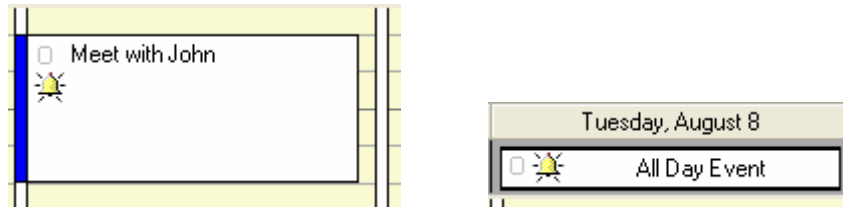
You can schedule your “project blocks” as part of your weekly planning session, or do it on a daily basis instead.

If something unexpected comes up, just move things around as needed. After rescheduling, you will know instantly if you are in danger of missing any important deadlines.

Now you can stay on schedule with a minimum of fuss.

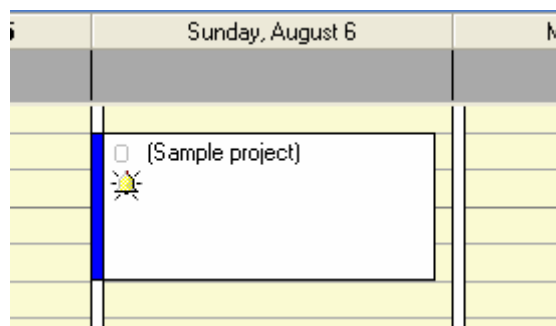
Go beyond daily tasks and appointments by using features designed to help you manage personal time as well as business time:

☑ Weekly schedule looks and feels like Microsoft Outlook, supporting Outlook style appointments and events, so you’ll feel right at home.



- ✓ The weekly schedule also supports “project blocks,” which are time blocks that you’ve committed to a specific project.

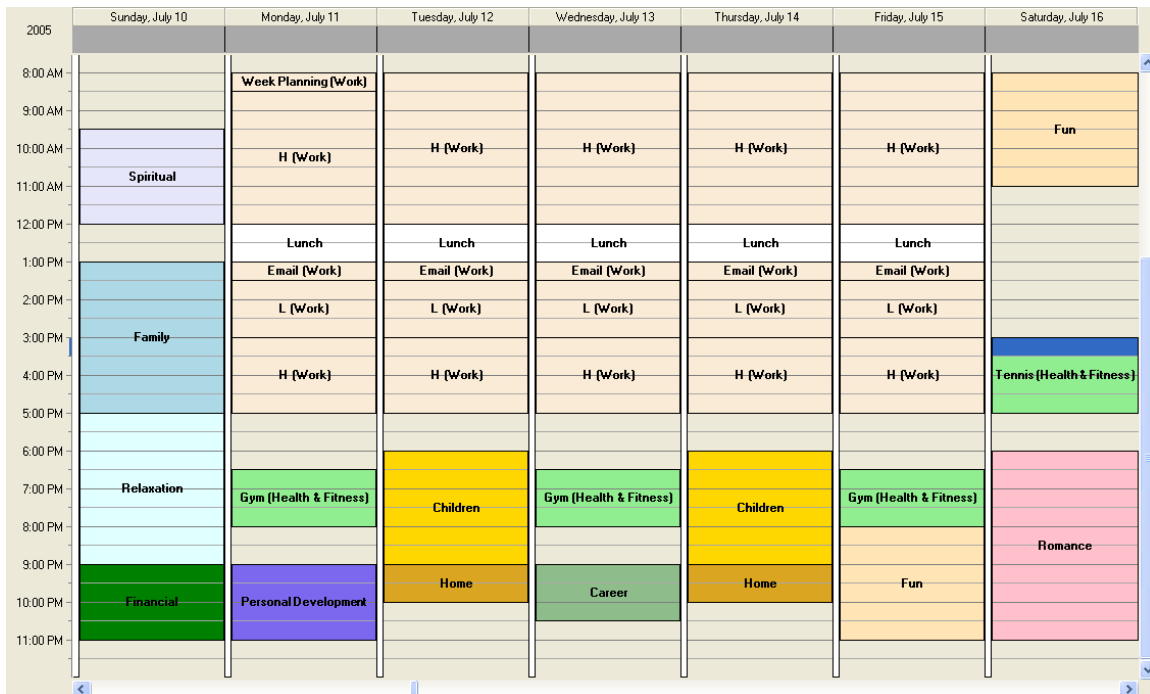
You can think of them as appointments with yourself to get your work done. You get several tools to help you work with project blocks in your weekly schedule.



Project Block for a project called “Sample Project”

- ✓ View the schedule 1, 3, 5, 7, 10 or 20 days at a time, depending your advance-planning needs
- ✓ Drag-and-drop project blocks to the schedule for quick scheduling and planning
- ✓ Reminders alert you when an appointment, event or deadline is coming up
- ✓ Automatic scheduling and updating for recurring appointments and events
- ✓ Link appointments to projects for easy coordination
- ✓ Use Time Charts to map out time slots for various activities, such as work, family time, personal time and exercise time to achieve your ideal week and avoid over-booking your time.

Here is an example of a time chart shown in the background of the weekly schedule (without any appointments, which would appear on top of the time chart areas):



4 Connect Your Daily Actions with Your Mission, Vision, and Goals

Planning and scheduling is about more than just getting work done. It's about achieving goals and living a fulfilling life.

Now you can define your dreams and ambitions, determine your goals, and balance your life to achieve satisfying results:

- ☒ Organize your projects within result areas representing your major life dimensions and roles
- ☒ The goal organizer helps you set, plan and track your dreams & goals
- ☒ Capture everything you may want to do in each life area with the convenient wish list
- ☒ Develop mission and vision statements for your life areas

- ✓ Perform S.W.O.T (Strengths, Weaknesses, Opportunities, Threats) analysis for each result area
- ✓ Track your short-term goals using relevant metrics and progress reports
- ✓ Plan your goals in greater detail by including vision statements, identifying obstacles, developing your strategy, and breaking your goal into smaller steps
- ✓ Integrate goals with time management by implementing your goals using projects and tasks

5 Get Started with Little Effort

It's easy to get started without duplicating planning and scheduling effort you've already put into Microsoft Outlook®. You can import your Outlook® tasks quickly and painlessly.

You can also perform 2-way synchronization of appointments, contacts, and tasks back and forth with Outlook®.

Achieve Planner tools minimize administrative tasks to get you moving:

- ✓ Import tasks and projects from Microsoft Outlook®
- ✓ Export projects/tasks to Microsoft Outlook® and Microsoft Excel®
- ✓ File organizer helps you organize printed documents and paper files
- ✓ Manage details for your contacts
- ✓ Synchronize contacts, appointments and events with Microsoft Outlook®
- ✓ Capture wizard gets your to-do's out of your head and into your system
- ✓ Weekly and daily planning wizards help you plan so you can focus on doing what's most important

6 Summary

Microsoft Outlook® has some very useful features, especially when it comes to communicating and sharing information with other members of a project or work group.

But when it comes to planning your schedule and prioritizing activities, it has some serious limitations. After all, you wouldn't let the U.S. Postal Service manage your calendar or let Verizon Wireless set your goals.

That's not what they do—they do communications.

Similarly, Microsoft Outlook® was never truly designed to help you plan projects, prioritize your tasks, set goals, or effectively manage your time—it does email, contacts, and calendars.

Let's quickly recap some of the key features that help you enhance productivity beyond the abilities of Microsoft Outlook®:

Hierarchical project/task structuring — Most projects are made up smaller projects and related tasks. How do you track the progress of those projects and make sure tasks get done in order and on time?

Hierarchical structuring of tasks and projects lets you group related tasks and projects so you can prioritize, schedule and track them easily. Outlook's task feature amounts to little more than a long to-do list, with no simple way of connecting related tasks or tracking the overall progress of projects.

4 levels of meaningful prioritization— Some days everything seems high priority, but Achieve Planner's 4-tier prioritization level provides you with clear guidelines for assigning priorities—not just 'low', 'normal' or 'high' priority.

If you prefer a different prioritization system, you can reassign the priority definitions to fit your needs or make use of Achieve Planner's numeric sub-priority system for nearly limitless priority levels.

Task Chooser tool — Which are your most important tasks? What should you work on next?

Microsoft Outlook® can't really help you decide. But Achieve Planner's Task Chooser instantly analyzes priority levels, deadlines and work schedule to help you pick the best tasks to work on.

Appointments link directly to projects/tasks via project blocks — Using the weekly calendar to block off time to work on your most important projects and tasks will help you become significantly more productive.

Full 2-way synchronization with Microsoft Outlook® — Continue to use your favorite Outlook features, including meeting requests, emailing and converting emails to tasks.

The simple synchronization feature lets you get the most out of Outlook's great communication tools while providing productivity and scheduling tools beyond the limits of Outlook.

Executives, managers, business owners, independent professionals, and anyone whose work and life involves a complex array of projects, goals and priorities clearly need more than Microsoft Outlook® has to offer.

Achieve Planner has the tools you need to get more done and create the kind of life you want for yourself.

Try Achieve Planner today for a risk free 30-day trial.

Just [click here](#) to get started.

[Download Free Trial Now](#)

If you want to learn more about Achieve Planner features, please take a look at the Achieve Planner User's Manual. It is available for download at:

<http://www.effexis.com/achieve/training/>