資訊管理五常法工作坊
Information Management 5S Workshop

中小企資訊科技培訓計劃
課程編號 **M10**

Stephen Pong

Director & Consultant

Clever Solutions for smart business

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Information Management 5S Workshop Outline

Morning session

- About Information Management
- About MS-Outlook
- Mail –
  – Installation & Settings
  – Environment
  – Send
  – Receive & Management
  – Advanced features
  – Mail writing techniques and etiquette
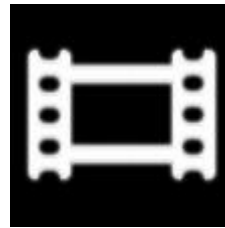- Q & A
- Test

Afternoon session

- Calendar – Time management
- Contacts – Relationship management
- Task – Task management
- Notes – Electronic notes
- Journal – Work recording
- Other Outlook functions
- Barriers in EIM implementation
- Information Management 5S
- Q & A

Slide 2

sp1 Stephen Pong, 1/2/2010

Information are vitally interrelated to our business and life

資訊與你，息息相關

Information is overflowing the world

IDC report 2008
- Information increment 60 % (08 Vs 07)
- Increment speed is getting fast
- Forecast 10 times increment by 2010

If you don't know how to manage all those information properly

Your business will be seriously affected
by

Information Tsunami

Information Management

About Personal Information Management (**PIM**)

Refers to both the practice and the study of the activities people perform in order to acquire, organize, maintain, retrieve and use information items such as emails messages, documents, web pages, notes, contacts, news and meetings/appointments request, etc. for everyday use to complete tasks (work-related or not) and fulfill a person's various roles (as student, member of community, employee, business owner, etc.).

PIM is good for Time Management and Task Management as well.

Information Management

Personal Information Management – PIM

- Good for Small & Medium-sized Enterprises
- MS-Outlook, Entourage (MS-Outlook for Mac), Google Application…
- Minimal IT support required
- Information Management Tools
  Desktop PC, Notebook/Netbook PC, UMPC, Pocket PC, Palm, Smartphone, BlackBerry, iPhone, Gphone, MID, etc...

Information Management

Enterprise Information Management – EIM

- Most MNC or Medium-sized enterprises, government organizations are using EIM.
- Lotus Notes, GroupWise, MS-Windows Small Business Server, etc..
- Must have strong IT team & infrastructure support

Information Management
Application status in Enterprise

- Using Outlook Express instead of Outlook
- Using Mail basic function only
- Never use IRM for confidential mail
- Lotus Notes users' problems in using Mail
- Not using "Calendar" for Conference room booking, meeting/appointment/event organizing
- Never use "Tasks" for task assign/management
- Never use "Contacts" for relationship management
- Using Smartphone/PPC for mobile phone only, not for mobile office as well

What will happen for Enterprises without implement IM properly

- Poor management of emailing, always late or no responding clients' emails.

- Spent more time in reading spam mail or low priority emails.

- Cannot easily find out emails that are urgently wanted.

- Clients complain can not receive attachment or attached file too large.

- Feeling frustration by the increasing unread mails at inbox everyday

What will happen for Enterprise without implement IM properly

- Low effectiveness in organize meeting, conference room and other public resources booking.

- Poor time management, sometimes late or forget attending meeting/event.

- Poor task management, always overdue, forgot to follow up on tasks that assigned to subordinates.

- Poor People/Customer Relationship Management.

PIM Solution – MS Outlook

- Microsoft developed over ten years.
- Integrated Information Management programs
  - Mail + Contacts + Calendar + Task + Notes + Journal
  - Integrated with Word/Excel/Access/Publisher functions
- Synchronize with most of PDA, Pocket PC, Smartphone, Palm, iPhone..etc.
- Bundled with MS-Office (except for Home/ Education version), HK$ 700+ per license (Outlook 2007)
- Bundled with Pocket PC
- Over 90 % enterprises in the world are using it
- Version – Outlook 2000/2002/2003/2007, Outlook 2010 is coming soon
- PST Size – Outlook 2000/02 – 2G, Outlook 2003/07– 20G

Mail – Installation Modes

- ## Mail accounts
  - MS-Exchange/POP/IMAP/HTTP/Others
  - Multi accounts – Company, Gmail, Hotmail…
  - Incoming server/Outgoing server
  - Other settings – Reply email address, Delivery, Server Port No., Server Timeouts…
  - Test Account Settings

- ## Options
  - Preference - Junk Email, other options
  - Mail Setup - Email accounts, Send/Receive…
  - Mail Format - HTML/Text, Editor, Stationary, Signature
  - Spelling – Spell check settings
  - Security - Pictures download Settings..
  - Others - Advanced Options, Auto Archive, Person online status…
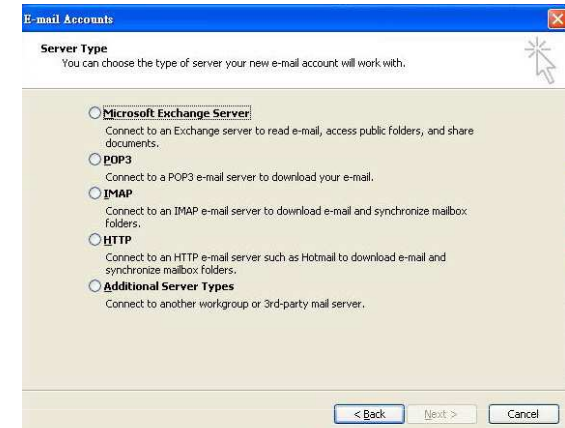
Mail - Environment

- Menu bar – Customized, Help

- Tool bar – Standard, Advanced, Web, Customized

- Favorite Folders –

- All Mail Folders – with sub-folders

- Function Buttons

- View Window – Flag, Categories

- Read Window – Right, Bottom

- View mail modes- Current View Arranged by

- Web browsing

Mail – Send

- **Create a new message/Open a template**
- **To/CC/BCC, Check Names**
- **Reply/Reply All/Forward**
- **Subject**
- **HTML/Text, Theme, Signature**
- **Format – Font, Theme, B/G, Text direction...**
- **Attachment – Options, Items**
- **Insert – Picture, Hyperlink, Object (PPT, Video..) Symbols, AutoText…**
- **View – Tool Bar, Table**
- **Windows – New Window, Split**
- **Permission – IRM**
- **Options – Message, Voting, Tracking, Delivery...**
- **Using Word/Excel/Access/Publisher (2003)**
- **Reminding Flag, Recall, Mail Merge, Circulation**
- **Select Mail Account to send**
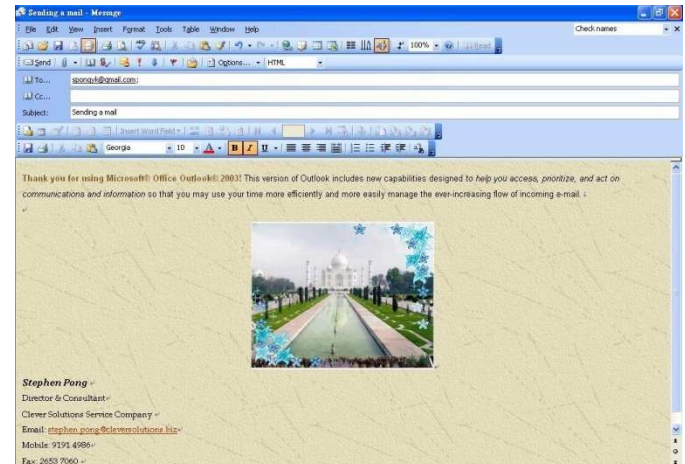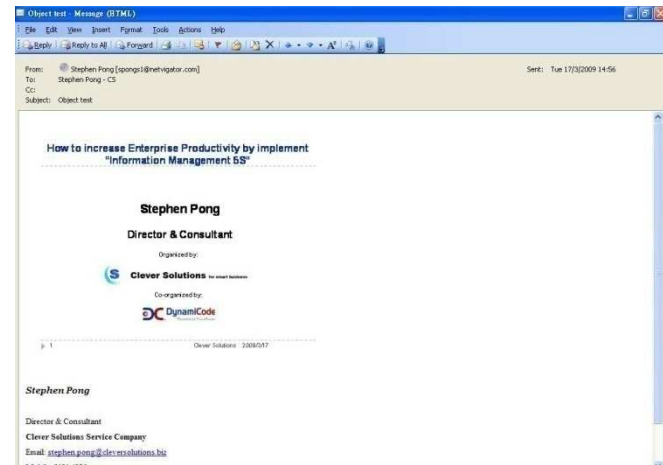
Mail – Receive and Management

- Receive from Mail Account
- View Modes
- Reading Pane
- Auto Pre-view
- Un-block photo download
- Encoding – Big5, GB, Unicode..
- Save attachment
- Virus protection - .exe, .bat, ..
- Online Translation
- Customize heading – Add Categories
- RSS (Outlook 2007)

- Desktop Alert
- Reminding Flag
- Junk Mail
- Folder & Sub-folders
- Find, Advance Find..
- Schedule Receive/Send time
- Respond to Receipt request
- Email to Calendar/ Tasks/ Note
- Restricted mail (IRM)
- Online status

Mail – Advanced Features

- Rules and Alerts
  - Stay Organized
  - Stay Up date
  - Messages when they arrived
  - Messages after Sending
  - If -> Then + Exception
  - Activation/De-activation
  - Import/Export Rules
  - Application cases
    - Auto move to folders
    - Out-of-office notice
    - Delay send out time (rule takes priority)
    - Forward important mail to Mobile
    - Auto play music
    - Auto print out incoming mail

- Template

- Ways to Organize Inbox
  - Using Folders
  - Using Colors
  - Using Views

- Search Folders
  - Default Search Folders
  - Reading Mails
  - Mail from People and Lists
  - Organizing mails
  - Custom

- Favorite Folders
  - Add
  - Move place
  - Remove
  - What folders must be there?

Email writing technique
Dos & Don'ts

- Select "To", "CC" or "BCC" properly, don't misuse "CC" and "BCC".
- Pick email addresses from Contacts List, use Distribution List or by Category, don't mis-type or mis-pick.
- Use proper "Subject", don't borrow other email because you want the same mailing list, but forget to change the subject.
- Always use proper stationery, don't misuse those fancy stationery.
- Keep your email content short and concise, don't put too many subjects within an email.
- Use proper word size/font, make paragraph and insert graphic/photo as appropriate, don't insert graphic/photo with large size.
- Request of "Receipt" only when there is a need, don't misuse.
- Insert "Reminding flag" as appropriate, don't misuse.
- Spelling check before send, don't close "Spelling check" options.
- Pay attention on size of attachment, don't attach file with large size.
- Put signature as appropriate, don't attach vCard every mails.

8 e-mail mistakes that make you look bad –

Article of Microsoft Small Business Center

1. Failing to follow e-mail etiquette

2. Thinking you are anonymous

3. Sending e-mail to the wrong person

4. Using one e-mail address for everything

5. Forgetting to check all of your e-mail accounts

6. Clicking "Send" too fast

7. Forgetting the attachment

8. Using your ISP's domain and not your own

Calendar – Time Management

- Setting Options
  - **Work week, Week no.**
  - **Chinese Lunar**
  - **HKSAR Holidays download**
  - **Time zone**
  - **Resource Scheduling**

- Appointment/Event/Meeting
  - **Recurrence – Chinese Lunar**
  - **Label**
  - **Reminder**
  - **Show time as**
  - **Categories**
  - **Private**

- View – 7 modes

- Insert – File, Item, Object

- Reading Pane

- Multi Calendar folders

- Organizing a meeting
  - **Add others attendees**
  - **Auto Pick**

- Responding appointment
- Forward, Shared Calendar

Contacts – Relationship Management

- Create contact information
  - Email to Contacts
  - Name card scanner
  - Manual input
  - Others - same company
  - Import

- General
  - Photo
  - Phone no. – 19 options
  - Address – Business/Home/Other
  - Email address – 3 addresses
  - IM Address (online status)
  - Categories
  - Notes Area
  - Private

- Name card (2007)

- Details

- Activities

- Certificates

- All Fields

- Options

- Find

- Vcard
  - Export/Attach
  - Signature with Vcard

Contacts – Relationship Management

- View - 7 modes

- Reading Pane

- Insert - File/Item/Object

- Actions

- Organize

- Distribution List

- Shared Contacts

- Folders
  - Mailing list
  - Set for email address book

- Follow up Flag

- Check names

- Application cases sharing
  - Mail Merge
  - Categories

Tasks – Task Management

- Setting Options
  - Completion status

- Create Task
  - Task/Details
  - Recurrence
  - Categories
  - Private

- Assign Task
  - Task/Details
  - Task update

- Responding Task assignment
- Insert – File, Item, Object

- Review – 10 modes

- Shared Tasks

- Task to Calendar

- Task Management

Notes – Electronics Notes

- Setting Options

- Folders

- Create Note
  - Color
  - Categories

- Forward

- Shared Notes

- Keep web Clipping in Notes

- Email to Notes
- Notes to Email/Calendar
- Notes to Desktop

- Application cases sharing
  - Meeting agenda
  - Idea notes
  - Shopping list
  - Voice note (Pocket PC)

Journal – Work Recording

- **Setting Options**
  - Items record
  - Contacts record
  - MS-Office file record
    - Word
    - Excel
    - Access
    - Power Point

- **View – 6 modes**

- **Shared Journal**
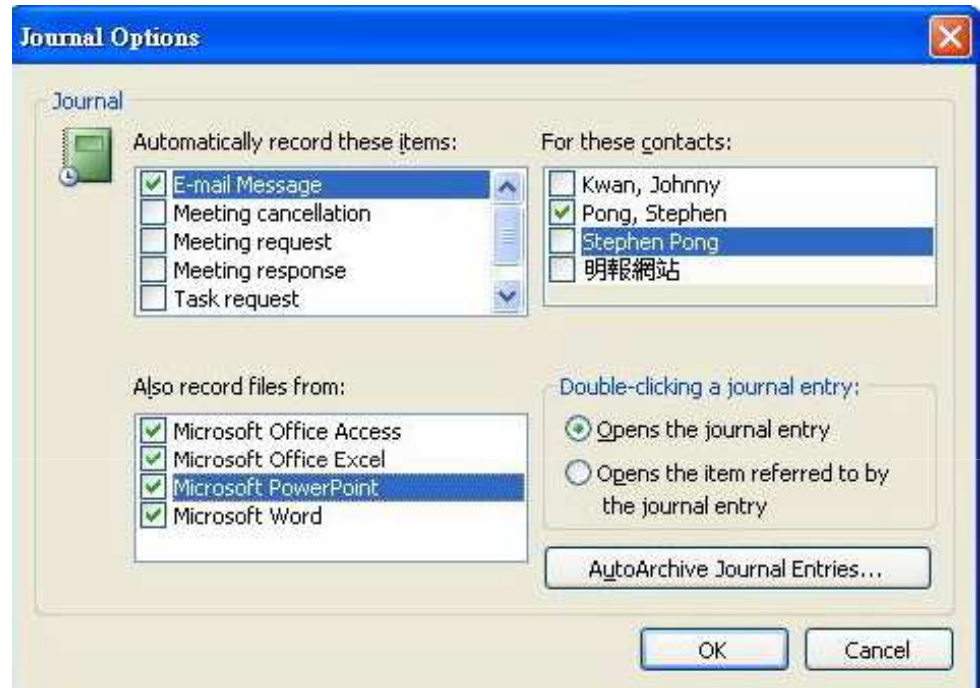
MS-Outlook – Other functions

- Outlook Today
  - Customize

- Archive (move to other file)
  - Move data from outlook.pst to achive.pst
  - Options- Activate Archive
  - Open Archive folders
  - Close Archive folders
  - Auto execute Archive
  - Retrieval
  - Mail do-not-archive
  - Functions AutoArchive options

- Import (copy from other file)
- Export (copy to other file)

- Backup
  - Standalone – pfbackup.exe
    Download form Microsoft Office Online website
  - Exchange server

- PST file repair – scanpst.exe
- Personal Folder size
- Exchange Server Functions- Outlook Web Access (OWA)

OWA – Security

- Security issue when doing mobile office by access of OWA

- Two-factor Authentication login

- Dynamic Token

- Strong network security

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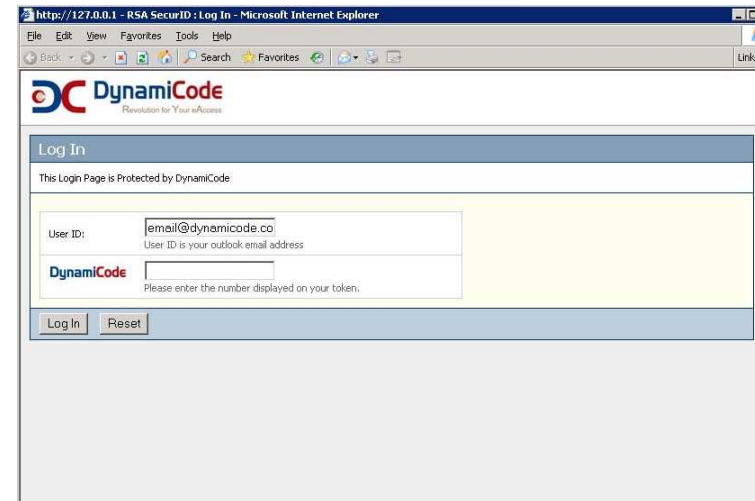
PIM Solution – Mobile Office

➢ Windows Mobile (WM) or Windows Phone
  ➢ 99.9 % Compatible to MS-Outlook
  ➢ Synchronize Mail, Contacts, Calendar, Notes, Tasks
  ➢ Thousands of applications available

➢ iPhone 3G/3GS
  ➢ Synchronize partial MS-Outlook functions - Mail, Contacts, Calendar
  ➢ Good for Web 2.0 applications
  ➢ Thousands of applications can be easily downloaded from App Store
  ➢ Wi-Fi or 3.5G internet connection everywhere

➢ Others OS – BlackBerry, Linux, Symbian…

PIM Solutions Sharing
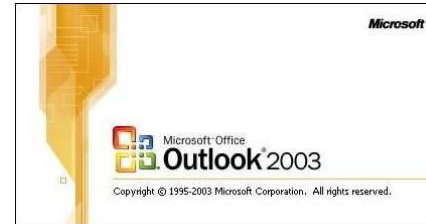
Benefits of implement EIM program

- Effective mail management, check and respond priority mails promptly
- Advanced searching, easy to find mail
- Easy follow up of pending items
- Effective time management – meeting, event and appointment organizing
- Effective tasks management, high completion rate
- Relationship & contacts management
- Synchronize with PDA/PPC/Smartphone for Mobile office
- Increase work effectiveness, communication culture and market competition
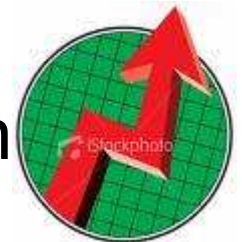
Barriers in EIM implementation

- Knowledge of what the EIM system can provide
- Awareness of importance in using EIM
- Policy of information management
- Training
- Budget
- Not clear on responsibility, which department is to lead?
    - IT
    - Management team
    - HR

- **Information Management 5S program will help**

Information Management 5S Program

5 S Methodology 五常法

- A Japanese management philosophy and a way of organizing and managing the workspace and work flow with the intent to improve efficiency by eliminating waste, improving flow and reducing process unreasonableness.

- Prof. Sam Ho, Founder Chair of Hong Kong 5S Association, modified and promoted by setting Certification system, helping enterprises to implement 5S:
    - S1- Seiri (Structurise) 常組織
    - S2- Seiton (Systematise) 常整頓
    - S3- Seiso (Sanitise) 常清潔
    - S4- Seiketsu (Standardise) 常規範
    - S5- Shitshke (Self-discipline) 常自律

Information Management 5S Program

- Apply 5S methodology in Enterprise Information Management
- With senior management consent, include the "Information Management 5S" as one of quality programs under company's quality policy.
- Organize an "IM5S Committee"
- Arrange IM training for all IM users, to understand and master all those functions of the IM system in the company (Lotus Notes, MS-Outlook, GroupWise, etc.) and IM 5S
- Regularly review the effectiveness, take corrective actions and appreciate achievers.

Information Management 5S Program

- IT department set up public documents/address books, conference room and resources booking channels, information security, information right management, and all other general settings. Ensure network smoothly operating with high speed Internet access.
- HR department arrange trainings for IM skills and IM5S knowledge.
- Encourage Environment Protection, make use of online document library. Less printing, promote paper-less office culture.
- Objective: Continuously increase Productivity of work, promote enterprise communication culture, and market competition

S1 - Structurise 常組織

- Setting Options – Preferences of Email, Contacts, Calendar, Tasks, Notes, etc.. Set up of Email Format, Signatures, Spelling check, Spam mail filter, Reading Panel, Auto-archive, Person Names Smart Tag...
- Create folders, sub-folders, Search Folders, Favorite Folders..
- Create Rules, Categories as required
- Setting Options of "Outlook Today"
- Setting of "Contact folders", Contacts" and "Distribution list"
- Setting of customized templates
- Setting IRM

S2 - Systematise 常整頓

- Automation – Apply Rules & Organize according to needs
- Outlook Today – Check twice a day for work plan review
- Flags – For mails to be followed up, review & update
- Drag message into Tasks for further follow up or assignment
- Drag message into Calendar to create an appointment/meeting
- Drag useful web content to Notes for further reference
- Search folders – quick search for mails that to be found out
- Set & update Calendar with appointment/meeting recurrence
- Set & update Tasks with personal tasks/task recurrence and assigned task
- Set & update Contacts with appropriate category and related information
- Other IM skills to improve efficiency of work

S3 - Sanitise 常清潔

- Always keep clean of workplace, PC and accessories
- Make use of Notes to replace paper note
- Use email or eFax to reduce fax paper
- Update of Anti-virus definition, scan PC regularly
- Don't print mails out unless there is a must

S4 – Standardise常規範

- Standardise of email/request respond time
- Standardise maximum size of attachment
- Utilize pre-designed template
- Utilize Distribution list
- Use IRM for confidential mails
- Regularly archive old mails
- All internal meetings must be organized by using Calendar with agenda inserted
- Utilize Tasks for task assignment
- Version control on documents in public folders
- Charge Smartphone using USB and synchronize
- Other standardization to improve effectiveness of work….

S5 - Self-discipline常自律

- Learn and use properly all functions of IM system
- Understand and follow the spirit and rules of IM5S
- Not misuse of ""CC" list
- Make sure the proper use of "Reply" or "Reply all"
- Pay attention on attachment size
- Respond mail/meeting request/task request timely
- Properly use of "Receipt request", "Reminding flag"
- Follow communication etiquette considerately
- Never install un-authorized software/hardware
- Pay attention on net security
- Execute all rules and standards set by the IM5S committee

Benefits of implement Information Management 5S Program

- Company quality policy
- All staff training
- Information management skills
- Effectiveness of meetings
- Task completion
- Fully utilize resources
- Continuous improvement
- Culture change (prompt respond/action…)
- Competition
- Zero cost -> cost saving program

Action now!

Be a initiator of this Cost Reduction Quality Program

Be a smart communicator with good culture

- Be responsible for your email account –
    - Check your email boxes timely
    - Prompt respond to all mails "to" you
    - Learn and master your PIM system, use all functions properly.
- Be considerate, follow the communication rules -
    - Always use an appropriate subject
    - Pay attention on attachment size
    - Only use "Receipt request", "Attention flag", etc.
    - Never misuse CC, Reply All, Replay with attachment.
    - Always write short and simple email politely
    - Use Calendar to call meetings/events/appointment, if applicable
- Be self-discipline -
    - Always update calendar and attend meetings timely
    - Support environment protection, never print email unless really necessary.
    - 「知行合一」，「己所不欲，勿施於人」

About Clever Solutions for smart business

- PIM Seminar
- PIM Workshop
- IM5S Workshop
- In-house EIM training
- In-house IM5S program consultancy
- PIM Coaching for executives

Contact Stephen Pong
Email: stephen.pong@cleversolutions.biz
Mobile: 9191 4986
Blog: http://cs-spong.blogspot.com

Thank You...