

# Organization, Outlook and Time Management (OOIM)

## Course Overview

Even the most organized person can become sidetracked during the crush of daily activity. Learn how to prevent information overload, get organized and stay on track—even during your busiest times of the year— by effectively organizing and managing your time using Microsoft Outlook and appropriate task delegation techniques. Take control of your job and improve your performance and that of your team members.

## Objectives

- Recognize how to better manage your—and your staff's—time.
- Identify and use simple method to organize your work.
- Determine how to best set priorities.
- Recognize Outlook features that track assignments and meet deadlines.
- Identify how to improve communication with clients, supervisors and staff.
- Recall different delegation techniques and how and when to use each one.

## Major Topics

- Organizational systems for CPAs
- Progress toward priorities
- Speed up and improve business writing
- Using MS Outlook in the workplace
- Email do's and don'ts
- Seven steps of effective delegation

**Field of Interest Code:** Business Management and Organization

**CPE Hours:** 8.00

**Level:** Overview

## Designed for:

Professionals who want to develop their organizational skills and manage their time more efficiently.

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