# plan.it

## workflow management



This training will help individuals and teams get control of their workflow by developing best practise processes and the use of planning software. This will dramatically enhance the ability to manage objectives and projects

Learn how to make the best choices and use the calendar and task functions of your software to have an effective overview of your work. Control the inbox with a quick and simple process.

All training is tailored to the participants' needs. We will review your software and emphasis on one or more functions will be decided before each training session.





### Who will benefit from this training?

We all need to be able to focus on our priorities. So the first exercise is to find out what a priority means to you, your team and your organisation. Based on your objectives you will create an overview of your tasks in your computer, so that you can plan what you need to do, when you choice to do it and where the task fits in the bigger picture.

During the workshop you will discover why you need the tools and make best use of the software installed on your desktop, tablet and smart phone. Participants can use any planning software

#### What is the content?

- Objectives: analyse your job description, projects and objectives
  - review the "workflow iceberg"
  - create categories to visualise priorities
- Calendar:
- use your calendar effectively
  - set-up views to highlight project/objective work
- Tasks:
- manage your daily workload
  - set-up views to track projects and billing

• transfer emails to calendar, tasks or contacts

- Inbox:
- create and use a filing system based on your objectives
- Communications:
  - set-up note taking software
  - track verbal communications

#### How long will it take?

Team training is one day (09.00-17.00) for groups of 8-10 participants with an optional personal coaching session post training. Participants should bring with them their own laptop and be able to access their planning software offline.

Individual training is a half day (4 hours) with an optional follow-up session. Participants should bring with them their own laptop and be able to access their planning software offline.

#### Which language is used?

The training is given in English. Coaching in English or Dutch. The software can be in any language.

#### Who is the trainer?

Katie Challans, British, lives in Brussels. She has over 25 years experience training people to improve their workflow management skills and become more effective. She has trained people in the private and public sectors and is an expert user of the different softwares and tools available.

She gives courses for her own training company, the European School of the Administration (via GreenHouse Group, Corporate Learning Solutions and AIM) and is a senior trainer for Priority Management.