

# **Managing “Waiting For” Using Microsoft Outlook**

## Background

During our sessions, we identify a list of “time wasters”. Almost invariably, chasing up other people is on the list. People let us down; all the time. In fairness, we let others down too. The sheer volume of work means things are going to fall between the cracks and competing demands for everyone’s time means that if that “thing” is not high on the individual’s personal list of priorities, there’s a good chance it’s going to be forgotten.

These actions from others may come from phone calls, face to face conversations, etc. but because of the large part email plays in our lives, many of the “Waiting For” items will have arisen from an email we have sent out to someone.

### Scenario

As an example, we send an email to John asking for him to give an update regarding the budget. But John is handling such a large workload as well, that we worry it might slip off his radar. Nonetheless, we really need the answer to this. Many would simply try to remember that John needs to get back to them, but that adds to the stress.

During our sessions, we recommend that the “Weekly Review” is the key to managing others’ commitments to you; but where you can track them? Here are three options for using your corporate tool to manage this complex list (the first two need no setting up, the third takes around 5 minutes to set up and is very powerful):

- 1) When you send your email to John, you also manually create a task and categorise it as “Waiting For”. If you are using Outlook to manage tasks, this ensures your “Waiting For” list is your task list with your other items. If you use paper and pen, get into the habit of adding these to a “Waiting For” list as you send the emails.

**Advantages:** no setting up time required; keeps the “Waiting Fors” with your tasks.

**Disadvantages:** A bit cumbersome

- 2) Think of your “Sent” folder as a part of your “Waiting For” approach and when doing your weekly review include a scan through your “Sent” items folder.

**Advantages:** no setting up time required; you won’t forget to add any items to the list

**Disadvantages:** Many emails in your sent items don’t need to be part of your “Waiting For” list so you are potentially wading through masses of emails to find the few that you do need to track

- 3) A third (and powerful) option is to create a rule in Outlook to manage the outgoing “Waiting For” list. On the next page is a step-by-step guide; with essentially 3 stages.
  - a. Create a new folder called “Waiting For”.
  - b. Create a rule to move any email from yourself to the “Waiting For” folder.
  - c. Always “bcc” yourself into any email you need to track. This moves it to the “Waiting For” folder which you scan during your weekly review.

**Advantages:** powerful; lets MS Outlook do the work for you.

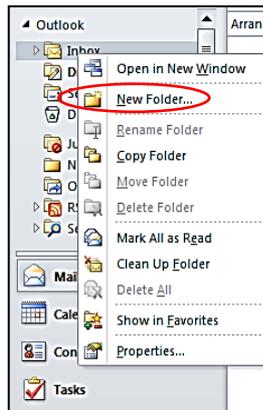
**Disadvantages:** Needs 5 minutes to set up.

There are of course, many ways of handling these “Waiting For” items. What do you do?

Email your tips to [david@positivepeople.biz](mailto:david@positivepeople.biz)

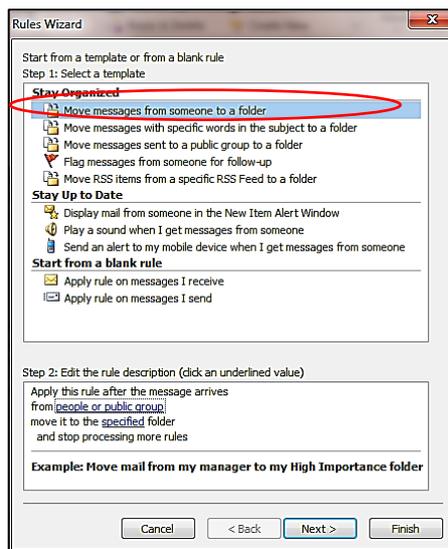
## How to create a Waiting For rule in Outlook

- 1) On the left hand side (Outlook Navigation pane) right click on your "Inbox" and choose "New Folder ...". Name that folder "Waiting For".



- 2) If you use Outlook 2010 or newer Select **Rules** button from the ribbon (In Outlook 2003 and 2007 choose **Tools** from the top menu, then **Rules**)
- 3) Click **Manage Rules & Alerts**
- 4) Click on **New Rule**

- 5) Select **Move messages from someone to a folder** (under "Stay Organised")

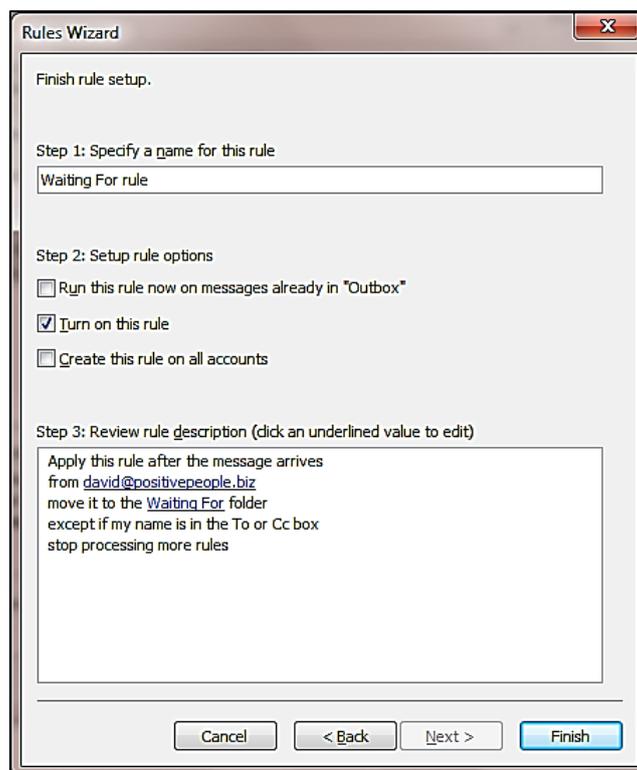


- 6) Click **Next**
- 7) Check **from people or specific group**. Then click on where people or public group is underlined and select yourself as the From contact (if you are not listed as a contact in your address book, just type your email address in the From -> box). Click **OK**. Click **Next**.

- 8) Check **move it to the specified folder**. Then click on where specified folder is underlined and choose the “Waiting For” folder that you have just created. Click **OK**. Click **Next**.
- 9) Check **except if my name is in the To or CC box**
- 10) Name your rule.



Your final settings should look like this:



10. Click **Finish**.

Try it out by sending a test message to yourself and put yourself in the bcc: field. It will send a copy of the email to your “Waiting For” folder.

This rule eliminates having to dig through your Sent folder to find emails that you are waiting on a response. Simply include a scan through this folder as part of the “Weekly Review” (or increased frequency if needed).