Microsoft Outlook Training Agenda (Level 200)

Overview

This agenda will discuss some of the more advanced features of Microsoft Outlook. This will be catered towards business professionals who rely on Microsoft's email platform and may have unique needs in comparison to our consumer customers.

Introduction

Microsoft Outlook is known by many as an email application, when it is much more than that. Our business customers rely on Outlook to keep their daily schedule, communicate with employees and clients, and collaborate with their peers. This agenda assumes that the user has a basic knowledge of the Outlook application, has already setup their account, and is looking to empower themselves by getting the most out of Outlook's features.

Mail

- Rules
    - Creation
    - Rule Management
- Custom Message/Out of Office
    - Specific internal and external
- Delegation
    - Allow other users to create or respond to meeting invites and folder permission on your behalf
- Signatures
    - Assigning specific signatures based off email account
    - Business Card implementation
- Contact Export
    - For simplicity, leverage .csv for demo
- Creating a Group Email
    - Allow external users to respond to the group email
- Delayed Delivery
    - Do not deliver before
    - Expires after (if using voting buttons)
- Mail Recall
    - Recall message
    - Resend message

Calendar

- Shared/Sharing Calendars
    - o How to share and adjust permissions
    - o Viewing shared with you calendars
        - Adjusting the overlay and side-by-side views
- Importing Calendars
    - o Location for adding Internet Calendars
- Add multiple time zones
    - o Discuss best practice if working with colleagues in multiple time zones
- Teams Meeting creation
    - o How to do it in Outlook versus Teams, transition into Scheduling Assistant portion, can display side-by-side comparison of the two methods
- Scheduling Assistant
    - o Overview and comparison to Teams' Scheduling Assistant
    - o Discuss response Tracking (Accept, Tentative, Decline)

Associate Training

- [Microsoft Outlook Office Support](#)
- [MOS Outlook Associate – LinkedIn Learning](#)

Question and Answer

- Partner with the organization's point of contact to field any questions before hand, set expectation that Microsoft Store Employees are not present to create business specific solutions, only to demonstrate the skills and features that will allow them to do so.
- Include Q+A session at the end of the training