

How to: Audit Your Outlook Calendar

Purpose

What does your ideal workday or work week look (or feel) like?

Analyzing your calendar through an audit can empower you to make informed decisions about how you want to work moving forward – and how to ‘get more time’ out of your day. Assess how your time is spent over a two- or three-week period that best represents your average workday and work week.

The end goal will be to find ways to do our work better, more efficiently, and sustainably.

Strengthen your skills in:

- Microsoft Outlook
- Microsoft Excel (optional)
- Time management
- Data collection
- Productivity

How to Prepare

Before you begin your audit, we recommend that you view the step-by-step guide on how to code your calendar entries. Prior to following the steps in this document, ensure that your calendar:

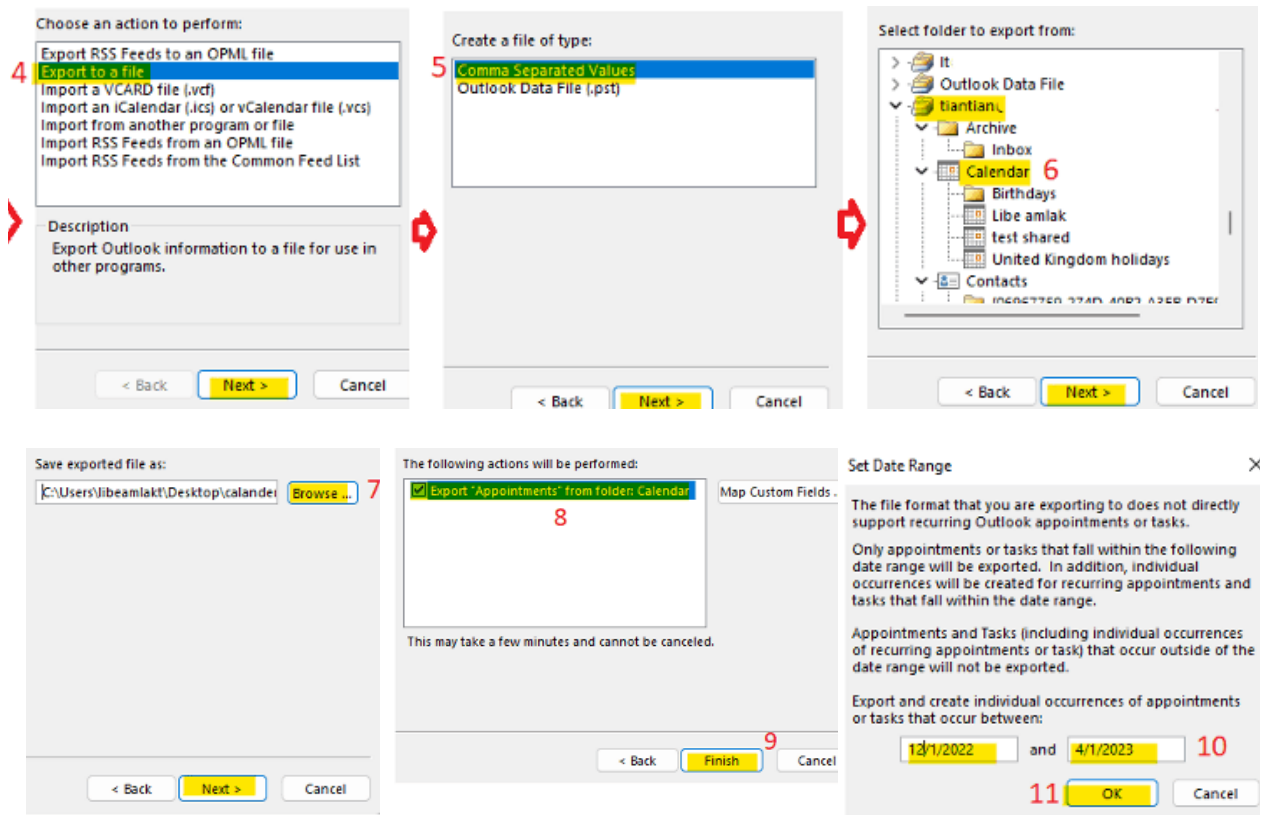
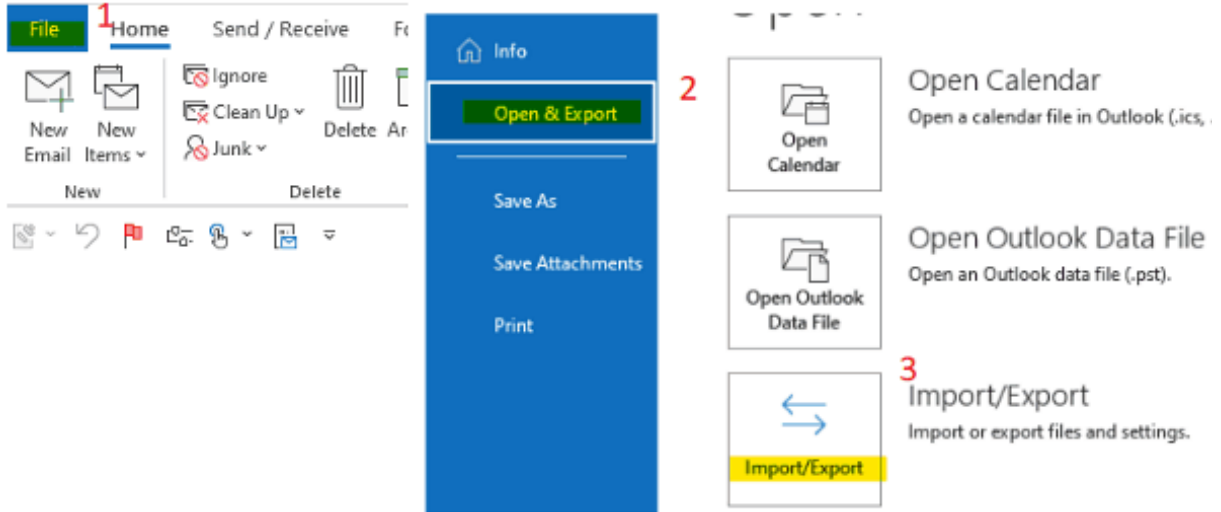
- Reflects the reality of your day, instead of how it was planned (this may require quick edits);
- Captures scheduled and unscheduled activities;
- Has assigned a category for each calendar entry.

Download Your Outlook Calendar Data

Open your Outlook Calendar and click the following buttons:

1. *File*
2. *Open & Export*
3. *Import/Export*
4. *Export to a File - Next*
5. *Comma Separated Values - Next*
6. Select the appropriate calendar from your list - *Next*
7. *Browse*
8. Select the folder you wish to save your file to and create a file name - *Next*
9. *Export “Appointments” from [Calendar name]- Finish*
10. Enter the appropriate start and end dates based on your audit period - *OK*

Reference images can be found below.



Open your calendar CSV file, and save it as an Excel Workbook (click File > Save As > Browse > Click the drop-down next to *Save as Type* > Select *Excel Workbook* and save).

Calendar Audit

- Using your data file, calculate how much time you spent on each category. You can manually tally how much time you have spent on each category, or use Excel to assist you with your calculations. For instructions on how to use Excel to analyze your data, see page 4.

Reflect and Analyze the Data

What observations can you make about your work week? Are you surprised by the findings? Does your time in each category align with how you would prioritize your work?

If you could make simple changes to your workday, what would they be? What would enable you to work in a healthy way, more efficient, or sustainably that would allow you to flourish?

Take a moment to write down your reflections. Use these questions as guide to help you get started:

- How often were you able to spend your time the way you planned?
- How often did urgent issues demand that you change your schedule?
- Did meetings start and end on time?
- Do you have enough time to move between meetings?
- Were there any meeting practices that you felt hindered or improved the effectiveness and efficiency of the meeting?
- Were you able to take breaks (wellness, medication, etc.)?
- Were you able to eat your lunch at a reasonable time?
- Was your work being interrupted often? If so, by whom? In what manner (phone calls, stopping by, etc.)?
- Were there any practices that you found helpful in reducing unnecessary interruptions (e.g. Do Not Disturb setting, closing your door, office hours, etc.)

You may also wish to use the [Eisenhower Matrix](#) as a tool to determine if your time is spent in the most valuable way.

Next Step: Make Actionable Changes

Set parameters to protect your time. Use the data and your reflections as a guide as you plan your calendar going forward. If you have an Executive Assistant, provide them with guidelines to ensure your calendar is maintained accordingly.

- **What can you delegate?**
- **What procedures can be put in place?** If you are constantly responding to urgent and important tasks, consider if there are any procedures that could be put in place that would allow these matters to be addressed before they become urgent issues.
- **Protect your time.** Changes can be small. Consider scheduling meetings 10-15 minutes after the 30 minute or an hour mark. Can a recurring meeting be shortened? Do you need to block time to eat lunch, or have uninterrupted time pre-scheduled?
- Discuss your findings with key members of your team, as needed to determine how your priorities can be managed. Strategies can address re-prioritization for a short period of time (for example, one week), or a longer duration based on need.
- **Reassess how your time is spent.** Determine if there are any areas in which you need to reduce the amount of time spent in meetings or on related tasks. Likewise, determine if there are any areas that require greater dedication of time.

Calendar Audit Using Excel

Step 1: Set up your formula in a new column

1. Insert a new Column F and rename it "Meeting Length" in cell F1
2. In cell F2, copy and paste this formula: $=(E2-C2)*1440$
3. Click cell F2 to highlight the cell. When a cross appears on the bottom right hand corner of the cell, click the cross and drag it to the bottom of your worksheet. This will add the formula to all rows.

Step 2: Pivot

To analyze create table:

=(E2-C2)*1440		
D	E	F
End Date	End Time	Meeting Length
9/5/2023	3:35:00 PM	35.0000
9/7/2023	3:35:00 PM	
9/12/2023	3:35:00 PM	

your keyboard

2. Click *Insert* in your top menu bar
3. *Pivot table*
4. *OK*
5. A new tab will open for your pivot table
6. In the right-hand PivotTable Fields menu, scroll until you see *Categories*
7. Click the checkbox for *Categories*

=(E2-C2)*1440		
D	E	F
End Date	End Time	Meeting Length
9/5/2023	3:35:00 PM	35.0000
9/7/2023	3:35:00 PM	35.0000
9/12/2023	3:35:00 PM	35.0000
9/14/2023	3:35:00 PM	35.0000
9/1/2023	1:30:00 PM	60.0000
9/4/2023	1:30:00 PM	60.0000

Create a Table

quickly your data, a pivot

1. Click Ctrl+A on

8. Scroll up to find *Meeting Length*
9. Click and drag *Meeting Length* into the Values box (in the bottom right corner)
10. In that same box, click *Count of Meeting Length*
11. *Value Field Settings*
12. Select *Sum*- OK
13. Your table will now display of minutes you spent in each category
14. Scroll up to find *Meeting Length*
15. Click and drag *Meeting Length* once more into the Values box (in the bottom right corner)
16. In that same box, click *Sum of Meeting Length 2*
17. *Value Field Settings*
18. Click on *Show Values As* in the menu bar
19. In the drop-down menu, select *% of Grand Total* -OK
20. You can now see the total percentage of time spent in each category

Row Labels	Sum of Meeting Length	Sum of Meeting Length2
(blank)		0.00%
Strategy Meetings	475	18.16%
1:1 employee meetings	650	24.86%
Responding to urgent/unplanned issues	545	20.84%
Strategy Work	500	19.12%
CAO Check-ins	445	17.02%
Grand Total	2615	100.00%

