



OUTLOOK

QUICK REFERENCE GUIDE

The highest-impact email habits for Hampton Golf team members

7 MODULES · EMAIL TEMPLATES · SIGNATURE SHORTCUTS · DAILY HABITS

THE FOUNDATION

Why this guide exists

"Your inbox is a processing center (AKA to-do list) — not a storage unit."

The average professional spends 2.5 hours/day on email.

Touch it once

Open an email → decide → act, file, or delete. Never set it aside to revisit later.

File, don't pile

Folders are free. A folder-organized inbox finds anything in seconds.

Flags = safety net

Every email needing future action gets a flag. No flag = forgotten.

01 · INBOX SETUP

Do these once — they pay dividends every day

1 Turn Off Focused Inbox

→ *Settings* → *Mail* → *Layout* → *"Don't sort my messages"*

✓ Focused Inbox hides emails you need to see.

2 Enable Conversation View

→ *View* → *Messages* → *Group into Conversations* ✓

✓ Full thread context in one click — cuts clutter 30–40%.

3 Dock the Reading Pane

→ *View* → *Layout* → *Reading Pane* → *Right*

✓ Read without opening new windows — saves dozens of daily clicks.

4 Build Your Signature

→ *Settings* → *Account* → *Signatures* → *Create New Messages + Replies versions*

✓ **Enforces Hampton Golf standards and eliminates repetitive typing. (See Module 06)**

02 · SIGNATURES AS EMAIL SHORTCUTS

Build once — deploy in two clicks for repetitive templated emails

💡 Most people don't realize: Outlook Signatures aren't just for contact info. You can create MULTIPLE signatures — each as a full email template — and insert any of them into a new email in two clicks.

HOW TO SET UP SIGNATURE SHORTCUTS

- 1 Open Signature Manager** → *Settings → Account → Signatures*
- 2 Click "New" and name it clearly** → *e.g. "TEMPLATE — Membership Inquiry"*
- 3 Paste your template content** → *Include subject line suggestion in the body as a reminder*
→ *Set both New and Reply dropdowns to "(none)" for template sigs*
- 4 Leave default signatures OFF**
- 5 To insert: New Email → Insert tab → Signature** → *Pick from your list — entire template loads instantly*

WHY THIS WORKS

- ✓ No .oft files to hunt down
- ✓ Works in desktop + web Outlook
- ✓ Insert in exactly 2 clicks
- ✓ Pre-fills body AND formatting
- ✓ Shareable naming convention
- ✓ No add-ins or plugins needed

▶ **Video Example: How to Create Signature Templates in Outlook** → hampton.golf/outlook-training

03 · MEMBERSHIP EMAIL TEMPLATES

Save as Signatures — insert in 2 clicks

Membership Inquiry — First Response

MEMBERSHIP

 Subject: Re: Membership at [Club Name]

Thank you for your interest in [Club Name]! I'd love to learn more about what you're looking for in a club. Would you have 15 minutes for a quick call this week?




In the meantime, I'm attaching our membership overview. Please let me know if you have any questions.

Tour Confirmation

MEMBERSHIP

 Subject: Your Club Tour — [Date] at [Time]

We're looking forward to welcoming you on [Date] at [Time]! Here are a few details:

-  Address: [Club Address]
-  Parking: [Parking instructions]
-  Ask for: [Your name]

Please reply to confirm, or let me know if you need to reschedule.

New Member Welcome

MEMBERSHIP

 Subject: Welcome to [Club Name], [First Name]!

On behalf of the entire team, welcome to the [Club Name] family! We're thrilled to have you as a member.

Your membership number is [#]. To get started:

- [Key link or resource]
- [Contact for questions]

Proposal Follow-Up

MEMBERSHIP

 Subject: Following Up — [Club Name] Membership

I wanted to follow up on the membership proposal I shared last week. Has anything shifted in your thinking, or do you have any questions I can answer?

I'm happy to revisit any details — just let me know what would be most helpful.

▶ Video Example: Setting up Signature Templates in Outlook → hampton.golf/outlook-training

04 · EVENTS & F&B EMAIL TEMPLATES

Save as Signatures — insert in 2 clicks

Event Inquiry Response

EVENTS / F&B

 Subject: Re: Event at [Club Name]

Thank you for considering [Club Name] for your event! We'd love to help make it a success.


Could you share a few details — approximate date, guest count, and the type of event? I'll follow up with our available options and pricing.

Deposit & Contract Confirmation

EVENTS / F&B

 Subject: Your Event Booking — Confirmed!

Wonderful — your event on [Date] is officially on the books! Attached is your signed contract and deposit receipt.

 Event Date: [Date]

 Confirmed Count: [#]

 Your Event Contact: [Name, phone]

We look forward to a great event!

Post-Event Thank You

EVENTS / F&B

 Subject: Thank You — [Event Name]

It was a pleasure hosting [Event Name] at [Club Name]. We hope everyone had a wonderful experience!

If you have any feedback to share, we'd love to hear it. And when you're ready to plan your next event, we'd be honored to be your first call.

Catering / Menu Request

EVENTS / F&B

 Subject: Catering Menu — [Club Name]

Thank you for your interest in our F&B offerings for your upcoming event. Attached is our current catering menu with pricing.

Our Chef is also happy to accommodate custom menus — just let me know your vision and I'll coordinate a conversation.

▶ Video Example: Events & F&B Email Templates in Outlook → hampton.golf/outlook-training

05 · GENERAL & OPERATIONS TEMPLATES




Save as Signatures — insert in 2 clicks

Meeting Recap / Follow-Up

GENERAL

 Subject: Recap — [Meeting Name], [Date]

Thanks for a productive conversation today. Here's a quick recap:

-  Key Decisions: [list]
-  Action Items: [Name — Task — Due Date]
-  Next Meeting: [Date / TBD]

Please let me know if I've missed anything.

Board Communications Intro

GENERAL

 Subject: [Month] Update — [Club Name]

Dear [Club Name] Board,
Please find below our [Month] operational summary. We appreciate your continued partnership and welcome any questions.
[Insert update content]

Respectfully,
[Your Name] | Hampton Golf

Vendor / Supplier Request

GENERAL

 Subject: Request for [Product/Service] — [Club Name]

Hello [Vendor Name],
We're currently evaluating options for [product/service] at [Club Name].
Could you provide:

1. Current pricing / rate sheet
2. Lead time / availability
3. Any volume or contract terms

Out-of-Office Auto-Reply

GENERAL

 Subject: Out of Office: Returning [Date]

Thank you for your email. I'm out of the office from [Date] and will return [Date].








For urgent matters, please contact [Backup Name] at [email/phone].

I'll respond to all other messages upon my return.

06 · FOLDER STRUCTURE & KEY SHORTCUTS

The organizing system + power moves

CATEGORY COLOR SYSTEM

	Red	Urgent — needs response today
	Orange	Follow up within 48 hrs
	Yellow	Waiting on someone else
	Blue	Member / prospect inquiry
	Green	In progress — no action needed
	Purple	Board / leadership thread
	Gray	FYI / reference only

4 SHORTCUTS WORTH MEMORIZING

Master these first — they cover 80% of daily use.

Ctrl + N

New email

Start a fresh message without your mouse

Ctrl + R

Reply

Reply to sender only — not the whole chain

E

Archive

Single key clears processed emails instantly

Ctrl + Shift + Q

New meeting invite

Open a meeting form from anywhere in Outlook

07 · FLAGS, TASKS & DAILY HABITS

The system that prevents things from falling through the cracks

FLAGS & TASKS

1 Flag the email

Right-click flag → Today / Tomorrow / This Week / Custom

2 Or drag to Tasks

Drag to Tasks nav icon — creates a linked task

3 Set due date + priority

Add date, High/Normal/Low priority, track % complete

4 Review every morning

Check To-Do bar. Overdue = red. Mark complete when done.

DAILY HABITS CHECKLIST

* MORNING

- 30-min email batch process
- Review To-Do / flag list
- Confirm today's calendar
- Reply to <2-min emails now

AFTERNOON

- Second email sweep (30 min)
- Clear resolved flags
- File important sent emails
- Prep tomorrow's calendar

BEFORE YOU HIT SEND

A 5-second checklist that prevents 90% of email mistakes

1 Right people in To / CC / BCC?

 *Reply vs Reply All — does everyone need this?*

2 Attachment actually attached?

 *Search for 'attached' in your draft body text.*

3 Do all links work?

 *Ctrl+click each hyperlink to test before sending.*

4 Is the subject line specific?

 *"Q: Member dues at Deerwood" — not just "FYI".*

5 Did you proofread?

 *Install Grammarly for Outlook — catches typos before they go out.*

→ [grammarly.com/microsoft-outlook](https://www.grammarly.com/microsoft-outlook)

6 Is the timing right?

 *Use Delay Delivery (Options tab) for early-morning emails.*

08 · FOLDER STRUCTURE

Set up once — find anything in seconds

💡 Right-click any folder in the left panel → "New Folder" to create. Drag and drop to nest subfolders under a parent. Name parent folders in ALL CAPS so they sort to the top.

RECOMMENDED FOLDER TREE

- 📁 **CLIENTS & PROSPECTS**
 - 📁 Active Members
 - 📁 Prospects – Hot
 - 📁 Prospects – Pipeline
- 📁 **EVENTS & F&B**
 - 📁 Upcoming Events
 - 📁 Catering Contracts
- 📁 **OPERATIONS**
 - 📁 Vendors & Suppliers
 - 📁 HR & Staffing
- 📁 **BOARD & LEADERSHIP**
- 📁 **REFERENCE & ARCHIVE**

HOW TO CREATE & NEST SUBFOLDERS

1

Create a parent folder

Right-click your inbox (or any folder) → New Folder. Name it in ALL CAPS.

2

Add a subfolder

Right-click the parent folder → New Folder. The new folder auto-nests underneath.

3

Drag to reorganize

Drag any folder onto another to make it a child. Drag to inbox level to promote it.

4

Rename or delete

Right-click any folder → Rename or Delete. Deleting moves contents to Deleted Items.

5

Pin frequent folders

Right-click → Add to Favorites. Pinned folders appear at the top of your folder list.

09 · CALENDAR MANAGEMENT

Use the calendar as a productivity engine — not just a meeting log



Block Email Time

Schedule 30 min AM + 30 min PM as recurring calendar blocks. Name them "Email — Do Not Schedule Over" so the team respects them.



Always Add an Agenda

Type purpose, key decisions, and time per topic in the meeting body. No agenda = consider rescheduling.



Use Scheduling Assistant

New Meeting → Scheduling Assistant tab. See all attendee calendars overlaid before sending — stops back-and-forth emails.



Set Zoom as Default

Get Add-ins → search Zoom → Install. Auto-generates a meeting link on every new invite.

CALENDAR BEST PRACTICES

Color-code event types

Green = internal, Blue = member/prospect, Orange = F&B events, Purple = board. Matches email category system.

Set reminders intentionally

Default 15 min is rarely right. Set 1 day + 1 hour for member visits; 5 min for quick calls.

Add buffer blocks


Schedule 15-min "Prep" blocks before important meetings. Prevents back-to-back cognitive drain.

Decline with grace

If you can't attend: Decline → add a note. Don't silently ignore invites — it leaves organizers guessing.

10 · CALENDAR IN YOUR INBOX

Display today's schedule on the right side — without leaving your inbox

 Both Classic and New Outlook let you display a live calendar panel directly in your inbox view — so you can see today's schedule, click into meetings, and create events without switching apps.

CLASSIC OUTLOOK

1

Enable the To-Do Bar

View tab → To-Do Bar → Calendar
→ The calendar mini-view appears on the right side of your inbox.

2

Show Date Navigator

View → To-Do Bar → Date Navigator ✓
→ Adds a clickable monthly mini-calendar above the daily agenda.

3

Show Appointments

View → To-Do Bar → Appointments ✓
→ Lists today's upcoming meetings directly below the mini-calendar.

4

Resize the panel

Hover over the left edge of the To-Do Bar → drag left/right to set your preferred width.

NEW OUTLOOK (2024+)

1

Open My Day panel

Click the calendar icon in the top-right toolbar (looks like a small calendar page).
→ My Day slides open on the right.

2

Pin My Day open

Click the pin icon (📌) at the top of the My Day panel.
→ It stays visible every time you're in Mail view.

3

View full day agenda

The panel shows today's meetings in chronological order. Click any event to open or join.

4

Create an event from inbox

Click "+ New Event" at the top of My Day — creates a calendar entry without leaving Mail.

10b · WHAT IT LOOKS LIKE

Calendar panel displayed inside your Outlook inbox

CLASSIC OUTLOOK — To-Do Bar

The screenshot shows the Classic Outlook interface. The top bar is blue with "Inbox — Outlook" on the left and a light green "← To-Do Bar panel" on the right. Below the top bar is the "Inbox (14)" list. To the right of the inbox is a calendar view for April 2025. The calendar shows the days of the week (Su to Sa) and the dates. The 23rd is highlighted with a blue circle. Below the calendar is a "TODAY'S SCHEDULE" section with three events: "9:00 Team Standup" (blue bar), "11:00 RVCC Call" (green bar), and "2:00 Pipeline Review" (orange bar).

Inbox (14)		← April 2025						
		Su	Mo	Tu	We	Th	Fr	Sa
Lou Pinella	9:42 AM			1	2	3	4	5
Re: GM Transition Update		6	7	8	9	10	11	12
Bill Rehanek	8:15 AM	13	14	15	16	17	18	19
Operations — River Hall		20	21	22	23	24	25	26
Donna Rockfeld	Yesterday	27	28	29	30			
Miami Shores RFP Follow-up		TODAY'S SCHEDULE						
Taylor Morrison	Mon	9:00 Team Standup						
Solivita Marketing Plan		11:00 RVCC Call						
Ryan Laubach	Mon	2:00 Pipeline Review						
SharpSpring Pipeline Q2								

NEW OUTLOOK — My Day Panel

The screenshot shows the New Outlook interface. The top bar is blue with "Mail — New Outlook" on the left and a light green "← My Day panel" on the right. Below the top bar is the "Inbox (14)" list. To the right of the inbox is a "My Day" panel for Wednesday, April 23. The panel shows three events: "Team Standup" (9:00 – 9:30 AM, Zoom), "RVCC Member Call" (11:00 – 11:45 AM, Phone), and "Pipeline Review" (2:00 – 3:00 PM, Conference Rm). At the bottom of the panel is a blue button with "+ New Event".

Inbox (14)		My Day	
Johnny Damon	9:42 AM	Wednesday, April 23	
Re: GM Transition Update		Team Standup	
Bill Rehanek	8:15 AM	9:00 – 9:30 AM	
Operations — River Hall		Zoom	
Donna Rockfeld	Yesterday	RVCC Member Call	
Miami Shores RFP Follow-up		11:00 – 11:45 AM	
Taylor Morrison	Mon	Phone	
Solivita Marketing Plan		Pipeline Review	
Ryan Laubach	Mon	2:00 – 3:00 PM	
SharpSpring Pipeline Q2		Conference Rm	
		+ New Event	

You now have everything you need.

The difference between an overwhelming inbox and a productive one is a system — consistently applied.

- ✓ Inbox Setup
- ✓ Signature Shortcuts
- ✓ Membership Templates
- ✓ Events / F&B Templates
- ✓ General Templates
- ✓ Folders + Subfolders
- ✓ Flags & Daily Habits
- ✓ Calendar Management
- ✓ Calendar in Inbox
- ✓ Calendar View Example

Questions? Contact info@hampton.golf