



# Legal Ease Consulting Guide to Using Color to Organize Your Calendar and Email in Outlook

If you're a visual person, using color can help you easily identify the most important tasks, appointments and messages in Outlook. This guide takes you step-by-step through the process.

Allison C. Johs

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## Color on Your Outlook Calendar: Categories

If you want to make your Outlook calendar easier to use, try implementing Categories to color-code your appointments. I do this to make it easier for me to see at a glance what I have coming up in a given day, week or month.

For example, I created a category that I've named Clients, and assigned the color green. When looking at my week, I can easily see how many client appointments I have that week and when they are. Similarly, I created a pink category for personal appointments, and a purple category for marketing activities related to my consulting business.

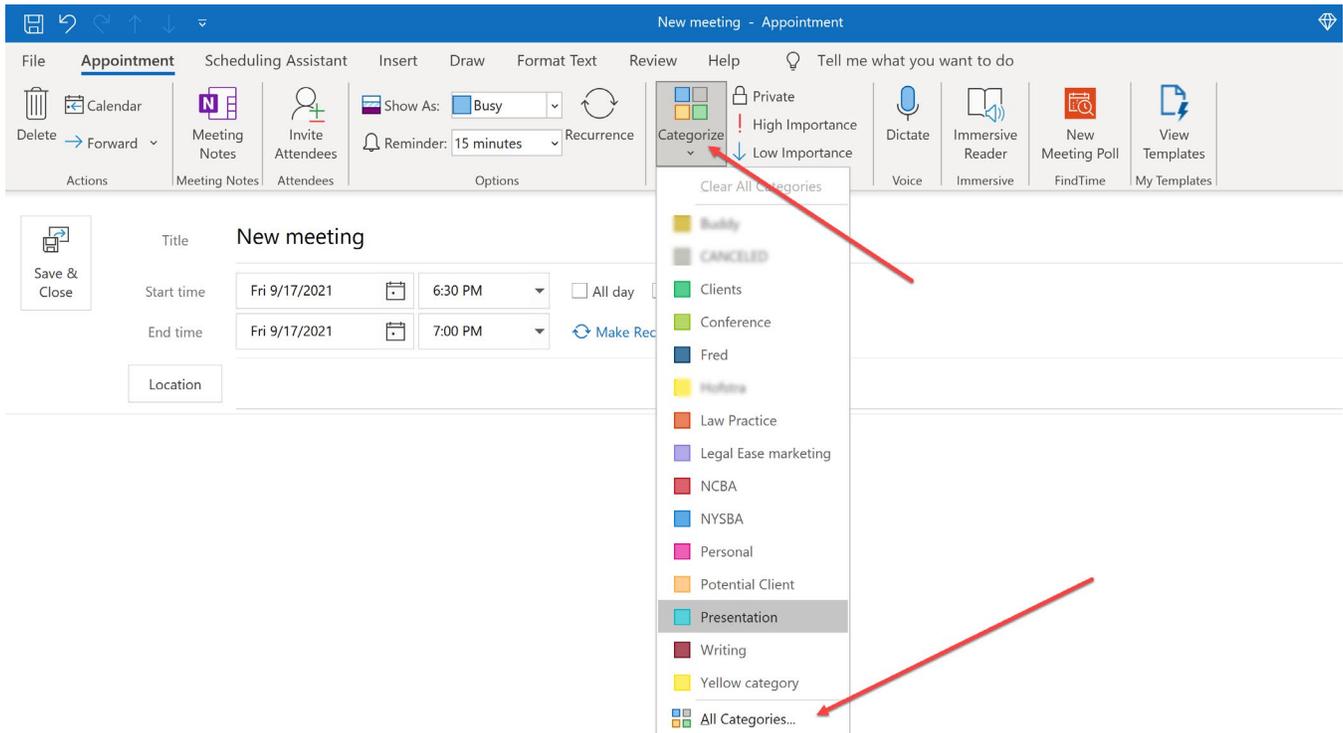
Here's an example of what that might look like on my calendar:

The screenshot displays the Outlook calendar interface. The main view is a weekly calendar for September 12-18, 2021. The calendar is color-coded by category:

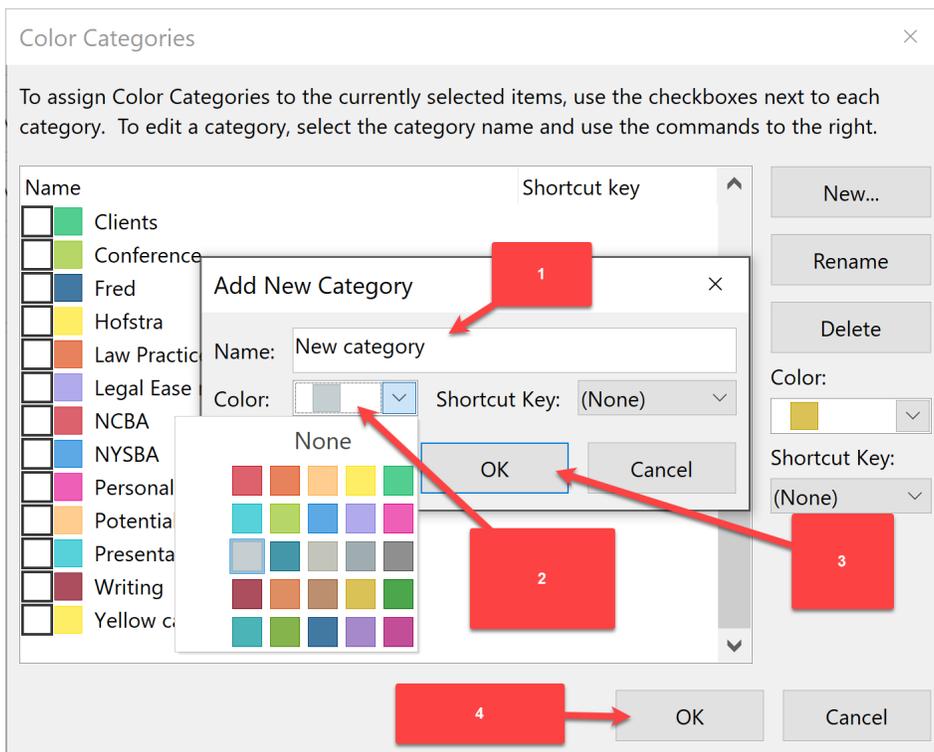
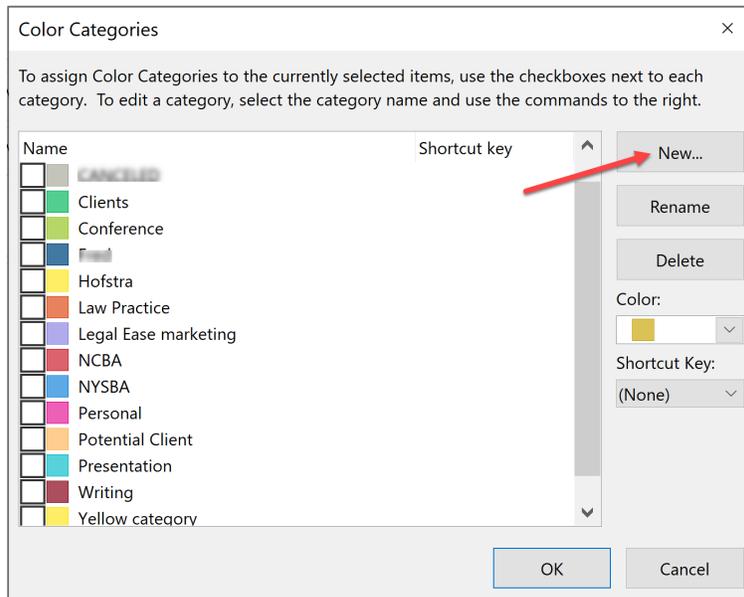
- Pink:** Personal appointments, including "Carolina here" on Monday, September 13th.
- Blue:** Work-related events, including "Follow up with Carol G" on Tuesday, September 14th, and "HOUSTON PROFILES" on Monday, September 13th.
- Green:** Client appointments, including "Legal Ease Consulting 2" on Wednesday, September 15th.
- Orange:** Marketing activities, including "LTRC Board Meeting" on Wednesday, September 15th.
- Purple:** Marketing activities, including "Allison Johs - Possible" on Thursday, September 16th.
- Red:** Newsletter Due on Wednesday, September 15th.

The sidebar on the left shows a monthly calendar for September and October 2021, and a "My Calendars" section with "Calendar" checked. The "Other Calendars" section includes "United States holidays" and "Birthdays".

To add a category to an appointment, open the appointment and click on Categories. Then click on All Categories at the bottom of the list. (As you can see, I have quite a few categories created already)



When you click on All categories, you'll see the pop-up below. Click on "New" to add a new category.



When you do, you'll get the "Add New Category" box, seen below.

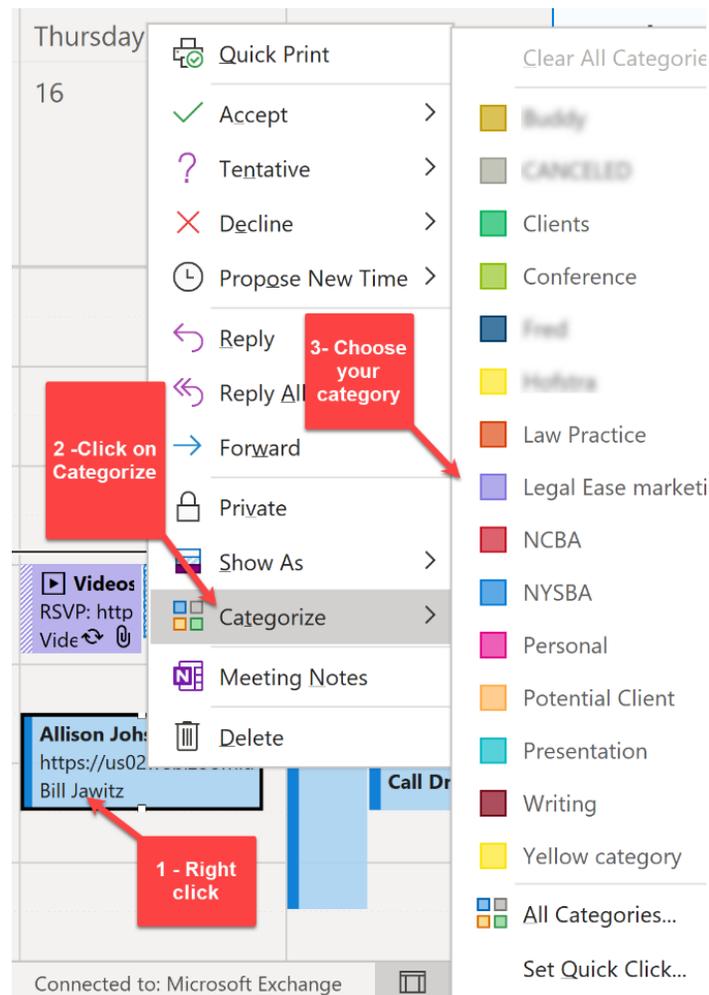
1. Give your category a name
2. Choose the color you want to associate with that category
3. Click OK
4. Click OK again in the original Color Categories box.

Now, when you want to categorize an appointment, simply:

1. Right-click on the appointment
2. Click on Categorize

### 3. Choose the category you want

(See the image on the next page)

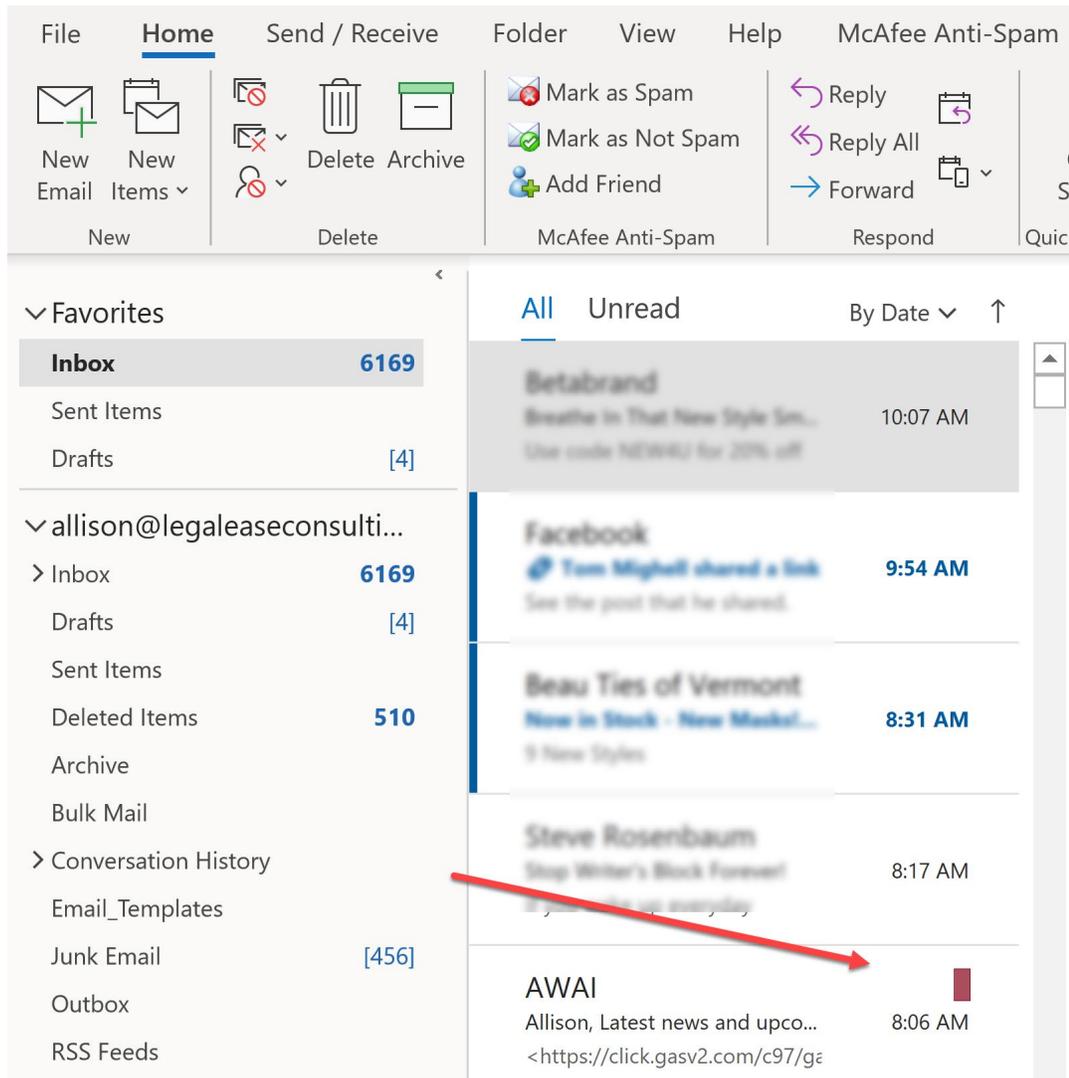


Now your appointment will be color-coded!

## Adding Color to Email: Conditional Formatting

Although you can use categories for email as well, for me, it doesn't have the visual impact I need. When you add a category to an email message, Outlook just places a colored box corresponding to that category on the message.

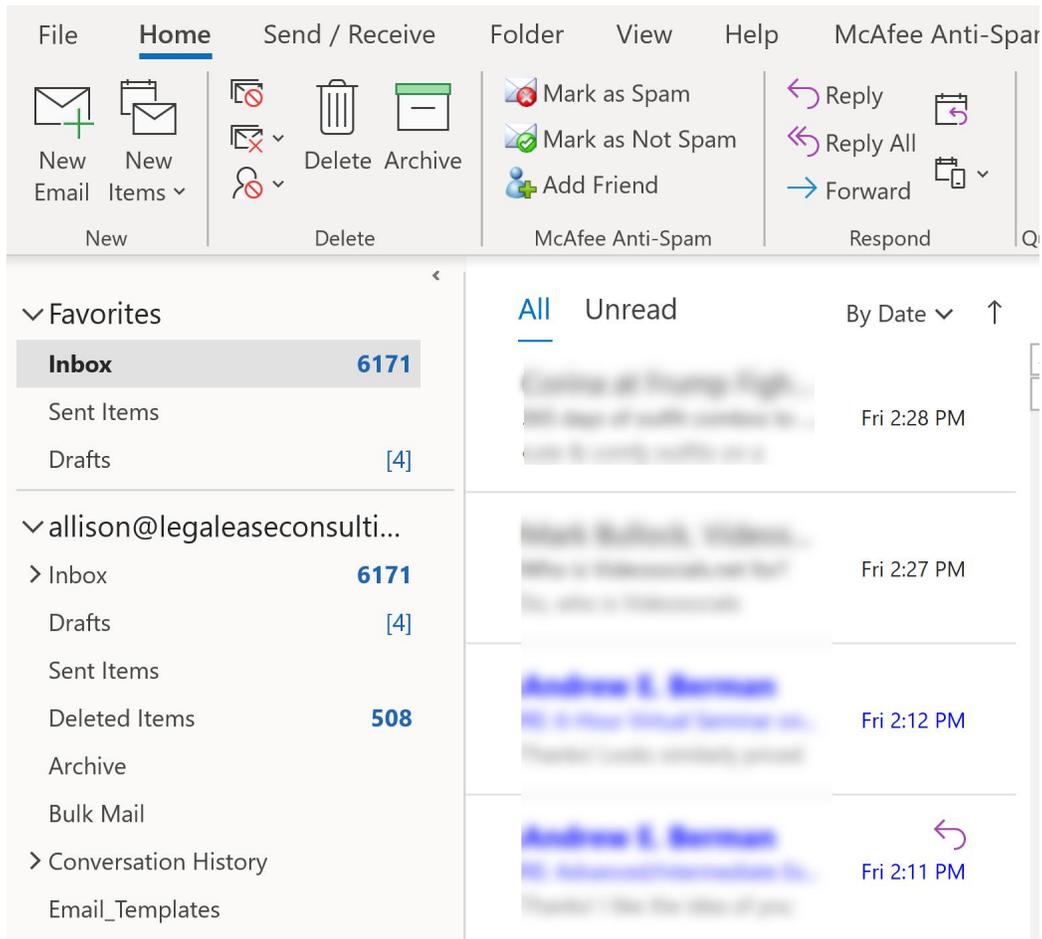
Here's an example of what a categorized message looks like in my inbox:



This just isn't prominent enough for me.

Instead, I use color with email by color coding messages from certain individuals or with specific items in the subject line so when I look at my inbox, I can see right away if there is an important message I need to respond to immediately.

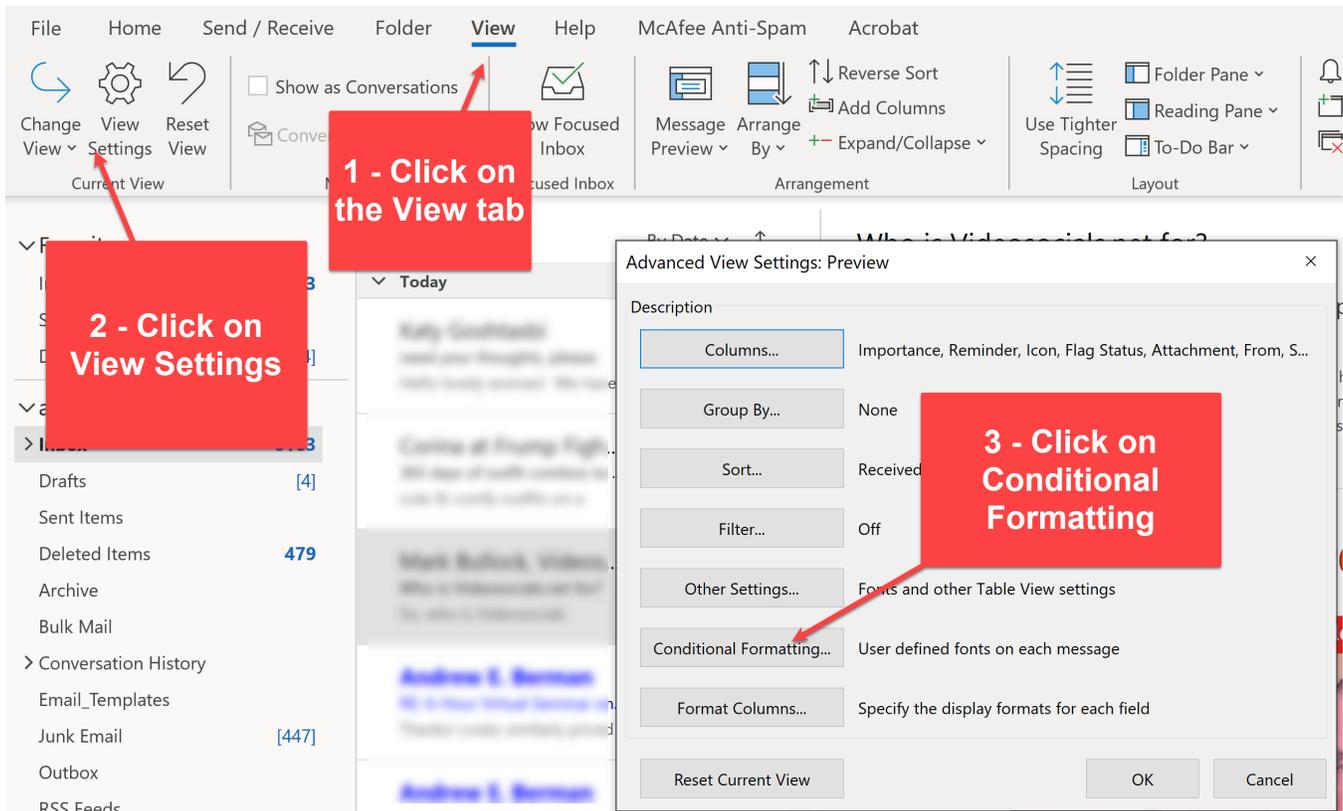
Here's what it looks like in my inbox:



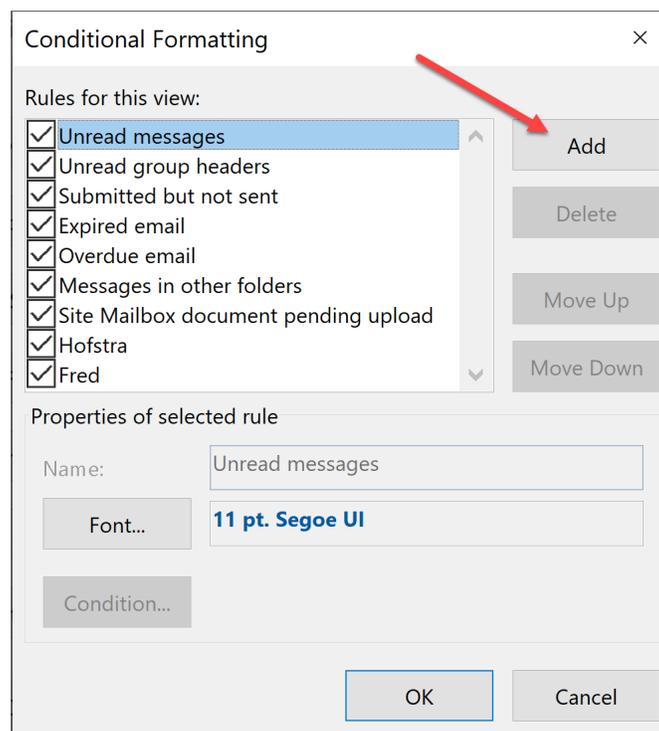
I've blurred the image for privacy reasons, but you can immediately see how the blue colored messages are much more prominent than "regular" messages in my inbox, so I know exactly which client they're from, and I can respond to those messages first.

Here are the steps I follow to accomplish this (as seen in the image on the next page):

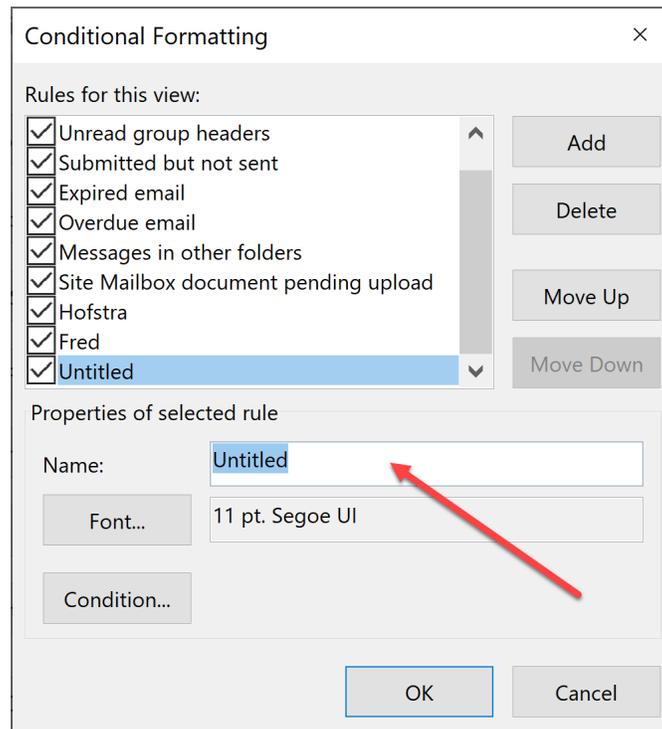
1. Click on the View tab
2. Click View Settings
3. In the Advanced View Settings Preview popup, click Conditional Formatting



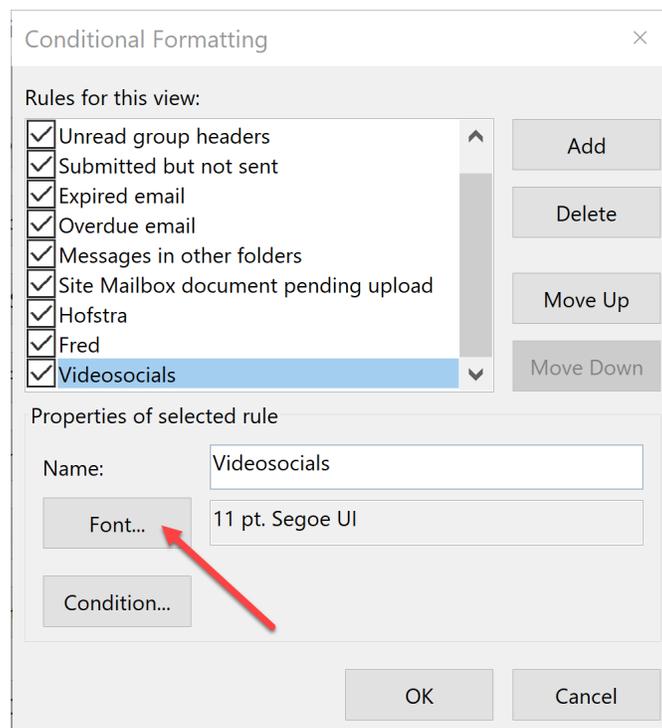
You will then see the conditional formatting pop-up screen. Click on Add to add a new conditional formatting rule:



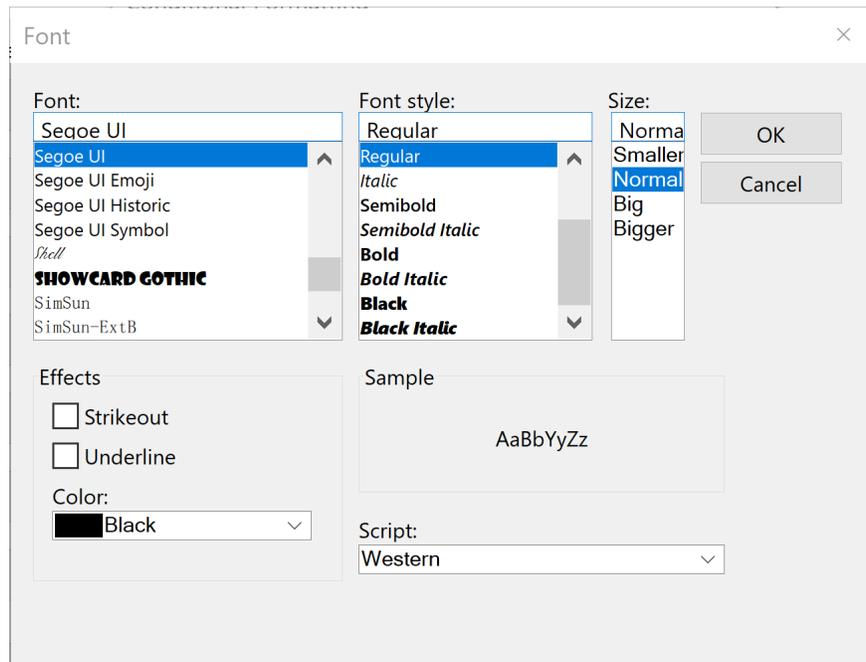
Next, click in the Name box to give your rule a name:



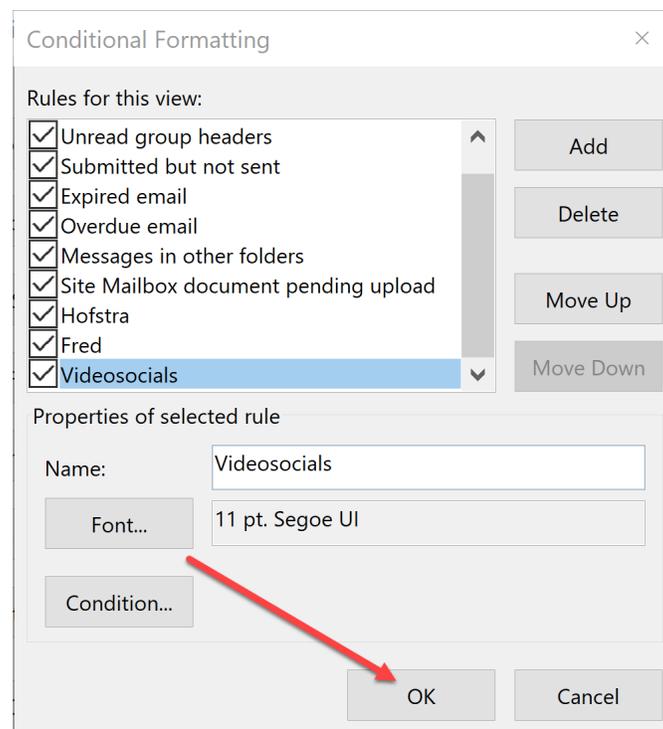
After you've named your rule, click Font to choose the formatting for the messages you've identified:



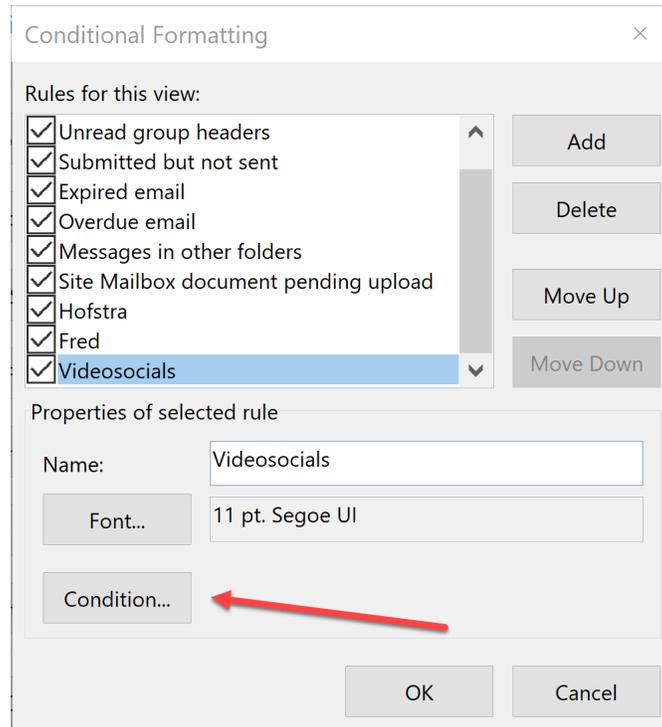
You can choose any combination of colors and fonts so your messages stand out:



Don't forget to click OK to finalize your changes. You'll need to click OK on the previous screens as well, once you have made all of your selections.



For a more advanced approach, you can click on the Condition button, which will provide you with additional options for your conditional formatting rule.



The Filter pop-up will appear (see below), which allows you to add more conditions to your rule; you can format messages with specific words in the subject or body, or from specific individuals, and even limit messages that are conditionally formatted to a specific time period.

As usual, once you've filled in all of your chosen options, click OK on all remaining pop-ups to save your conditional formatting rule.

You can always return to conditional formatting if you want to modify or delete one of your previous conditional formatting rules.

I hope this tutorial helps you organize your email and calendar and that these visual cues help improve your productivity!

If you want additional help with your productivity, please contact me!

All the best,

Allison



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**Allison C. Shields Johs, Esq.**, President of Legal Ease Consulting, Inc., provides marketing, social media, business development, productivity and practice management coaching and consulting services for lawyers and law firms.

After leaving her position as Administrative Partner at one of Long Island's premier law firms in 2005, Allison started Legal Ease Consulting, Inc. to help lawyers build better law practices. A former practicing lawyer and law firm manager, Allison understands the law firm environment and the daily pressures faced by lawyers trying to manage and build their business while practicing law and successfully serving their clients.

Allison helps her clients create efficient, effective systems and operations to maximize productivity and enhance client experience. Her clients learn how to identify and attract their ideal clients, improve their client intake and selection, increase client loyalty, develop client-friendly fee structures, and increase profits. With the rise of the internet and social media, Allison recognizes that lawyers must capture attention and demonstrate their expertise online. She provides online marketing and social media services and training for lawyers to help them maximize these important opportunities.

The College of Law Practice Management inducted Allison as a Fellow in October 2018. In 2016, Allison was one of the first to receive the Outstanding Women in Law Award from Hofstra University Center for Children, Families and the Law and Long Island Business News. She was recognized by the American Bar Association's Law Practice Division in October 2018 with the Wilkins Award for Overall Achievement in Division Publishing, and received the award for Best Column in 2019 for her *Simple Steps* column in *Law Practice* magazine. Allison currently serves as Chair of the ABA's Legal Technology Resource Center, has served as the Chair of the Division's Book Publishing Board, on the Division's Council, Education Board, Nominating Committee, and on the editorial boards of both *Law Practice Magazine* and *Law Practice Today*. She also serves as Co-Chair of the Division's Legal Technology Resource Center.

Also active in her local bar associations, Allison is the former Executive Director of the Suffolk Academy of Law, the educational arm of the Suffolk County Bar Association, served as Associate Dean of the Academy of Law, and is a past member of the Board of Directors of the Suffolk County Bar Association and past Chair of the Solo and Small Firm Committee. She has served as a member of the Nassau County Bar Association's Nominating Committee, Chair of the Membership Committee and on the editorial board of *The Nassau Lawyer*.

Allison writes and lectures on marketing, social media, business development, productivity and practice management for bar associations, law schools and other legal associations, and has been a presenter at the ABA TECHSHOW, the leading legal technology conference and expo. She is the co-author, with Daniel J. Siegel, of [\*How to Do More In Less Time: The Complete Guide to Increasing Your Productivity and Improving Your\*](#)

[\*Bottom Line\*](#), and with Dennis Kennedy, of [\*LinkedIn in One Hour for Lawyers\*](#), and [\*Facebook in One Hour for Lawyers\*](#), all published by the American Bar Association's Law Practice Division. Her most recent book, [\*Make LinkedIn Work for You, A Practical Handbook for Lawyers and Other Legal Professionals\*](#), co-authored again with Dennis Kennedy, was released in October of 2019.

Allison is the author of the Legal Ease Blog at [www.LegalEaseConsulting.com](http://www.LegalEaseConsulting.com). Her website, [\*Lawyer Meltdown\*](#), provides resources and information for lawyers about managing and building their practices.