

INTERACTIVE WORKSHOP



Boost Productivity & Unwind

Join us for an interactive workshop — learn efficiency hacks, healthy work habits, InDesign tricks, proposal closeout tips, and more!

>>> Date

April 15, 2025
4:00 - 6:00 pm

>>> Location

McCarthy Building Companies, Inc.
3721 Douglas Blvd, #180
Roseville, CA 95661

Sponsored by:

MCCARTHY

April 15, 2025

Meet Your Presenters!



Liz Lewin
Stantec



Mel Bennett-Salmeron
Air Systems Service &
Construction



Justy Tadlock
Allerion Consulting Group, Inc.



Haley Palmer
Wood Rodgers, Inc.



Crystal Miller
Swinerton

A Positive Outlook: Save Yourself Time with Email Templates and Contact Groups



Liz Lewin
Stantec

Quick Parts Time Saver

This section will cover:

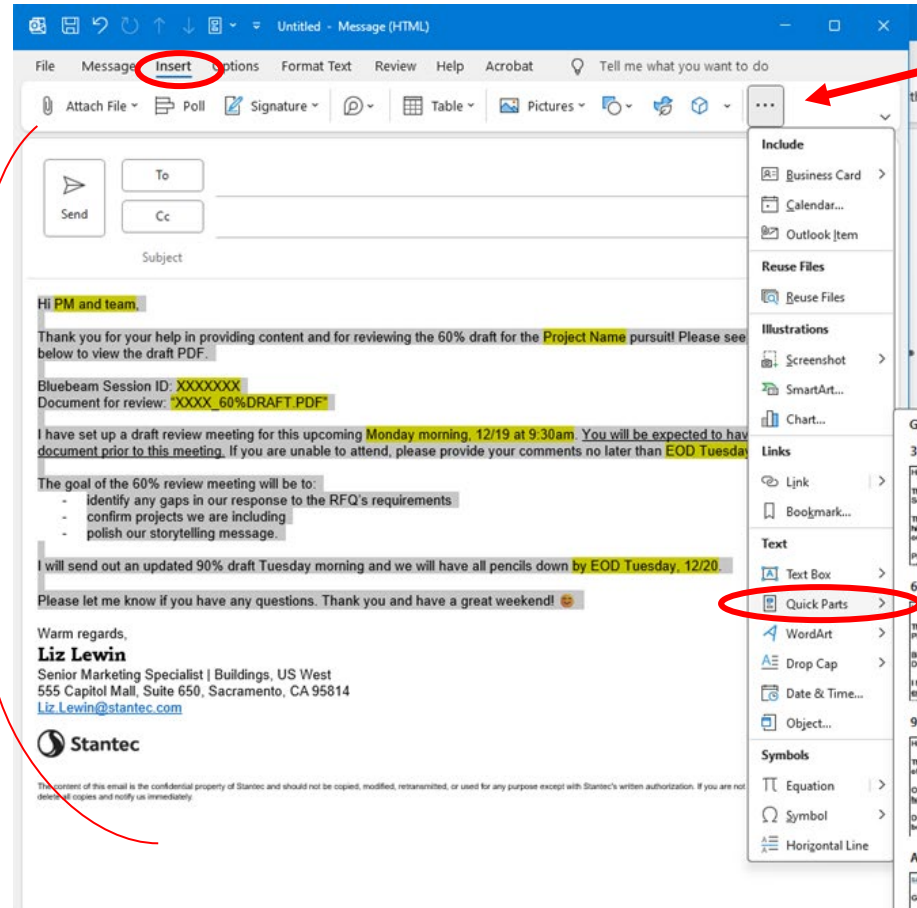
- Using Quick Parts to save time on emails you send frequently
- Saving new Contact Groups to streamline strategic team communications



Quick Parts Time Saver

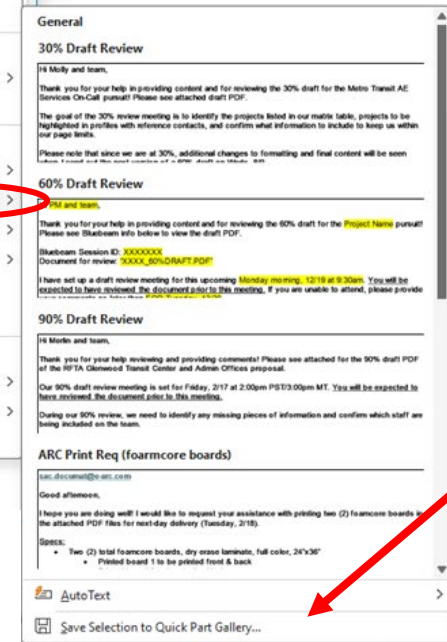


1) Have your text selected within the body of your email that you want to use as a template



2) Go to the three dots for additional Insert options

3) Go to Quick Parts dropdown and "Save Selection to Quick Parts Gallery"

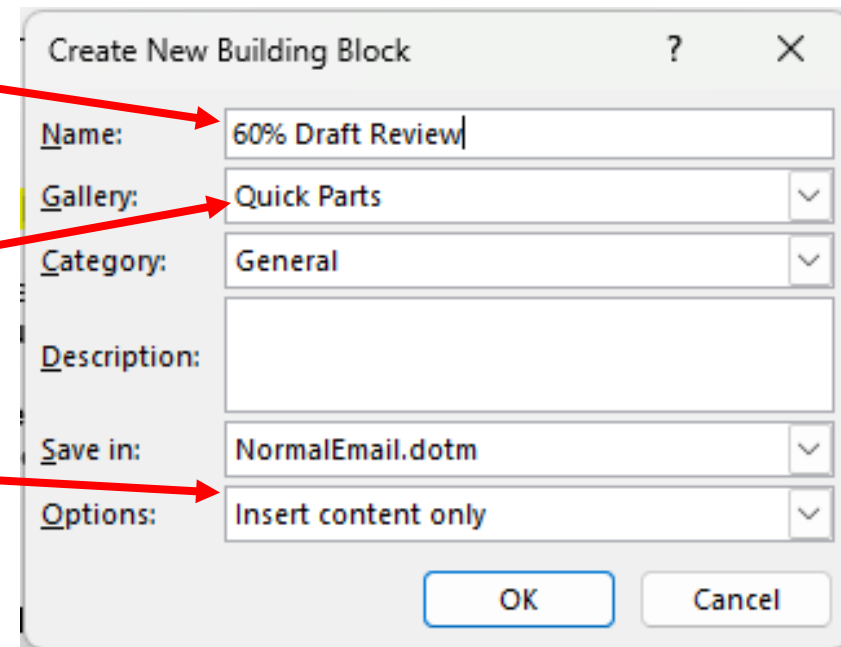


Quick Parts Time Saver

4) Create a name
for new template

5) Save to Quick
Parts Gallery

6) Select Option to
Insert Content Only



The screenshot shows the 'Create New Building Block' dialog box with the following fields and values:

- Name:** 60% Draft Review
- Gallery:** Quick Parts
- Category:** General
- Description:** (empty text box)
- Save in:** NormalEmail.dotm
- Options:** Insert content only

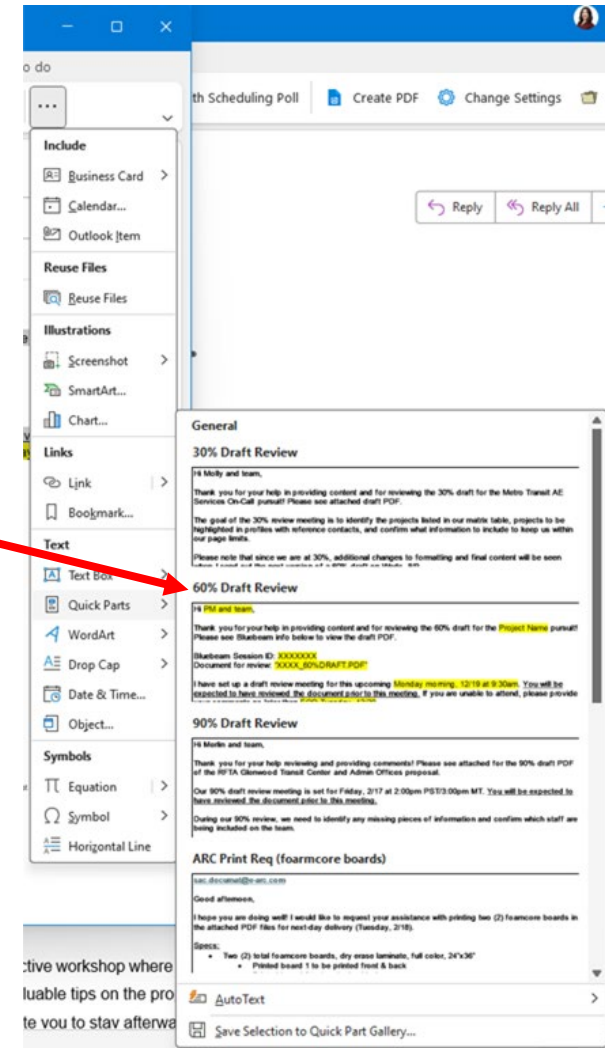
Red arrows point from the instructions on the left to the 'Name', 'Gallery', and 'Options' fields.

Buttons: OK, Cancel

Quick Parts Time Saver



7) You can now see your new template saved in your Quick Parts Gallery!



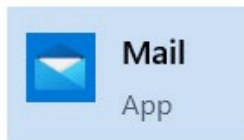
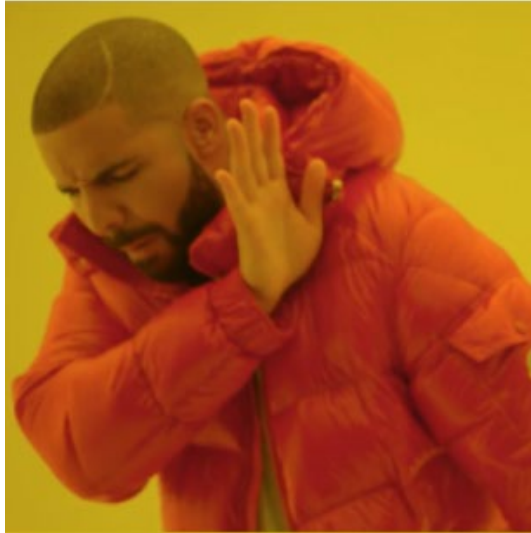
Quick Parts Time Saver

A screenshot of a Microsoft Word window titled 'Untitled - Message (HTML)'. The ribbon shows 'File', 'Message', 'Insert', 'Options', 'Format Text', 'Review', 'Help', 'Acrobat', and a search bar. The 'Insert' tab is active, showing options like 'Attach File', 'Poll', 'Signature', 'Table', 'Pictures', and 'More'. The email body contains the following text with yellow highlights: 'Hi PM and team.', 'Thank you for your help in providing content and for reviewing the 60% draft for the Project Name pursuit! Please see Bluebeam info below to view the draft PDF.', 'Bluebeam Session ID: XXXXXXXX', 'Document for review: "XXXX_60%DRAFT.PDF"', 'I have set up a draft review meeting for this upcoming Monday morning, 12/19 at 9:30am. You will be expected to have reviewed the document prior to this meeting. If you are unable to attend, please provide your comments no later than EOD Tuesday, 12/20.', 'The goal of the 60% review meeting will be to:', a bulleted list: '- identify any gaps in our response to the RFQ's requirements', '- confirm projects we are including', '- polish our storytelling message.', 'I will send out an updated 90% draft Tuesday morning and we will have all pencils down by EOD Tuesday, 12/20.', 'Please let me know if you have any questions. Thank you and have a great weekend! 😊', 'Warm regards,', 'Liz Lewin', 'Senior Marketing Specialist | Buildings, US West', '555 Capitol Mall, Suite 650, Sacramento, CA 95814', 'Liz.Lewin@stantec.com', and the Stantec logo. At the bottom, there is a confidentiality disclaimer.

8) Ta-da! Your new template can be quickly dropped into a new email

Pro tip: Highlight the pieces of info that get switched out within your template

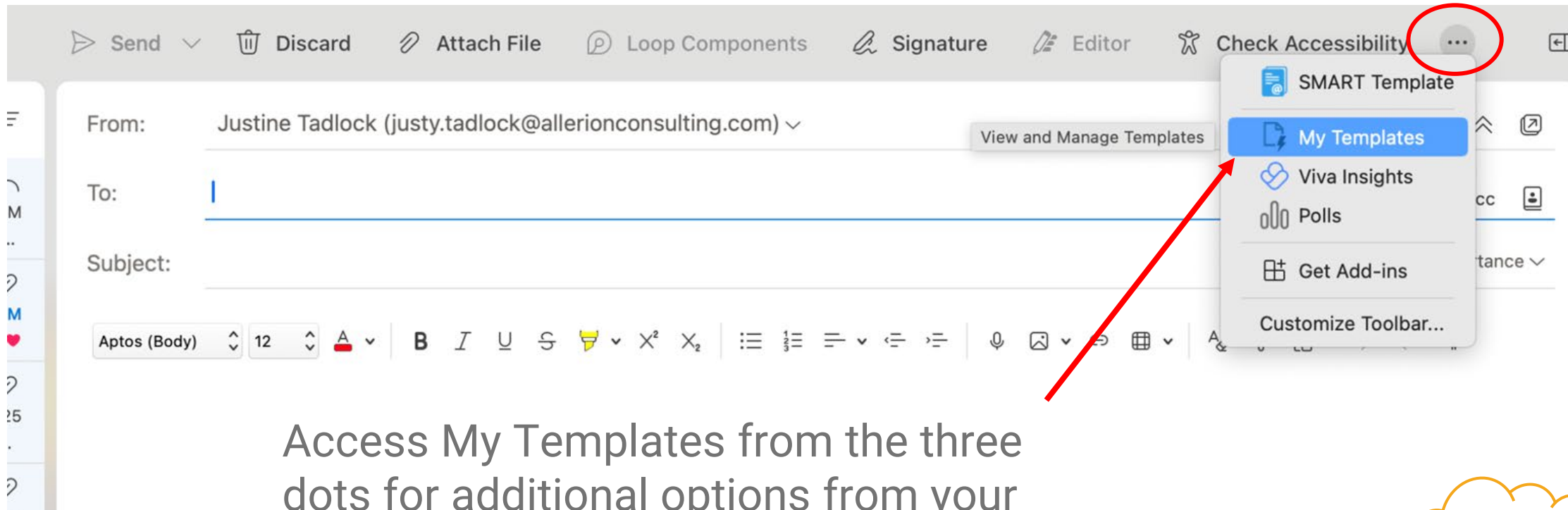
Quick Parts Time Saver



Have the newest version of Outlook?

Never fear! You can still do the same steps, but you will save it to your “My Templates” instead of Quick Parts.

Quick Parts Time Saver



Access My Templates from the three dots for additional options from your new email window and save.

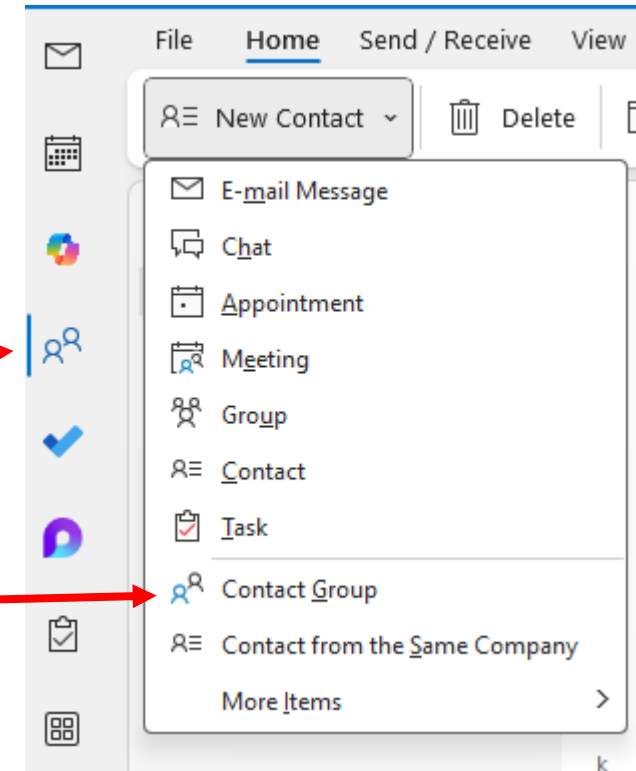


Contact Group Time Saver

In addition to email templates, save time with custom Contact Groups for your strategic teams

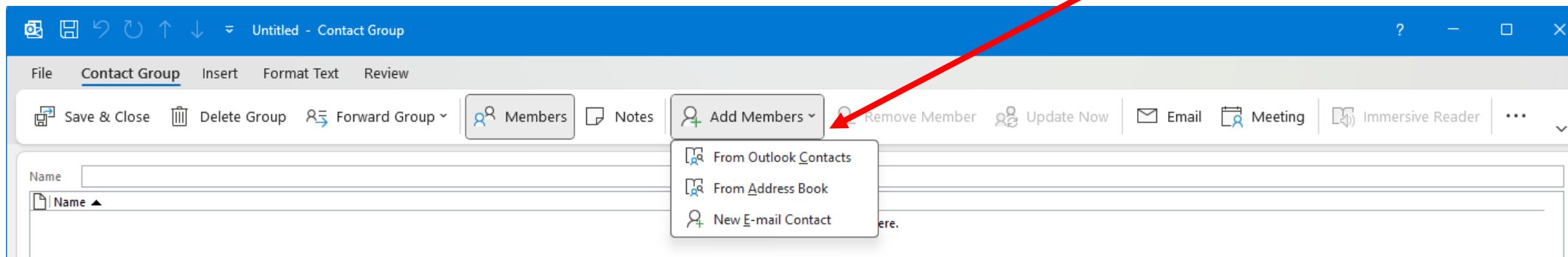
1) Go to your Contact Tab

2) Scroll down on New Contact dropdown menu and select Contact Group

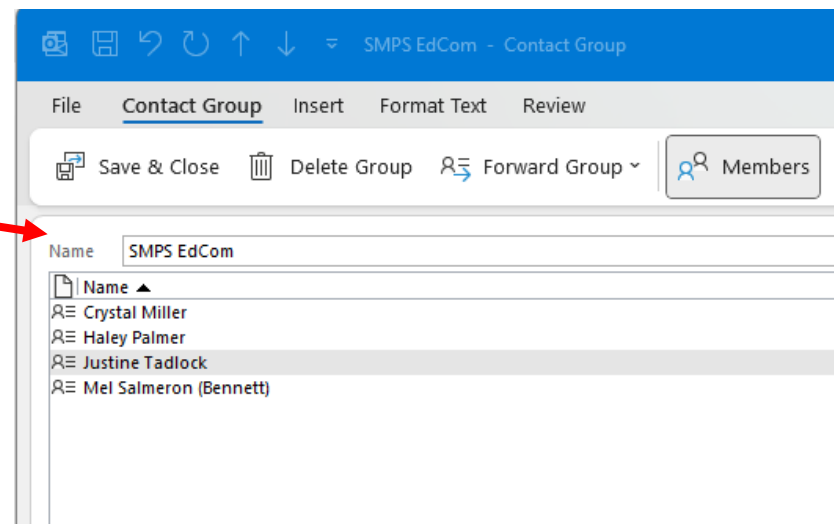


Contact Group Time Saver

3) A new window will open. Select Add Members (either through Outlook Contacts or Address Book, depending on if internal or external)

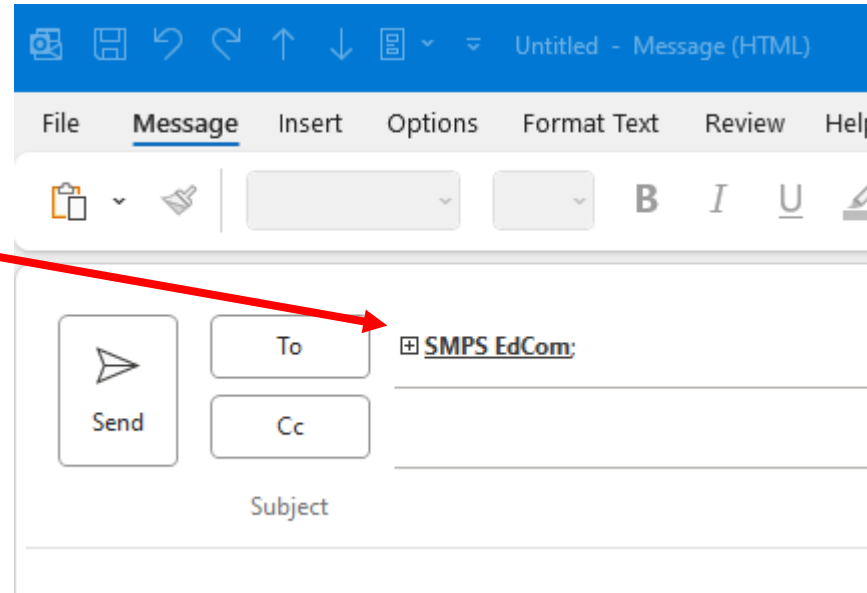


4) Add a Name to your group and check all members are added. Then Save & Close



Contact Group Time Saver

5) Your new Contact Group can now be used by typing the group name in the “To” line instead of typing every individual email



Healthy Habits: Make Your Schedule Work for You



Mel Bennett-Salmeron
Air Systems Service &
Construction

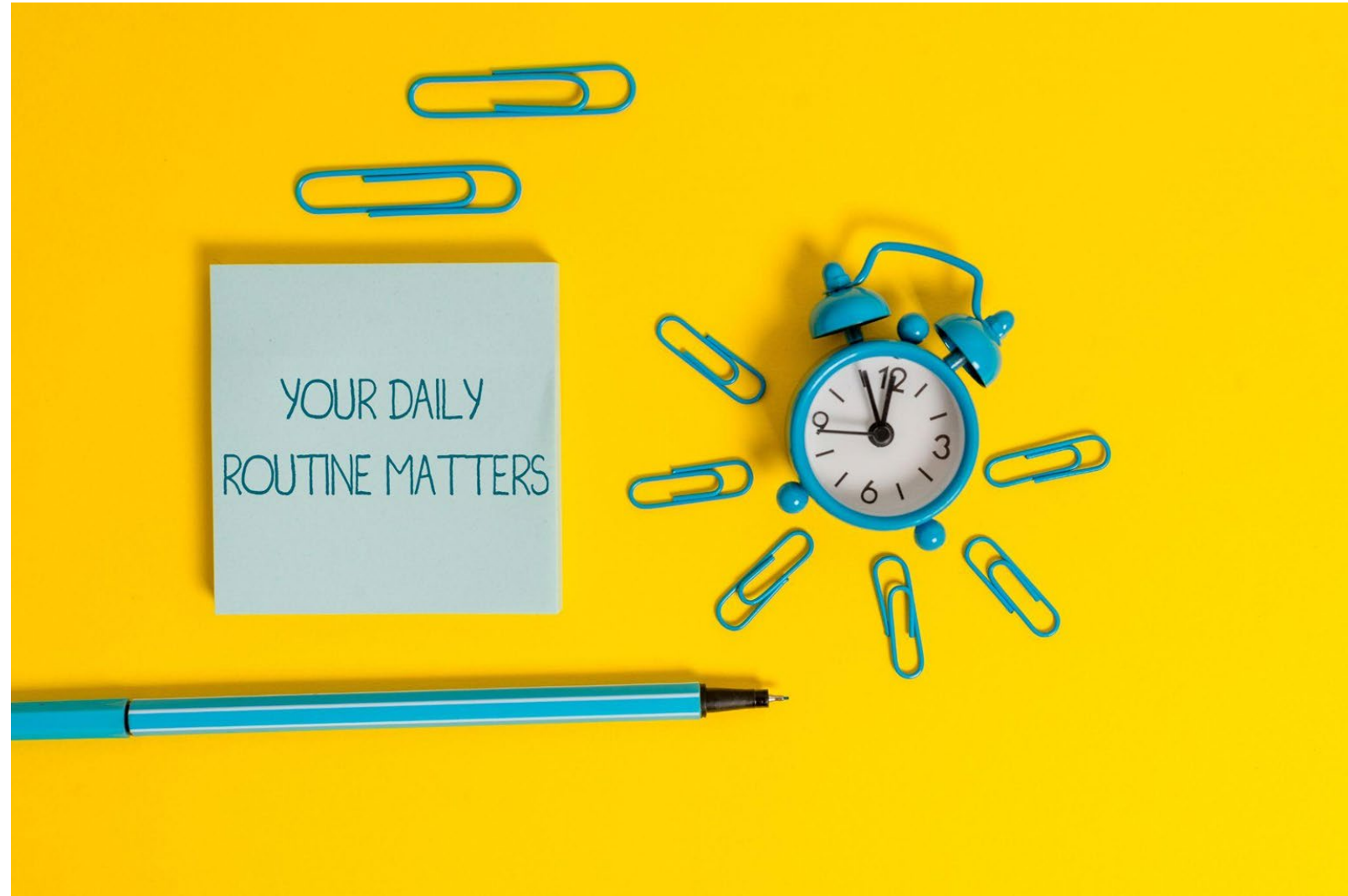
Set Your Day for Success

Setting Up Your Daily Routine:

- Movement
- Reflect/Gratitude
- Grow
- Three Priorities

PROTIP

Use your commute for growth.



Set Your Day for Success



The Grind:

- First Hour: Largest Project First
- 5-10 min Break
- Repeat
- Afternoon Fill w/ Lower Value Work

I live by my CALENDAR!



Calendar:

- Color Coding
- Schedule Boundaries
- Time Blocking
- Due Dates/Milestones/Deadlines
- Personal/Family Appointments & Events

I live by my CALENDAR!



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
23	24	25	26	27	28	01
	John Doe Start Date	12:00pm SMPS PRC Recap		11:00am ASSC Spring Cleaning	10:00am AI for Business	11:00am Low Rider Car Show
02	03	7:30am Charity Event	Mateo Min Day	6:30am BD & Pursuits	8:00am Time Card	08
WIC WEEK						
	10:30am Estimating Mtg.	11:15am Client Lunch	8:30 ASSC Ladies Group Photo	9:00am WIC Panel Dry Run	9:00am WIC Panel - SMACNA	11:00am Oyster Festival
	2:30pm Mel & Adam Onboarding	5:00pm SMPS EdCom Mtg.	11:00am Client Meet & Greet	11:00am Jobsite Walk w/ JJ	11:00am NAWIC Jobsite Tour	
	4:30pm NAWIC TopGolf		2:15pm ASSC WIC Event	12:00pm WIC Josite Lunch		
09	10	11	12	13	14	15
	10:30am Estimating Mtg.	7:30am Charity Event Planning	8:00am Placer Business Alliance	9:00am Take Mom to Eye Surgery	7:30am Q1 Prep w/ CW	
		10:00am Mel & Monica Training	12:00pm New Employee 90-Day Questionnaire	11:00am ASSC Lunch & Learn		
		11:30am Client Lunch	4:00pm Accupressure Apt.			
16	17	18	Peyton Picture Day	6:30am BD & Pursuits	D&P No School	22
	10:30am Estimating Mtg.	7:30am Charity Event Planning	10:00am Rox+Mel SMPS Event	7:30am Marketing Check-In	8:00am Time Card	
		9:30am Facilities Expo Prep	1:30pm Q1 Prep w/ Managers	7:00am Facilities Expo	7:00am Q1 Team Meeting	
		2:00pm D&P Ortho / Dentist	7:00pm Kings Game w/ Client	4:00pm SRBX Bourbon & Builders	9:30am RFP Kick-Off	6:00pm L&M Anniversary Party
23	MEL OUT OF OFFICE	25	Devin Finals / Min Day	Devin Finals / Min Day	28	29
	10:30am Estimating Mtg.	7:30am Charity Event Planning	8:00am Mel Concord Office	6:30am BD & Pursuits	8:00am Time Card Exp. Report	11:00am Sac Service Technician Appreciation @ The Apex
4:00pm Phin & Evin Wedding		8:30am RFP Time Block		1:30pm Website Action Items	12:00pm Venue Tour	
		11:30am Client Lunch			6:00pm Devin Concert	
30	31	01	02	6:30am BD & Pursuits	8:00am Time Card	05
	10:30am Estimating Mtg.	7:00 am RFP Time Block	7:30am Charity Event Planning	7:30am Marketing Check-In		
	11:00 am RFP Time Block	4:00pm SMPS EdCom Mtg.	2:00pm RFP DUE			

LEGEND

- Company / Internal Marketing
- Company Charity Event
- Onboarding
- Business Development
- Estimating & RFP
- Industry Events
- Marketing
- SMPS
- General / Placeholder
- Kiddos
- Personal

Unraveling the Chaos: Tips About Time Management



Justy Tadlock
Allerion Consulting Group, Inc.

Spend Your Energy Where It Counts



- Think of your energy like a battery.
- Hopefully you start your day at 100%.
- Tasks chip away at your energy.
- Key isn't doing more with your time.

It is about spending your energy where it counts.

Budget Your Focus, Not Just Your Time



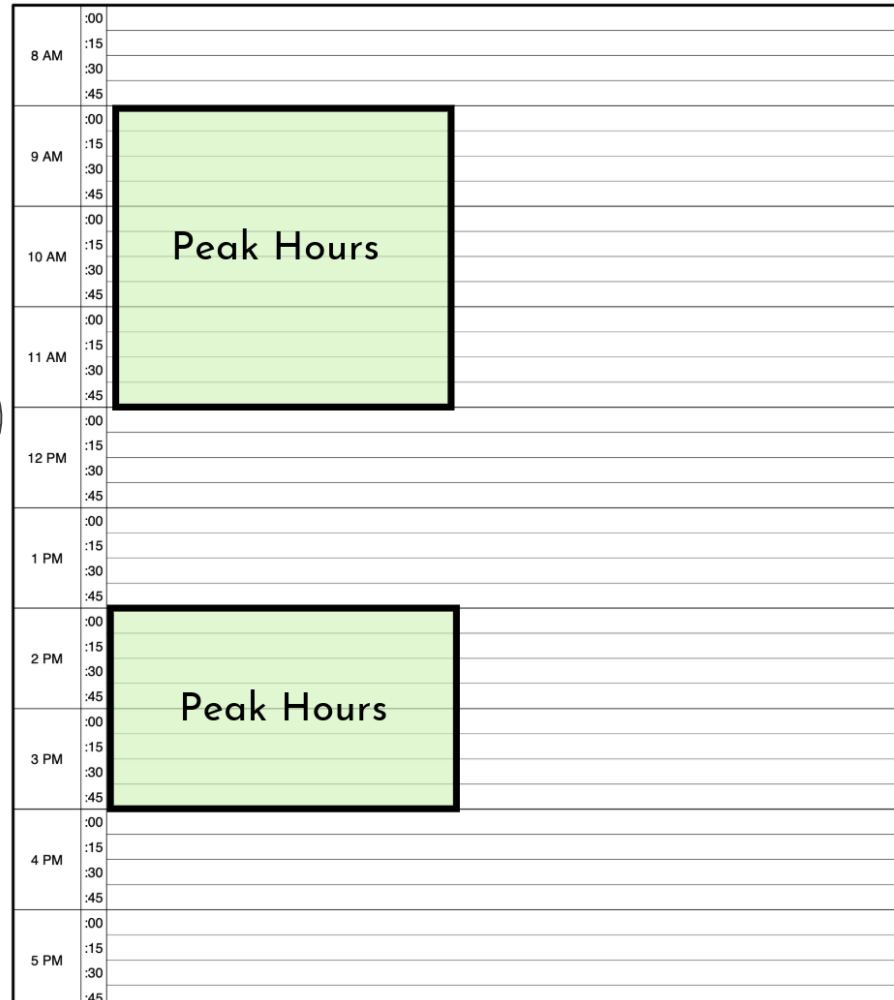
- Think of focus like money — spend it on what matters.
- Identify your peak energy hours (AM or PM?).
- Peak Hours = Creative/complex tasks.
- Non-Peak Hours: Lower-energy tasks.
- Examples
 - Peak Hours: RFP focused.
 - Non-Peak Hours: E-mail responses.

Finding Your Focus Budget



Self Evaluate Yourself

- When do I feel mentally sharp?
- When does my brain get foggy?



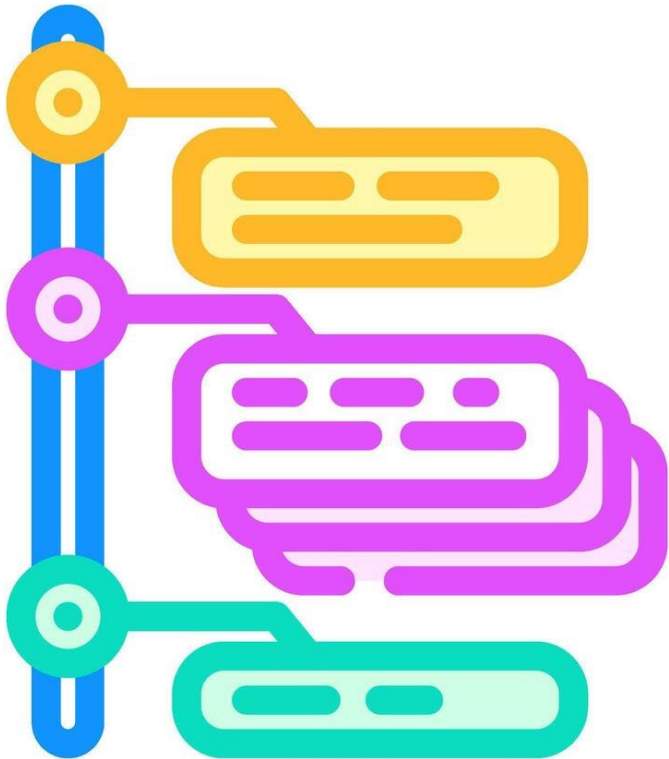
Use Daily Log/Journal

- Re-block out your schedule.

*Find Your Focus Budget
PROTECT IT FIERCELY*

Like any good habit, focus budgeting takes time and consistency.

Structure The Chaos: Task Batching



- Think of this as an assembly line, not a juggling act.
- Block time for similar tasks.
- Reduces start-stop distractions.
- Example: Batch e-mail responses or meetings.

Delegation: The Power of Passing It Off



“If you want to do a few small things right, do them yourself. If you want to do great things and make a big impact, learn to delegate.”

— John C. Maxwell

Delegating Tasks Like A Pro



- Focus on what only you can do.
- Delegate routine, repeatable, or lower-priority tasks.
- Empower others with clear instructions.
- Check-in with those you delegated tasks to.



Intuitive InDesign: Insert Your Word Documents and Tables with Ease



Haley Palmer
Wood Rodgers, Inc.

Streamlining Word & Excel Imports in InDesign



This section will cover:

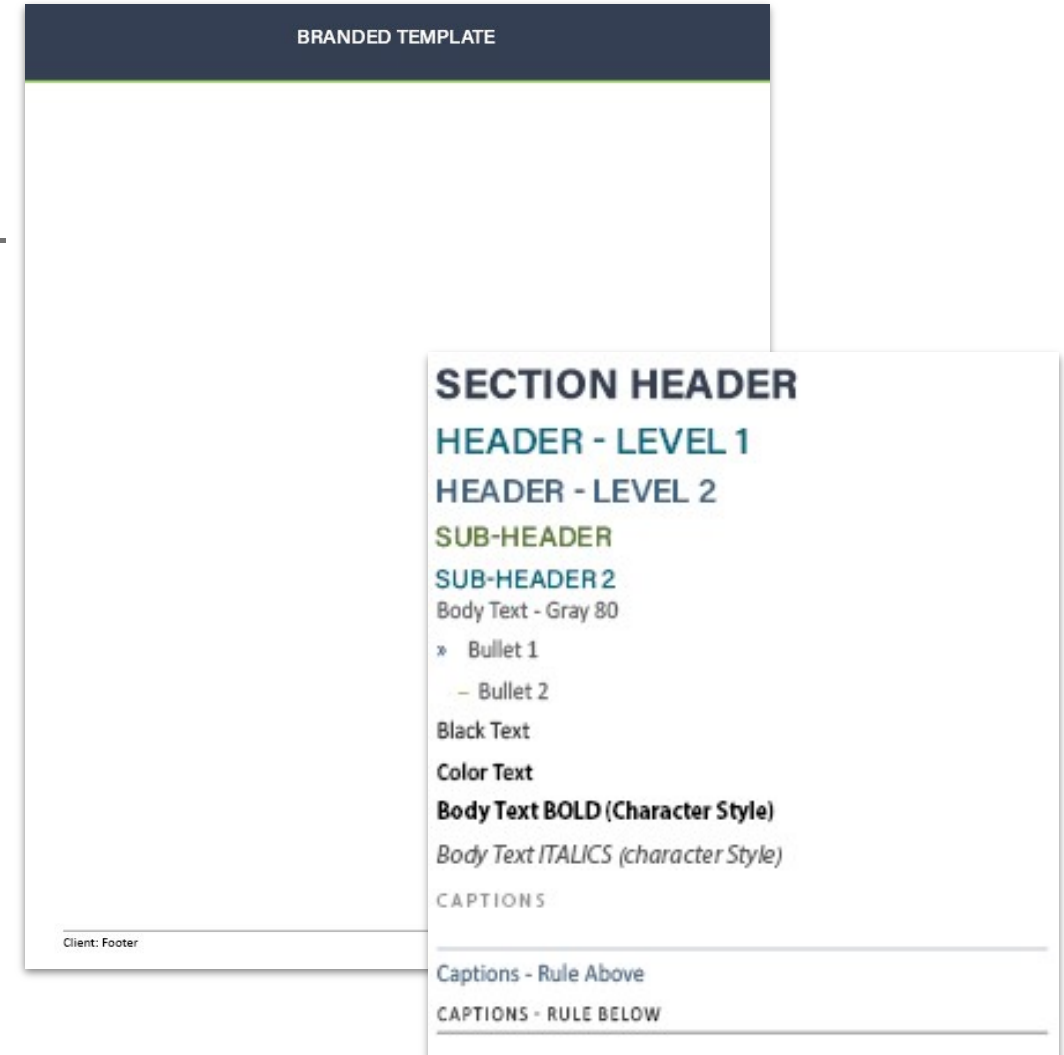
- Quick Guide to Better Proposals & Reports
- Save Time & Improve Efficiency on Proposal Setup
- Importing a Word Doc w/Paragraph Styles
- Pro Tips for Clean Formatting



Template Setup



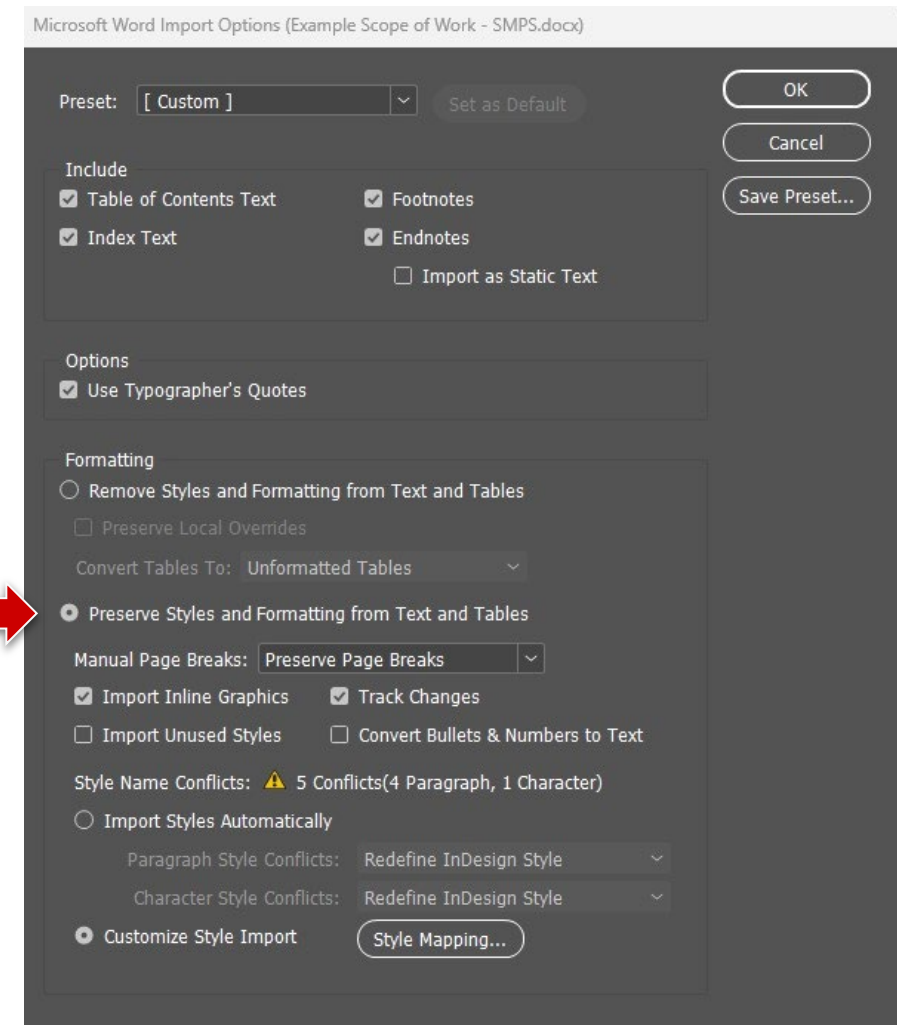
- Set Yourself Up for Success:
 - Branded Template + Paragraph Styles - Is this setup?
 - *Do this ahead of time.*



Import Options - Word Doc



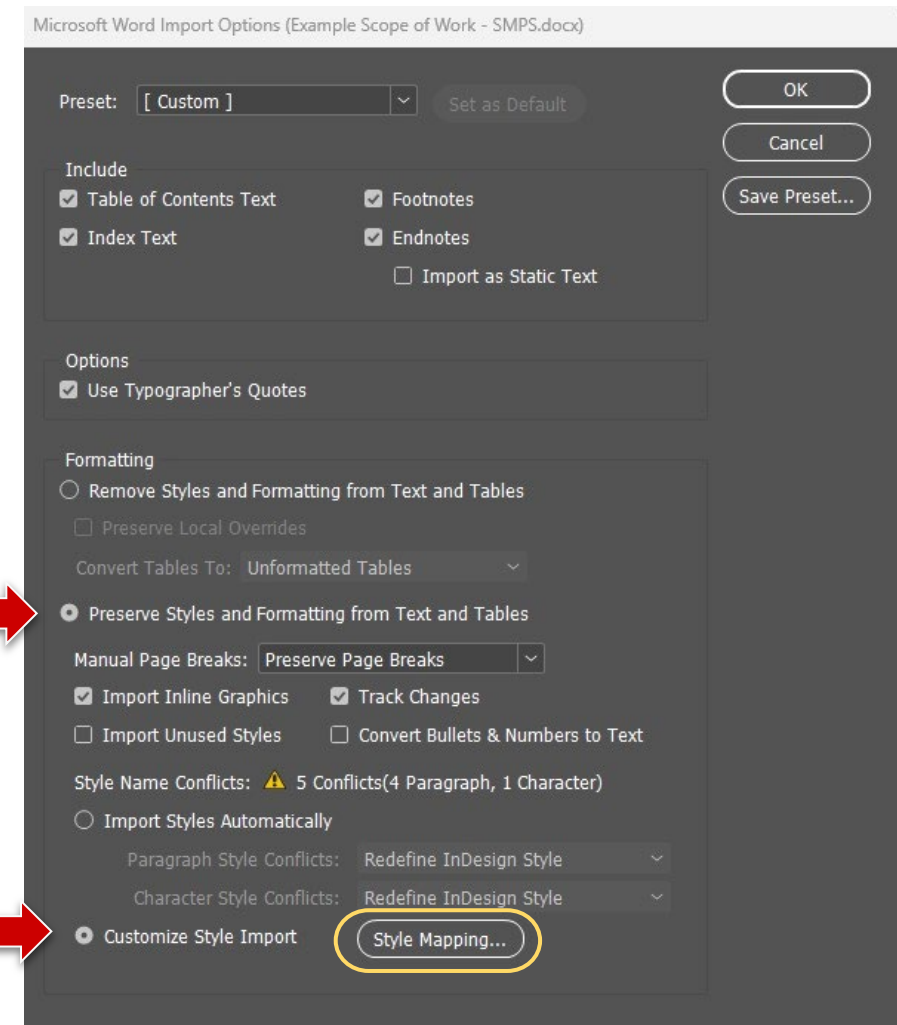
- In Word: Use *consistent heading styles* (e.g., Heading 1, Body Text)
- In InDesign:
 1. Set up **Paragraph Styles** ahead of time
 2. Go to **File > Place** (Ctrl + D / Cmd +D)
 3. Enable **Show Import Options** - choose Preserve Styles & Formatting from Text and Tables & Select 'Customize Style Import', then Style Mapping...



Import Options - Word Doc



- In Word: Use *consistent heading styles* (e.g., Heading 1, Body Text)
- In InDesign:
 1. Set up **Paragraph Styles** ahead of time
 2. Go to **File > Place** (Ctrl + D / Cmd +D)
 3. Enable **Show Import Options** - choose Preserve Styles & Formatting from Text and Tables & Select 'Customize Style Import', then Style Mapping...



Import Options - Word Doc

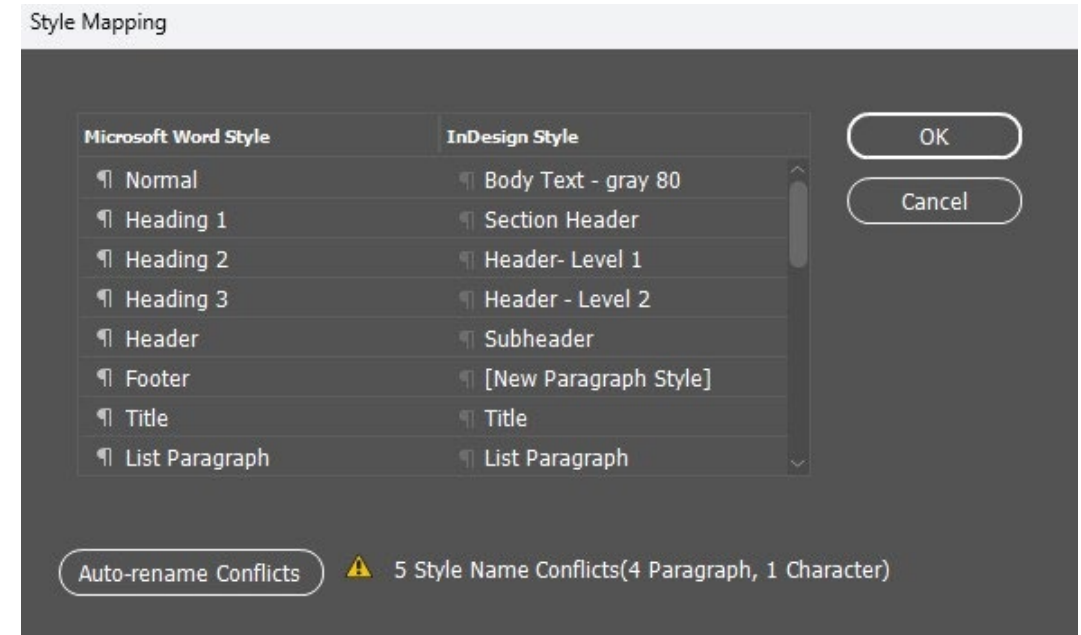


Style Mapping...

Tip: Paragraph styles names must match exactly for auto-mapping!

Left Column = Word Styles

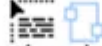
Right Column = InD Styles



Import Options - Word Doc

Load Text Cursor

- Loaded Text Cursor
 - **Shift Key + Left Click** = Loaded Pages w/Styles
 - Chuck Norris Approves :)


If you have a document with lots of text you'll have to create multiple text frames. 'Threading' is how you connect



Import Options - Excel



- In Excel:
 1. Go to **File > Place** (Ctrl + D / Cmd +D)
 2. Chose Excel File
 3. Uncheck “Formatted Table” for full InD styling control
 4. Click to Place
 5. Apply **Table and Cell Styles**

Check Your List Twice: Tips for Having a Successful Proposal Closeout Process



Crystal Miller
Swinerton

Check Your List Twice



- **Update the Proposal Status:**
 - RFQ/RFP submitted, In-Progress, Shortlisted, Interviewing, etc.
- **PDF the Complete Proposal**
- **Log the Staff that Worked on the Proposal**
- **Log the Associated Companies**
- **Log the Competitors**
- **Enter in any New or Improved Information:**
 - Project and Personnel Information, Headshots, Narratives, Company Information/stats, Graphics, etc.



Open Forum—let's hear from you!





Thank you!

Calendaring/ Schedule Management

Sending
reminders
to pursuit
team for
year deadlines

I pin a word doc
that has all my
to do lists
priority tasks
& Goals for year

time management
matrix
(quadrants!)

YEAR - LONG
ETSY WALL CALENDAR

blocking out
time on cal for
everything - incl.
drive time for
events

Full Proposal cycle
+ interview
Team
Save the Dates

Todoist/
Great-task
Manager

SENDING
CALENDAR
INVITES TO
PM's, PIC's
FOR PROPOSAL
REVIEWS

MICROSOFT TASKS/
MICROSOFT PLANNER

Send
emails
w/ reminders

InDesign Tips & Tricks

DELETE ANY
UNUSED TEMPLATE
PARENT PAGES
BEFORE PACKAGING
A FILE. MAKE S
IT A LOT SMALLER!

Julie Shaffer
- InDesign
Lunchtime
Learning Lab
* Table / Group Styles

cc libraries
for brand standards

Processes/ Checklists

Pin active
proposals to
your quick
access in
windows

2nd kick off mtg
+ Storyboarding

Spend last
20 min of
each day planning
carry-over tasks/
tomorrow

Writing down
all tasks
done during
the day &
keeping track
of prev. tasks

Using a task
manager
(Monday.com,
Trello, Asana)

Track wins/
losses
- personal
+ as a
team

Update CRM
ask you
get wire info.
or create a file
for updates

Get a daily
to-do notebook
and start your
day with making
a to-do list,
prioritize

Business Development/ Networking

Business
Cards -
after event
add description
about where
you met them,
things you'll write

→ remember
for the future.
Ex.
Met at smps
Ed Lam Harvey
Horr
- Vegetarian

Get attendee list
prior to conference
Event so you
can arrange
conversations and
other prepared!

Pursuits & Interviews

Record Kick-off to look back at when needed

Detail + Update Responsibility Matrix Often!

Smart sheets for proposal matrix

Customized Indesign templates for large pursuits

SAVE + ARCHIVE INTERVIEW QUESTIONS

add standardized to do list to each proposal

Take meeting notes with PLAUD

multiple recurring for a person based on industry

Send email w/ actions immediately after meeting

add reminders via calendar invites

Tag people w/ actions in email

Send a reminder email w/ actions a few days before next meeting

Miscellaneous

BUILD
AN AI
PROJECT
to help w/ clients

Be
flexible

Take a
walk after
lunch or
in afternoon.

Chat GPT

On the new
windows update:
when you open
file explorer there
is now a "tabs"
button at top! no
more 50 windows!

use
copilot AI
to catch
actions

Share your
ideas and
follow through
w/ them ♡

onenote

Draft emails,
social media
posts, etc.
ahead of
time/
before you need it.

willing
to learn &
adapt
ALWAYS!

Make it
fun "

meetings-
take note of
action items &
next steps