

Stand Up And Be Counted!

by
Kim Murdock

Sometimes you need to take a head count at your firm. How many attorneys have responded to the audit letter request? How many partners like the new Letterhead? How many people are coming to the holiday party? If your firm has Outlook, you have a ballot box at your fingertips.

Party!

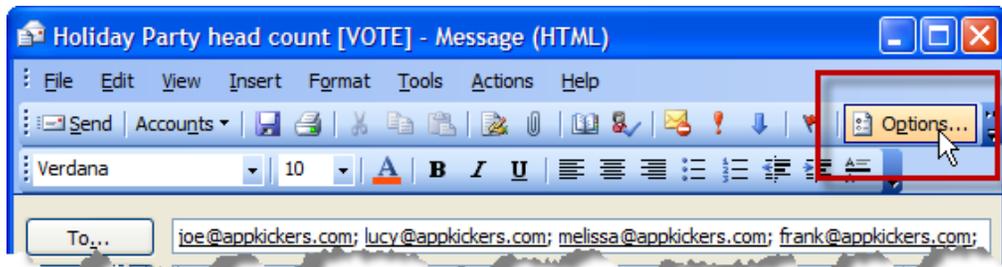
So let's say you're organizing the holiday party and you need to contact the hotel by the end of the week to give them a head count.

So you send out an email – “We're firming up the Acme Hotel for our fabulous holiday party on December 18th! Please let me know if you'll be joining in the fun-fun-fun!”

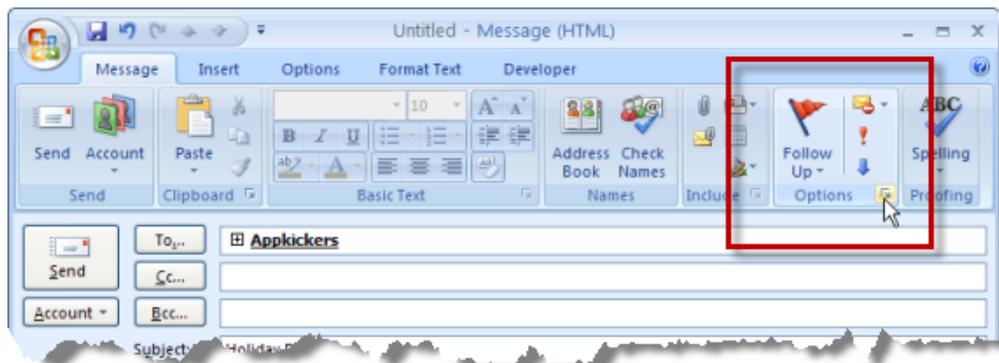
Out it goes and in come the responses. You count them up one by one. Or you move them to a separate folder in Outlook and deal with them later. Or you start an Excel spreadsheet to help you track them. Not so much fun-fun-fun.

Get Out The Vote!

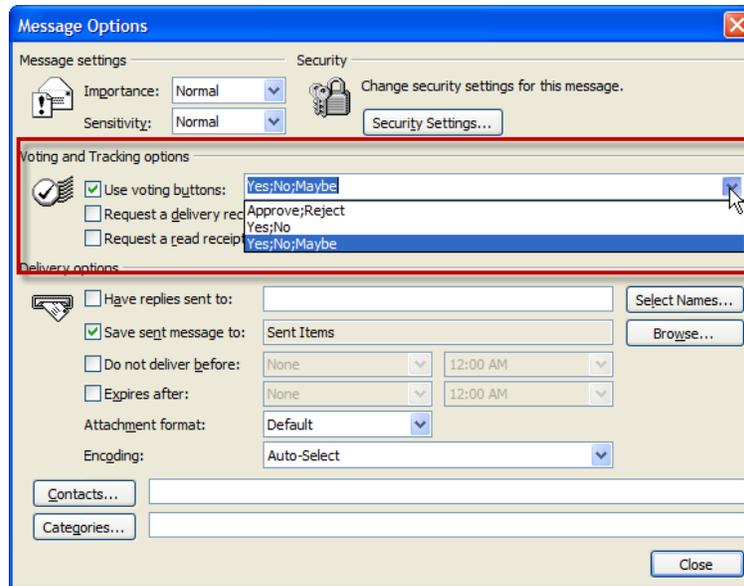
Before you go to all that trouble, try this. Click the Options button. This is in a different place depending on your version of Outlook. With 2003 or earlier, click the button at the right end of the Standard toolbar to display the Message Options dialog.



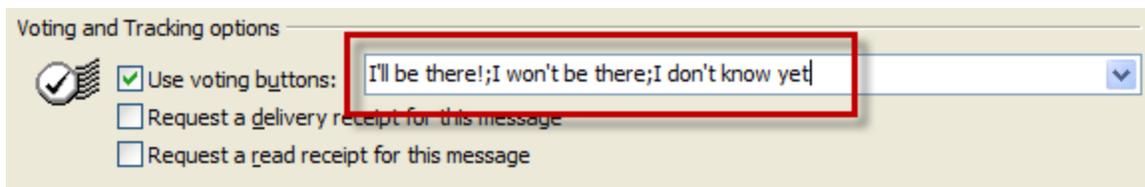
With Outlook 2007, it's at the right end of the Ribbon – click the lower right corner to open the Message Options dialog.



Take a look at the Voting and Tracking options. You can use one of the three sets of responses already listed in the drop-down menu:



Or you can type your own:



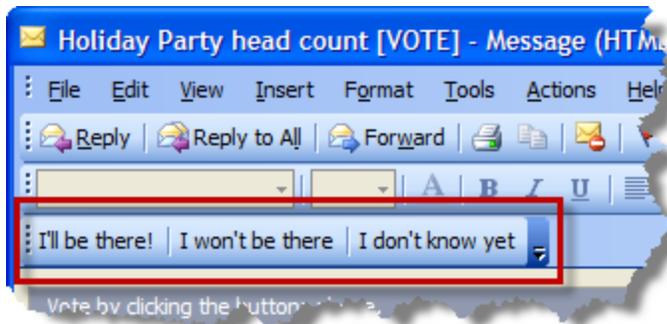
What you type here appears on the voting buttons. Separate each word or phrase with a semi-colon. You're not restricted to three choices, but I'd keep it short, or you may lose that quick response while folks ponder their choices. Another bit of advice is to add "[VOTE]" or some other eye-catching phrase to your email's subject line so your voters will immediately know what you want them to do.

Close the Message Options dialog and send your email. Of course, a copy is automatically placed in your Sent Items folder. *Make sure you leave it there; don't delete it or move it.* This is an important step in getting Outlook to do the heavy lifting for you.

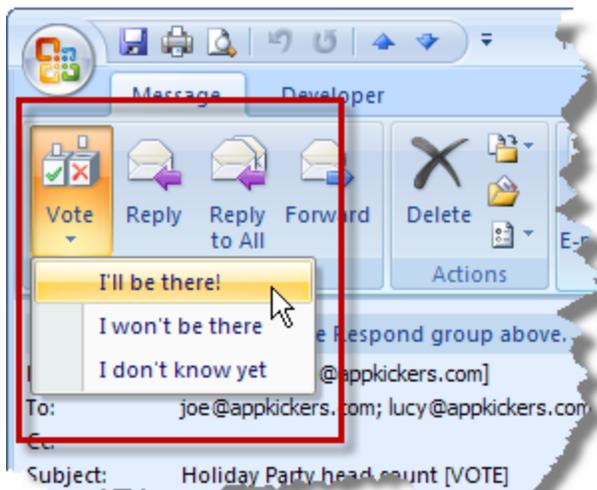
The Polls Are Now Open

What will your constituents see when they open their mail? Depending on their version of Outlook, they'll either see a special toolbar displaying your voting buttons (2003 or earlier) or a new icon at the left end of the Ribbon (2007) which is labeled, appropriately enough, "Vote."

Now, all that your voters need to do is click a button. No hanging chads here.



Outlook 2003

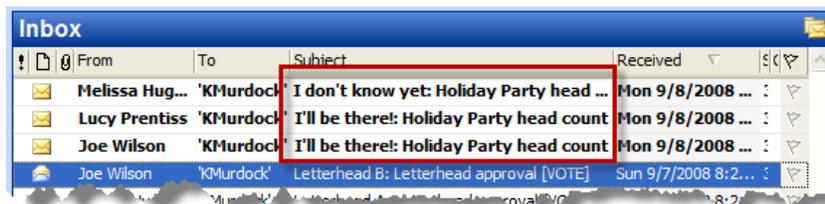


Outlook 2007

Once they click their answer, they can simply send their response, or add a message to it before sending. This does *not* mean they can add another response within the vote tallies. It simply means they can send you a message in the body of their email.

Calling The Election

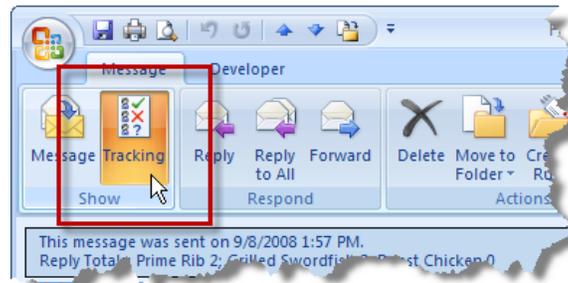
Once the results come pouring into your Inbox, you'll notice that each voter's response is automatically inserted at the beginning of the Subject line.



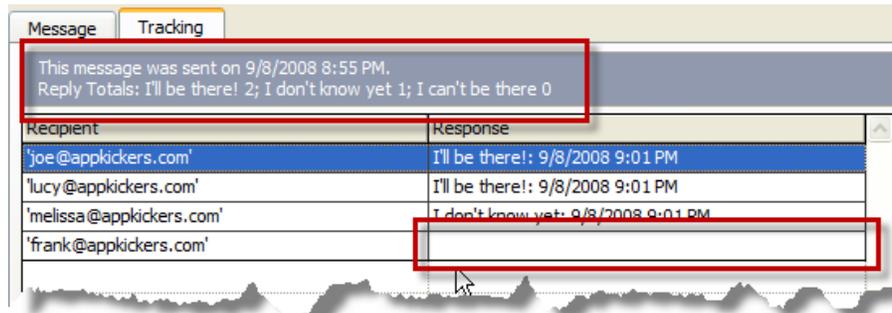
However, the *best* part is that Outlook goes to work tallying them. Remember how I told you to leave a copy of your message in Sent Items? Go open it now. In 2003 and earlier, click the Tracking tab.



In 2007, click the Tracking icon at the far left of the ribbon.



The Tracking tab collects and counts the Votes. It will even show you who hasn't responded.



In this case, we can see that two people are coming, one doesn't know yet, and nobody can't be there. We can also see that Frank hasn't responded (as usual).

And you don't have to open each of the messages to get the tally. *Just leave the responses in your Inbox*, and give Outlook a moment to recognize them.

What Could Possibly Go Wrong?

Funny Business At The Ballot Box?

When the ballots come in fast and furious, overcome your desire to immediately move them to a new folder in Outlook. Leave them in your Inbox for a while so Outlook can tally the results and associate them with the outgoing message in Sent Items. You don't even have to open them.

If you move them, Outlook won't find them *unless you open each one*. So if you're polling 10 people, that might be acceptable. But if you're asking 243 people what they want to eat, let Outlook keep track. Once the votes are "registered" and displayed on the Tracking tab, go ahead and move them. Heck, you can even delete them.

Voter Fraud?

You might think your voters could foul things up by voting more than once, either by accident or design. Actually, Outlook handles this quite elegantly.

Your Tracking tab will update with the most recent response. If they want to change their vote, Outlook changes it. If they simply vote twice, well, it doesn't matter – it only counts once.

Lost Ballots?

If someone deletes or loses their email ballot, well... there's no elegant way to recover from that (unless it's still in their deleted items folder). You may have to replace some ballots.

Every time you send a replacement email, you'll have to deal with a separate tally. So why not wait to see how many folks lose your email, then send only one new message – to all of them at once. At least you'll only have one separate tally, which you can add to the original tally.

Absentee Ballots?

I won't sugar-coat it – none of this will work in Outlook Web Access. You can't set up voting there, or vote from there. The interface just doesn't handle it.

Publishing The Results?

Printing from Outlook leaves something to be desired. You'll get a list of who's coming and when they voted. Oddly, the coolest feature Outlook voting gives you – the totals – are not present here. Of course, you can always write that in....

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KMurdock

From: KMurdock
Sent: Monday, September 08, 2008 8:55 PM
To: 'joe@appkickers.com'; 'lucy@appkickers.com'; 'melissa@appkickers.com'; 'frank@appkickers.com'
Subject: Holiday Party head count

Tracking:	Recipient	Response
	'joe@appkickers.com'	I'll be there!: 9/8/2008 9:01 PM
	'lucy@appkickers.com'	I'll be there!: 9/8/2008 9:01 PM
	'melissa@appkickers.com'	I don't know yet: 9/8/2008 9:01 PM
	'frank@appkickers.com'	

Hi all,

Please let me know if you're coming! Thanks!

Kim Murdock
831.274.2800

By the way, if you like working from an Excel spreadsheet, you can copy and paste your results from the Tracking tab right into a worksheet. Unfortunately, the tally won't appear there, either.

And The Winner Is...!

Despite some shortcomings, the voting feature in Outlook is a *super* tool for those times when you need your constituents to stand up and be counted. And in this case, power doesn't corrupt, it just makes life a little easier.

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