

LET'S GET ORGANIZED!

How I keep work moving—and move institutional knowledge beyond email

Outlook • ClickUp • Teams • SharePoint • AI • Microsoft 365

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Not a perfect system. A working one.



Email is delivery—not institutional memory

1

Make the work visible

Move commitments out of individual inboxes.

2

Create a durable record

Keep the decision, context, and source together.

3

Separate management from access

Use ClickUp internally; share living records broadly.

4

Organize for the next employee

People should not need your email history to do the work.

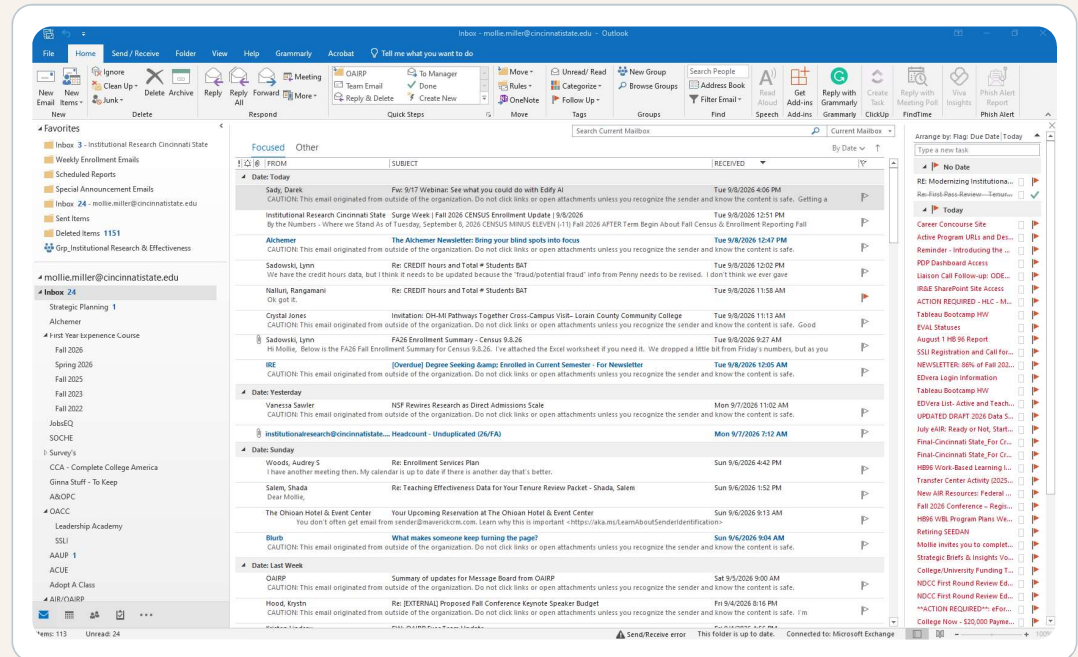
**If knowledge
leaves when a
person leaves,
it was never
institutional.**

I route email instead of rereading it

THE TECHNIQUE

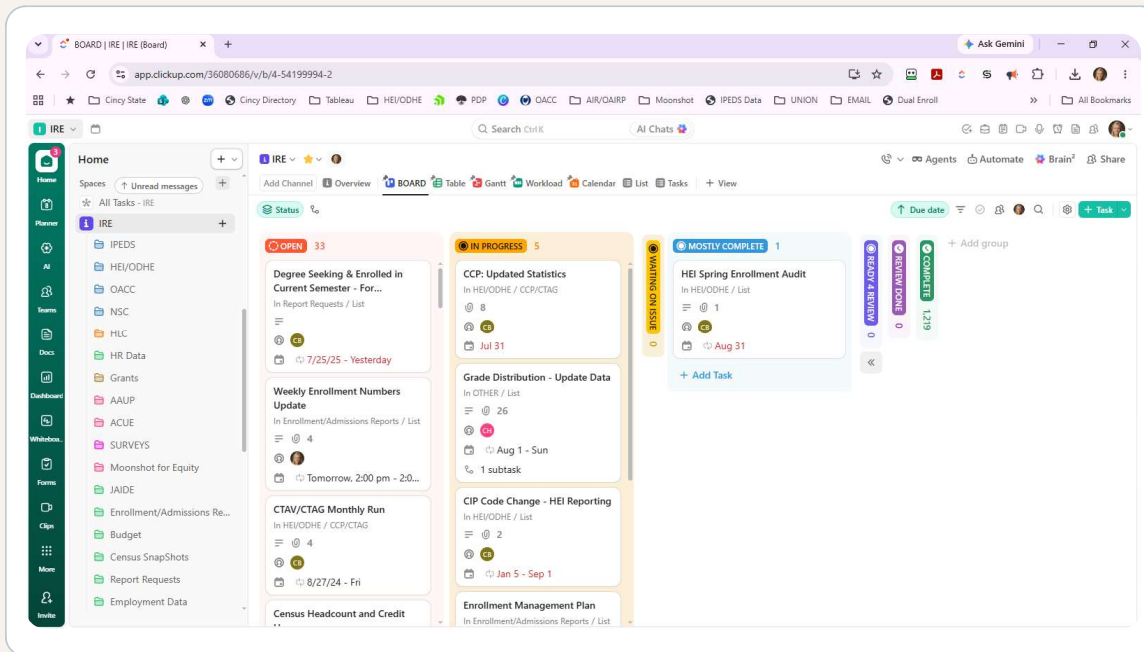
Decide once, then give it a destination

Delete or archive the obvious. Do short work immediately. Flag a commitment. Schedule focused work. Move reference material out of the inbox.



SHOW: one message moving from arrival → decision → destination

Email captures the request; ClickUp manages the work



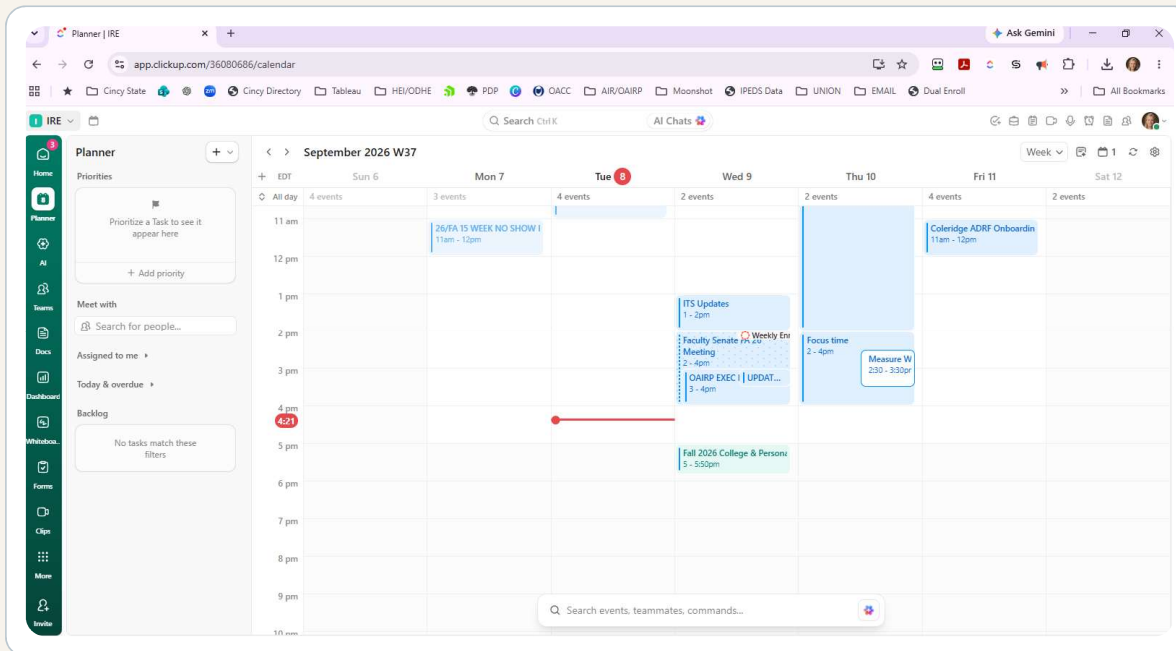
THE TECHNIQUE

Move durable work into a visible workflow

The board gives each project a status, due date, owner, and home. Open, in progress, waiting, review, and complete are decisions—not decorative labels.

The inbox is an entry point—not a project-management system.

I change the view when I need a different answer



CALENDAR VIEW

When will the work happen?

The same tasks become a capacity map. Deadlines, recurring work, focus time, and meetings are visible together.

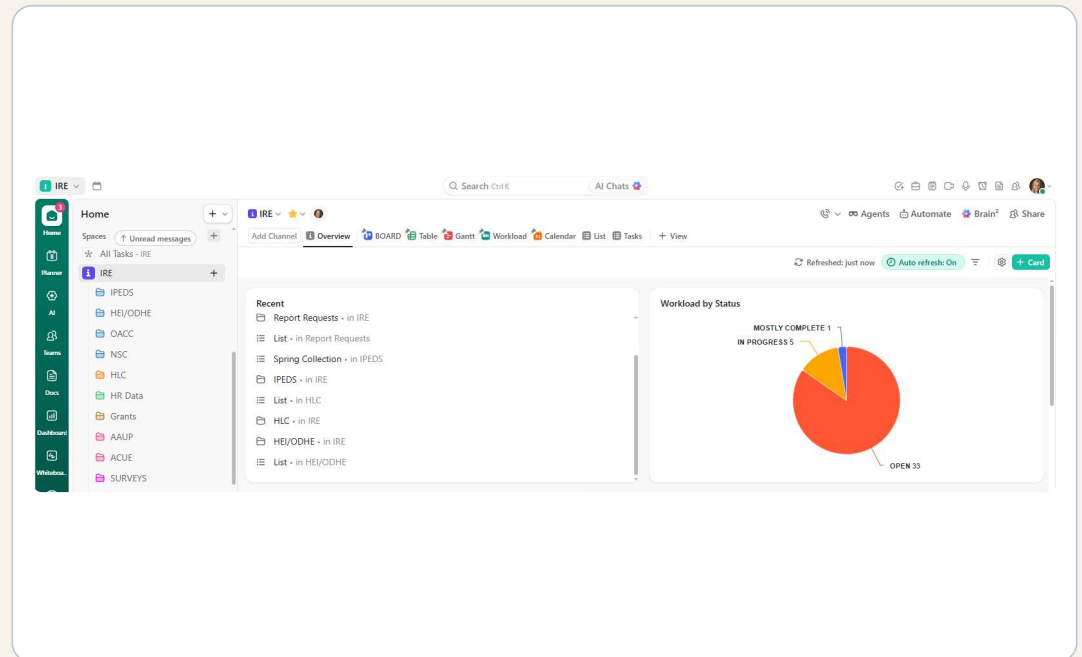
**A list shows obligations.
A calendar shows collisions.**

The dashboard tells me where the system is backing up

OVERVIEW

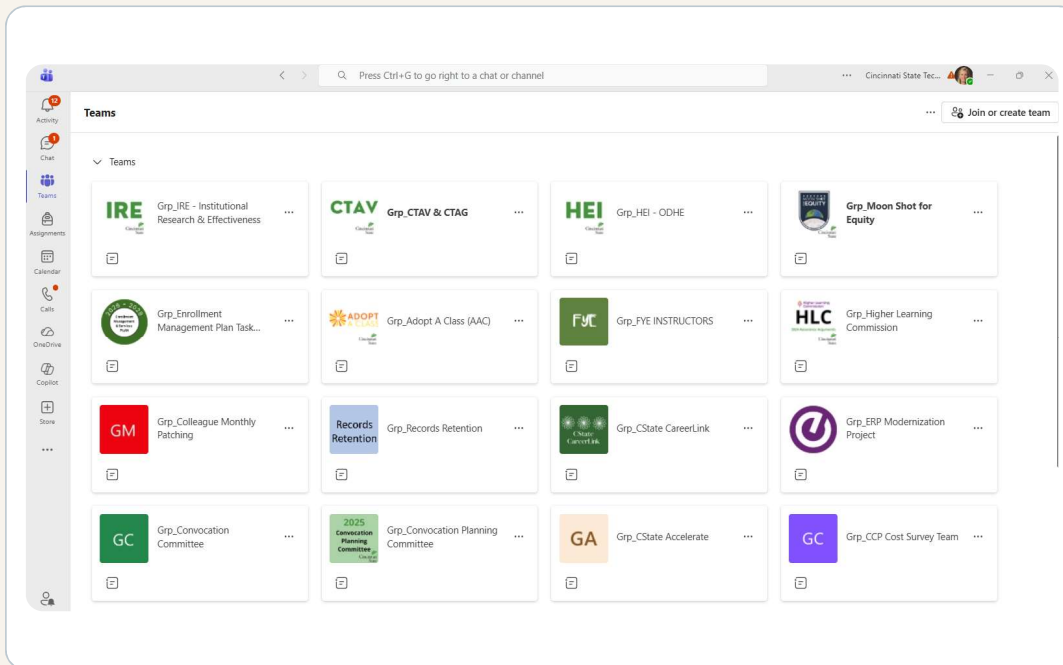
Where is the workload accumulating?

A quick view of statuses can expose stalled work, overloaded queues, and tasks that need decisions. The point is not the pie chart—it is the conversation it triggers.



33 open items is not automatically a crisis—but it is a question.

Move the conversation out of individual inboxes



THE TECHNIQUE

Create a durable home for shared work

A Team keeps communication available to the function—not only to the employees who happened to receive an email at that moment.

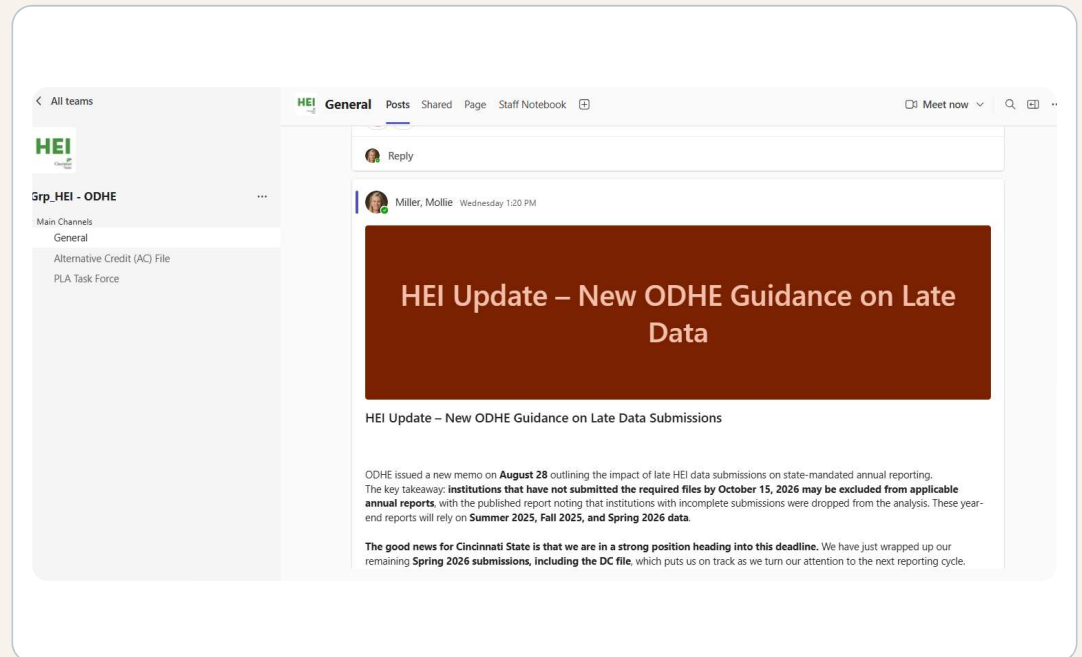
My test: should this knowledge survive staff turnover?

AI helps me turn a memo into an institutional update

THE TECHNIQUE

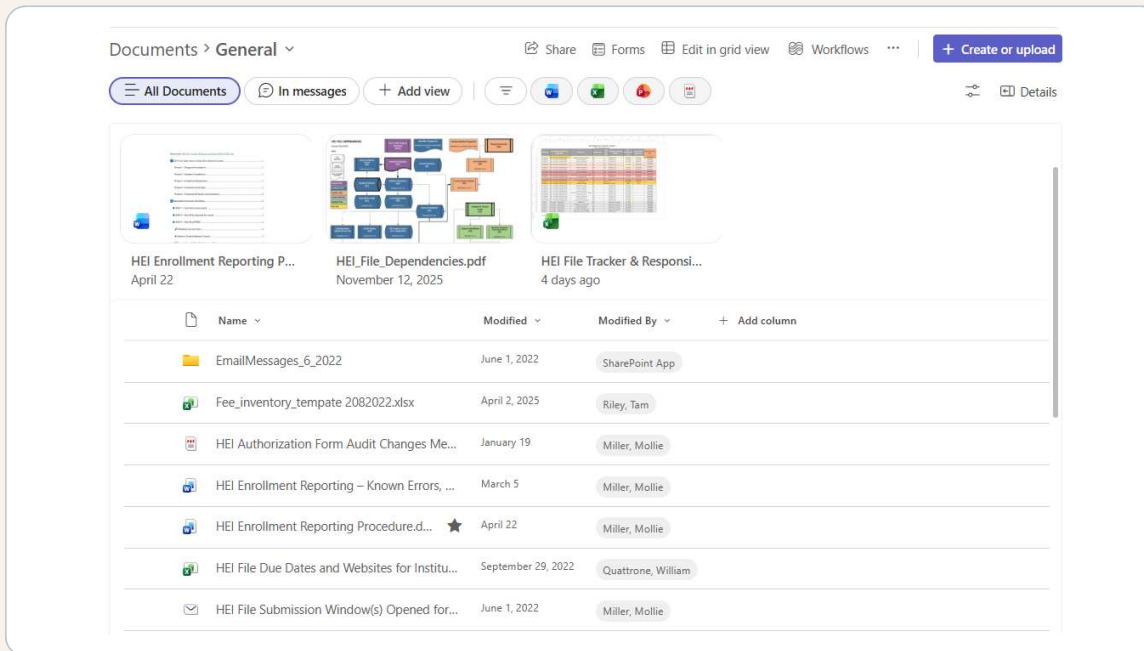
Synthesize the source, add local impact, retain the evidence

I use AI to extract the key requirements from an ODHE memo, identify the impact on Cincinnati State, and shape a readable update. The original memo stays attached to the post.



The post becomes searchable context; the memo remains the source.

A living tracker takes the work beyond ClickUp



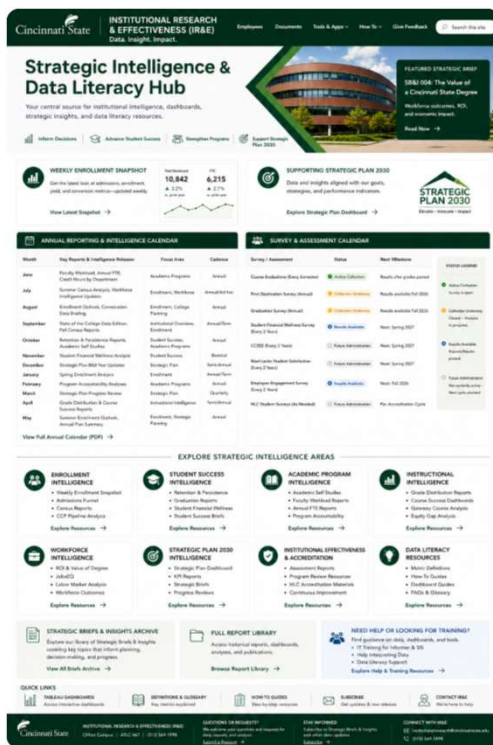
THE TECHNIQUE

Give the broader group a shared operational record

Not everyone has access to ClickUp. The HEI file tracker becomes the living, accessible record for departments involved in reporting, while procedures and dependency documents stay beside it.

Access differences should not become information gaps.

A repository becomes useful when people can navigate it



THE TECHNIQUE

Organize around the questions people ask

The hub brings together dashboards, reporting calendars, strategic insights, and data-literacy resources. People should not need to know who created something—or when—to find it.

Institutional knowledge should belong to the institution, not to an employee's inbox.

A useful prompt connects the message to the work

EXAMPLE COPILOT PROMPT

“ODHE shared this new memo. Create a Teams HEI post explaining how it impacts our work. Highlight the key requirements, deliverables, and dates the team needs to act on. Keep the memo attached as the source, and flag anything that needs human interpretation.”

The prompt does more than summarize—it creates a usable handoff.

COMMUNICATION

Translate the source

Audience • plain language • local impact • source attached

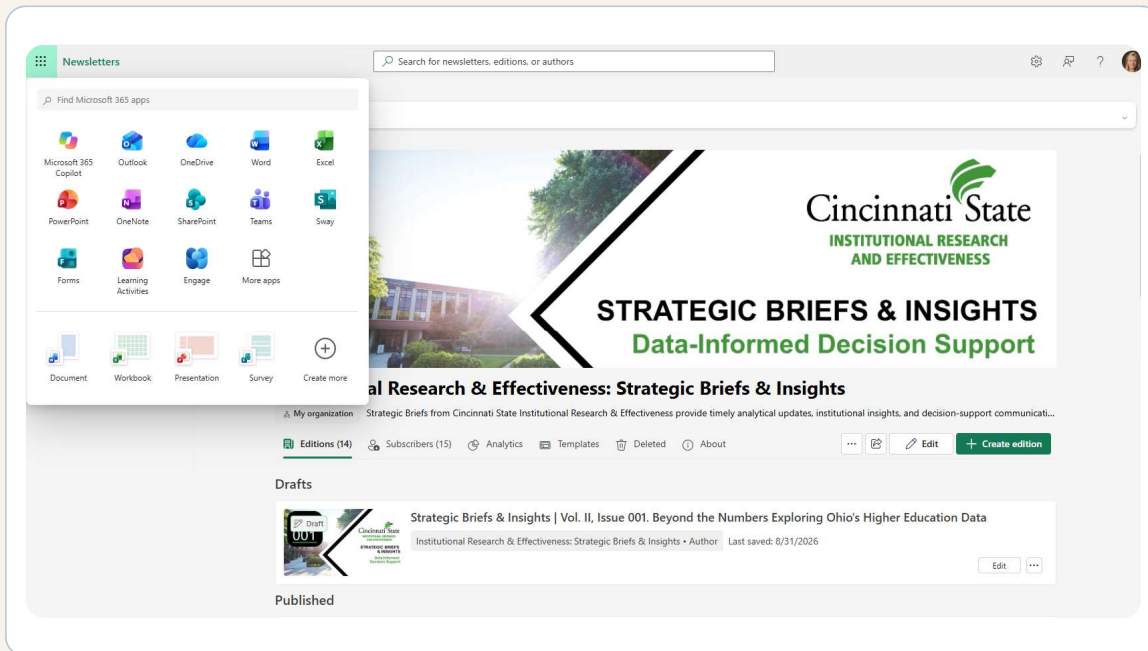
PROJECT MANAGEMENT

Make the action visible

Deliverables • dates • owners • questions requiring judgment

AI drafts the bridge. I verify the meaning.

Use the Microsoft 365 tools we already own



THE TECHNIQUE

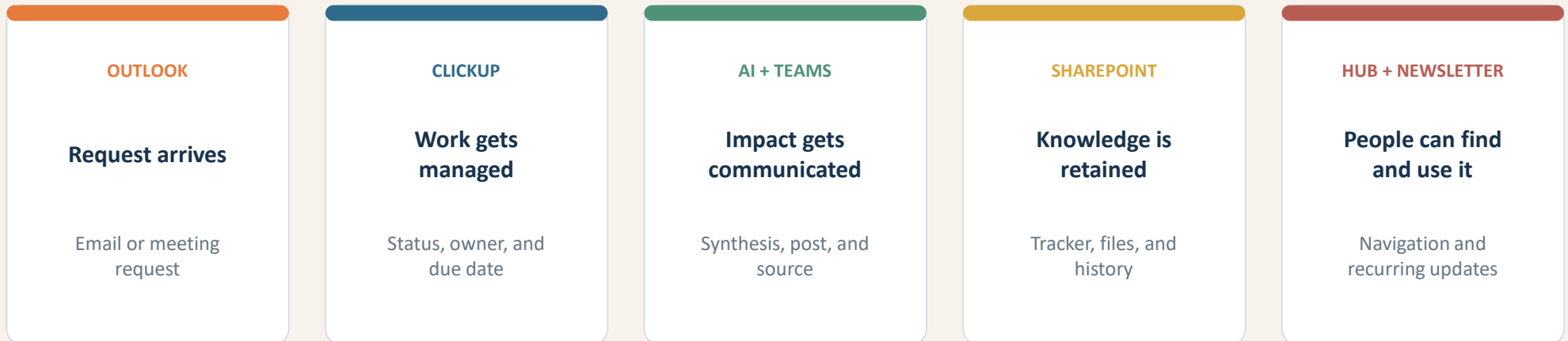
Explore the ecosystem— not only the familiar apps

Microsoft 365 already includes tools for shared notes, workflows, forms, newsletters, organization-wide communication, and accessible repositories. The barrier is often awareness—not availability.

**Newsletters turn recurring updates
into a searchable archive.**

The tools work because the handoffs are intentional

Choose one project and show the evidence trail



Every handoff leaves a link, decision, owner, or next action.

What will you move out of email first?

- ✓ A recurring update
- ✓ A cross-functional file tracker
- ✓ A policy or procedure discussion
- ✓ A project's decisions and history
- ✓ A communication others will need later

Questions—and better ideas from the room