

Personal Email Management

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How to Master Your Inbox and Get Your Life Back

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Contents

Acknowledgments	vii
Introduction	1
1. Email Inbox Power Hour	5
2. Control the Flow Out	11
3. Control the Flow In	18
4. Make a System	20
5. Control Your Attention	25
6. Review	27

Acknowledgments

I would like to acknowledge Melissa Morrow for editing this book. With precision and tact, she did a fantastic job of cleaning up my messy manuscript.

The Pareto principle is a theory that implies that 80% of your results came from 20% of your efforts. I am drawn to the idea that if I can focus my attention on the 20% of things that are important, I can become much more effective. One of the places this can be easily applied is email. I acted on the idea that only 20% of my emails were important and deserved my time. I went from getting hundreds of emails a day to having only ten emails in my inbox after a week of vacation. Through this short book, I will show you how to do the same.

I come at the problem from an information management perspective. As a librarian, I'm primarily focused on getting people the information they need. As a technology librarian, I'm concerned with how people interact with technology to get the information they need. Email represents one of the most frustrating ways we get information.

Each chapter will focus on an aspect of email mastery with exercises that will help you get through an email backlog and then create your own email organization system.

And why do we need to focus on email? Because email has some problems.

We spend too much time with it.

On average people receive about 78 incoming emails a day and people check their email on average of 36 times an hour ¹. The average worker spends 20 hours a week managing, reading and writing emails. For the average 40 hour workweek, that's half the week spent in email. What could you do with half of your time back?

People expect fast responses.

Half of all emails are responded to within the first hour². For the rest, 40% get a response within 48 hours. After 48 hours, the likelihood you'll get a response plummets to near zero. Remember these numbers, because we will use them later to help figure out your email system.

It's used for anything and everything.

On average, people have 187 to 500 emails in their inboxes³. For most people, their inbox represents a monolithic backlog of decisions, actions, readings, references, and useless junk. People use their inbox as a to-do list, a memo list, a reading list, a notification tool, an archive of knowledge, and a trash bin. According to the Harvard business review, **only 15% of emails are critical**.

How to battle these problems?

We will tackle these problems by walking through four steps that will be addressed in the next few chapters.

1. Control the flow of email coming in.
2. Control the flow going out.
3. Control your attention.
4. Develop a system to maintain it.

Exercise #1: Email Log

Create a document and open the inbox you want to work on. Write down the current date, and how many emails are in your inbox. We are writing this down so you can know how much you are dealing with, and be able to measure your progress as we go. You will use this document to keep track of the decisions you make and why, as well as keep track of how many emails are coming in per day so you can see the difference. For the rest of the text, we will refer to this document as your Email Log.

Notes

1. <https://www.forbes.com/sites/jacobmorgan/2013/10/15/5-ways-email-makes-your-employees-miserable/#2619c3181caa>
2. <https://www.forbes.com/sites/amymorin/2015/11/28/waiting-for-a-reply-study-explains-the-psychology-behind-email-response-time/#2d2005bf9755>
3. <https://hbr.org/2013/06/e-mail-not-dead-evolving>

1. Email Inbox Power Hour

If you have a lot of your emails in your inbox, looming over your head, then this chapter is for you. Whenever you have a buildup, you can open this chapter and work through it for one solid hour.

Normally, the exercises for the chapters would be at the end, but this whole chapter is an exercise, so we will break it down into steps.

The Goal: Inbox Zero

The goal of this power hour is to get your inbox so that there is nothing in it. Why? Because we need to stop using our inboxes as a task list, a reader, and a reference file. It needs to do its job as a landing place for things you haven't dealt with yet. This is often called "Inbox Zero"¹. Inbox Zero is a rigorous approach to email management aimed at getting the inbox to nothing in it and keeping it empty. I don't agree with responding to all emails every day, but I do recommend you aim to get things out of your inbox and put them into different places and deal with them specifically. So that's what the email power hour will do.

During this process, you will not only be cleaning out your inbox but also creating rules that will help keep your inbox clean.

Skills Before You Start

Before we get started, you need to know some features of your email program.

In Gmail, you will need to know how to:

- Create labels and how to apply them
- Create rules to filter your emails

In Outlook, you will need to know how to:

- Organize your email by using folders
- Use Inbox rules in outlook.com
- Set up rules for Outlook desktop app

Prep: Schedule a Power Hour

Find one hour of uninterrupted time. During this hour, do not respond to any new emails that come in. Lock your door and set yourself to do not disturb. You might get through all your emails in this hour. If not, then you will set up as many power hours as it takes to get through. I assert you might be surprised how many you get through when you change your mentality of what your goal is.

Get Your Email Log

Open your email log document, and note the date and how many emails you currently have in your inbox. Every time you work on your inbox, open up this document, note the date and the number of emails, and keep track of what you did.

Create Four Folders or Labels

In Outlook, I put the folders under the inbox. In Gmail, you create labels. The point is, you are going to create a folder or label called “TODO”, one for “Read Later”, and one for “FYI”.

- **TODO** – This is for any email you must take an action on at some point.
- **Read Later** – This is for emails that contain a lot of information that you have to digest, so you need more time with them.
- **FYI** – This is for emails you were sent only for information.
- **Reference** – This is for emails that you have to keep to check

later.

Set a timer

You will need a few timers, actually. You can use your phone, but I prefer to use an online timer. You can find one here at [Time and Date Timer](#). Set one timer for 1 hour. Set a 10-minute timer and reset it until you hit the end of your hour, or you can set up a timer to go off every ten minutes.

The steps

I'm going to write out the steps here so you can reference them quickly, but read the sections below on them to understand the process before you start.

- 1-10m: Quick Sort from top to bottom
- 11m-20m: Emails from NOT People
- 21-30m: Emails to NOT you
- 31-40m: Unread email
- 41-50m: To me from a real person
- 51-60m: Closeout

1-10m: Quick Sort

For Outlook, you will move these emails to folders. For Gmail, you will apply labels (by dragging and dropping) and remove them from the inbox using the archive button.

For ten minutes, focus on the first email in your inbox and decide if it needs further action (move it to TODO), if you need to read it more in-depth to figure what you need to do (Read Later), and if it is just an email that was sent to you for information (FYI). If there is no work needed, but you still need the email, move it to Reference. Under no circumstances are you to respond to any email at this stage. If you feel like you should respond, then it should go in TODO.

I like to have my reading pane open so I can quickly glance at the contents of an email.

The important thing is that you go fast and don't think about it too much.

Stop working when the alarm goes off, even if you're not done.

11m-20m: Emails from Not People

If you are getting an email from a person, it's probably something you need to respond to. If you're getting an email from a group or organization, most likely it's an FYI email. You might have to look at it, but you don't necessarily need to do something. Your goal is to find emails from Not People, and see if you can move them to your FYI folder. Stuff like notices from your bank, notices from Amazon, or from listserves. Usually, only the new emails from these groups are relevant, and you should have been able to deal with most of those in the first 10 minutes, so all the rest should be FYI.

In Outlook, create rules to move these emails as you find them. In Gmail, use the "Filter messages like these" to automatically label these as FYI in the future, and remove them from the inbox. In Outlook, you can also sort by ICON, which will put all your meeting requests and responses on either the top or the bottom. Missed calls and other notifications. Move all of these to the FYI folder.

Don't be worried about not seeing these. Later in the book, we'll help you create a method for dealing with these emails so you never miss one.

Stop working when the alarm goes off, even if you're not done.

21-30m: Emails to NOT you

For the next 10 minutes, you're going to avoid emails sent directly to you. You will focus on emails sent to groups, lists, etc. In Outlook, you can sort by the To column, and just avoid the section that only has you in the TO field. See if you can move these to FYI, and create rules and filters to automatically move them in the future.

Stop working when the alarm goes off, even if you're not done.

31-40m: Unread Email

Now, sort your inbox only by unread email left. If you consistently don't read an email from someone, maybe that's an email that needs to go to FYI. Make a rule. See how many of your unread emails are actually ones that you could make rules about to avoid them in the future.

Some people use email too much, and they also somehow never manage to actually do anything with it. Of the people left in your inbox, who never seems to say anything you want to read or need to respond to? Make a rule for them to be moved to the FYI folder.

Some notifications you signed up for, but you just never have time to read them. Go ahead and make the decision to move them to FYI and have a rule that puts them there first.

41-50m: To Me from A Real Person

Focus on going through emails from real people directly to you. Decide if they are TODO, Read Later, or FYI.

51-60m: Closeout

Look at how many emails you have left, and jot that down in your Email Log. Make note of anything you learned during your supercharged email cleaning. If you're not done with your inbox, use this time to also schedule another Power Hour to go through the rest of your email.

Notes

1. <https://www.entrepreneur.com/article/290175>

2. Control the Flow Out

The first step toward taming your email is by starting with the person in the mirror. Master your own email habits before you tackle everyone else's.

Send Fewer Emails

If you send out fewer emails, you will receive fewer. Always ask yourself if an email needs to be sent out or if it can wait until later.

Delay Sending Emails

Most of the email services available have a delayed delivery option. Ask yourself if you can delay sending the email until 9am the next morning. If you can, then do.

- Outlook Desktop App: Delay or schedule sending email messages
- Gmail: Schedule email to send later

Don't Hit Reply-All

How many of us have been a part of an email chain where everyone was responding to the whole group and twenty people were being spammed when they didn't need to? The fewer people on an email,

the fewer responses you'll get back, so stop and ask yourself if you really need to hit reply-all. You need to hit reply-all if more than one person needs to know the email was responded to, if your response will influence others, and if the email impacts 70% of the people on the chain¹.

Use Blind Carbon Copy More

BCC is a great way to keep people in the loop even when they are not the primary person an email is intended for. If you BCC on emails, then other people will not be able to hit "Reply-ALL" and spam the whole group. The BCC'd recipient will know the email is sent without being subjected to all the chatter that happens afterward. This is especially important when you're sending to large groups.

Don't Send Many Emails When One Will Do

Use your drafts or a notes app to keep track of things that you want to send people that are not urgent. Once you hit three things, then send the email with three things instead of sending three separate emails.

Give Yourself Time to Back out

I have a rule that every email I send gets held in my outbox for one

minute, which is plenty of time for me to realize that I shouldn't send something. I can go delete it or move it to a draft before it gets sent. In Outlook, you can do this by creating a rule to defer delivery by one minute. If you've already started scheduling emails for the following morning, then you'll also have plenty of time to back out of an email you shouldn't send.

Have a Meeting, Phone Call, or Chat Instead

If it takes more than three emails, or if the email is going to be longer than a paragraph, just contact the person a different way. I have a personal rule that if I end up revising an email more than three times, it means I need to call them up and talk to them instead because the issue is too complex for email.

Always avoid email if you are breaking bad news to someone, if you are upset, or if you are resolving a conflict. Apologizing through email after the conflict is resolved is fine.

Bettina Buechel created a scale for deciding if things should be handled in email or in person by evaluating the scope of the media and the richness of the media². In this scale, face-to-face communication is at the opposite spectrum as a blanket email. So, when the stakes are high, and you have no room for misunderstanding, you will need all the communication richness you can manage, so you should talk face-to-face. If the message you have is simple and you need to communicate it quickly, use email.

If you need a quick consensus, an email will do. However, discussion getting to a consensus should happen a different way.

Make Your Important Emails Different

Help other people sort through their emails by making it clear which emails from you are vital and which ones are just FYIs. You can either use email flags, or you can tag your subject line. It doesn't matter what method you use as long as you are consistent. Do not use your "important" tag on all your emails. Try to only use them on the ones you really need an answer to. When you are just sending someone information they don't need to act on, make that clear by saying "FYI" first thing in the subject line.

Schedule your important emails so they will be read. Schedule your unimportant emails so it doesn't matter. For an email you must get a response to, you can pick good times that most people are actively engaged. I looked at marketing research to see what times marketers think are peak attention times.

The best day of the week to get people's attention is Tuesday. Mondays are bad because it's the first of the week. Fridays are bad because people are looking forward to the weekend. After Tuesday is Thursday, and then Wednesday.

The best time of day to get people's attention is 10-11am. It avoids their maybe slow morning start and the lunch hour. After that, it's 2pm. The third best time is 6am, because you can schedule an email to be the first thing in someone's inbox when they open it.

So, if you really need to get someone's attention, send the email at 10am on Tuesday morning.

If, however, you have FYI emails you want to send people, choose Friday or Monday, at non-peak times.

Communicate Clearly

An email problem in an organization is a sign of a greater communication problem³. You might not be able to fix other

people's communication problems, but you can fix yours. Write your emails so they can be easily read, easily understood, and they don't require too much from the reader⁴.

Keren Eckberg identified four types of email:

1. Self-fulfilling – Tell the receiver something expecting no reply. Use “FYI:”
2. Inquiry – You need something from the receiver. The reply is the desired outcome. “Response Needed:”
3. Open-Ended Dialog – You want to keep communication lines open for future purposes.
4. Action – The goal is an action on the part of the receiver, not a reply. “Action Needed:”

Be concise and to the point. Let your receivers know right away what you need from them and what type of email you are sending so they don't have to figure it out on their own. If no action is expected, state that no response is necessary.

The US military goes further with this concept of using the subject line⁵.

- “ACTION-” Compulsory for the recipient to take some action.
- “SIGN-” Requires a signature from the recipient.
- “INFO-” This is an informational email only. No response or action is required.
- “DECISION-” This email requires a decision from the recipient.
- “REQUEST-” Seeks permission or approval by the recipient
- “COORD-” Coordination by or with the recipient is needed.

You don't have to use this exact system, but it's good to keep in mind. They want to get the who, what, when, where, and why as fast as possible. They follow the concept of BLUF (Bottom Line UpFront), where you answer all the details right there.

Forward Emails Carefully

There are two kinds of forwarding: manual and automatic. If you consistently get emails that you are manually forwarding to other people, you can set up a rule to do that automatically. Even better is get them to be the receiver of the emails. If you have to get a notification, then try to get your name on the BCC.

If you manually forward an email to someone, always add context before you send it. There's a reason I put this below the communication section. If you can't add context to a forwarded email about what you expect from the person you're sending, then you shouldn't forward it. It just confuses them and demands too much from their attention.

Exercise

For the next week, use your Email Log and your “sent messages” folder to take note of the number of emails you have sent for each day. See if you can challenge yourself to cut the number in half. You should still get your work done, but try to do it in as few emails as possible. Delay delivery of emails if possible. Once you start slowing down your output, and spending your time working, then email total becomes easier to handle.

Notes

1. <https://blog.hubspot.com/sales/reply-reply-all-bcc-flowchart>
2. <https://www.cbsnews.com/news/phone-or-email-meeting-or-wiki-when-to-use-which/>

3. <https://hbr.org/2012/02/stop-email-overload-1>
4. <https://www.slideshare.net/KarenEckberg/effective-email-communication>
5. <https://lifehacker.com/write-email-with-maximum-efficiency-using-this-military-1789571032>

3. Control the Flow In

Now that you have 1) gotten your email down to zero and 2) slowed the flow of emails out, next we need to start dealing with controlling the flow of emails in. If you did the email power hour, you actually have a lot of data that you can use to finish this section. Go through your FYI folder and see what things can be gotten rid of or moved.

Unsubscribe

Unsubscribe from anything you can manage. Before you make a rule or a workflow in how to handle something, decide if you really need it or not. An easy way to see if you need something is by looking at how many of the emails from that subscription are unread.

Turn Off Notifications

People often use emails as a notification system. The purpose of a notification is to get your attention. If your inbox is full, then any notification there will not get your attention so it doesn't help.

Move It to Something else

Do you have a blog you follow that you get emails about? Instead of getting an email for it, sign up for an RSS service or just set a time on your calendar to go read the blog. If you are getting notifications

from a service, just schedule a time to check that service instead of getting notifications. This goes for Twitter, Facebook, Slack, etc.

Mark It as Junk

If you can't unsubscribe from something, consider marking it as junk. It will go to your junk mail folder so if you really need it in the next 30 days, it will be there, but it will also not be in your inbox and it will automatically disappear. I am particularly fond of doing this for listserve emails, because I can go back and reference them if I need to, but they're irrelevant after 30 days and they disappear.

Exercise: Stopping the Flow

For one week, use your Email Log and keep track of what emails come in that you really don't need. Brainstorm ways to stop that email from coming to your inbox, or diverting it to the FYI folder, trash bin, or Junk mail folder.

4. Make a System

So, now that we've tamed your inbox, controlled the flow of emails in and out, the next thing is to actually come up with a system to deal with your emails once you've sorted them, and to keep your inbox at zero.

Morning 10-Minute Email Triage

Every morning (or whenever you decide to work on email), set a 10-minute timer and open your inbox. You can find one here at [Time and Date Timer](#). You will spend these 10 minutes only sorting email. Not responding to it or reading it. You will sort your email into the folders you created during your power hour. So, TODO, Read Later, and FYI, or you're going to delete them.

Some people use the 4-D's: Delete, delegate, do or defer¹. The only reason why I don't like this system is that the "do" and "defer" cuts into your time like nothing else, and I think it's better to spend a dedicated 10 minutes sorting email so you can focus on the doing and deferring later.

Dealing with FYI

I deal with my FYI folder immediately after my 10-minute email triage, but only if I have extra time in my 10 minutes. Once you get your inbox to zero, this shouldn't be hard. Read through your FYI emails quickly, and delete most of them. Glance, read, delete. If you realize that you actually have a TODO, then move to the appropriate folder. The idea is that you go fast and not waste your time on them. If you have a backlog from your email power hour, then go through as many as you can before the 10 minutes for your Email triage is up, and STOP. Work on the rest tomorrow.

Outlook Quick Steps

For me, one of my strongest allies in my inbox triage time is my Outlook Quick Steps.

- Outlook Desktop App: Automate common or repetitive tasks with Quick Steps

I have five set up, because the little banner at the top only shows five.

- Calendar- Create an appointment with the text of the email message, move the email to archive, mark complete. Great for ANY email that is just giving you a date you need to do something or be somewhere.
- Done- Marks message as complete, moves to Archive, mark it a read. Great for emails that you don't have to do anything to, but you want to make sure you know you looked at it. Also good for when you've completed TODOs, because it moves them out of the folder and marks them complete.
- TODO- Flags message to follow up tomorrow, moves it to my TODO folder, marks as read.
- Read Later- Moves it to my READ LATER folder, flags message to follow up next week.
- Reference- Moves the email to my reference folder. Marks as read. Marks it as complete.

I'm a big fan of using Outlook's task list, but I'm also just that kind of person. So for me, the quick steps automate some of that. I've also set up my Outlook tasks to only show me things that are due today or overdue, so I don't get overwhelmed. However, personal task management could be its own book. Be on the lookout for a sequel.

Dealing with TODOs

For this first bit of getting through the TODOs you built up in your email power hour, schedule an hour a day to do nothing but work through these. Once your timer goes off, stop and work on your other work. For the hour, decide how you will tackle your email, either First In, First Out or Last In, First Out:

First In, First Out

The idea that you go from oldest to newest, and tackle emails as they were given to you. The benefit of this is that the people who have waited for the longest will get dealt with first. However, if you rememebr our introduction chapter, most people give up on getting a response from an email after 48 hours because the chances they'll get responded to are low. There's also this idea that they've waited this long- what's the issue with them waiting a bit longer? However, some jobs require you to tackle the first ones in first. If that's the case, then you don't have a choice, but if you do have a choice, I suggest you do the next one.

Last In, First Out

The idea being that you take the most recent email and work on that one first, then the next one. I highly recommend this, especially to start off with, because it lets people who have active concerns be responded to first, so that your turnaround time is immediately faster for new requests. This is how you start changing your reputation and being a prompt responder, even with tasks filling your todo list.

Dealing with Read Later

Read Later emails are often ones that need concerted attention to get through, but they might not require you to actually do anything. So, schedule one hour a week to deal with these. Set a timer, and

stop when the timer goes off. Get through as many as you can. If you realize that in reading, you've developed TODOs, that's fine. Move emails as necessary.

Set up a schedule

I set up a schedule to deal with my email. 10 minutes every morning for triage and FYI emails. One hour every week for Read Later emails (for me it's on Monday mornings). And I schedule a work hour to get through my TODO's. These are actual appointments on my calendar. Now, let's add that up.

- 10 minutes every morning for 5 days is 50 minutes
- + 1 hour of Read later
- + 5 hours of todo.

Total that's 6 hours and 50 minutes spent on email every week, instead of the 20 that most people spend. What to do with all that extra time?

Exercise

In your calendar for the next week, schedule your morning inbox triage, your one hour of Read Later, and dedicated time to work on your todos. Try out the process and see how it feels. Do you work better in the morning or do you work better at the end of the day? Move your schedule around. If you're not the type of person who likes strict schedules, then just do the triage first thing in the morning, then work on TODOs, and then work on Reading. Try things out and see how you feel.

Notes

1. <https://www.vitalyst.com/delete-delegate-do-or-defer/>

5. Control Your Attention

Now that you have your email sorted out, and you have a schedule to handle the incoming email, it's now time to control how much attention you pay emails.

Control when you Check Email

If you are involved in work that requires deep thought and concentration (and your boss expects this), you can get away with only checking email once a day. Break the expectation of immediate response, and make it clear that you will check it and when. You can put this in your signature line if you like. Always let your supervisor know that you are doing this.

However, if you are in a situation that you have to deal with more urgent things through email, or most of your job is email, then we can take advantage of that statistic that half of all emails get responded to within an hour. Check your email on the top of the hour for urgent emails.

Close your Email

No amount of organization is going to fix an email problem if you still have to think about it all the time. Remember, the whole point of this is to focus less on email so you can do other things. If you're sitting there waiting for emails to come in, you're wasting your time. Do your scheduled email tasks, and then close the whole program down.

Ask for Urgent and Important Emails to be treated differently

If you are not actively looking at your inbox all day, then when something comes through that is truly urgent, you might be scared you won't see it. Alleviate that fear by asking your supervisor and your employees to treat urgent emails differently. You can use your email signature line to let people know what you would like.

If you have a person that is super important, you can create a rule to handle those differently. In Outlook, you can ask people to use the "Mark as Important" feature. Or, you can ask that they put the word "URGENT" in the title, and you can create a rule that handles those differently.

You can set up rules to have urgent emails go to your phone, make a sound on the desktop, or even pop up in a window.

Exercise

Try closing down your email for just one hour. Start there. Set a timer, and try. What changes do you notice? Are you nervous? Did you actually check your email despite the fact that you weren't supposed to? What did you do during that hour instead of email?

For the first week, try closing your email for an hour every day and see if that's something you are comfortable with. After that week, see if you can start checking your email then closing it every hour. If that goes well, stretch it to two hours. Then see if you can check it once in the morning and once after your lunch break. If that works, see if you can check it only once a day.

If at any point you experience problems (not seeing important emails), then take a step back and figure out if you can have those important urgent emails be treated differently.

6. Review

In this book, we have gone through quite a journey. Hopefully, along the way you've learned that your whole life probably shouldn't be about email.

Here is a quick reference you can print out:

- Inbox Power hour
 - 1-10m: Quick Sort from top to bottom
 - 11M-20M: Emails from NOT People
 - 21-30m: Emails to NOT you
 - 31-40m: Unread email
 - 41-50m: To me from a real person
 - 51-60m: Closeout
- Control the Flow Out
 - Send Fewer emails
 - Delay sending emails
 - Don't Hit reply all unless you have to
 - Use Blind Carbon Copy (BCC) more
 - Use drafts and notes to build up information for people, and send one email instead of many.
 - Give yourself time to back out by delaying email.
 - Have a meeting, phone call, or chat instead.
 - Make your important emails different
 - Communicate what you need from someone clearly
 - Add context when forwarding emails
- Control the Flow of Email in
 - Unsubscribe from things
 - Turn off notifications
 - Move it to something else
 - Mark it as junk
- Make a system

- Morning 10-minute email triage and delete FYIs
- Schedule 1 hour a day to deal with TODO emails. Last in first out if you can.
- Schedule 1 hour to read the Read Later emails.
- Set up a consistent schedule that works for you.
- Control Your Attention
 - Control when you check. Once an hour? Twice a day? Once a day?
 - Close your email for most of the day
 - Ask for urgent emails to be sent differently