

Taming The E-mail Tiger

A Strategic, Best Practice Approach to Managing Your E-mail Overload

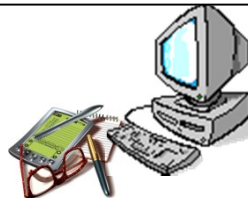


Best Practice E-mail Management

There are 5 'Golden Rules' of Best Practice for strategically managing your email more effectively and maximising your 'email productivity'.

Notes:

1: Use CALENDAR view
as your default setting,
rather than the Inbox



Whose agenda & priorities?
RU plan or interruption driven?
Reactive or Proactive?
Change default to Calendar
from in-box; turn Calendar
reminder defaults off

2: SCHEDULE times
to monitor and process email,
rather than simply react as they arrive
Real Customer Service is being responsive, not simply reactive!



Impact of email interruptions -
time, \$\$\$, IQ, work/life balance
How to identify the truly urgent
and best tool to send them
Research on response times –
4 planned times is best model
Turn OFF all e-mail alerts &
use P.S. to manage expectations

3: KEEP THE INBOX EMPTY

This can be done if you HANDLE each
message only ONCE – do it once, do it right!

1: DITCH / DELETE

2: DEAL (Reply/Reply All/Forward)

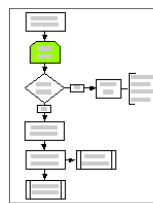
3: DELEGATE (via e-mail or assign Task)

4: DECIDE

- WHERE - File (Done/Folder/Along with)
- WHEN – Convert to Task or Calendar item
- WAIT - Add to Watch list (pending reply)



Empty your in-box NOW by
creating a backlog folder. Also
set time (last 15 mins of the
day) with a reminder to process
backlog using 4D process at left



Set up RULES to automate
many of the things you now
do manually on a regular or
routine basis, especially those
not time critical. eg:

- delete/junk rule
- 'CC' rule & folder
- ezines/updates rules
- personal messages rule

4: STORE your email
messages & attachments
appropriately



Reduce mailbox size; use doc. links; establish folders; auto archive

80% volume taken by 4% email
Send document links, instead of
attachments (where possible)
Set up folders to separate
'finished' vs 'unfinished'
Set up Reference Folder with 4
or 5 primary folders
Use Auto-archiving

5: Communicate with CLARITY

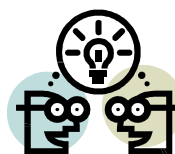
Write for the reader, take time at front end of process

1: **THINK first:** is email the appropriate tool ?

2: **PRE-write:** FOCUS on desired outcome

3: **FREE-write:** Use INVERTED PYRAMID structure

4: **RE-write:** edit message, write subject line, address last



Is e-mail the best way for this
message? for this person?

Set up 4 draft emails with
subject lines such as;
- Action Required
- Response Requested
- Read Only
- FYI (for your info)

Put your **Main Point** first,
details & background later

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Plan of Action

During the Taming the Email Tiger presentation, you've learnt a number of strategies for more effectively managing email. Take action on what you have learnt by writing out when you will implement the three following suggested strategies.

FIRST STRATEGY: CHANGE DEFAULT SETTINGS

By the _____ I will take the following steps to achieve this strategy.

- Action Steps
- Change default View to CALENDAR (not inbox)
 - Turn default calendar reminders OFF (untick box)
 - SCHEDULE times to check email and turn all email alerts OFF

SECOND STRATEGY: KEEP IN-BOX EMPTY

By the _____ I will take the following steps to achieve this strategy.

- Action Steps
- Make decisions – use the 4D method
 - Set up folder structure (separate finished from unfinished)
 - Remove attachments from email, use archiving function

THIRD STRATEGY: WRITE CLEARER MESSAGES

By the _____ I will take the following steps to achieve this strategy.

- Action Steps
- THINK first (is e-mail the best option?)
 - Give a 'heads up' in subject line (to achieve better outcomes)
 - Use INVERTED PYRAMID structure (make MAIN POINT first)



*Solutions
for Success*

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How to Empty Your Inbox . . . *today!*

- 1: Create a new folder called **Backlog** – Right click on **Inbox** folder, select **New Folder**, then type **Backlog**
- 2: Select all messages in **Inbox** (click on any message and then press **Control + A** keys together)
- 3: Click anywhere in selected messages in **Inbox**, then drag and drop them into **Backlog** folder
- 4: Create a calendar appointment (**Shift+CTRL+A**) with a recurring reminder to spend 15 mins just before the end of your day, working through the **Backlog** folder using the 4D method.
5. Use same process to keep your **Inbox** empty on a daily basis from now on!