Email Mastery: 10 Point Checklist

This checklist shows 10 key strategies and actions to empower you to better manage email and maximize your eProductivity. These strategies have been tried and tested by thousands of participants over the past decade and they will work powerfully for you too!

1. Change the default setting so Outlook opens in **Calendar view rather than the In-box**. When checking email, right click on the mail icon to '**open the inbox in a new window**' to consciously address email at a pre-defined block of time and then close the window when finished.

2. **Turn off all e-mail alerts** to eliminate e-mail as a source of interruption and avoid being reactive to e-mail (**with exceptions for specific people**). Check the in-box pro-actively only at scheduled times each day (with the aim of emptying the inbox) - 'single-task' rather than 'multi-task' it.

3. **Manage other people's expectations** about how promptly you will respond their e-mail.

4. **Empty your inbox right now**! Start with a clean inbox today and use the 4D method (see below) to keep it that way into the future.

5. Use the **4D method** to handle each message only once when processing the in-box. Identify the next action as one of;
   - **Delete/Ditch**
   - **Delegate**
   - **Deal** with immediately (2 mins or less)
   - **Decide**
     - **Where** to store the message (in an email folder or a pre-existing calendar item)
     - **When** you will do the task the email has delivered (**convert the email to a new calendar item or appointment** with yourself to complete the task)
     - **Wait** (right click to add a reminder to the email then drag 'n drop to the Pending Reply folder)

6. Set up a **CC Rule** to divert CC messages into a separate 'CC' or 'Reading' folder that you will visit as often as needed to keep up to date with all this background information.

7. **Re-organise and simplify your e-mail folder structure**. Separate finished or completed emails from unfinished or incomplete ones by setting up a folder called **Filing Cabinet** with 4 sub-folders;
   - Internal/Team/Colleagues/Associates
   - External/Clients/Customers/Suppliers
   - Projects/Outputs/Subjects
   - Admin/Miscellaneous

8. Set up 4 draft e-mails pre-written with your **desired outcome** in the subject line. Include your signature block and any other pre-written text.
   - Action required
   - Response requested
   - Read only
   - FYI

9. Write **effective subject lines** with all three of the following elements to **get attention, engage interest and motivate action**.
   - Desired outcome (as per list of 4 above)
   - Preferred timeframe
   - Succinct summary of the subject/content of the email

10. Use the **Inverted Pyramid Structure** for outgoing e-mails, ensuring that the main point of the email is located at the top of each message (see the **F shape concept**).