



Taming The E-mail Tiger

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



Stuart Snooks
Email Productivity Expert

Email Mastery: 10 Point Checklist

This checklist shows 10 key strategies and 14 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 - 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 to 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;

1. **Delete/Ditch**
2. **Delegate**
3. **Deal** with immediately (2 mins or less)
4. **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 that are pre-written with your **desired outcome** in the subject line. Also 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**).

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Solutions for Success

Phone: 1300 789 468
Mobile: 0413 830 772



www.emailtiger.com.au
stuart@solutions4success.com.au



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Work your way through this checklist at your own pace, ticking off each of the strategies and writing in the date you complete it. Just call if you need any help!

#	New Email Productivity Strategy	Done	Date
1	Change default view from inbox to calendar	<input type="checkbox"/>	
	Open the inbox in a separate, new window	<input type="checkbox"/>	
2	Turn off all email alerts	<input type="checkbox"/>	
	Set up exceptions for specific people	<input type="checkbox"/>	
3	Manage other people's expectations (ie: set up PS in signature block)	<input type="checkbox"/>	
4	Empty your inbox	<input type="checkbox"/>	
5	Use the 4D Method		
	Copy email into an existing calendar item	<input type="checkbox"/>	
	Convert email to a new calendar item	<input type="checkbox"/>	
6	Set up a CC rule	<input type="checkbox"/>	
7	Restructure and simplify your email folder structure		
	Set up Filing Cabinet folder	<input type="checkbox"/>	
	Create 4 sub-folders of Filing Cabinet – Internal, External, Projects, Admin	<input type="checkbox"/>	
8	Set up 4 draft emails with pre-written subject lines showing desired outcomes	<input type="checkbox"/>	
9	Write effective subject lines with;		
	1. desired outcome	<input type="checkbox"/>	
	2. preferred timeframe	<input type="checkbox"/>	
	3. Concise summary of subject matter	<input type="checkbox"/>	
10	Use the Inverted Pyramid Structure for outgoing emails	<input type="checkbox"/>	
Additional ideas			
1	Block out daily times in the Calendar for processing the inbox	<input type="checkbox"/>	
2	Change inbox preview pane to 'Bottom'	<input type="checkbox"/>	
3	Set up colour categories in the Calendar	<input type="checkbox"/>	
4	Use flags and reminder for emails requiring follow up	<input type="checkbox"/>	