

10 TIPS FOR SMARTER EMAIL MANAGEMENT



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Email: Alive, Well and Growing

Despite the many predictions and statements by various bloggers and social media gurus, the death of email is greatly exaggerated. While there is no denying the rapid growth of texts, tweets, and other forms of digital messaging, email continues to dominate the world of digital communications. This is especially the case in B2B situations.

According to a recognized expert on the email industry, the [Radicati Group](#), the volume of global email accounts will increase from the present 3.9 billion accounts to nearly 5 billion accounts by the end of 2017. Of these, nearly a billion mailboxes belong to business users, with an expected 12 percent increased during that time of growth.

These total email accounts generated more than 100 billion emails a day during 2013, the majority of them related to business activities. Using the same methodology, Radicati estimates total business email traffic will rise to 132 billion emails sent and received daily by 2017. One factor in the growth of business email is related to the increasing use of mobile devices for email sending and viewing.

A Major Consumer of Time

With these current and growing numbers, it is not surprising to find that reading and answering email is such an important part of the daily effort of many workers. According to a study by [McKinsey Global Institute](#), email is already the activity that ranks number two for time spent on all work tasks, with as many as 200 emails received and sent daily. With email already consuming an average of more than 11 hours a week for the average user, companies make an ongoing major investment in this communications tool.

These numbers point to a basic fact about email productivity. If there are ways to shave even 20 percent off the time spent dealing with business email, companies could capture as much as 8% in immediate productivity improvements. In light of this potential, it is worth reviewing some basic steps and disciplines that encourage more effective management of the growing email burden.

In the following discussion are 10 tips any individual can implement to achieve immediate efficiencies in daily email practices. The administrative assistant can implement many of these ideas independently. A few, however, require some modifications in the behavior of those supported.

As the majority of business users are still utilizing Outlook, the comments are generic to this Microsoft product. However, virtually all major email products accommodate similar capabilities, such as filters and rules.

The format for each tip is as follows:

Type: (Single action, Recurring, or Optional)

Who: (User, Assistant, or Both)

Difficulty: (Simple, Moderate (takes a little time), Difficult (large investment of time))

Tip No. One - Attitude

Type: Recurring

Who: Both

Difficulty: Moderate

As email has evolved into a common tool for today's generation of users, most have had little or no training in its use. Habits, good and bad, exist as a result of accepting email as a new tool and putting it to use.

A recent study by the [University of California and Army researchers](#) shows that users respond to email by going into a state of high alert with higher heart rates. This situation affects the ability to focus and creates ongoing low levels of stress. Workers not managing an active email account performed much better at multitasking and work flow, according to the study.

It is of great value to stop and rethink both individual and corporate attitudes towards email and how it is employed. Many now begrudge the current heavy usage of emails and respond to it with less than a positive perspective. Others have essentially let it become a second or even primary boss, dictating the day's work flow and priorities. All managers and individuals should be encouraged to stop and redefine the role email is to play. This includes individually, as a team, and with assistants.

Define the Purpose

The first step to take is making an effort to determine specific uses of email, such as:

- Sales and customer communications
- Project management and collaboration
- Seeking and receiving work-specific information
- Delegation
- Disseminating general news and information
- Interpersonal communications
- Automated responses to various actions, reports and other factors

When approaching the inbox, the first requirement is to understand that all email is not created equally and does not deserve the same priorities and time. It is estimated by Radicati that as much as 19 percent of all emails received are essentially junk, regardless of filters used. However, the effects of treating an important email in a cursory way can have major consequences.

Dr Tom Jackson of Loughborough University, has reported his observation that, “poorly worded or structured messages can take time to decipher and can cost up to \$16,000 per employee. Office politics played out over email create negative impressions. Bad habits can result in alienation, particularly among mobile workers, for whom it may be their only connection to the office. Brief conversations, which allow for nuances of speech, may prove a more effective way of tackling problems.”

As with all habits, a simple process of seeking awareness goes a long way towards reinforcing good ones and eliminating the bad.

Tip No. Two - Disciplines

Type: Recurring

Who: Both

Difficulty: Moderate

Delete First

An effective step for individuals opening their inbox at the determined time (as discussed below) is to immediately delete any emails readily seen as unnecessary or irrelevant. This is done even before addressing priority and important emails. As noted, such emails will appear frequently, despite following the steps reviewed in this paper. If a quick review shows such emails, delete them without opening or review. They'll end up in the junk or deleted folder for later review as discussed in that topic.

Deleting such emails as auto alerts and obvious solicitations or needless cc's will immediately eliminate a percentage of emails before starting to work on others.

Use Alternate Folders

While this is discussed in more detail below, a handy first step is to move certain emails into one of the management folders set up for that purpose. These can include Hold, FYI, Archive and Follow Up folders.

Review, Delete and Eliminate Weekly

A basic principle for any handling paperwork applies equally to emails. The goal should be to handle it once and take appropriate action. Delete it, delegate it, or send it to the right folder. The inbox should be treated as a mail receptacle, not a filing cabinet.

Using the sort function as a handy way to review and delete large numbers of messages. It is also a good tool if the inbox is reaching its limits of storage, allowing large files to be moved or deleted quickly. This process will additionally work as a good way to handle messages in the sent folder.

This is easier to do once the below suggestions concerning rules and filters are implemented. As for both junk and deleted folders, these are to be reviewed once or twice a week when relaxing or all priority work is completed. Sorting through these emails quickly will help find any that don't belong there. Knowing there will be a second review of all emails aids in the ability to be somewhat brutal about the first round of deletions. This is, in fact, an excellent task to delegate to an assistant.

If this technique is followed, the "Automatically empty trash bin" feature should be turned off. However, it should then be emptied weekly or after every final quick review of messages in the folder.

Proof

Everyone benefits when emails, attachments and addresses are checked and proofed before hitting the sent button. Not only does this eliminate many potential embarrassments, finding errors first saves time and prevents unnecessary follow-up emails. It also one more way to ensure the right message is communicated.

Limit Checks of the Inbox

Probably the single greatest discipline for controlling email is to decide when it is checked and how frequently the inbox is reviewed. The first productivity step to take is turning off the notification alert. Workers should be trained that sending a priority email is not the best way for getting immediate attention. Phones are still handy for that purpose. As noted above, research shows making the inbox a servant rather than a master enhances productivity and lowers stress.

Set regular schedules for checking email. Many workers will do find significant relief if they only check email two or three times a day. This is especially the case if normal senders understand emails are not read immediately and plan around that reality. Very importantly, inbox checks should not consume the most productive work times. Whatever that period is for a particular individual or job, it is an inefficient allocation of the resource to use it to deal with email. There are, of course, exceptions, but email seldom requires the highest level of alertness and efficiency.

Respond Daily

A vital part of managing email is setting expectations. If regular senders know email is only opened a couple of times a day, a certain standard is set. At the same time, giving them confidence every email will be reviewed daily, if at all possible, allows them to be patient. It also establishes the need to call if there is a higher priority. This will also eliminate resends and unnecessary follow up emails if a response isn't received immediately.

Customize

Most email programs today follow Outlook's lead and provide many options for customization. Aside from producing more professional and effective outgoing messages, a number of other options make the inbox easier to handle. These variables include:

- Make emails readable. Set the zoom option to open and read emails at a comfortable size.
- Use signatures, drafts, and templates. Numerous standard responses and boiler plate can be added to a variety of saved emails and drafts. These can be used for the actual email or cut and pasted into a reply
- Use colors selectively and effectively

Only send and accept needed copies

While it's important to keep the right people in the loop, a lot of CYA is involved with many emails. Only those with a genuine interest in the information contained in a message should be copied. As a side point, use both cc and bcc in a planned way. Let people know who is receiving the message to avoid needless forwarding. Of course, bcc provides an opportunity for confidentiality when needed.

Manage Communications Appropriately

Revisiting the issues of the attitude and purpose of emails, recognize them for what they are. Most emails should be short and succinct. Long memos and communications should generally be composed as attachments or placed in the cloud and linked in an email. This supports a team attitude of dealing with the inbox promptly and assigning work projects to more productive periods of time.

If a subject has been handled in a series of emails without resolution, try a phone call. Personal contact is often the best solution for complex issues with a multitude of interactive discussion points. The focus of email communications should be clear, sharp and concise messages and information.

Focus on the Subject Line

While modern search capabilities are dramatically improved, all teams and groups should focus on consistency with subject lines to improve easy recognition of their emails. For example a subject line of “Smith proposal, draft 3” is easy to find and will show up sequentially with all Smith proposal emails

Manage Contacts

The contact manager is precisely that – an effective way to manage contacts. New contacts should be added when an email comes in if that person is expected to be part of ongoing communications. Setting up Distribution Lists will save time with each email and help avoid errors or missed addressees. This type of grouping also makes other actions, such as moving to folders, deleting and archiving, much easier.

Tip No. Three - Filters

Type: Recurring

Who: Both

Difficulty: Moderate

Virtually everyone has waited on an important mail that doesn't arrive. Only later is it found in the junk folder, a victim of the spam filter. While filters do have their limitations, they serve as powerful tools for many purposes.

Filters can save time by flagging, sorting and prioritizing specified types of email. Filters are used to sort out groups, individuals, and certain content. It is possible to either eliminate or highlight certain types of mail. If a user gets mail from an important client at a certain domain, a filter can label, sort and highlight that email to suit the user's desires.

As noted, however, filters are not infallible and an important customer might send an important message from a Gmail account while on vacation, perhaps causing it to be missed. These are further reasons to regularly check both junk and deleted folders.

Most email vendors continue to enhance the flexibility and power of their filters. Even Gmail has a surprising range of filters for customization or use as is.

Use auto-replies for more than just out-of-office messages.

The auto-reply function is not just for vacations. It can be used to notify senders of your schedule of checking emails and include a message such as "If you are sending a priority email, you can contact me at (phone number or assistant's email/phone number).

Tip No. Four - Rules

Type: Single action

Who: Both

Difficulty: Moderate

Outlook makes it very easy to set rules that are actually sophisticated filters. However, the time investment is made in carefully determining the rules and how to best use them. These rules are especially useful for those who have multiple accounts and social media messages forwarded to the inbox. It allows a presort of priorities and more efficient use of the time spent on the inbox.

For example, if all incoming messages concerning tweets are sent to a designated folder, one glance will indicate the number of new messages. All of these can be handled at one time when the priority is dealing with social media. Likewise, if tweets are a priority, this separates them out of all other inbox items for quick access.

Another example is newsletters from industry sources. These are often important, but not a priority. A rule can place all of them in a “Newsletter” file for later review and avoid the inbox clutter. If the news feed is crucial, it can also serve to highlight its arrival in a priority folder, rather than joining all the other messages sent to the inbox.

Highlight Addressees

As discussed below, inboxes often have messages from a number of accounts. If for example, a worker has a personal account for a relative in the service overseas, a special account can use a different name for the addressee and receive special highlighting. While this can be accomplished in different ways with filters and rules, it is another method of placing priorities on different communications.

Combining these tips achieves the greatest effectiveness. It also provides some peace of mind to those who follow the discipline of only checking email a couple of times a day. When an inbox is opened, certain flags, colors and highlights will make it easy to prioritize the process of dealing with new messages.

Tip No. Five - Block

Type: Single

Who: Both

Difficulty: Simple

While unsubscribe is always a preferred action, some senders violate Can-Spam rules and repeatedly send millions of emails. When on one of those lists, it is easy to mark any sender address as junk and place them on the blacklist. This sends such messages to the junk filter without ever hitting the inbox.

Tip No. Six - Alternate Addresses

Type: Single

Who: Both

Difficulty: Simple

With the number of websites demanding an email address for a download or to access wanted information, one effective control is to have an email address for that very purpose. In fact, for ongoing research and longer-term projects, it may make sense to have a single email account to accumulate the auto responder emails these signups often initiate.

Filters can be set on those accounts and only selected emails forwarded, while keeping the other information on hand for analysis when desired or needed.

There are also ways to protect and collect emails from email accounts when team members move between companies and projects. [Lifehacker.com](https://lifehacker.com) has a good insight on what they call “future-proofing” email accounts.

Many small businesses without large IT resources can use a number of Gmail accounts to both consolidate and manage multiple email accounts and ensure accessibility when not in the office or during system downtime.

Tip No. Seven - Learn Effective Search Techniques

Type: Single

Who: Both

Difficulty: Simple

Over time, most users will accumulate thousands of emails dealing with thousands of subjects, projects and customers. Even the most disciplined of these users will fail to get emails saved where they want them to be. It is worth the time to gain experience and insights into how search protocols look at content in email folders.

A little time and practice will also guide how original emails are created and such things as subject lines are used. There are times when finding an email is the most important priority of the day and it is easier to accomplish the task with a little knowledge of the process and the parameters available.

Tip No. Eight - Unsubscribe

Type: Recurring

Who: Both

Difficulty: Simple

Can Spam legislation requires all emailers to make it easy to unsubscribe to future mailings. However, there are a couple of caveats to consider. First, when the unsubscribe option is a link, caution is warranted. This is because many blackhat emailers actually use the unsubscribe option as a Trojan horse or worse.

Secondly, it can take several seconds to a couple of minutes to unsubscribe from some sites. This is one function best trusted to an assistant who can take the time to evaluate the best course of action and notify IT if it appears the message is actually malware.

Tip No. Nine - Use the Cloud and Mobile Sync

Type: Recurring

Who: Both

Difficulty: Moderate

The only reason this tip is ranked moderately difficult is the overall issue of evaluating a company's use of the cloud and its resources. As with emails, all clouds are not created equal. Security and compliance issues must be addressed before relying on the many advantages of the cloud and mobile devices. This is especially the case when accessing accounts from public hot spots or other points outside the corporate fire wall.

That being said, having all emails from all accounts and devices easily accessible, backed up, and synched is a powerful way to manage emails and gain reliable 24/7 access.

Tip No. Ten - Alternatives

Type: Recurring

Who: Both

Difficulty: Simple

As discussed in earlier paragraphs, technology provides many ways to communicate as an alternative to emails. From phone calls to texts, it is useful to develop certain attitudes, protocols and rules concerning which methods to use in which circumstances. This even includes the choice of snail mail in certain circumstances as carrying a different message than a standard email.

Email is here to stay for the foreseeable future. These tips are intended to provide a substantial return of investment on the time it takes to review and implement them.

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