Better email management
1. REDUCE DISTRACTION
Rule #1

Turn off email when doing work that requires uninterrupted focus.
Rule #2

Stop “checking” your email.

Instead, *work on it.*
2. STORAGE FOLDER IDEAS
Consider:

1. Reducing the number of topical reference folders

2. Adding folders for messages related to your current work.
Projects associated messages

- Cross-Cohort Collaboration Consortium decision
- Fall 2017 inperson meeting agenda planning
- Nanette: Glycated albumin in SWAN
- National Death Index proposal (Carrie)
- Repository proposal votes
- Swan decision making (sioban) 1
- SWAN VI preconcept proposal - input from NIH on format and budget info to...
- SWAN VI aims & pitches draft 6
@ Calendar event associated messages

2017.07.14-19 EWIM with visit to Jane's in Portland
2017.07.21 Periodontics retreat: email productivity
2017.07.24 SWAN EC call
2017.07.28 swan cancer adjudication call
2017.08.07 Peds Dentistry time management session
2017.08.29-30 WUSTL keynote
2017.09.06 nursing grad student session
3. TRY FOCUSED INBOX (ONLY IN OL 365)
Focused Inbox

To Enable Focused Inbox

- **Outlook Windows desktop**, select the **View** tab, click icon in ribbon to “on”
- **Outlook Mac desktop**: select the **Organize** tab, lick icon in ribbon to “on”
- **Web app**: Select **Settings** (“gear” icon in upper right-hand corner) & toggle Focused Inbox “on”

**Focused**: the OL algorithm thinks *you will want to see first* (addressed just to you; from your contacts, etc)

**Other**: the OL algorithm thinks *you won’t want to see first* (mass email, list serves, advertisers, etc)

You then “train” the algorithm to individualize your preferences (next slide…)

To “train” the algorithm in Windows Desktop:

1. **Right-click** on the message your want to be in the other list.

2. **Click on “Always move….”** to permanently redirect all future messages from that sender to the other location.

That is, you can redirect messages in **Focused** to **Other**, or, **Other** to **Focused**

(You can also do a one time move **message** although I don’t use this very often)
4. A process for staying on top of email
INBOX ZERO!
My “full processing” method

Part 1.
I run through all new messages, and delete the ones I can without opening the message

(if I see something that looks truly urgent, I open and take care of)

Pass 2:
I go to the newest message (or you could start with the oldest)

I open each message in turn, without skipping, and follow the action checklist to the end
The action checklist:

- For each message, I decide what action I will take the first time I read it:
  - Delete
  - File only: Archive
  - File only: Topic specific folder
  - Read: Optional
  - Forward to delegate or hand off

- Message needs a reply
- Message is sending me new work (task or project)
For messages that require a reply or work:

**Reply required**

- I ask: would phone or in person better? (reply: “Let’s talk + proposed plan for doing so)
- I reply immediately to as many as I can
- For the rest, I designate them as “deferred to later”

**New work to do:**

- I complete immediately as many tasks as I can
- For the remaining tasks, and all the projects, I add to my **to-do list system**...
- If I now have a new calendared event or project, I create the email folders to store related messages
Options for storing deferred messages

**Emails that contain new work / tasks:**
Add to your to do list system or task manager app

Create a time block on your calendar to complete the needed work.

**Emails that need a reply:**

1. Store in a folder

2. Keep in the inbox, but “segregate” from unprocessed messages with a flag or category
How to copy messages to create a calendar time block

1. Left-click drag message to the calendar icon, and “drop it” (The original email will remain in the inbox)

A new appointment or task dialogue box will open.

2. Modify the subject, date and time as needed

Source for calendar instructions:
https://kb.parkland.edu/page.php?id=55562#:~:text=Step%201%3A%20Select%20and%20highlight%20Calendar%20in%20the%20navigation%20bar.
Defer using a flag:

Sort on “flag”
Defer using categories:

Prep 1: Create the categories you want to use

Prep 2: Set sort to “by categories”

Method:

• Add the appropriate category to deferred messages:

  Right click on message to access categories
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Contact me anytime with questions or comments, and, get articles on my website

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