

Getting E-mail Under Control

Susan R. Johnson, MD, MS
Emeritus Professor of Obstetrics & Gynecology, and Epidemiology
The University of Iowa

Speaker / Coach

Thriving Amidst Chaos

<http://susanrjohnson.com/>

susan@susanrjohnson.com

319-321-2117

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In my conversations and work with people about the stresses of work, complaints about e-mail often top the list. The reasons seem obvious: e-mails arriving in your inbox in an unending stream; the “you’ve got mail” type announcements that interrupt your work; the volume of “junk,” and hidden in the midst of all this, important, URGENT! messages demanding your immediate attention. It is no surprise that many of us become overwhelmed, and let our inboxes grow to hundreds, or even thousands, of messages.

This is not a pretty picture – but it doesn’t need to be this way. In this article I will discuss ways you can get your e-mail under control, so that you can come to view it as the valuable assistant it can be. We’ll discuss your e-mail “environment” and how to make it less stressful, e-mail composing habits that you can use and perhaps pass on to the people who write to you most often, a filing system that helps keep your inbox thinner and your work better organized, and a method for processing new messages that supports getting work done.

The Environment

Here are four ideas to improve the environment. Get instructions specific to your e-mail program from the help section, or your friendly IT staffer.

First, turn off the notification announcing each e-mail. You likely do *not* need to know about messages the instant they arrive – the noises and visual cues take your focus off what you are doing, disrupting your real work, and leading a scatterbrained feeling. Somewhere in your system there most likely is a toggle box that allows you to turn it off. If your work involves frequent urgent messages, check your inbox every half hour or so – but at a time of your choice, not the machines. If you get complaints about response time, consider asking that person to call you the next time an immediate response is required.

Second, create an automatic signature block. Nothing is more annoying than needing to call someone who has e-mailed you, but not provided their number. When you create a new message, this block automatically is inserted, saving you countless keystrokes. It should contain at least your full name, phone number, fax number, and e-mail address. You can also include a mailing address, title, and anything else you like. In Outlook you can create multiple signatures, and, for example, have a “long form” automatically attached to new messages, and a “short form” automatically attached to replies. If you have different positions (such as faculty member and journal editor), you can create a separate signature block for each.

Third, learn the keyboard commands for the most common actions you use, including how to open, reply to, delete, and move your messages to another folder. This is ergonomically sound advice, and it will make your e-mail experience physically less stressful.

Fourth, if your e-mail is part of an institutional exchange server (i.e. your messages are stored centrally on a network drive), you probably have limited cyberspace available for your messages. When that space becomes full, you may be prohibited from receiving or sending messages until you clear some space, or at least the system will slow down – and who wants to wait more than a second for the computer to respond to your keystroke! You prevent these events by keeping your primary network folders small, and saving other messages to folders outside the primary inbox server space. Two folders that often don't get emptied regularly are “deleted” items and “sent” items. Empty them daily, and your system will run more smoothly.

Composition

E-mail is best used to provide either **factual information** (“The June 22nd molecular genetics journal club meeting will be held in Room 101 of the Smith Research Building”), or **to ask a straightforward question** (“When is the next molecular genetics journal club?”). E-mail is the wrong medium with which to express negative emotions, or to raise personally or politically sensitive issues. Institutional e-mail may be discoverable, and more importantly, your tone is easily misjudged. Deliver these kinds of messages in person, or by telephone.

E-mail messages should be brief, almost never more than one screen in length. This medium does not lend itself to comfortable reading of long messages.

Make the subject line informative. A blank subject line, or one that says “hi” wastes the recipient's time. Instead say: <Details of the June 22nd journal club enclosed>; or <Today's pizza lunch is cancelled>. This kind of subject line allows the recipient to make an informed decision about when to read (for the first example), or whether to open at all (for the second). If you need a reply the same day, say so: <REPLY TODAY: your sandwich selections for tomorrow's box lunch>. Or, if no reply is needed, <FYI: minutes of the December faculty meeting>.

Think carefully before copying others. Much of your own inbox is likely filled with messages copied to you that you don't need to see.

Filing

To keep your inbox empty, you need folders to store messages you want to save. Here are three folders that most people will find useful.

“Waiting for” is a folder used to store messages that you have sent OTHER people, and for which you are awaiting a reply. This folder should be a top level folder (i.e. not a subfolder), at the same level as the Inbox. Here is how to use this folder: You have sent a message to Jane, asking for the date and time of the next molecular biology journal club. Because you need this information, you will put that sent message in the Waiting For folder. The two universally available methods to do this are: 1) After clicking the “send” button, go to the sent items folder, “grab” the message, and drag it to Waiting for. 2) CC or BCC yourself on the original message and you copy will appear in your Inbox and you can drag to Waiting for. Now you don't need to rummage through dozens of sent items to know who you am waiting to hear from; instead, you have a simple list to review periodically.

“Projects” is a main level folder. I use the term “projects” for work I am currently doing that involves multiple tasks. You may choose a different name, such a “Current Work,” or any phrase that is meaningful to you. The Projects folder is a place to create subfolders in which to store email associated with individual work projects. **These emails are moved to the specific Project subfolder *only after* you have dealt with whatever the email requires you do to. In other words, these folders are for storing completed emails only.**

Here is an example:

- Projects
 - Journal club meeting plan
 - Lab assistant hire AIM to complete by mid-June
 - Lecture preparation DUE May 20
 - R01 submission DUE JUNE 1

In most email programs, these subfolders will sort in alpha-numerically, so pick a name that that will make it easy to find the subfolder – for example, starting with a key noun (as shown in the example) is better than a verb. Use this same organizational approach to creating names for paper files and virtual document folders associated with these same projects. Paper folders for each project are stored together in alphabetical order in a single file drawer, and virtual project folders are subfolders of a Project folder (for

example, in MyDocuments). Name each subfolder (e-mail, paper, virtual) with the *same project* name – and you will never misplace project materials again.

“**Reference**” is a third mainline folder for messages that you want to keep, but that are *not* part of any active project work. The internal organization of this folder can be organized by topical subfolders, or not. The search function of both Outlook and Gmail is generally robust enough to find most needed old e-mails quickly, allowing you to “dump” these messages in to a single file. In fact, the emerging literature on how to most quickly find a stored email suggests that “search” is faster in most cases than using topical folders, so you may want to move toward that approach for non-project associated messages.

Newer versions of Outlook and Gmail have a built-in version of this single folder called the “archive” folder. This is not to be confused with the long available “archiving” process. Instead, the Archive is a single folder in your Inbox server space. Both Outlook (all platforms) and Gmail have an icon in the “ribbon” section of the email view that will automatically move the selected message to that folder. Because this folder is like any other, it can be searched or scanned to find what you need.

Work style

Here is where the rubber meets the road: how to get through that inbox quickly and with minimal stress. The following are presented as “guidelines” rather than “rules” because you need to decide how each of these, as is or tweaked, works best for you.

Guideline one. Complete (or start) at least one important task each day *before* you look at e-mail. For example, edit the abstract for the poster submission that is due next week, or call your mentor to arrange a meeting to discuss your dissertation, or review your notes for the lecture you are giving later in the day. I was skeptical of this trick when I first heard it, but having used it for years, I guarantee that it changes the way you think about both your e-mail and your day. **Option:** You may be in a job where truly urgent messages greet you on most mornings. You can stick with the spirit of this guideline by doing an “urgency scan” first thing, dealing with truly urgent emails you find, and then moving on to do some important work.

Guideline two. Aim to deal with most of your email in batches, rather than one by one as they show up. Set a limit for the amount time you will spend in an email batch - 10 minutes, 30 minutes, two hours – depending on your day and needs; the crucial thing is to not get caught up in a never-ending session. Use a kitchen timer to help you to stop when you plan to. This method not only preserves your sanity, and prevents your day from being consumed with e-mail, but it also improves your efficiency in getting e-mail done - your mind responds to the time limit by working faster in order to meet the deadline.

Guideline three. Work through your messages one at a time, starting with either the most recent or the oldest– and **NO SKIPPING!** At first this sounds painful, as you will be forced to confront issues and tasks that you would prefer to put off. However, the

psychological effect is just the opposite. By the very act of dealing with these unpleasanties, you eliminate the anxiety that builds when you ignore them. You may find, as I do, that your energy increases and mood improves as you plug away, one message at a time.

Guideline four. For each message, do one of the following: delete, file (reference or a project file), respond / do the requested task, or defer to a later time. The last option causes the most problems. Try to minimize the number of deferred messages. Work hard at figuring out a way to respond immediately. If you must defer, decide exactly what you need to do next in order to be able to respond, and put the e-mail in a place where you will not forget it. In Outlook, some options are to create a “Action needed” folder, convert the e-mail into a task, or “flag” the message” and leave it in the inbox.

Getting started if your inbox is REALLY full.

The goal of this system is to deal with today’s e-mails *today*, and to get your inbox as close to empty as possible by the time you stop working. If you have hundreds of messages in your inbox now, that may seem like a distant goal.

Here is how to make this goal a reality now. Create a second inbox folder, titled: “INBOX messages prior to <specific date>.” Use a date of no more than two weeks before today. Move all earlier messages into the new folder. Set aside an hour or two to process the messages from the last two weeks that remain in the real Inbox. Starting the next day, finish everything that arrives that day.

In order to deal with the backlog in the other Inbox, spend 10 to 20 minutes per day dealing with the old messages, one at a time, beginning with the most recent. In my experience, most messages that are more than 6 weeks old are “dead” and do not require responses.

Conclusion:

E-mail, despite its bad reputation, has for the most part made our work easier. If we did not have it, we would spend more time playing telephone tag, walking to our fax machines, and waiting impatiently for information from others. If you implement all or some of the habits and techniques I have described, I believe you will come to appreciate the value of this medium once again.