Getting E-mail Under Control

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Managing email is stressful.

Messages arrive in an unending stream, 24-7. And you have access to those messages wherever you are, any time of day. Notifications disrupt your attention. Way too many messages are unwanted. Response time expectations are often unrealistic. And failing to "keep on top" results in an inbox with hundreds, or even thousands, of messages that feel overwhelming.

And then, hiding in plain sight are the messages that are important to you and require your attention.

This is not a pretty picture – but there are things you can do to get back in control.

This article is divided into four parts.

> **ONE. Reducing email distraction**.
>
> **TWO. A method for processing new messages.**
>
> **THREE. A folder system for people whose work involves multiple projects**. (This is *you* if you are an academic, administrator or manager, graduate or professional student, or work in a business of any kind!)
>
> **FOUR. Composing better messages.**

You can read straight through or jump to the sections that meet your needs.

ONE.
Reducing email distraction.

Distraction from email is a major cause of fractured attention and difficulty getting primary work done. These guidelines will help mitigate this problem.

Stop checking your email! "Checking" is the practice of scanning the list of messages in your inbox, perhaps opening then closing a few but doing nothing else – other than increasing your stress level! In one study, employees checked their email accounts on average almost 90 times a day! Other studies have shown that limiting the number of times workers access email measurably reduces stress.   **If you *need* to check for urgent messages throughout the day,** follow the "every hour rule" I just described but restrict yourself to looking for those messages.

Complete (or start) at least one important task each day *before* you look at your e-mail. For example, edit the abstract for the poster submission due next week, 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 think you will find that doing the important thing first will increase your energy and lead to a more productive day. You can stay within the spirit of this guideline by doing an "urgency scan" first, dealing with genuinely urgent emails you find, and then moving on to do some important work.

Do not have the inbox visible when you do work that requires your full attention. Minimize or close the program on your computer or laptop. Put your phone out of sight. Otherwise, you will peek at your messages, breaking your train of thought even if your notifications are turned off.

Unless critical to your work, turn off email notifications. You likely do *not* need to know about messages when they arrive, and the notification noises and visual cues are disruptive. Find the toggle switch box in your client's options that allow you to turn them off. If your job involves frequent *urgent* messages, check your inbox every hour or so – but at a time of your choice rather than reacting to incoming messages. If you get complaints about response time, consider asking that person to call you the next time an immediate response is required.

As a corollary, process your new messages in batches rather than one by one as they appear. Set a limit for the amount of time you will spend in an email batch - 10 minutes, 30 minutes, two hours – depending on your day and needs. The crucial thing is not to get caught up in a never-ending session. Use a timer to remind 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.

TWO.
A method for processing new messages.

Here is where the rubber meets the road. The primary goal in managing new messages is to find the ones that require your attention. Using a consistent method saves time and reduces stress. I'll describe my method as an example you can use to develop your own.

Before I do that, and important "housekeeping" detail. You need a plan for where to store the messages you want to save. Otherwise will waste time thinking about the destination for every message.

My exact process.

- **I scan the inbox looking at the sender and subject line or every message I have received since the last time I processed messages.**
  - I delete as many messages as possible based on that information alone. However, if I need to open the message to decide, I leave it alone.
  - The only messages I open are those that look truly urgent, and then I take care of those immediately.

- **Now I go back to the most recent new message, open it, and read as much as I need to decide what to do.** Sometimes the answer is obvious once the message is opened, but more often, I need to read the entire message.

- **I decide what I you need to do with each message. Here is my checklist:**

  - Delete
  - File (in a reference or project file) if no action is required, but you must keep it.
  - Review, or put it in a folder to review later if you only need to read the message.
  - Delegate to someone else
  - You need to reply to the message
    - Reply now
    - Defer replying until later
  - You need to do a task:
    - Do it immediately
    - Move to your task list to do later.

- **Once I have decided on an action, I do it immediately if I can.**
  - Before I decide to defer, I ask myself *why* I can't do it now, and that often results in finding a way to do it after all.
  - I *never* leave messages to delete or file in the inbox – I take those actions immediately.

- **If you must defer the action to later, put the e-mail in a place where you will not forget it.** At the end of this section, I describe two simple options.

- **Once I have finished a message (or deferred it to later), I go to the very next message.** I don't skip around, thinking about what message would be "best" to do next. This may sound painful, as you will be forced to confront issues and tasks you would prefer to put off. However, the psychological effect is just the opposite. By the very act of dealing with these unpleasantries, you eliminate the anxiety that builds when you ignore them. You may find, as I do, that your energy and mood improve as you plug away, one message at a time.

Simple options for deferred messages.

Here are two easy-to-implement methods that can be used in Outlook. Each has a potential **"out of sight, out of mind"** trap to avoid.

1. **Put the messages in a "to do" folder.**

   o A <u>single</u> folder for all deferred messages [e.g. "emails that need a reply."
   o A <u>set of folders</u> to separate messages by urgency, as shown in this figure.
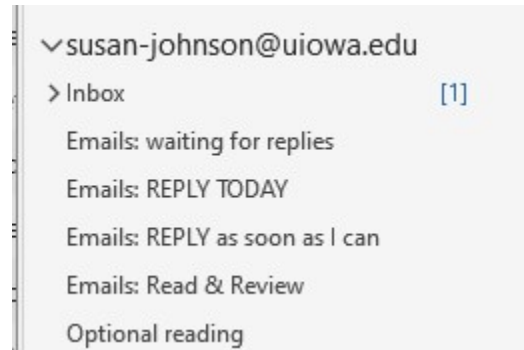
   o **The trap:** Failing to go back into the folders to do the work.

   o **Solution:** Set a daily reminder, or block time on your calendar.

2. **Attach a flag to the message in the Inbox**.

   o **The trap:** In the default Inbox, flagged messages will disappear from view as time passes and newer messages occupy the top of the list.

   o **Solution**: "Sort by flag" to gather the flagged messages into a group. You can keep your Inbox view in "sort by flag" all the time or temporarily resort when it is time to work on deferred replies.
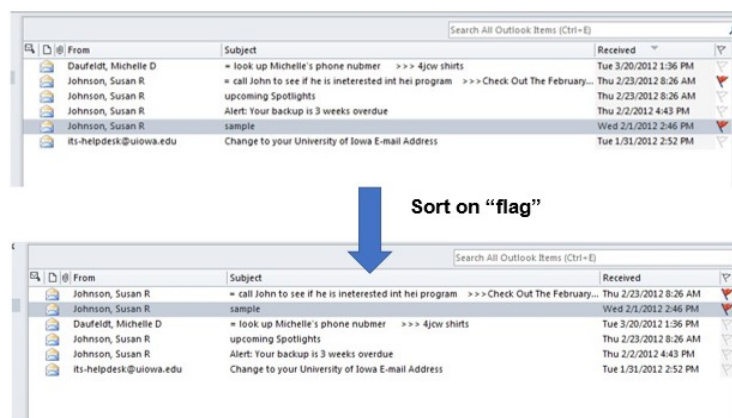
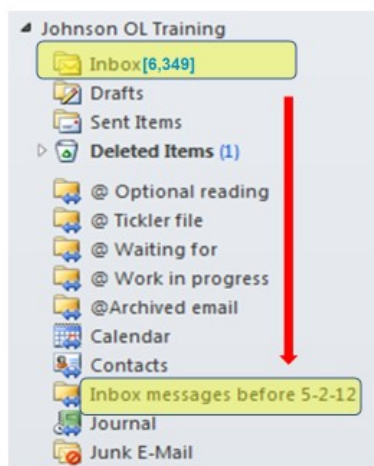# A quick start method if your inbox is "over-full."

This processing system aims to find the messages you need to deal with the day they arrive, respond to as many as you have time for right away, and have a place to store those you need to return to that you won't ignore. If you have hundreds of messages in your inbox now, that may seem like a distant goal.

Here is a "quick start" method that takes advantage of the fact that after a few weeks, most messages are out of date and will never require your attention. The idea is to create a folder for all the messages in your inbox older than the date you choose.

To use this method:
- Create a second inbox folder titled: "INBOX messages before <specific date>." Ideally, pick a date of no more than two weeks before today.

- Move all earlier messages into the new folder.

- If you can, set aside an hour or two to process the messages from the last two weeks that remain in the inbox.

- Starting the next day, focus on getting through all new messages for that day (using the process I've described) before going back to the older ones.

- To deal with the backlog folder, 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 over six weeks old are "dead," and you can stop processing at that point. The message will still be there for you if you need to find them later.

How to move you current inbox messages to a "backlog" folder in Outlook for Windows

▲ Johnson OL Training
- Inbox[6,349]
- Drafts
- Sent Items
▷ Deleted Items (1)
- @ Optional reading
- @ Tickler file
- @ Waiting for
- @ Work in progress
- @Archived email
- Calendar
- Contacts
- Inbox messages before 5-2-12
- Journal
- Junk E-Mail

- **MAKE BACKLOG FOLDER**
  - Just a regular folder with a clear name, as Inbox message before yyyy.mm.dd
- **MOVE**
  - Select messages prior to a date you select from the Inbox and move to the new folder
- **PROCESS backlog as needed**
  - As you have time, starting with the most recent, or, any marked "important", or from specific people, like your boss
- **THEN QUIT**
  - When you get to the point where there seems to be nothing that needs action (~6 weeks or so)
- **KEEP the folder for future searches**

THREE.
A folder system for people whose work involves multiple projects

If you want to your inbox free of messages you have already processed, you need folders to store messages you want to save. I have two categories of folders:
   1. Folders for messages about **current projects and selected scheduled events.**
   2. Folders for everything else.

By "project" I mean any outcome I am currently working toward that involves multiple tasks. Examples include writing a paper, grant, blog post, or report, making a hiring decision, creating a presentation, or solving a problem. (Fixing a problem with my Kindle reader – it no longer downloads my books - is on my current Project list!)

By "selected scheduled events," I mean events that will require preparation on my part and/or will generate a lot of email messages. Examples: a conference call I am chairing; a presentation I am giving; a trip or a dinner party I am hosting.

I use two "main-level" folders at the same level as the Inbox, one for regular projects and the other for events on the calendar. **Each project or event gets a subfolder under the appropriate folder.**

   • @Calendar Event-associated messages
   • @Projects associated messages.

This figure illustrates the location of these folders in Outlook 365.
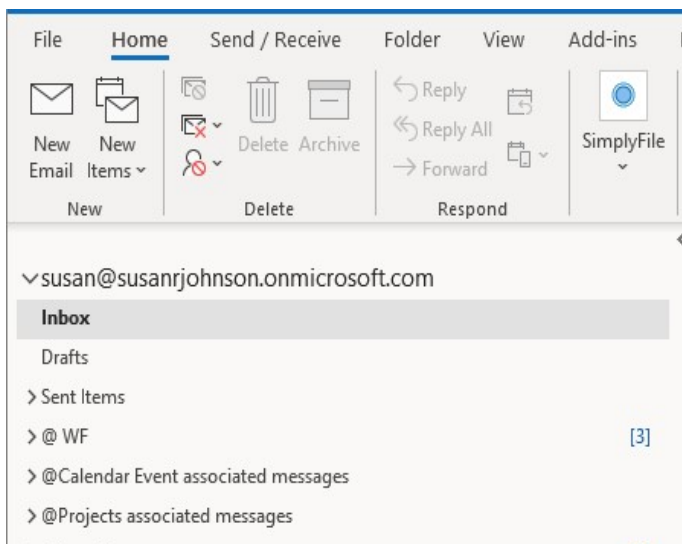
A message is moved to the project or event subfolder *only* after the message has been dealt with, either by replying or adding the requested task to your task management system.

The advantage of this method is that you know exactly where to file and retrieve the messages, and it will usually be *faster* to access and retrieve messages than searching through all your messages.

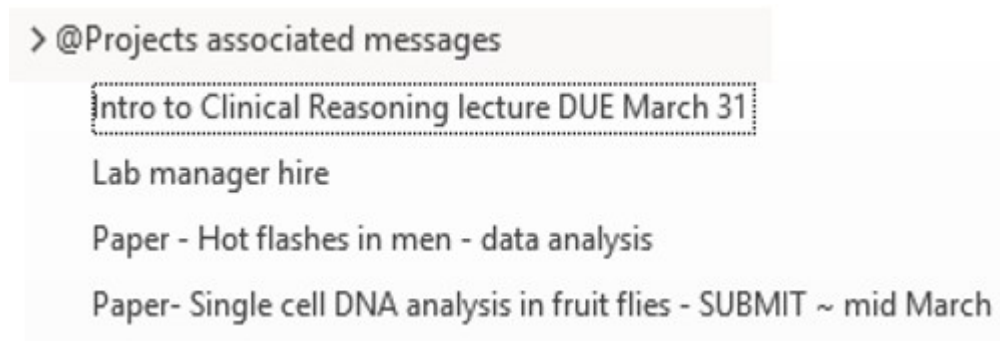This analogy may help explain the retrieval advantage of current work folders:

If you are interested in ordering food from a specific restaurant, it is most efficient to search online using that restaurant's name. This is analogous to searching on a sender or subject line word to find the one email you need.

On the other hand, if you find yourself in a new neighborhood and want to see what restaurants are within a 6-block radius, you would be better off looking at a map with the restaurants highlighted. This is analogous to wanting to look at a group of messages related to a project. For example, suppose I have an upcoming trip. In that case, I can look in the trip folder and find my plane itinerary, hotel reservation, and other details without having to search for each individually.

Project-associated messages.

Remember, each Project gets a subfolder nested under the main level:

To maximize efficiency, use the same name for a project across your entire system: these email subfolders, your project list, and any digital or paper folders in which you store that project's materials.

> @Projects associated messages
    Intro to Clinical Reasoning lecture DUE March 31
    Lab manager hire
    Paper - Hot flashes in men - data analysis
   Paper- Single cell DNA analysis in fruit flies - SUBMIT ~ mid March

In most email programs, these subfolders will sort alpha-numerically, so pick a name that will make it easy to find the subfolder – for example, starting with a critical noun (as shown in the example) rather than a verb.

When a Project is finished, I delete it if I don't want to keep it or move it to a Reference folder if I do.

Calendar event-associated messages

I make folders for any Event on my calendar that will generate messages I may need to reference. For example, when I agree to give a workshop, I store the original invitation and my response, correspondence about the agenda, travel arrangements, hotel reservations, and messages with materials I sent, like the slides and handouts. For my research group conference calls, I store the agenda and other messages related to the call.

The **subfolder naming convention** is what makes this system work. Each subfolder name begins with the date of the event, in this format: YYYY.MM.DD (and -DD if multiple days.) That way, the subfolders sort in chronological order with the next event at the top.
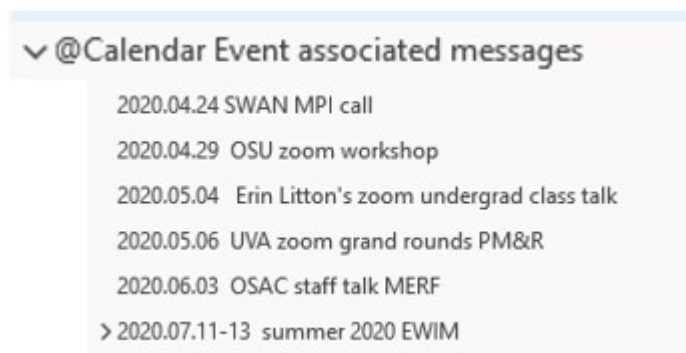
When an event is over, I can delete or store the material elsewhere as needed.

For example:
- The folder for a meeting related to a current project will be stored as a subfolder of that project's folder.
- After a talk is finished, I store the folder in my Reference "Talks and Trips" folder.
- The event folders for my SWAN research study calls can be deleted, as all the relevant material is stored on the project's website.

FOUR.
Composing better messages.

E-mail is best for conveying information ("The June 22nd molecular genetics journal club meeting will be held in Room 101 of the Smith Research Building") or **asking straightforward questions** ("When is the next molecular genetics journal club?"). E-mail is the wrong medium for expressing negative emotions or personally or politically sensitive issues. Deliver these messages in person or by telephone or video call.

Use informative subject lines. A blank subject line or one that says "hi" is confusing, and the message may be ignored or, worse, deleted as spam. Instead, let the recipient know what you want and when you need it. For example: "Details of the June 22nd journal club enclosed;" or "Today's pizza lunch is canceled." This allows the recipient to make an informed \decision about *when* to read the message (the first example) or whether to open it (for the second). If you need a reply the same day, say so: "REPLY TODAY- your sandwich selection for tomorrow's box lunch." Or, if no response is needed, "FYI only: minutes of the December faculty meeting."

Put your "ask" at the beginning of the message. Knowing your ask at the start helps the reader to look at the additional information with that request in mind.

E-mail messages should be brief, seldom more than one screen in length. Most people do not like reading long emails; some will simply stop before the end or not read the message if it is too long. Perhaps more importantly, the shorter the message, the faster the response will likely be sent.

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

Use automatically inserted signature blocks. Nothing is more annoying than needing to contact someone who has e-mailed but for whom you don't have a phone number or address. Using pre-made signature blocks in your messages can save others from this annoyance. Also, you will save time by not having to type the information. Outlook and Gmail allow you to create multiple signatures, and you can select different ones for automatic use with new messages and replies. I use a "long form" block with the complete list of elements for new messages and a "short form" with just my first name, email address, and phone number for replies. If you have different positions (such as faculty member and journal editor), you can create separate signature blocks for each that can be easily substituted for the automatic one.

Create template responses for frequently requested information. This is especially useful for complex reactions. Both Outlook and Gmail offer this option. The most efficient way to create a template is to copy an answer you have just written and then paste it into a template. For example, I have a template for new requests for productivity coaching that includes information about the process and how to get started. I no longer worry that I will leave out important information, and although I may need to make modifications to personalize the message, I still save time.

In 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.