

conquer your email chaos

proven strategies that work in the real world



for Outlook

sherry borsheim



conquer your e-mail chaos:

proven strategies that work in the real world

Sherry

Vancouver, BC
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ALSO BY SHERRY BORSHEIM

*Conquer Your Chaos: fast forward to office
efficiency*

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▶ forward by sherry borsheim



As a productivity consultant, speaker, trainer and coach I've worked with thousands of busy professionals, entrepreneurs and homeowners who want to use their time effectively and avoid letting e-mail run their lives.

E-mail is an easy way to communicate with others and has become an integral part of our lives. The volume of e-mail we receive has dramatically increased in the past several years and the number will continue to rise. As the volume increases, so does the amount of time spent sorting through piles of e-mails and text messages that constantly demand our immediate attention. The faster the information

comes to us through mobile devices, the quicker the response is expected.

The ability to effectively filter all the information that comes to us on a daily basis is a key skill to develop. How do we determine what requires immediate action and what can wait? The speed of response and finding time to respond are boundaries we will need to establish.

The longer I'm in the productivity business, the better able I am to prioritize the messages coming to me. Firstly, I've become very ruthless with the "Delete" key! Secondly, I have specific short-term goals that keep me focused on current projects. Thirdly, I have specific retention guidelines on what to keep and what to toss. Lastly, in many occasions I will pick up the phone and make a call instead of starting a string of e-mails for a ten-minute task. Another habit I've developed is scheduling specific times to reply to e-mail. Because I am clear about my priorities and follow these best practices, this allows me to easily filter all the information coming at me.

Through this book, I will take you step-by-step through the process of organizing your e-mails. I'll be there with you along this organizing journey because that's exactly what it is – a journey. As your roles and

responsibilities change and as new information comes into your life, your organizing systems will need to be adjusted along the way.

When you have a strong foundation and follow the best practices for managing your e-mail and your life, the organizing journey will be easier to manage and adapt along the way. If you leave it as a “to-do for someday,” I guarantee the problem will dramatically increase and “someday” may never come. You will carry the heavy burden of this task on your to-do list and it will slow you down and increase your stress levels.

The screenshots in this workbook are from Outlook 2003 but you can adapt the strategies and solutions to other e-mail programs. The key is to set up your unique e-mail systems that will work for you!

I'm glad you have made the decision to join me in this endeavour to organizing your e-mails. I'll share my secret e-mail solutions and strategies for effectively utilizing your e-mail program. As a result you'll reduce your stress levels, gain peace of mind and have free time to enjoy! So let's get started.

If you have a great e-mail management tip or resource, I'd love to hear from you. Just e-mail me at info@simplyproductive.com.

I am honored to be guiding you on this e-mail journey...

Sherry Borsheim

Sherry Borsheim
Organizing & Productivity Consultant
Simply Productive

Chapter 1

introduction

In this chapter:

- ▶ setting the stage
- ▶ e-mail: time-saver or time-waster?
- ▶ time management essentials

▶▶ setting the stage

The goal of this book is to provide you with efficient ways to streamline the way you process and take action on your e-mail. As with other things in your life, there is no one-size-fits-all solution to e-mail management. Implement what works for you and customize it to your unique situation. Your ultimate objective is to be in control of – and not controlled by – your e-mail.

You will also find time-saving strategies to increase your efficiency when working with the other components of your e-mail program: Calendar, Task List, Contacts and Notes.

Although many of the examples in the following pages are specific to Outlook 2003 or 2007, the underlying principles apply to other versions of Outlook, as well as to other e-mail management programs. If any of the step-by-step instructions provided do not apply to your particular program, you will find your program's Help feature to be an invaluable resource. Use the strategies in this workbook to give you a jumpstart on organizing and creating unique systems for managing your e-mail.

▶▶ e-mail: time-saver or time-waster?

The Internet and e-mail were created to make our lives easier. Suddenly, all the information we could ever want, and much more, is just a mouse click away. In the world of business, written communication became almost instantaneous, and sending a quick e-mail gained favour over picking up the phone or putting pen to paper.

Before we knew it, our Inboxes were overflowing with 100's or 1000's of e-mails. Simple requests, complicated tasks, meeting scheduling, spam and much more are all delivered to us by e-mail. Precious time is wasted sorting legitimate e-mails from unimportant e-mails.

As we become increasingly reliant on technology for communication, e-mail has emerged as one of the biggest time-savers of the information age – as well as one of the biggest time-wasters.

Once you learn how to deal effectively with e-mail, you can turn it into a time-saver and use it to boost your productivity.

▶▶ time management essentials

Highly Effective People

When looking for ways to become more effective, it only makes sense to look at the habits of those who are already leading effective lives. Highly effective people manage their time well by:

- Planning on a regular basis
- Limiting interruptions and protecting their time
- Leading a balanced life
- Not “living in their e-mail”
- Spending time on high pay-off tasks

Successful individuals know the secret to success: focus and planning. It is their clear sense of where they will focus their time as well as daily, weekly and monthly planning that enables these people to achieve their desired goals. **Planning is not optional: it is the key to being effective.** Planning simplifies what you have to do and allows you to go from being reactive to proactive, from feeling pressured to feeling in control of how you use your time. Further, the more you plan, the more effectively you will manage your e-mail.

Thirty minutes a week spent in planning is one of the best investments anyone can make. Schedule time at the end of each week to plan for the following week. Then schedule time at the end of each day to plan for the following day, using your Planning Checklist as a guide (click on link below). Otherwise you might find yourself coming into your office and wasting valuable time in the morning sorting through e-mail, only to find it is 11:30am and you haven't really accomplished anything. Always start your day with a plan! Spending time at the end of each day planning for the next really does save you time.

As part of your planning, schedule time in your calendar for dealing with e-mail. For example, check e-mail at 11:30am, after lunch, and at 4:00pm. Research has shown that it takes time to transition between tasks. If you are constantly interrupting what you are doing to check e-mail, you might be surprised by how much time you are wasting. Computers are designed to multi-task but the human brain is not. To learn more about multi-tasking click link below (available with purchase of eBook).

You may need to check e-mail first thing in the morning and it is true that important issues do come up constantly, but realize that you need to set boundaries. Add a note in your e-mail signature letting others know when you'll respond to e-mails. Unless you have a company policy to respond instantly to e-mails, I suggest you set specific times to check your e-mail during the day so you can focus your time dealing with the important, not urgent, e-mails. With proper planning you'll find that the number of urgent matters you have to deal with decreases.

Time-Saver Tip

It takes 10 to 20 minutes to transition back into what you were doing prior to an interruption.

One way to limit interruptions is to turn off notifications so you will not be distracted each time a new message arrives in your Inbox. Better yet, turn off the **automatic send/receive** feature so that you only send and receive e-mail when you manually press the **send/receive** button.

Leading a balanced life means knowing what is important to you and spending your time there. Guard your time so you can focus on your priorities. The following time matrix will help you ensure that you are spending your time most effectively on what matters.

Your Next Action Steps:

When do you want to have your e-mail organizing project complete by?
Write down your completion date here: _____

What dates and times will you schedule into your calendar to organize your e-mails so you have this done by the completion date? List dates and times here:

Schedule the above dates and times into your calendar and remember to keep these appointments with yourself.