The E-mail Blizzard

Tips for Taming Your Outlook Inbox

By Sheila Blackford

I remember the first time I heard that cheerful voice, "You've got mail!" Hmm, I wonder who it's from, I thought, as I eagerly clicked open my e-mail program. My enthusiasm for opening the overfilled inbox has waned over the years. If your inbox spilleth over, read on for some tips that will help you dig out of the swamp.

Think of your e-mail inbox like a physical inbox. Just as your physical inbox isn't meant to be your file cabinet, your e-mail inbox should hold only that day's mail. *Uh oh.* Do you have e-mail from weeks, months, even years ago just sitting in there? Undoubtedly, your overflowing inbox got that way because you opened e-mail after e-mail message and thought, "What do I do with this one? I'll deal with it later." Then you closed that message and opened the next. It doesn't take long before you end up with e-mails numbering into the high four digits! If you have an out-of-control e-mail inbox, it's time to tune up your processing methods. Although the following instructions are specific to Outlook, you can modify the procedures for your e-mail program.

Decide on Your Categories

You need an effective way to sort and process your e-mail. In the spirit of simplicity, limit yourself to four decision-making categories so you can quickly process new mail. Think of it as triage for your e-mail so it doesn't become an emergency. To help you sort quickly, use four categories such as the ones I have adopted—*Act, Defer, File,* and *Toss*—or the four Ds—*Do, Defer, Delegate,* and *Delete*—or similar categories of your choice.

Be clear about the purpose of your categories. The *Act* or *Do* category is for an item you can do in less than two minutes—file it, respond to it, or make a quick phone call. The *Defer* category is for items that you cannot delegate, delete, or do in less than two minutes. *Delegate* is a wonderful category if you have someone to whom to delegate. If not, use *File,* as filing tends to be the number-one delegated task for e-mails. And the *Toss* or *Delete* category, of course, is for messages you can discard.

Sorting E-Mails

Whatever category titles you choose, create subcategories with those names under the inbox in your e-mail folder, putting two asterisks before **Defer,* so that it appears first in the subcategory list and one asterisk before each remaining category (**Act, *Toss,* and **File*).

Sort your messages quickly. Begin by deciding which e-mails to delete. Start at the top of the e-mail list in your inbox and make your decisions. While holding down your CTRL key, left-click the successive e-mail messages that you want to move into *Toss.* Once you have the e-mails highlighted, while holding the CTRL key, click your mouse's right button and select Move to Folder, then select *Toss* in the popup window. Yes, you could just delete the messages at this point, but it is easy to have the *Toss* category collect your e-mails to be deleted and then delete them all at once at the end of the day.

Then quickly tackle the remaining subcategories, sorting e-mails until you have nothing in your inbox. You will then have your e-mail messages sorted into your *Act, Defer, File,* and *Toss* folders.

Processing E-mails

Your *Act* folder should now contain only those e-mails that you can take some action on in less than two minutes. Be sure to stick to the two-minute rule or you'll find yourself enslaved to your e-mail for hours. Start doing the items one by one. If you don't have enough time in one sitting, you can open up the *Act* folder whenever you are on hold. The *Act* folder should be empty by the end of the day.

Block out enough uninterrupted time to process your *Defer* folder. The action for

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Defer is something that only you can do that will take more than two minutes—turning it into a task or scheduled appointment. Note that *Defer* isn't meant to become the equivalent of the miscellaneous drawer in your kitchen that collects all that stuff you don't know where to put. Don't turn your *Defer* category into your eternal *Mañana* folder!

When you are done with your e-mails for the day, open the *Toss* folder, choose Select All under the Edit menu on the toolbar, and click the Delete button, which is the X on the toolbar.

Turn a *Defer* Message into a Task

In your inbox, right-click the e-mail message you want to move to Tasks, hold down the right mouse button, and drag the message to the Tasks button on your navigation pane—it is the icon with the red check mark below the calendar icon. In the popup Tasks window, name your task something specific so you don't have to open up the e-mail to determine which action is required. Then simply click Save and Close.

Turn a *Defer* Message into an Appointment

In your inbox, right-click the message you want to turn into an appointment, hold down the right mouse button, and drag the message to the Calendar icon in the navigation pane. Release the mouse button and in the Appointment popup window enter the pertinent information—subject, date, start time, and end time.

Do it Daily

Do this triage process for e-mail management every day. The idea is to quickly sort and then process the messages. If your existing inbox has become a file cabinet, you will need to devote some time to work through the backlog. Clean out your inbox every day. Once you have your clean inbox, you will be able to quickly sort your new e-mail into one of your four categories and process it.

Despite the popular wisdom to never check e-mail in the morning, I do. While my computer is booting up, I retrieve and prioritize voicemail messages, then process new e-mail into my four categories. I then know which telephone or e-mail message I must respond to first. Do what works for you. I *try* to deal with my e-mail at only three junctures of the workday—at the beginning of the day, before lunch, and toward the end of the day. Although the advice to not check e-mail in the morning may work for some people, most lawyers will probably need to check their inboxes at the beginning of their workday, just as they do voicemail messages and physical mail. The point is not to be a slave to your e-mail all day long.

> Invest the time. Your goal should be to have no unread messages sitting in your inbox.

E-mail management can help improve your response time to new messages, increasing your ability to keep up with critical actions and deadlines, which, in turn, increases your ability to avoid ethics complaints and malpractice claims and improve your client relations. Invest the time. Your goal should be to have no unread messages sitting in your inbox. Archive messages if you must, but don't keep thousands of e-mails from last year clogging up your inbox.

You will find the lack of clutter dazzling when you finally see the message, "There are no items to show in this view" for your unread mail. What an accomplishment! ∎

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