GTD – TWO
CONQUER YOUR EMAIL!

CETABC WORKSHOP PRÉCIS

Daniel Thorpe

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The Right Attitude

Email is supposed to help us get our work done – to be a tool to help us communicate. So, why does email so often seem like it's in control of us? Time to put email in its place!

This starts with the right attitude:

1. Email is not your To-Do List

If look at your email inbox to see what you need to do for the day, you're letting someone else schedule your day for you. Instead, you need to have a proper to-do list / system / app where *you* keep track of the things *you* decide to do today. Then you can properly treat email as just another inbox into your task management system.

2. Email is not your Day-Planner

You wouldn't stand by a traditional mailbox all day waiting for letters to arrive. So, why do you keep checking email all the time instead of planning your day around the work *you* choose needs to be done? Just as you need a proper task-management or to-do system separate from your email, you need to have a proper calendar system where you track your daily schedule and any commitments that have a fixed date/time. This needs to be synced across all your devices and available everywhere.

3. Email is not your Reference System

Email is a terrible place to go looking for people's contact info, agenda notes, meeting times, and other reference info you get sent. It's not easy to look up and it means you have address information, for example, split between your address book and what is still unprocessed in your inbox. Once again, you need to have a proper reference system to properly store all this information (regardless of its source) separate from your email inbox. At a minimum this will consist of an address book (synced across all your devices) and a system of computer folders.

The Right System

To-Do Lists; Calendars; and Address Books

If we're going to use email for what it's good at (communications) and not as a to-do list, day-planner, or reference system, then you need to set these up properly.

You need to have some kind of reliable to-do list synced across all your devices. If it's to be effective, it needs to be the *one and only* place you keep track of tasks (how to organize your life – keep a to-do list; how to totally confuse your life – keep *two* to-do lists!).

Likewise, you need to have a reliable calendar, synced across all your devices where *all* your appointments go, and a similarly synced address book that holds *all* your contact info.

Dull the Cacophony

Now that you've set up the right tools for each job that needs to be done, you can start treating email as a communications tool that you control:

- Turn off all the icon badges, buzzes, and alerts that cause nothing but distraction; and
- Set a couple of specific times a day when you handle email in bulk.

In between these sessions, focus on your real work and don't let email interrupt you. Modern research on the brain has confirmed what we've suspected for a long while: no-one is very good at multi-tasking. So, don't let email be a constantly running background task throughout your day. Handle it in focussed bursts at set times each day then – when you're done – switch to your other tasks with equal focus.

Which time of day? Some experts advocate not handling email first thing in the morning because it can then hijack your day. On the other hand, I find mornings to be a good, high energy time to whack at the Inbox, and I feel more comfortable moving onto other tasks, knowing that it's been cleared. So I handle email first thing in the morning and first thing after lunch, with – sometimes – a final clean-up at close of business.

The Right Actions

Now that we have our systems set-up and have set aside time to focus on email, it's important to process the Inbox as quickly and efficiently as possible. Most of us are inundated daily under way too many messages to allow for any waste here; every extra moment you take is valuable working and thinking time lost. Establishing a drill speeds up this process a lot. As you process it each message, slot it into one of the categories below and quickly action it accordingly.

1. Spam or Irrelevant: Delete

We all get a lot of promotional or mailing list email that isn't really relevant to us. No need to file this "just in case." Delete it immediately and move on.

2. Information: Read & Delete

Work bulletins and messages on which you're cc'd for information may be worth reading. If they really are just background – read them and delete. (Very rarely, file in an "Archive" folder for reference, if the message merits it).

3. Can Handle in Two Minutes or Less: Reply & File or Delete

If you can handle the message in two minutes or less, reply to it right away, then either delete it or file it.

4. Needs More Than Two Minutes:

If a message will take more than two minutes, don't try to handle it while you're processing your Inbox. Instead:

4a. Delegate, or

Forward the email to someone else to handle it (recording the date and when action is due)

4b. Defer

File the email in an Action folder for action at the appropriate time (when you are focussed on the particular project the email is part of). If it will be a while before you can send a proper reply, send an interim acknowledgement so that the sender knows you've received their email.

When you've finished processing your Inbox you'll be down to zero messages (hence the moniker "Inbox Zero" often attached to this methodology). The sight of a completely empty Inbox will result in a terrific endorphin rush that will lift your whole day. Admittedly, there are still deferred messages that need to be worked on at some time, but it is still tremendously satisfying to feel that you have been through all your email and it has all been processed appropriately. (Finally, do have a regular time to work on your deferred emails so that they aren't lost or forgotten.)

The Right Folders

Keeping your Mailbox folder arrangement simple can speed the above process. In addition to the Inbox you really need just three:

Reply To

This is for messages you've deferred, as per 4b above. Messages you need to go back to at some stage to compose a full reply.

Waiting

For Messages on which you cannot take any action until you receive more information.

Archive

For all messages you've received or sent which have been properly handled and on which no further action is required. Only put messages here if they are potentially useful as references (otherwise delete them). All modern email clients have such good search facilities that there's no need to create sub-folders within Archive for individual messages. It's faster to just bin them all into a single Archive folder and use search to find what you need.

Advanced Tips

- For common replies or phrases it can be very useful to set up a text-expansion utility, or just keep a text file on the Desktop that you can copy and paste from;
- Many common email etiquette practices also improve productivity (such as using a good, specific subject line (see the Email Etiquette handout); and
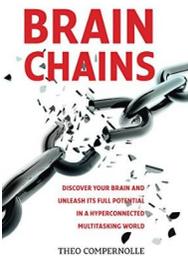
- Set up your official signature block so that it's automatically inserted at the end of every email (all modern email clients have an option for this).

Appendix One: Further Resources
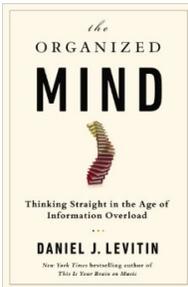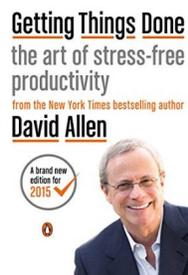
	The Organized Mind by Daniel J Levitin (2014) Excellent summary of the current state of brain research, with a focus on how we can take advantage of this knowledge to be more efficient and productive.
	BrainChains by Theo Compernolle (2014) Perhaps the best summary of what we now know about how the brain works. Shatters the myth of multi-tasking.
	Getting Things Done by David Allen (2015) New edition of the best and most practical personal productivity manual around.
	43 Folders Series: Inbox Zero by Merlin Mann http://www.43folders.com/izero Merlin Mann is probably the leading guru of Inbox Zero. This page links to a whole series of web articles and resources he produced on the topic.

Appendix Two: Keyboard Shortcuts

As a professional person, email is one of the core tools in the performance of your job. There is no excuse for not being fluent in this tools. At the very minimum, that means you should know the keyboard shortcuts for your mail client for all the commands listed below.

	Apple Mail	**Outlook (Mac)**	**Outlook (Windows)**	**Thunderbird (Windows)**
Reply	Cmd+R	Cmd+R	Ctrl+R	Ctrl+R
Reply All	Cmd+⇧+R	Cmd+⇧+R	Ctrl+⇧+R	Ctrl+⇧+R
Forward	Cmd+⇧+F	Cmd+J	Ctrl+F	Ctrl+L
New Message	Cmd+N	Cmd+N	Ctrl+N	Ctrl+N
Send	Cmd+⇧+D	Cmd+Return	Ctrl+Enter	Ctrl+Enter
Add Attachment	Cmd+⇧+A	Cmd+E	Ctrl+E	-
Delete	Delete	Delete	Ctrl+D	Delete

Legend

Cmd = Command / ⌘
Ctrl = Control
⇧ = Shift

Appendix Three: Email Etiquette

1. Be concise and to the point.

An email should be as long as it needs to be and no longer. Reading an e-mail is harder than reading printed communications and a long e-mail may not be read to the end.

2. Answer all questions, and pre-empt further questions.

An email reply must answer all questions, and pre-empt further questions – If you do not answer all the questions in the original email, you will receive further e-mails regarding the unanswered questions, which will not only waste your time and your customer's time but also cause considerable frustration. Moreover, if you are able to pre-empt relevant questions, your customer will be grateful and impressed with your efficient and thoughtful customer service. Imagine for instance that a customer sends you an email asking which credit cards you accept. Instead of just listing the credit card types, you can guess that their next question will be about how they can order, so you also include some order information and a URL to your order page.

3. Use propper speeling, grummer & punctuation..

This is not only important because improper spelling, grammar and punctuation give a bad impression of your company, it is also important for conveying the message properly. E-mails with no full stops or commas are difficult to read and can sometimes even change the meaning of the text. And, if your email client has a spell checking option, why not use it?

4. Make it personal.

Not only should the e-mail be personally addressed, it should also include personal i.e. customized content. For this reason, auto replies are usually not very effective. However, templates can be used effectively in this way, see next tip.

5. Use templates for frequently used responses.

Some questions you get over and over again, such as directions to your office or how to subscribe to your newsletter. Save these texts as response templates and paste these into your message when you need them. You can save your templates in a Word document, or use pre-formatted emails. Even better is a tool such as ReplyMate for Outlook (allows you to use 10 templates for free).

6. Answer swiftly.

Customers send an e-mail because they wish to receive a quick response. If they did not want a quick response they would send a letter. Therefore, each e-mail should be replied to within at least 24 hours, and preferably within the same working day. If the email is complicated, just send an interim reply saying that you have received it and will get back to them soon. This will put the customer's mind at rest and usually customers will then be very patient!

7. Do not attach unnecessary files.

By sending large attachments you can annoy customers and even bring down their e-mail system. Wherever possible try to compress attachments and only send attachments when they are productive. Moreover, you need to have a good virus scanner in place since your customers will

not be very happy if you send them documents full of viruses! It's good practice to list the attachment and its file format in the body of the email.

8. Use proper structure & layout.

Since reading from a screen is more difficult than reading from paper, the structure and lay out is very important for e-mail messages. Use short paragraphs and blank lines between each paragraph. Don't be afraid to leave lots of white space in your email and use bulleted or numbered lists for sequential items. This may make you email take up more space, but electronic paper is cheap and the email will actually be easier to read and faster to scan.

9. Do not overuse the high priority option.

We all know the story of the boy who cried wolf. If you overuse the high priority option, it will lose its function when you really need it. Moreover, even if a mail has high priority, your message will come across as slightly aggressive if you flag it as 'high priority'.

10. Do not write in CAPITALS.

IF YOU WRITE IN CAPITALS IT SEEMS AS IF YOU ARE SHOUTING. This can be highly annoying and might trigger an unwanted response in the form of a flame mail. Therefore, try not to send any email text in capitals.

11. Don't leave out the message thread.

When you reply to an email, you must include the original mail in your reply, in other words click 'Reply', instead of 'New Mail'. Some people say that you must remove the previous message since this has already been sent and is therefore unnecessary. However, I could not agree less. If you receive many emails you obviously cannot remember each individual email. This means that a 'thread-less email' will not provide enough information and you will have to spend a frustratingly long time to find out the context of the email in order to deal with it. Leaving the thread might take a fraction longer in download time, but it will save the recipient much more time and frustration in looking for the related emails in their inbox!

12. Add disclaimers to your emails.

It is important to add disclaimers to your internal and external mails, since this can help protect your company from liability.

13. Read the email before you send it.

A lot of people don't bother to read an email before they send it out, as can be seen from the many spelling and grammar mistakes contained in emails. Apart from this, reading your email through the eyes of the recipient will help you send a more effective message and avoid misunderstandings and inappropriate comments.

14. Do not overuse Reply to All.

Only use Reply to All if you really need your message to be seen by each person who received the original message.

15. Mailings > use the Bcc: field or do a mail merge.

When sending an email mailing, some people place all the email addresses in the To: field. There are two drawbacks to this practice: (1) the recipient knows that you have sent the same message to a large number of recipients, and (2) you are publicizing someone else's email address without their permission. One way to get round this is to place all addresses in the Bcc: field. However, the recipient will only see the address from the To: field in their email, so if this was empty, the To: field will be blank and this might look like spamming. You could include the mailing list email address in the To: field, or even better, if you have Microsoft Outlook and Word you can do a mail merge and create one message for each recipient. A mail merge also allows you to use fields in the message so that you can for instance address each recipient personally. For more information on how to do a Word mail merge, consult the Help in Word.

16. Take care with abbreviations and emoticons.

In business emails, try not to use abbreviations such as BTW (by the way) and LOL (laugh out loud). The recipient might not be aware of the meanings of the abbreviations and in business emails these are generally not appropriate. The same goes for emoticons, such as the smiley :-). If you are not sure whether your recipient knows what it means, it is better not to use it.

17. Be careful with formatting.

Remember that when you use formatting in your emails, the sender might not be able to view formatting, or might see different fonts than you had intended. When using colors, use a colour that is easy to read on the background.

18. Take care with rich text and HTML messages.

Be aware that when you send an email in rich text or HTML format, the sender might only be able to receive plain text emails. If this is the case, the recipient will receive your message as a .txt attachment. Most email clients however, including Microsoft Outlook, are able to receive HTML and rich text messages.

19. Do not forward chain letters.

Do not forward chain letters. We can safely say that all of them are hoaxes. Just delete the letters as soon as you receive them.

20. Do not request delivery and read receipts.

This will almost always annoy your recipient before he or she has even read your message. Besides, it usually does not work anyway since the recipient could have blocked that function, or his/her software might not support it, so what is the use of using it? If you want to know whether an email was received it is better to ask the recipient to let you know if it was received.

21. Do not ask to recall a message.

Biggest chances are that your message has already been delivered and read. A recall request would look very silly in that case wouldn't it? It is better just to send an email to say that you have made a mistake. This will look much more honest than trying to recall a message.

22. Do not copy a message or attachment without permission.

Do not copy a message or attachment belonging to another user without permission of the originator. If you do not ask permission first, you might be infringing on copyright laws.

23. Do not use email to discuss confidential information.

Sending an email is like sending a postcard. If you don't want your email to be displayed on a bulletin board, don't send it. Moreover, never make any libellous, sexist or racially discriminating comments in emails, even if they are meant to be a joke.

24. Use a meaningful subject line.

Try to use a subject that is meaningful to the recipient as well as yourself. For instance, when you send an email to a company requesting information about a product, it is better to mention the actual name of the product, e.g. 'Product A information' than to just say 'product information' or the company's name in the subject.

25. Use active instead of passive voice.

Try to use the active voice of a verb wherever possible. For instance, 'We will process your order today', sounds better than 'Your order will be processed today'. The first sounds more personal, whereas the latter, especially when used frequently, sounds unnecessarily formal.

26. Avoid using URGENT and IMPORTANT.

Even more so than the high-priority option, you must at all times try to avoid these types of words in an email or subject line. Only use this if it is a really, really urgent or important message.

27. Avoid long sentences.

Try to keep your sentences to a maximum of 15-20 words. Email is meant to be a quick medium and requires a different kind of writing than letters. Also take care not to send emails that are too long. If a person receives an email that looks like a dissertation, chances are that they will not even attempt to read it!

28. Don't send or forward emails containing libellous, defamatory, offensive, racist or obscene remarks.

By sending or even just forwarding one libellous, or offensive remark in an email, you and your company can face court cases resulting in multi-million dollar penalties.

29. Don't forward virus hoaxes and chain letters.

If you receive an email message warning you of a new unstoppable virus that will immediately delete everything from your computer, this is most probably a hoax. By forwarding hoaxes you use valuable bandwidth and sometimes virus hoaxes contain viruses themselves, by attaching a so-called file that will stop the dangerous virus. The same goes for chain letters that promise incredible riches or ask your help for a charitable cause. Even if the content seems to be bona fide, the senders are usually not. Since it is impossible to find out whether a chain letter is real or not, the best place for it is the recycle bin.

30. Keep your language gender neutral.

In this day and age, avoid using sexist language such as: 'The user should add a signature by configuring his email program'. Apart from using he/she, you can also use the neutral gender: "The user should add a signature by configuring the email program'.

31. Don't reply to spam.

By replying to spam or by unsubscribing, you are confirming that your email address is 'live'. Confirming this will only generate even more spam. Therefore, just hit the delete button or use email software to remove spam automatically.

32. Use the cc: field sparingly.

Try not to use the cc: field unless the recipient in the cc: field knows why they are receiving a copy of the message. Using the cc: field can be confusing since the recipients might not know who is supposed to act on the message. Also, when responding to a cc: message, should you include the other recipient in the cc: field as well? This will depend on the situation. In general, do not include the person in the cc: field unless you have a particular reason for wanting this person to see your response. Again, make sure that this person will know why they are receiving a copy.