



INBOX OVERFLOWING? TAKE BACK CONTROL

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This tip sheet will share strategies to help you take control of your inbox and spend less time on email and more time on strategic initiatives.

This content is adapted from a webinar produced by Ginny Ferguson. The majority of all User Group content is produced by Dynamics end-users providing unique insight into product usage and best practices.

To view additional webinars and educational content visit, WWW.DYNAMICCOMMUNITIES.COM.

ABOUT DYNAMIC COMMUNITIES

Dynamic Communities is a business management organization that develops and supports technology-centric, volunteer-driven user groups – providing necessary resources and business operations such as staff, systems and event production.

With business management provided by Dynamic Communities, user group volunteer leaders at the grassroots level can focus entirely on cultivating rich community engagement and delivering authentic member value.

Proven Answers. Proficient Users. Productive Teams.

BECOME A DYNAMICS EXPERT

Gain focused education to become proficient with the Dynamics version you currently use, prepare for upgrades and find clever solutions

EXPAND YOUR SUPPORT NETWORK

Access the online forum and use the experience of other Dynamics users to learn best practices and solve issues swiftly

SHARE AND COLLABORATE

Network with other Dynamics users to form collaborative connections—locally, globally and virtually—and share knowledge to ‘pay it forward’ to your community

POWER IN NUMBERS

Over 90,000 users across all communities serve as an authentic force to inform Microsoft and shape the direction of future Dynamics products

OUR USER GROUPS:



4 TYPES OF EMAIL

- Critical and urgent
- Critical and not urgent
- Not critical and urgent
- Not critical and not urgent

| | | | |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | URGENT | | NOT URGENT |
| IMPORTANT | <p>Manage</p> <ul style="list-style-type: none"> • Crisis • Medical Emergencies • Pressing Problems • Deadline Driven Projects • Last-Minutes Preparations for Scheduled Activities | QUADRANT OF NECESSITY | <p>Focus</p> <ul style="list-style-type: none"> • Preparation/Planning • Prevention • Values Clarification • Exercises • Relationship Building • True Recreation/Relaxation |
| NOT IMPORTANT | <p>Avoid</p> <ul style="list-style-type: none"> • Interruptions • Some Calls • Some Mail And Reports • Some Meetings • Many “Pressing” Matters • Many Popular Activities | QUADRANT OF DECEPTION | <p>Avoid</p> <ul style="list-style-type: none"> • Trivia • Busy Work • Junk Mail • Some Phone Messages/Email • Time Wasters • Escape Activities • Viewing Mindless TV Shows |
| | | QUADRANT OF WASTE | |

STEP 1 ADMITTING YOU HAVE A PROBLEM

- Do you check emails during meetings, calls, family time, at the store, in the car?
- Are you constantly scrolling through your inbox and scanning subject lines only?
- Do you have several emails open and started but not finished due to disruption from another email?
- Are you acting like a reactive firefighter rather than a proactive business builder?
- Are you cc'ing team members unnecessarily?
- Is your inbox your agenda for the day?
- Do you start every day in your inbox?

STEP 2 TAME THE FLOW OF INCOMING EMAIL

- Separate business and personal email
- Eliminate spam, opt-out
- Rules and filters are your best friend
- Send less = receive less
- Use chat for short conversations
- Pick up the phone
- Set email expectations

STEP 3 PREPARE YOUR TERMINALS

- **Action Today** — for emails that require your action as quickly as possible
- **Follow Up** — for when you are either waiting on someone else's input, or you need to check progress on an action
- **Read Later** — for emails that don't require action but you do need or want to read content

Email overload has nothing to do with the amount of email you receive daily, but with your capability to quickly process them.

STEP 4 CREATE A CRYSTAL CLEAR ARCHIVING ARCHITECTURE

- The point of filing is easy placement and access to information
- Make your filing system simple
- Keep filing system up to date, schedule 30 minutes per month on filing maintenance (make sure files are still relevant)

STEP 5 PROCESS YOUR INBOX IN BATCHES

- Productivity is actually hindered when people try to accomplish two things or more at once
- We are biologically incapable of processing inputs simultaneously
- People who switch back and forth between tasks may spend up to 50% more time on those tasks

STEP 6 TREAT ALL & TOUCH ONCE: THE 4 + 1 ACTION D'S

Action D1 - Delete It

- Do I really need this information?
- Is this part of my job?
- Before I delete this, how can I avoid getting it again?

Action D2 - Deal with it

- If you can deal with it in less than two minutes, just do it immediately.
- When you are done with the message, either archive it, move it to your *Follow Up* folder if it needs follow-up attention, or delete it.

Action D3 - Defer it

- If it will take longer than two minutes, you can choose to defer it.
- If it will take less than one hour and is part of your job, move to your *Action Today* folder.
- If it will take longer than one hour and you need to do it, you need to plan it into your calendar. Don't keep the mail in your inbox until it happens.

Action D4 - Delegate it

- Some messages require another person's action.
- Don't forget to include clear instruction (what, by when, how, next action, answer to be sent etc.)
- If you need to follow up on progress, file the message in your *Follow Up* folder.
- If you do not need to follow up, delete or archive it.

Action D5 - Done

- It is important to keep moving when processing your inbox.
- Don't get distracted by a link, attachment etc.
- Receive new email while processing? Leave them unread for next batch or include them in current processing at the end.

STEP 7 DEAL WITH YOUR BACKLOG

- Create a folder called *Temporary Backlog* and move all emails in your inbox to that folder
- Deal with the *Temporary Backlog* in 15 minute increments
- Run the rules
- Delete big batches
- Sort on subject
- Sort on sender
- Sort on date
- Quickly scan mail where you are in copy
- Treat remaining mail with 4 + 1 D's
- Email bankruptcy is not the solution

STEP 8 CREATE CLEAR EMAIL

- Clear subject
- Clear structure and layout — avoid one big block of text
- Clear call to action
- Try to think of any question the recipient might ask and include that information
- If you write it twice, automate it

STEP 9 SPEED UP EMAIL REPLIES

- For requests that require a short answer – just answer question, hit send and delete the email.
- When more than one question is being asked, write the replies in the original message
- Limit replies to a maximum of five sentences if possible
- If the email requires a lot of information, use bullet points
- “Garbage out is garbage in”

STEP 10 WHEN EMAIL GOES WRONG

- Take care when hitting “reply-all”
- The *E* in email is for electronic not emotional — worst tool when feeling angry, upset, revengeful or frustrated
- Loaded email — if your news will shock or generate a negative emotional response, don't use email — pick up the phone
- Back from vacation backlog
 - Block time to deal with backlog
 - Use first 15 minutes to scan and delete big batches
 - Create a temp folder called *Inbox Holiday* and drag all remaining email to that folder
 - Take 30 emails at a time from the *Inbox Holiday* folder and practice the 4 + 1 Action D's

THE FIVE 15 MINUTE INBOX HABIT

- Do email in batches at limited fixed times per day
- Process your inbox to zero at least once per day
- Constantly create filters, opt-out and delete faster
- Think before you send
- Plan filing maintenance once per month

TO GET STARTED WITH THE 15 MINUTE INBOX

1. Put a post-it memo on your desk or screen that says “Do I really need to send this mail?”
2. Go to your inbox and create at least five rules based on the email you find in your inbox or trash folder
3. Create three folders, number them and use all caps so they show up neatly underneath each other
 - Action Today
 - Follow Up
 - Read Later
4. Create clear archive folders
 - Put all your inbox emails into a temp backlog folder and start working through them
 - Commit to processing your inbox in batches using 4 + 1 Action D’s

IF YOU’RE ALREADY ENJOYING THE BENEFITS OF A USER GROUP MEMBERSHIP, CLICK BELOW TO WATCH THIS TIP AS AN ON-DEMAND WEBINAR:

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