

# Take Back Your Life! Using Microsoft® Office Outlook® 2007 to Get Organized and Stay Organized

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# Table of Contents

	Acknowledgments . . . . .	xi
	Who Is This Book For? . . . . .	xiii
Part One	<b>Laying the Foundation for Productivity—Using an Integrated Management System</b>	
Chapter One	<b>Changing Your Approach Changes Your Results . . . . .</b>	<b>2</b>
	<b>10 Beliefs That Limit Productivity . . . . .</b>	<b>5</b>
	1. There’s Too Much Information Coming at Me Too Fast, and I Can’t Keep Up . . . . .	9
	2. I Get Interrupted Too Many Times . . . . .	11
	3. I Don’t Have the Discipline to Be Organized . . . . .	12
	4. I Have to Keep Everything . . . . .	13
	5. It Takes Too Much Time to Get Productive . . . . .	15
	6. I Can’t Find What I Need When I Need It . . . . .	16
	7. Organization Cramps My Freedom and Creativity . . . . .	17
	8. I’m No Good with Technology!. . . . .	18
	9. There’s Not Enough Time in the Day! . . . . .	20
	10. I’m Not Organized by Nature . . . . .	21
	<b>Making Changes Involves Letting Go . . . . .</b>	<b>22</b>
Chapter Two	<b>Defining Productivity . . . . .</b>	<b>24</b>
	<b>What Is Productivity? . . . . .</b>	<b>25</b>
	Meaningful Objectives . . . . .	27
	Strategic Next Actions . . . . .	29
	Work/Life Balance . . . . .	30
	<b>The MPS Cycle of Productivity . . . . .</b>	<b>31</b>
	Step One: Identifying Meaningful Objectives...with Execution Plans. . . . .	33
	Step Two: Creating Strategic Next Actions...Without Dependencies . . . . .	34
	Step Three: Scheduling and Completing Strategic Next Actions...Creating Integrity . . . . .	35

Table of Contents

	Step Four: Reviewing and Course Correcting...Being Accountable. . . . .	36
	<b>Introducing the MPS Action Hierarchy Model . . . . .</b>	<b>37</b>
	<b>What Gets in the Way of Productivity? 39</b>	
	<b>Introducing the Integrated Management System 40</b>	
	Collecting System . . . . .	41
	The Reference System. . . . .	42
	The Action System. . . . .	42
	<b>Introducing ControlPanel . . . . .</b>	<b>42</b>
	<b>Introducing the ControlPanel with the MPS Cycle of Productivity . . . . .</b>	<b>44</b>
	<b>Bringing It All Together. . . . .</b>	<b>45</b>
Chapter Three	<b>Creating an Integrated Management System . . . . .</b>	<b>46</b>
	<b>Phase 1: Collecting . . . . .</b>	<b>48</b>
	Setting Up a Collecting System . . . . .	48
	Managing Interruptions . . . . .	49
	Clearing the Mind Exercise . . . . .	49
	<b>Phase 2: Processing and Organizing . . . . .</b>	<b>50</b>
	Setting Up Your Action and Reference Systems . . . . .	50
	Introducing the MPS Workflow Model. . . . .	51
	<b>Phase 3: Prioritizing and Planning. . . . .</b>	<b>53</b>
	Prioritizing and Planning Activities onto the Calendar . . . . .	54
	Introducing the Weekly Review . . . . .	54
	<b>Integrating Personal and Business into One System. . . . .</b>	<b>56</b>
	Integrating Your Personal Life into Your System . . . . .	56
	Technology. . . . .	57
	Company Policies. . . . .	57
	Keeping Your Personal Life Separate . . . . .	58
	<b>Small Things Make a Big Impact . . . . .</b>	<b>58</b>
	<b>Tools You Need to Get Started. . . . .</b>	<b>59</b>
Part Two	<b>Creating an Integrated Management System— The Collecting Phase</b>	
Chapter Four	<b>Setting Up Your Collecting System . . . . .</b>	<b>62</b>
	<b>Identifying Your Current Collecting Points . . . . .</b>	<b>63</b>

Table of Contents

	Where Are You Currently Capturing Your Commitments and Agreements? . . . . .	64
	<b>Deciding to Consolidate Your Collecting Points . . . . .</b>	<b>66</b>
	Setting Up Your Approved Collecting Points . . . . .	66
	You Are Not a Collecting Point . . . . .	80
	<b>Implementing Your Collecting System . . . . .</b>	<b>81</b>
	<b>What Changes Are You Going Make? . . . . .</b>	<b>82</b>
Chapter Five	<b>Successfully Managing Interruptions . . . . .</b>	<b>86</b>
	<b>Are Interruptions Necessary? . . . . .</b>	<b>88</b>
	<b>Are You Training Your Staff to Interrupt You? . . . . .</b>	<b>89</b>
	Scheduling Uninterrupted Work Time . . . . .	90
	Using 1:1 Agendas . . . . .	90
	Using Staff Meetings . . . . .	91
	Using E-Mail . . . . .	91
	Creating Solutions, Not Problems . . . . .	91
	<b>Are You Using Technology to Help or Hinder Your Focus? . . . . .</b>	<b>92</b>
	Turning Off E-Mail Alerts, Cell Phones, and Landlines During Work Appointments . . . . .	94
	Clarifying Response Times . . . . .	94
	<b>Resetting Expectations and Holding People Accountable . . . . .</b>	<b>95</b>
	Managing E-Mail Response Times . . . . .	96
	Managing Drive-By Interruptions . . . . .	99
	Managing Cell Phones, Pagers, and Instant Messaging . . . . .	100
	<b>What Changes Are You Going to Make? . . . . .</b>	<b>101</b>
Chapter Six	<b>Clearing the Mind . . . . .</b>	<b>102</b>
	<b>Are You Using Your Mind As a Collecting Point? . . . . .</b>	<b>103</b>
	Understanding the Conscious and Unconscious Mind . . . . .	105
	Are You Carrying a Heavy Load? . . . . .	107
	<b>Clearing the Mind and Lightening the Load . . . . .</b>	<b>107</b>
	<b>Doing the “Clearing the Mind” Exercise . . . . .</b>	<b>108</b>
	Awarenesses . . . . .	116
	Using Categories: (none) as a Collecting Point . . . . .	117
	<b>Keeping Your Agreements and Maintaining Your Integrity . . . . .</b>	<b>118</b>

Table of Contents

Being Discerning . . . . .120  
Keeping Agreements with Yourself First. . . . .121  
Renegotiating Agreements. . . . .122  
Disengaging from Agreements . . . . .123  
Learning to Say “No” to Agreements. . . . .124  
**What Changes Will You Make? . . . . .126**  
    Keeping Track of the Changes You’re Going to Make. . . . .126  
**Success Factors for the Collecting Phase. . . . .127**

Part Three

**Creating an Integrated Management System—  
The Collecting Phase**

Chapter Seven

**Setting Up Your Action System. . . . . 130**  
**Introducing the Planning and Action Categories. . . . . 132**  
**Defining Planning and Action Categories. . . . . 134**  
    Meaningful Objectives. . . . .135  
    Supporting Projects. . . . .136  
    1:1 Meetings . . . . .136  
    Strategic Next Actions. . . . .138  
    Someday Maybe . . . . .140  
**Setting Up the Planning and Action Categories. . . . . 140**

Chapter Eight

**Creating Meaningful Objectives. . . . . 144**  
**Five Steps to Creating Personal and Professional Objectives. . . . 146**  
    1. Integrating Professional and Personal—Creating Balance . . . . 147  
    2. Creating Alignment and Accountability—The Action  
        Hierarchy Model. . . . . 148  
    3. Establishing Your Meaningful Objectives . . . . . 150  
    4. Being in Alignment and Being Accountable. . . . . 166  
    5. Organizing Your Meaningful Objectives in Your IMS. . . . . 168  
**What Changes Will You Make? . . . . . 170**

Chapter Nine

**Processing and Organizing Categories: (none) . . . . . 172**  
**Using the MPS Workflow Model . . . . . 175**  
    What Is It? . . . . . 176  
    Is It Actionable? . . . . . 177  
    Does It Relate to a Meaningful Objective? . . . . . 179

## Table of Contents

	Organizing and Planning Your Meaningful Objectives. . . . .	181
	Organizing and Planning Your Supporting Projects . . . . .	189
	What's the Strategic Next Action Without a Dependency? . . . . .	196
	<b>The Strategic Next Action Story . . . . .</b>	<b>197</b>
	Do It? . . . . .	203
	Delegate It? . . . . .	203
	Defer It? . . . . .	208
	<b>Examples of How Clients Use the MPS Workflow Model. . . . .</b>	<b>210</b>
	<b>Frequently Asked Questions . . . . .</b>	<b>212</b>
	Why Separate Strategic Next Actions from Supporting Projects and Meaningful Objectives? . . . . .	212
	Can I Still Associate My SNAs with My Supporting Projects? . . . . .	213
	Can I Customize My SNA Categories? . . . . .	214
	Can I Have More Than One Strategic Next Action per Project? . . . . .	215
	When Do I Transfer a Strategic Next Action into the Calendar? . . . . .	216
	How Do I Insert E-Mail Messages and Documents into Tasks? . . . . .	216
	Does Every Task Require a Due Date? . . . . .	217
	Can I Choose Multiple Categories? . . . . .	217
	How Do I Track Both Personal and Work Items? . . . . .	218
	<b>Awarenesses . . . . .</b>	<b>220</b>
	<b>What Changes Will You Make? . . . . .</b>	<b>220</b>
	<b>Success Factors for Processing and Organizing     Categories: (none) . . . . .</b>	<b>222</b>
Chapter Ten	<b>Improving Your Reference System . . . . .</b>	<b>224</b>
	<b>The Difference Between Action and Reference Information . . . . .</b>	<b>225</b>
	<b>Using Search Functions to Find Information . . . . .</b>	<b>226</b>
	<b>How to Improve Your Reference System. . . . .</b>	<b>228</b>
	1. Identifying Existing Reference Locations. . . . .	229
	2. Reviewing the Six Reference Locations We Recommend . . . . .	230
	3. Consolidation . . . . .	238
	4. Creating a Folder Hierarchy That Works. . . . .	238
	5. Setting Up Your Reference System. . . . .	241
	Stop Using Your Inbox as a Reference System! . . . . .	242
	Determine What to Keep and What to Delete. . . . .	243
	Keep Your Folder List Current . . . . .	244
	Keep Your System Simple. . . . .	245

**Ensuring your E-Mail Reference System is Set Up . . . . . 245**  
**What Changes Will You Make? . . . . . 246**  
**Success Factors for Improving Your Reference System . . . . . 248**

**Processing and Organizing Your E-Mail . . . . . 250**  
**E-Mail Is a Communication Tool . . . . . 252**  
**Introducing the MPS E-Mail PASS Model . . . . . 253**  
**Creating Meaningful E-Mail Using the MPS PASS Model . . . . . 253**  
 What Is the Purpose of Your Communication? . . . . . 253  
 What Action Is Involved and Does It Have a Due Date? . . . . . 254  
 Have You Effectively Summarized Your Message in  
 the Subject Line? . . . . . 257  
 Did you Use the To, Cc and Bcc lines Effectively? . . . . . 259  
 Questions To Ask Before Sending E-Mail Messages . . . . . 262

**Preparing to Process and Organize Your Inbox . . . . . 265**  
 Setting Up the To-Do Bar . . . . . 266  
 Dragging E-Mail to the To-Do Bar or Calendar . . . . . 270  
 Inserting an E-Mail Message or Document into an  
 Existing Task . . . . . 273  
 Inserting an E-Mail Message or Document into an  
 Existing Calendar Appointment . . . . . 274  
 Flagging . . . . . 276

**Using the MPS Workflow Model to Process and  
 Organize E-Mail . . . . . 280**  
 What Is It? . . . . . 281  
 Is It Actionable? . . . . . 281  
 Does It Relate to a Meaningful Objective? . . . . . 281  
 What Is the Strategic Next Action Without a Dependency? . . . . . 282

**Using The Four Ds for Decision Making . . . . . 283**  
 Delete It . . . . . 283  
 Do It . . . . . 284  
 Delegate It . . . . . 285  
 Defer It . . . . . 287

**Processing and Organizing Your E-Mail for 30 Minutes . . . . . 288**  
**Awarenesses . . . . . 289**  
**Frequently Asked Questions . . . . . 291**  
 When's the Best Time to Process E-Mail? . . . . . 291

Table of Contents

	What's an Appropriate Amount of E-Mail to Receive? . . . . .	292
	How Do I Reduce the Volume of E-Mail I Receive? . . . . .	293
	Can I Customize My Own Subject Lines? . . . . .	293
	Didn't I Only Move E-Mail from the Inbox to the To-Do Bar? . . . .	294
	How Will I Remember to View the To-Do List? . . . . .	294
	When Do I Put E-Mail Messages onto the Calendar versus onto the To-Do List? . . . . .	295
	Can I Use the E-Mail Notification Options? . . . . .	295
	When Can I Use Flagging Effectively? . . . . .	296
	Can I Organize My E-Mail in the Inbox and Not Use the To-Do Bar? . . . . .	297
	<b>Emptying the Inbox and Getting to Zero . . . . .</b>	<b>297</b>
	<b>What Changes Will You Make? . . . . .</b>	<b>298</b>
	<b>Success Factors for Processing and Organizing E-Mail . . . . .</b>	<b>300</b>
Part Four	<b>Creating an Integrated Management System— The Prioritizing and Planning Phase</b>	
Chapter Twelve	<b>The Prioritizing and Planning Phase . . . . .</b>	<b>304</b>
	<b>Are You Planning from Your Calendar or Your To-Do List? . . . .</b>	<b>306</b>
	<b>Using Your Calendar to Prioritize and Plan . . . . .</b>	<b>308</b>
	<b>Setting Up Your BaselineCalendar . . . . .</b>	<b>309</b>
	BaselineCalendar Activities . . . . .	310
	Including Travel Time . . . . .	312
	Including "Catch-Up Time" After Travel . . . . .	313
	Using Out of Office Replies . . . . .	313
	Including 9-1-1 Interruptions . . . . .	314
	Keeping Appointments with Yourself Is a Priority . . . . .	314
	Using Colors on the Calendar to Create Differentiation . . . . .	315
	<b>Handling Meeting Requests . . . . .</b>	<b>319</b>
	What Is It and Is It Actionable? . . . . .	321
	Does It Relate to a Meaningful Objective? . . . . .	321
	Do You Have All the Information You Need? . . . . .	321
	Can You Delegate It? . . . . .	322
	Can You Add It to an Existing Meeting or Agenda? . . . . .	322
	Schedule It . . . . .	322

## Table of Contents

Three Stages to Completing a Weekly Review . . . . .	324
Making the ControlPanel Your Default View . . . . .	335
Scheduling Your Weekly Review . . . . .	336
Making Your Weekly Review a Priority . . . . .	336
What to Do When You Fall Off the Wagon? . . . . .	337
<b>Coming Full Circle. . . . .</b>	<b>337</b>
<b>Success Factors for Prioritizing and Planning. . . . .</b>	<b>339</b>
<b>Afterword. . . . .</b>	<b>341</b>
<b>Index . . . . .</b>	<b>343</b>

Chapter Eleven

# **Processing and Organizing Your E-Mail**

E-mail is one of the biggest challenges facing our organizations today. Our clients often comment, “We get too much of it, we can’t keep up with it, but we can’t stop doing it. We’re addicted!” Many companies are now questioning the value of e-mail and how to bring it back into balance. An information technology (IT) director recently commented to us: “E-mail has become unproductive. We’re overusing the Cc line, sending messages that aren’t valuable, and spending too much time with our heads stuck in the Inbox.” It would appear on the surface that e-mail is a big problem. However, is e-mail really the problem, or is it our approach to e-mail?

In the 21st century, technology has eliminated many personal boundaries, and a lot of our clients have allowed e-mail to drive their behavior instead of the other way around. As in dealing with interruptions, if you don’t consciously set boundaries for yourself, the world will set them for you. You have probably experienced working on e-mail at home, late at night, early in the mornings, during meetings, and while on telephone conference calls. Some of our clients have smartphones or personal digital assistants (PDAs) and process their e-mail while driving the car or standing in line at the grocery store!

We’ve discovered that e-mail is not the problem companies are facing today. The issue is the behaviors employees have adopted and developed around responding and approaching their inboxes. Companies readily adopted and deployed communication software company-wide; however, this was done with little or no education. In the absence of education, it is not surprising that e-mail communication has become a problem. The first step to controlling e-mail is re-examining your approaches, recognizing that they may not be working, and replacing them with behaviors that you can use to manage

your e-mail more effectively, not just as individuals but as teams and organizations. E-mail is a powerful tool that has the ability to increase productivity; a little education goes a long way and that's what this chapter is all about.

We review how to use the E-Mail PASS Model, which includes learning to create meaningful e-mail messages; the most appropriate use of the To, Cc, and Subject lines; and what questions to ask before clicking Send. We also review the McGhee Productivity Solutions (MPS) Workflow Model and the Four Ds for Decision Making, which you can use to process and organize your Inbox effectively so that you can empty it successfully into your Integrated Management System (IMS). (Yup, we did use the word *empty*!) When you've learned how to do this, you'll find that it can relieve a tremendous amount of stress and help you make better choices about what your priorities are and how to get them done.

If you have hundreds of e-mail messages in your Inbox, there's hope in sight. The search for the empty Inbox is close at hand, and there's gold at the end of the rainbow! Many of our clients go to bed at night with an empty Inbox! Even if your Inbox is already clear, read on, because we'll be introducing some very nifty MPS tips and tricks that we think you'll definitely find valuable.

## **E-Mail Is a Communication Tool**

Perhaps we have all forgotten that e-mail is primarily a communication tool. The purpose of communication is to exchange information so that it's clearly understood. Therefore, one of the main functions involved in processing and organizing your e-mail is communicating effectively. Communication is an art we can practice and improve. If your messages are not clear, your recipients will not be clear, and effective action will not take place.

We're certain you've gotten e-mail messages and said to yourself, "What is this, what does it mean, and why did I get it?" Having spent too much time trying to figure out what the message is about, you likely close it back into your Inbox, merrily on your way to hundreds, if not thousands, of other e-mail messages. On the flip side, think about the number of times you've sent an e-mail message that came back with questions because you didn't write the message clearly enough to begin with.

## Introducing the MPS E-Mail PASS Model

The MPS E-Mail PASS Model is designed to help you think about your e-mail communications before you send them. The result is clearly defined messages that produce effective action with the minimal number of communication cycles. By writing effective messages, you can actually reduce the number of e-mail messages you receive in a day.

## Creating Meaningful E-Mail Using the MPS PASS Model

The E-Mail PASS Model consists of four questions. We'll review them one at a time, and if you want to pick out an e-mail message to practice on, choose one that is complex and that would take more than two minutes to write. In other words, choose a really meaty, chewy example so that you can experience the value of this model. Obviously, using this model for an e-mail message that requires a one-sentence reply would be overkill; however, we all have messages that require some thought, and this model is designed to support that thinking process.

The E-Mail PASS Model questions are as follows:

- P** What's the **Purpose** of your communication and does it relate to a Meaningful Objective?
- A** What **Action** is involved and does it have a due date?
- S** What **Supporting** documentation do you need to include?
- S** Have you effectively summarized your communication in the **Subject** line?

Did you use the *To*, *Cc* and *Bcc* lines effectively?

## What Is the Purpose of Your Communication?

To help you clarify the purpose of your communications, first identify the Meaningful Objective the e-mail message relates to. If it doesn't relate to one of your objectives, you'll want to look at renegotiating or disengaging from it. If it does relate to one of your objectives, ask the question, "What's the outcome you want to produce as a result of this message?" Once you're clear on the outcome and have thought it through, you can write your e-mail communication.

Notice that we haven't asked you to complete the *To* line, the *Cc* line, or the Subject line at this point. We suggest you write your e-mail communication

If any man wishes  
to write a clear  
style let him first be  
clear in his  
thoughts.  
—Johann Wolf-  
gang Von Goethe

first. Once you've clarified the outcomes of the message, you complete your Subject line, To line, and Cc line.

Susan Burk, an IT program manager, received an e-mail message from her boss asking her to update him on the Microsoft Outlook Migration project. She realized she didn't know the status of the project and needed to get accurate data. She started to type a quick message to Jennifer, her assistant, to find out what was going on. John interrupted her and said, "Let's just pause and think about this for a moment." Susan looked at him a bit surprised. In her mind, she was mumbling, "Hey, this is a simple enough e-mail. I can do this on my own, thank you very much!"

John asked her two questions, "What objective does this relate to?" and "What is the outcome you really want?" As Susan stopped to think about the communication and these questions, she realized that what she really needed was to receive a reoccurring, monthly project status report. This would enable her to monitor what was going on, and if the report was posted on SharePoint, she and her boss could access it whenever they needed it. Her eyes lit up! This was a much better solution. She grinned and said, "OK, perhaps I need to think through these communications a bit more!"

**Exercise 11-1** Pick an e-mail message that requires a comprehensive communication, take a moment to establish the outcome for your message, and then write the reply in the body of your e-mail.

## What Action Is Involved and Does It Have a Due Date?

What type of action do you want the recipient or recipients to take as a result of your communication? By clearly stating the action, you have a better chance of it getting done.

Following are the four most common e-mail actions that we recommend.

1. **Action** The recipient has to take a physical action step: order an extension cable. Write a review. Read proposal. Book a meeting for Management Team.
2. **Respond** The recipient needs only to respond to your communication. There's no action to complete: "Let me know if you can attend the staff meeting at 9 A.M. on Friday."

3. **Read** The recipient needs only to read the information. There is no need to take action or respond: “Read sales plan before our next STP meeting on April 20.”
4. **FYI only** The recipient needs to file the information for future reference. There is no need to take action, to read, or to respond: “Enclosed is your approved expense report for your records.”

The reason to identify the type of action you’re asking the recipient to perform is to eliminate any confusion or guessing about your expectations. In many cases, the benefit is as much for you as it is for the recipient! In Susan’s example, she realized, with a little thought, that asking one of her direct reports to post a regular status report on the SharePoint site was a much more effective action than was asking her assistant to find out what was going on with the project. If Susan hadn’t thought this through, she wouldn’t have reached that conclusion. Think about your communication and clearly identify the action you want the recipient to complete.

Susan decided that her action was to delegate her task to Joe Healy one of her direct reports. She asked him to create the report for the Microsoft Outlook Migration project and post it each month to SharePoint, enabling her and her boss to access it easily.

Clarifying dates can help recipients prioritize their tasks more effectively. If everything you delegate is absent of a timeline, you’re relying on the recipient’s best judgment to know what your priorities are. That’s not a fair request to make of everyone. Most people need clear direction. Also, we do not assume that all tasks require due dates because not all of your actions need them.

When using timelines be discerning and make sure they mean something. It’s easy to use due dates, and it’s just as easy to overuse them. If you don’t hold people accountable to your timelines, they’ll eventually come to the conclusion that your timelines don’t mean anything. One day, when you give a date that really matters and your team don’t respond, you’ll wonder why. Don’t give out timelines unless you’re willing and able to follow up on them.

You can’t expect others to keep their due dates if you don’t keep yours. Remember, “What’s good for the goose is good for the gander.” When you demonstrate being accountable to timelines, other people around you will aspire to do the same.

Finally, be sensitive when giving out timelines to recipients who don't work for you. It's important to mention a timeline so that everyone is aware of the impact if a task misses a deadline. However, you can't reinforce a due date outside of your own team unless you're working on a project with mutual benefit to both parties.

**Exercise 11-2** Take a moment now to review your e-mail message and clarify the action. Then, revisit the deadline of the related Meaningful Objective and evaluate if the action needs to happen by a specific date to ensure that the objective stays on track. Check the Calendar to ensure that the timeline will work, given staff meetings, vacations, and other appointments. When you're clear that your due date is realistic, go ahead and add it to your message.

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**Example** Susan wanted Joe to create a Microsoft Outlook Migration project monthly status report. She wanted it posted to the SharePoint site by the fifth of each month and to have the first report completed in April. With this done, Susan could get back to her boss on time and it would give her regular data so that she could ensure the project stays on track.

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## What Supporting Documentation Do You Need to Include?

Identifying the supporting information that the recipient requires to complete the requested action successfully reduces the likelihood of your message coming back to you with questions, creating additional e-mail.

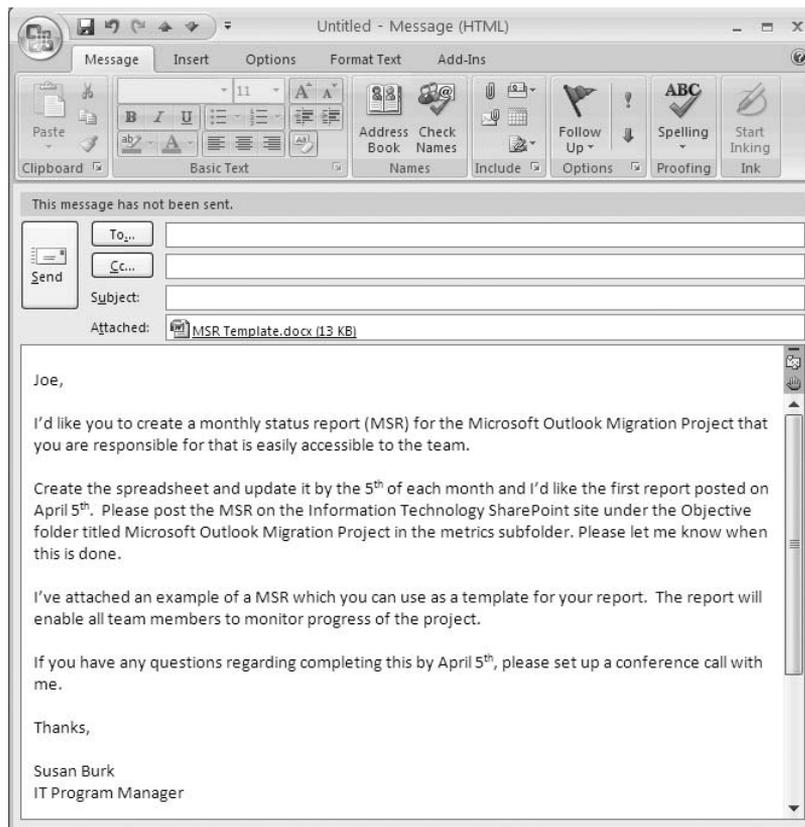
Recently, we asked our operations manager at our company to create a cash flow analysis report. We attached an example of the report we wanted her to complete. This enabled her to accomplish the request without sending further e-mail messages inquiring about layout, data to include, comparisons, and time frames. Once again, moving your thinking to the front end saves you time and effort on the back end.

**Exercise 11-3** If you need to include supporting documentation in your e-mail message, you can either type it in the body of the communication, attach a file (a Microsoft Office Excel worksheet, a PDF file, a Microsoft Office Word document, a Microsoft Office PowerPoint presentation, and so on), or insert an item (Inbox, Contacts, reference, or e-mail files). To attach a file or an item, open a new e-mail message, and on the Message tab in the Include group, select one of the following choices on the Ribbon:

- Attach File to insert a file from your computer

## ■ Attach Item to insert an item from your Folders List in Outlook

**Example** Susan inserted a monthly status report template into her message so that Joe could view a sample of what she was looking for, and she told him which SharePoint site to post the finished report on. Figure 11-1 shows Susan's e-mail message. This type of information reduced all kinds of guessing on Joe's part, making it easier for him to duplicate the report and post it where Susan could find it.



**Figure 11-1** Susan's e-mail message clarifies purpose, action, and supporting documentation.

## Have You Effectively Summarized Your Message in the Subject Line?

After you've completed writing your e-mail communication, you can then summarize your message using the Subject line. Our clients often fall into

the trap of trying to construct Subject lines first because it seems the intuitive thing to do. However, we've observed them consistently changing their subject lines after they've completed writing their communications. We suggest you construct your communications first, and then do your summary in the Subject line afterward. You will find that after you've clarified your outcomes and action and due dates it is a lot easier to create meaningful subject lines.

Three elements make a good Subject line:

1. Clarify the Meaningful Objective or Supporting Project that the e-mail message relates to.
2. Clearly indicate the action requested.
3. Identify a due date, if there is one.

An example Subject line might be "Microsoft Outlook Migration. Create monthly status report on SharePoint, by April 5."

There are four different types of action that you can use in your Subject lines.

1. **Action Requested** The recipient has to complete an action before he or she can respond. Example: AR: Outlook Migration: post monthly report to SharePoint starting April 5.
2. **Response Requested** The recipient needs only to respond. No action is required. Example: RR: When do you need the PP slides for your Oct. vendor meeting?
3. **Read Only** The recipient is required to read the document. Example: RO: Performance Review encl. for Holly Henson August 10 mtg.
4. **FYI only** The recipient doesn't need to read the document, but can file or delete it. Example: FYI: Updated P&L report for your Q1 records.

Imagine if you could sort your Subject lines by action—'Action Requested', 'Response Requested', 'Read Only' and 'FYI Only' or if you could sort them by the objective or due date. Clearly written subject lines speed up your ability to process and organize your e-mail effectively. The objective lets you know immediately what it relates to. The action lets you know what your responsibility is. The due date enables you to look at your Calendar and Task list to see if it is possible to complete on time. Taking the time to create clear subject lines makes e-mail communication more effective and increases the chance that your e-mail will be responded to.

Another helpful tip is to use “EOM” at the end of your Subject line. EOM stands for End Of Message. By using EOM, you’re informing the recipient that the message in the Subject line is complete and the recipient doesn’t need to open the e-mail. For example: “AR: Fabrikam. Book 1 hour review mtg. with Peter Houston by June 15th. EOM.” This is a courtesy and it saves time for the recipients.

You’ll want to be sensitive when using Subject-line acronyms: Action Requested (AR), Response Requested (RR), Read Only (RO) or End of Message (EOM). Recipients will not know what you mean unless they’ve received training. Your best solution, especially with people outside of your team, is to avoid using acronyms altogether and stick with the basic three Subject line elements: objective, action requested, and due date. This type of subject line is clear and universally understood. If in doubt, spell it out!

Just as it’s easy to overuse due dates, it’s easy to overuse Subject lines so that they become meaningless instead of meaningful. One of our clients so overused the “Action Requested” Subject line that it now holds no value and people disregard it. Be discerning about how you use the Subject line, reinforce its value by reminding people when they are using it appropriately and reminding them when they’re using it inappropriately.

**Exercise 11-4** Create a subject line for your message. Include the Meaningful Objective or Supporting Project, action, and due date if appropriate.

## Did you Use the To, Cc and Bcc lines Effectively?

### The Purpose of the To Line

The To line and the Subject line are intrinsically linked. The Subject line clarifies the action that the recipients on the To line have to take. Therefore, be aware of who you’re placing on the To line and ensure that they are responsible for the action in the Subject line.

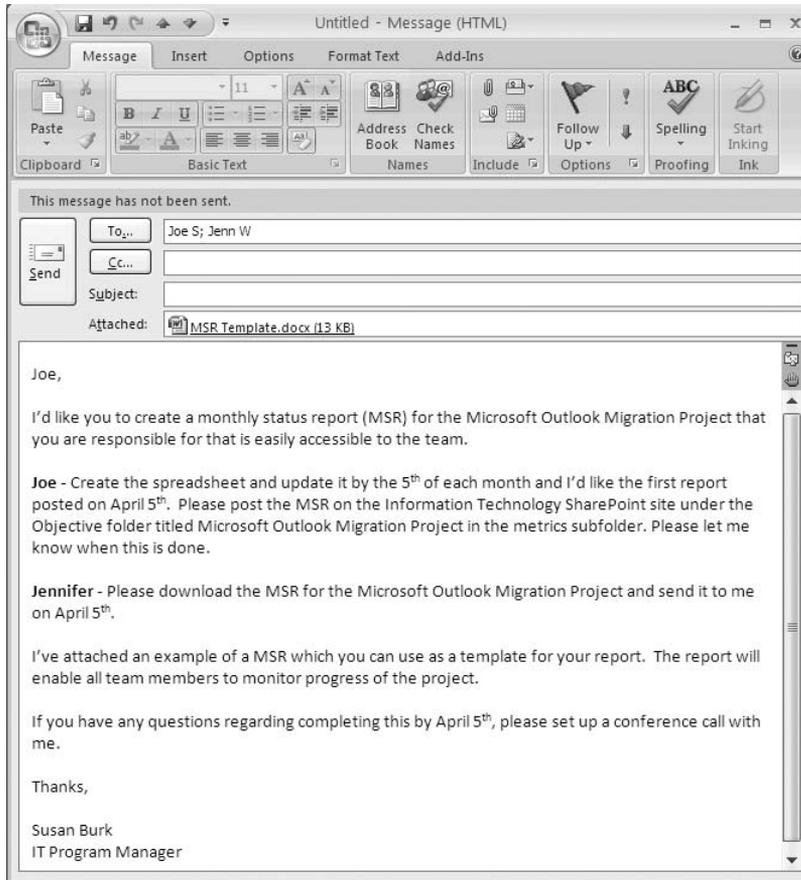
Here are two simple and useful questions to help you filter To line recipients.

- Does this e-mail communication relate to the recipient’s objectives?
- Is this recipient responsible for the action in the subject line?

If the Subject line requests an action, each individual on the To line is responsible for taking that action. Some people send e-mail messages with four or five people in the To line in the hopes that one of them will respond. Usually, each person receiving the message assumes that someone else on the To line will reply, and no one ends up responding. Be thoughtful and

respectful when you assign recipients to the To line. People will observe your thoughtfulness and the results will be more effective.

If the action in the Subject line relates to multiple recipients who need to take different actions, clarify this in the body of the e-mail message so that everyone is clear exactly what's needed. Figure 11-2 provides an example of a message with multiple recipients who must take different actions.



**Figure 11-2** This e-mail message demonstrates how to make it clear that multiple recipients are required to take different actions.

**Example** Susan put Joe on the To line because he was responsible for creating the status report. She also put her assistant, Jennifer, on the To line because she wanted Jennifer to download a document and send it to her. Susan clarified Jennifer's action in the body of the e-mail message, as shown in Figure 11-2.

## The Purpose of the Cc Line

E-mail we've been carbon copied on dominates our e-mail boxes and is an endless source of frustration and unproductive behavior, although it really doesn't have to be. The Cc line is only a courtesy copy, which means it needs to be read or filed, and no action or response is required. The Cc line is linked to the Subject line only by the objective and not by the action. Therefore, a useful question to help you filter your Cc line recipients is, "Will this e-mail impact the recipient's objectives?"

If you ask this question whenever you're about to type a person's name in the Cc line, you'll end up sending considerably less e-mail. We consistently question our clients' use of the Cc line, and 8 times out of 10, they don't need to use it. Take the time to pause and ask the question, "Does this communication impact the recipient's objectives?" If it doesn't, or you don't know what the recipient's objectives are, refrain from including the recipient on the Cc line. Believe me; you're not helping people by sending them information that doesn't impact their objectives. You're just giving them more work to do and more distractions to overcome. Don't be part of the e-mail problem. Be part of the solution by demonstrating effective use of the Cc line.

**Exercise 11-5** Assign the appropriate To and Cc contacts to your message. Do not send the message yet because we're not quite finished.

## The Purpose of the Bcc Line

If you want to protect a distribution list and keep individuals from receiving a Reply or Reply All, we recommend you use the Bcc line. Individuals on the Bcc line will not get messages if folks on the To or Cc line hit Reply and Reply All. It's important that you are aware that if anyone on the Bcc line hits Reply All, everyone on the To and Cc lines will receive that reply.

Other than that, we do not recommend using the Bcc line. For example, if you have an HR situation and you want to blind copy the HR manager, we recommend that you send your message, and then go to the Sent Items box and forward the e-mail to the HR manager. This way you ensure there are no ramifications or concerns. As we say to our clients, "Be very, very careful when using the Bcc line."

## Questions To Ask Before Sending E-Mail Messages

The three final questions to ask before sending your e-mail message are these:

- Does your e-mail message PASS?
- Have you written the message so that it will not come back to you with questions?
- Do you need to track this e-mail message in one of your 1:1 or SNA Waiting For categories?

This is your last chance *before* clicking Send to ensure that your message is clear and will produce the results you intend.

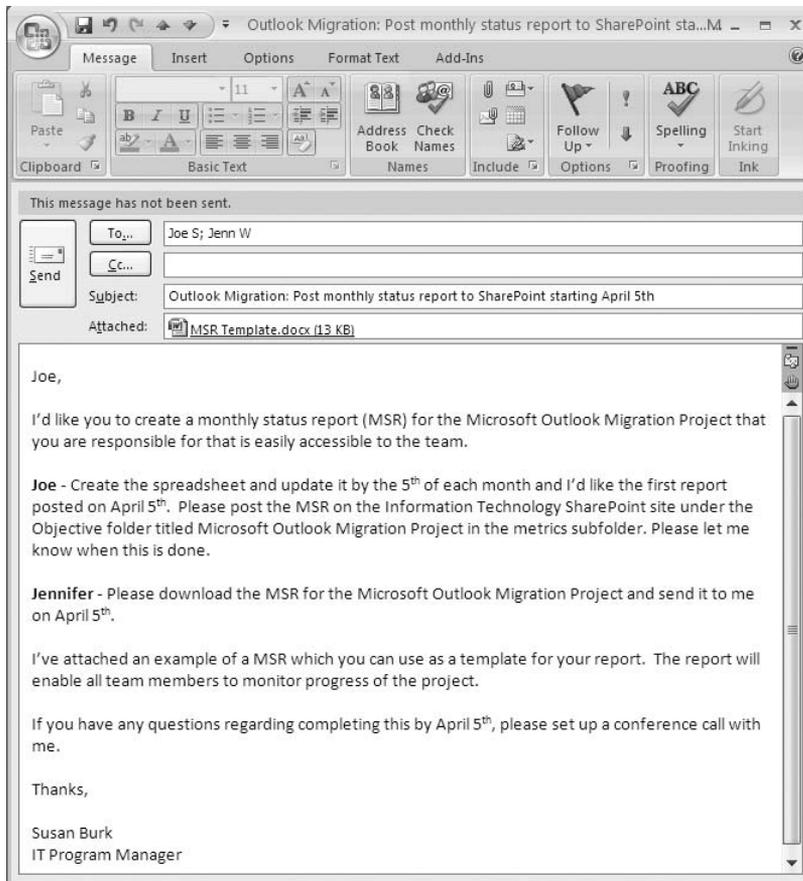
### 1. Does Your E-Mail Message PASS?

The PASS test is your final check to ensure that your e-mail message will be clearly understood.

To take the test, ask these questions:

- P** Have you communicated your **purpose** and made sure that it relates to an objective?
- A** Have you communicated the **action** requested?
- S** Did you include the appropriate **supporting documentation**?
- S** Have you summarized the message effectively on your **Subject** line?  
Did you use the *To*, *Cc* and *Bcc* lines appropriately?

Figure 11-3 shows Susan's message after she applied the PASS test.



**Figure 11-3** Susan's e-mail message demonstrating the E-Mail PASS Model questions.

## 2. Have You Written the Message so That It Won't Come Back to You with Questions?

When we ask clients this question, they inevitably go back and edit their message to make it clearer. This is not only polite and respectful, but it also reduces the volume of e-mail exchanged. When your communications are clear, people can move forward with requests instead of e-mailing you back and forth to gain clarity.

Don't underestimate this question. Just recently, we worked with a CIO and asked him this question repeatedly. He was a fast-thinking person who was having trouble understanding why we wanted him to slow down and put so much thought into his messages. At the end of the day, he received several

responses to his e-mail messages with questions asking for more information and clarity. He raised one eyebrow and said, “Wow! You weren’t kidding. I really do need to be clear to ensure I don’t get e-mail responses asking questions! I suppose I better change my standard for what clear means.”

Writing e-mail messages so that recipients understand what you mean and don’t need to ask questions is not as easy as people think. It takes pausing and collecting your thoughts. To do this you need a quiet, uninterrupted environment because processing e-mail during meetings, when you’re talking on the phone, driving in the car, or late at night doesn’t support this process. Writing clearly is a skill and it takes practice and concentration.

### 3. Do You Need to Track This Message in One of Your 1:1 or SNA Waiting For Categories?

This question reminds you to consider if you want to track a delegated item. If you trust your team members to do what they say they will do, there is no need to follow up with them. We recommend tracking delegated items if you need to follow up because the action affects the completion of your objective. Or track the item if you question a team member’s ability to complete the item on time and you want to make certain the person does, or if you’re training a new team member to be accountable. However, you don’t want to police people by tracking everything you delegate just because you can! It’s important to trust the people you’re working with, and only track a delegated task if you have a specific reason to do so.

If you want to track the e-mail message you just wrote, we suggest that you Cc yourself so that the e-mail goes back to your Inbox, and from there you can either transfer it into one of your 1:1 categories or to your Waiting For category.

**Exercise 11-6** Make any adjustments to your e-mail communication so that it does PASS and will not come back with questions. If it is a delegated item that you want to track, copy yourself in the Cc line so that it returns to your Inbox, and then you can move it into a 1:1 or Waiting For category. We will show you how to move messages into your 1:1 or Waiting for Category in the section titled “Dragging E-Mail to the To-Do Bar or Calendar.”

Now that you have completed creating an e-mail message using the PASS Model you may notice that it took you a wee bit longer to do than usual. However, after you get the hang of it, it’ll move faster. And when you write clear, purposeful e-mail, you’ll end up reducing the amount of mail you

receive and the amount of mail you send. You'll reduce cycles of action and make progress toward your Meaningful Objectives. When it comes to processing e-mail, slowing down does, in fact, help you speed up!

Unfortunately, some people have allowed the speed of technology to dictate the pace at which they work. But just because technology moves fast doesn't mean that you have to. Your best results will come from pausing and giving yourself time to think.

The more you practice and demonstrate writing clear, meaningful e-mail messages, the more those around you will take note. Demonstration is one of the most powerful instigators of change. When you're consistent in your behaviors, others will start to do the same. It's inspiring to work with people who go the extra mile and demonstrate excellence. This is another example of how "small things done consistently in strategic places create major impact"!

Many of our clients have shared with us that they want support with changing e-mail habits and have requested products that would help them reinforce new behaviors. In response to this request, we created our Take Back Your Life! 101 E-Mail Webinar Series. There are three 1 hour webinars in the series: Storing E-mail So You Can Find It Fast, 'Writing E-mail that Gets Results, and Getting to Zero in Your Inbox. You can purchase and download each webinar individually or as a series from the Products page on our Web site at [www.mcgheeproductivity.com](http://www.mcgheeproductivity.com), or go to the MPS Products page in the back of this book. The feedback we're getting is that they are assisting new and current customers to create and maintain new e-mail habits that increase productivity, save time, and support work-life balance. Check them out!

## **Preparing to Process and Organize Your Inbox**

Before you start to process and organize your Inbox, we are going to review some of the technical instructions that will be essential to implementing the MPS Workflow Model. In the following subsections, we run through how to set up your To-Do Bar so that you can use it effectively as part of your Action System. We show you how to drag and drop e-mail messages onto your To-Do Bar and Calendar and how to insert e-mail messages into existing Tasks and Calendar appointments. Finally, we discuss the difference between organizing your To-Do Bar by dragging and flagging. All these sections support using your IMS and getting your Inbox to zero.

## Setting Up the To-Do Bar

If you look at the control panel shown in Figure 11-4, you can see the To-Do Bar on the right-hand side of the Calendar. With this bar, you can easily view your “Total Life To-Do List” with all of the relevant Planning and Action Categories. The beauty of the To-Do Bar is that it’s accessible not only from the Inbox, but also from the Calendar, Tasks, and Contacts. This means that whichever part of Outlook you’re working in you can easily add Strategic Next Actions (SNAs), delete SNAs, or plan and prioritize them onto your Calendar. The To-Do List, which you’ve used up until now, is basically the same list with the following exceptions: the To-Do List can be accessed only from Tasks and it shows both completed and active Tasks and has more real estate to work with. The To-Do Bar does not show completed Tasks and is accessible from all parts of Outlook and has less real estate. Our clients use both of these lists depending on what type of work they’re doing; it’s a matter of preference and work style as to which list you use and when you use it.

Following are the technical instructions to set up your To-Do Bar. For reference, see Figure 11-4.

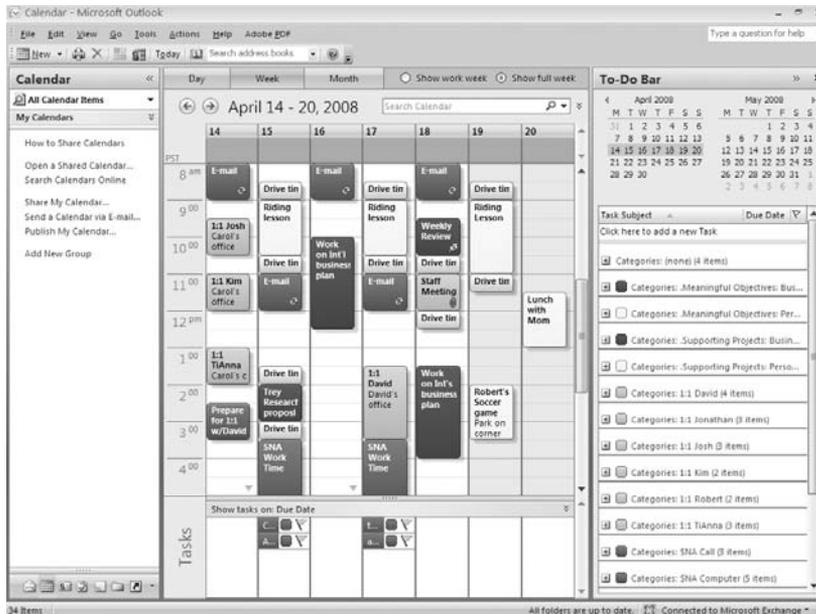
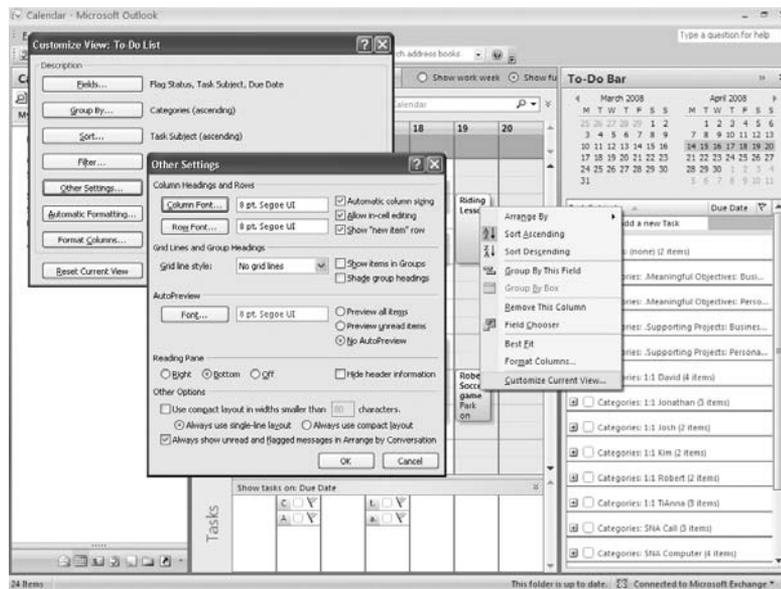


Figure 11-4 The ControlPanel showing the To-Do Bar on the right.

## Adding Click Here To Add A New Task and Changing Custom to Customize Current View

If you don't see the words Click Here To Add A New Task at the top of the To-Do Bar, follow these steps:

1. Right-click the Subject heading above Categories: (none), and select Custom or Customize Current View. If you see Custom instead of Customize Current View, be sure to follow step 4 below.
2. In the Customize View: To-Do List dialog box, click the Other Settings button.
3. In the Other Settings dialog box, in the Column Headings And Rows section, be sure both Allow In-Cell Editing and Show "New Item" Row are selected, as shown in Figure 11-5.



**Figure 11-5** Adding Click Here To Add A New Task to the To-Do Bar.

4. In the Other Options section, be sure the Always Use Single-Line Layout is selected.
5. Click OK.
6. Click OK again.
7. The words Click Here To Add A New Task will appear below your field headings and above Categories: (none).

## To-Do Bar Fields and Grouping by Categories

The next two settings are necessary to choose the To-Do Bar fields and to group your Tasks by categories. Follow these steps:

1. Go to the To-Do Bar, right-click the words Click Here To Add A New Task, and then click Customize Current View on the shortcut menu. Here you will choose the fields to view in the To-Do Bar and group your actions by category.
2. In the Customize View: To-Do List dialog box, click Fields.
3. Under the heading Select Available Fields From, choose All Task Fields from the drop-down menu.
4. In the Show These Fields In This Order section, select Icon and Due Date.
5. Under the heading Select Available Fields From, choose All Mail Fields from the drop-down menu.
6. Select Task Subject and add to the Show These Fields In This Order area. Rearrange your fields so they're listed in the order shown in Figure 11-6 and then click OK.

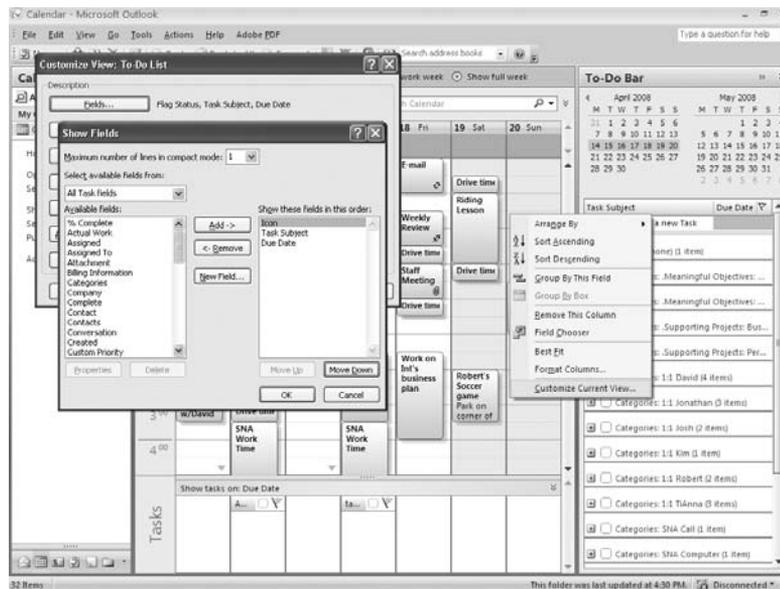
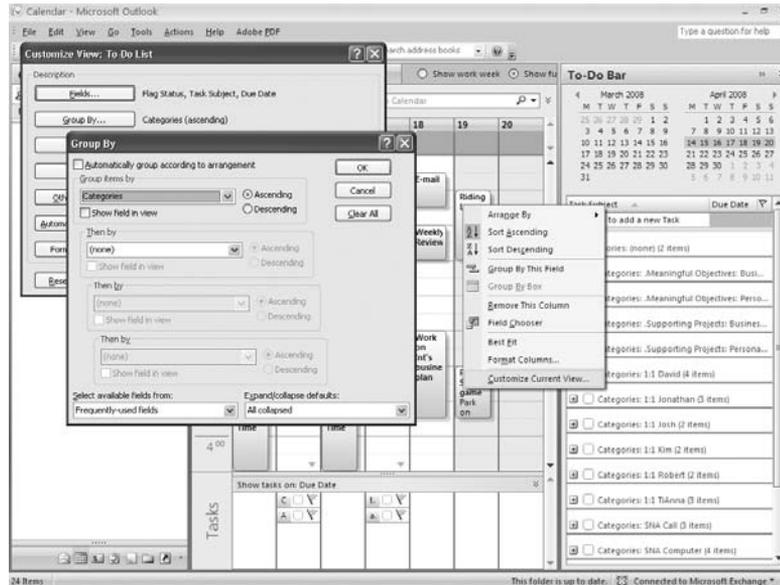


Figure 11-6 Selecting the To-Do List fields

7. In the Customize View: To-Do List dialog box, click Group By.

8. In the Group By dialog box, in the Group Items By drop-down menu, select Categories, and in the Expand/Collapse Defaults drop-down menu, select All Collapsed, as shown in Figure 11-7. Then, click OK.



**Figure 11-7** Grouping tasks by categories.

9. Click OK again.

## Attaching Contacts to Your Tasks

To complete the final setting that allows you to attach contacts to your Tasks, follow these steps:

1. On the Tools menu, click Options.
2. In the Options dialog box, on the Preferences tab, in the Contacts And Notes section, click the Contact Options button.
3. In the Contact Options dialog box, in the Contact Linking section, select Show Contact Linking On All Forms, as shown in Figure 11-8, and then click OK.
4. Click OK again.

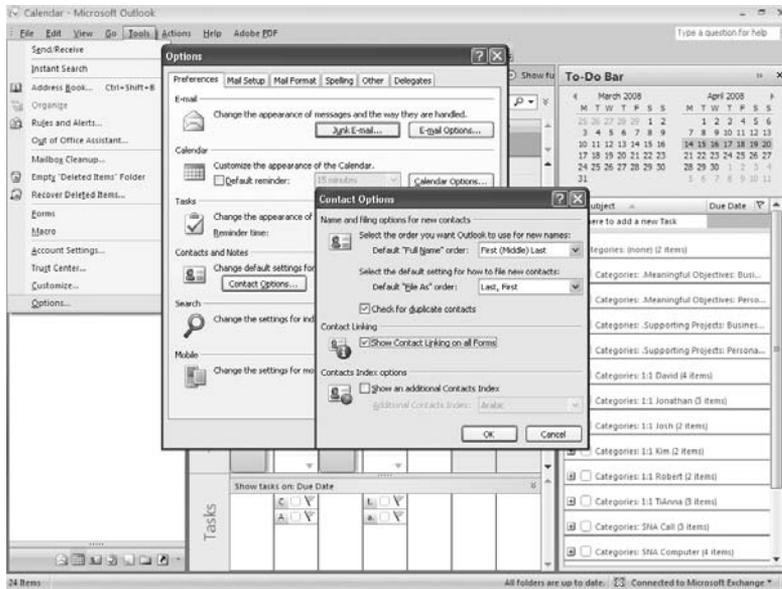
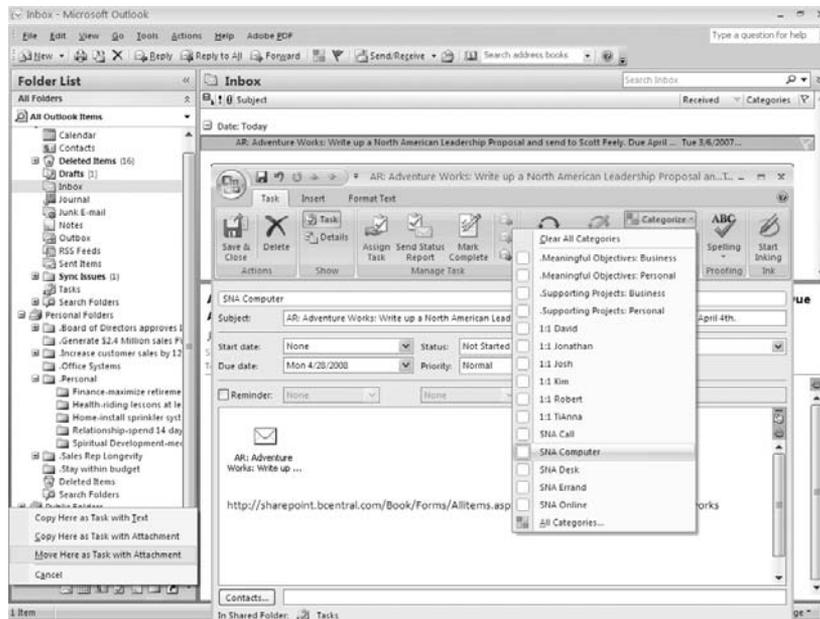


Figure 11-8 Linking contacts to your Tasks in the To-Do List.

## Dragging E-Mail to the To-Do Bar or Calendar

To set up an effective Integrated Management System, we recommend you predominantly use dragging as a method for organizing e-mail. Our productivity philosophy is based on you emptying Collection Points, centralizing your action list, and having all the data you need to complete an SNA attached to the SNA, and dragging facilitates this. You can drag an e-mail message from the Inbox directly onto your To-Do Bar and into your Planning and Action Categories or onto your calendar as an appointment. This is a pretty cool feature.

In Figure 11-9 Carol received an e-mail reminding her to edit the Adventure Works proposal, which was posted on a SharePoint site. Carol could not do this SNA in less than two minutes or delegate it, so she had to defer it to do herself. She dragged the e-mail into her SNA computer category, added a due date and inserted the proposal from SharePoint; she now had everything she needed to complete the action in one place. Dragging e-mails enables you to remove them from your inbox and puts them in your To-Do Bar as a task; from here you can respond to them as you would an e-mail which is really useful.



**Figure 11-9** Dragging an e-mail on the To-Do Bar into a Planning or Action Category.

To drag an e-mail into your one of your Planning and Action Categories on your To-Do Bar follow these steps:

1. Right-click and drag the e-mail to the Task icon in the Folder List.
2. From the shortcut menu, choose Move Here As Task With Attachment.
3. In the Task window, the e-mail Subject line appears in the Task Subject line, and the e-mail is inserted into the task as an envelope icon.
4. Review your subject line to ensure it says what you want and if not you can change it.
5. Click Categorize on the ribbon and select the appropriate Planning and Action Category.
6. Click Save and Close.

You can just as easily drag and drop e-mails onto your calendar as you can the To-Do Bar. Carol received an e-mail related to completing her performance review and submitting it online by Friday at 3 p.m. This was a SNA she could not do in less than two minutes or delegate so she had to defer it to herself. She wanted to make sure she got it done on Friday so she dragged

and dropped the e-mail onto her calendar on Friday at 1 p.m. and created an appointment for 1 hour to make sure she completed it. The e-mail attached itself to the appointment so that when she got to the appointment, she could open the e-mail, find the link to the intranet site, and complete the review online. By using this method, you can move action-related e-mail out of your Inbox and place it where you can do something with it to complete it.

To drag an e-mail onto your Calendar, follow these steps:

1. Right-click and drag the e-mail message to the Calendar icon.
2. On the shortcut menu, click Move Here As Appointment With Attachment.
3. In the appointment window, the e-mail Subject line appears as the appointment Subject line, and the e-mail is inserted into the appointment as an envelope icon, as shown in Figure 11-10.

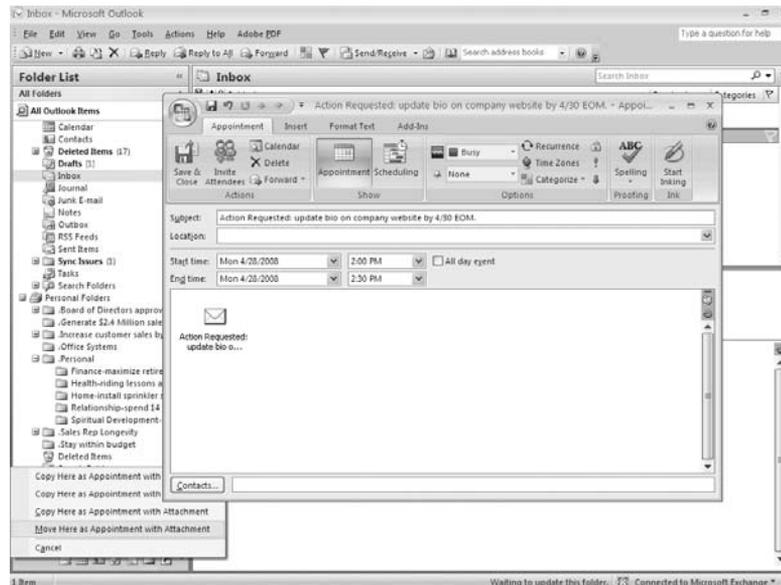


Figure 11-10 Dragging an e-mail message to the Calendar.

4. Review your Subject line to ensure it says want you want, and if not, you can change it.
5. Click Save and Close.

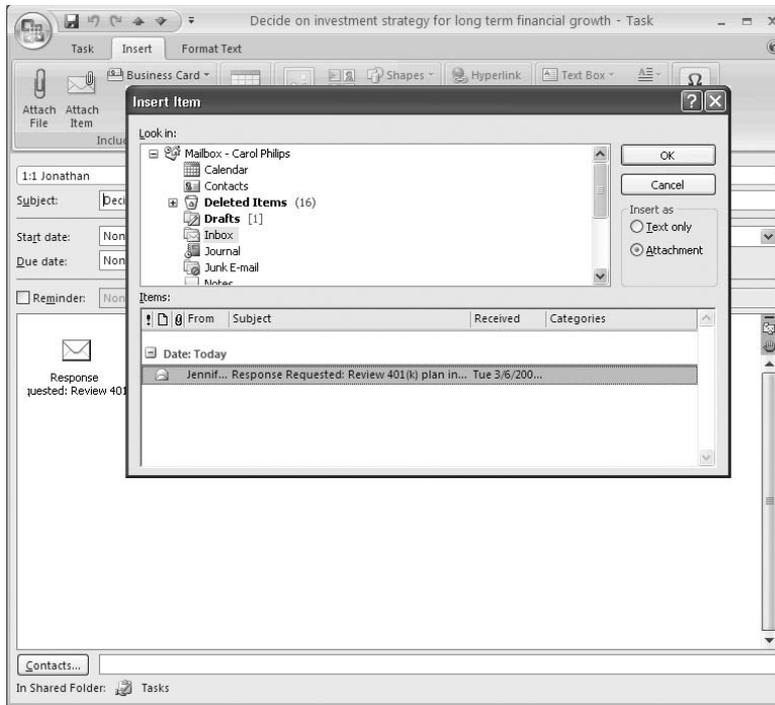
## Inserting an E-Mail Message or Document into an Existing Task

One of the cool things about Tasks is that you can insert files and contacts and e-mail messages into them, making it easy to have the supporting information you need to complete your Strategic Next Actions. Carol received an e-mail message related to her 401(k) plan detailing her different investment options. Carol has an existing Task in her 1:1 Jonathan category to talk to him about an investment strategy. Carol thought it would be a good idea to include this message in her conversation with Jonathan, and so she decided to insert it into that Task so that she can refer to it when she is in her 1:1 meeting with him.

You have a choice when inserting e-mail messages into Tasks. If the information you need is in an attached document in the e-mail message, you can either insert the entire e-mail message, which includes the attachment, or you can insert the attached document only. If you don't need the body of the e-mail message and only need the attached document, you can first save the document in your My Documents Reference System, and then link the document to the Task. This way, the document is in two places. When you delete the Task, you'll still have access to the document in your My Documents Reference System. Or if you want the e-mail message and the document, you can insert the message into the Task and the document will go with it.

To insert an e-mail message or its attachment into an existing Task, follow these steps:

1. Double-click an existing Task.
2. In the Task, click the Insert tab, and choose Attach Item from the ribbon.
3. In the Insert Item dialog box, select Inbox.
4. Locate the e-mail message that you want to insert, and click it once to select it.
5. In the Insert Item dialog box, in the Insert As section, select either Text Only or Attachment, as shown in Figure 11-11.
6. Click OK.



**Figure 11-11** Inserting an e-mail message or an e-mail attachment into an existing Task.

## Inserting an E-Mail Message or Document into an Existing Calendar Appointment

Some of the e-mail you receive will be information that you'll want to have handy during meetings or phone calls. For example, Carol Philips received an e-mail message outlining the agenda for a Friday staff meeting. Carol wanted to make sure she had the agenda available on Friday, and so she inserted the message into the staff meeting appointment on her Calendar, as shown in Figure 11-12. With this setup, she can open the appointment on Friday and double-click the e-mail icon, and the agenda immediately shows up on her screen. It takes less than two minutes to complete, and places the data where it is most useful, and minimizes what Carol has to do to find it on Friday at the start of the staff meeting.

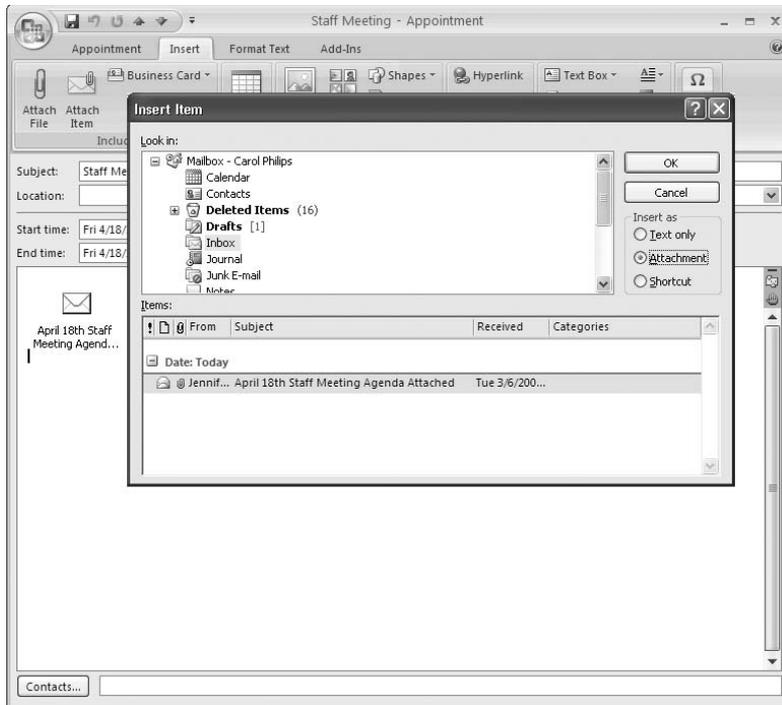
When you insert an e-mail message into an existing appointment, you have two options: you can insert the text, or you can insert the entire e-mail message. When you include the whole e-mail message in an appointment, you can open the message and respond to it or just view the information in it.

When you insert the text of a message only, you can't respond to the message, but you can see the text. This is useful in relation to using a PDA or smartphone. When you synchronize with a PDA, the text of the message shows up in the appointment so that you have it available. If you insert an e-mail message, you cannot open the message from a PDA. Based on how you are going to view this information you need to discern whether you insert text or the e-mail message itself.

In the example, if Carol inserts the Friday staff meeting agenda as text into the appointment, she can view the agenda on her PDA, which is pretty cool. Another example of using text on a PDA is when you go on trips, you can insert the travel data as text into your travel appointments, such as air, hotel, and car rental confirmations. It's much easier to view your PDA when you're on the road than it is to use your laptop. This information is extremely helpful, and having it readily available saves time and makes you look good! It's very important to look good and have the latest equipment, you know!

To insert an e-mail message or its text into an existing Calendar appointment, follow these steps:

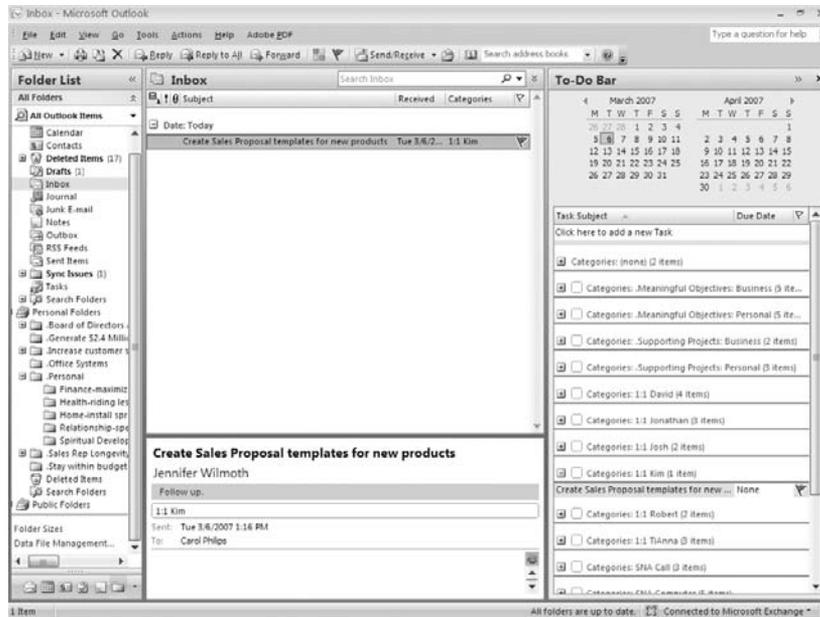
1. Double-click an existing Calendar appointment.
2. In the appointment, click the Insert tab, and select Attach Item from the ribbon.
3. In the Insert Item dialog box, select Inbox.
4. Locate the e-mail message that you want to insert, and click it once to select it.
5. In the Insert Item dialog box, in the Insert As section, select either Text Only or Attachment, as shown in Figure 11-12.
6. Click OK.



**Figure 11-12** Inserting an e-mail message or the text of a message into an existing Calendar appointment.

## Flagging

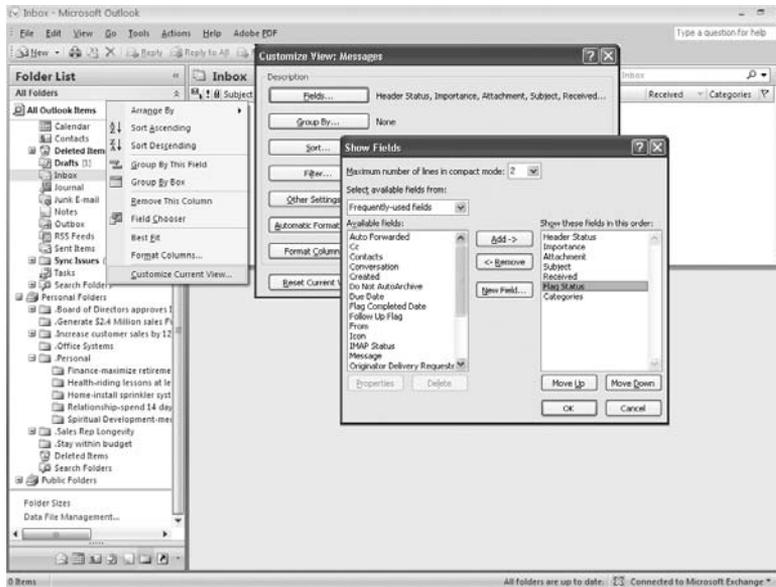
Flagging an e-mail message creates a synchronized link between the item in the Inbox and the To-Do Bar; it does not create a Task or an appointment, and the e-mail message stays in the Inbox. In Figure 11-13, you can see that Carol flagged an item in her Inbox; you can see the flag on the far right-hand side of the message “Create Sales Proposal Templates for new products.” Carol wants to discuss this item with Kim in their next 1:1 meeting, and so she categorized it under her 1:1 Kim category. You can see the item appears under this category in the To-Do Bar and stays in her Inbox. If Carol were to click the item in the To-Do Bar, it opens as an e-mail message not as a Task, and this enables Carol to respond to the e-mail immediately. However, she cannot insert or add any supporting information.



**Figure 11-13** A flagged e-mail message in Carol's Inbox.

If you are going to be flagging e-mail, we suggest you have the Flag Status Field and the Category field showing in your Inbox. To add these fields, follow these steps:

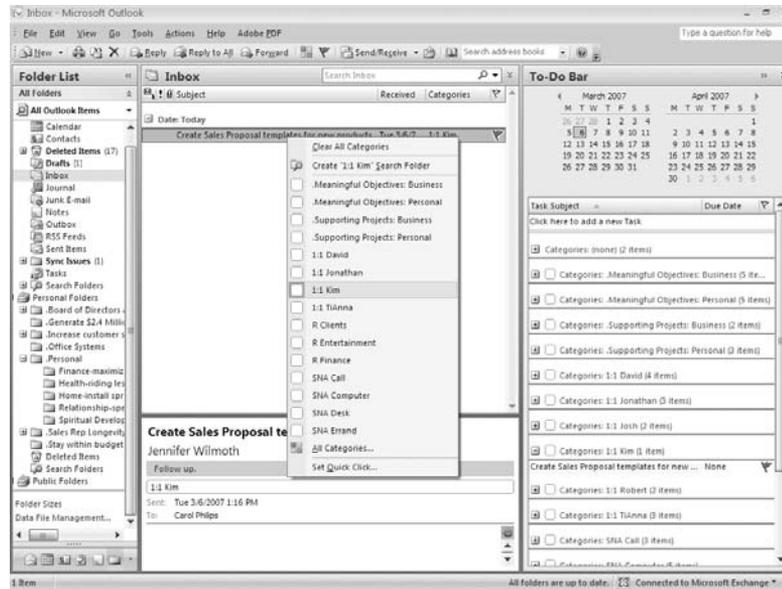
1. In the Inbox, right-click the Subject heading, and then click Customize Current View.
2. In the Customize View: Messages dialog box, click Fields.
3. In the Select Available Fields From section, choose All Mail Fields To Add Flag Status. Choose Frequently-Used Fields from the Select Available Fields From section to add Categories.



**Figure 11-14** Adding the Flag Status and Category fields to the Inbox.

To flag and categorize an e-mail message onto the To-Do Bar, follow these steps:

1. In the Inbox, click the Flag Status field of the message, and the flag will turn red.
2. In the Inbox, right-click the Categories field of the message, and then select a category. This e-mail message will show up on your To-Do Bar under the category you selected with no due date. See Figure 11-15.



**Figure 11-15** Flagging and categorizing an e-mail message onto the To-Do Bar.

## Why We Recommend Dragging Instead of Flagging

Dragging is not as intuitive as flagging, but dragging provides you with some very strong advantages.

- You can drag e-mail to the To-Do Bar as well as to the Calendar.
- You can create Tasks that capture relevant Supporting Information needed to complete SNAs.
- You can empty the Inbox by moving action material to your Action System and reference material to your Reference System.
- You have only one location for storing your Planning and Action Categories, not two, and so all of your action items are in one central location.
- If you delete a flagged e-mail message by accident, you remove it from the To-Do Bar without notification or warning.
- With flagging, you end up with two Planning and Action Categories to review, one in the Inbox and one in the To-Do Bar, and they are *not* identical. When you add Tasks to your To-Do Bar, they do not show up in your Inbox categories; they show up only on the To-Do Bar.

We believe these advantages make dragging the primary method to use. Flagging does have value, and we write about this in the section titled “When Can I Use Flagging Effectively?” later in this chapter. Of course, you can use a hybrid approach, mixing both dragging and flagging. For now it is simpler to choose one method and stick with that until you become an Outlook Power User and can use both effectively.

## **Using the MPS Workflow Model to Process and Organize E-Mail**

You’ve now learned how to create meaningful e-mail messages using the E-Mail PASS Model, how to set up your To-Do Bar, and the few essential technical features for moving e-mails onto the To-Do Bar and Calendar. Now you’re ready to go to work on processing and organizing your e-mail using the MPS Workflow Model.

Quick question: Does your e-mail come to you in the order in which it needs to be done? Now that would be a great software product! Until such a time, you have to process and organize your e-mail so that you can prioritize when to take the necessary actions.

Most of you probably scan your e-mail throughout the day, jumping around your Inbox and opening and closing messages without taking any action. We call you people “jumpers,” and you know who you are! The more you do this, the quicker it is for your Inbox to grow in size and the more time you are spending on nonproductive actions. For some people, the Inbox grows to as many as 7,000 e-mail messages. To get through large volumes of e-mail, you need a system for managing messages. The Workflow Model can help you process and organize your mail using a systematic approach so that you can empty the Inbox regularly.

Reviewing e-mail during meetings, in between meetings, and while you’re on the phone is not a productive way to process mail. We recommend quiet time during which you can concentrate, pause, and think clearly. Therefore, the first step in processing and organizing e-mail effectively is to schedule at least one hour of uninterrupted time each day to get through your e-mail. You will discover over time how much time you need to book and when the best time to book it is. Some clients like to process e-mail first thing in the morning, whereas others prefer the end of the day; you’ll discover what works best for you. This doesn’t mean you cannot monitor your e-mail during the day; however, processing e-mail is a completely different skill from monitoring and it requires your full attention.

The shortest way to do many things is to do only one thing at a time.

—Sydney Smiles

The second step is to sort your e-mail into the order in which you want to process it, organizing it by date, subject, or person. You'll be processing your e-mail messages one at a time, starting at the top of the list. This means that after you open an e-mail message, you will not close it until you have decided what the action is and transferred it into the appropriate bucket, be it your delete bucket or an SNA bucket. Basically, you're not allowed to close it back into the Inbox! Now for you "jumpers," during this exercise, we want you to refrain from jumping; work *one e-mail at a time in sequence*. Don't move to the second e-mail message until the first is processed. We know this will be challenging; however, it is well worth the discipline.

Now you're ready to start working through the MPS Workflow Model. Double-click your first e-mail message and let's get cracking.

## What Is It?

Is the e-mail message you've selected reference or action, big or small, a Meaningful Objective or Supporting Project, personal or business? When you're clear what the message is, move onto the next question in the Workflow Model.

## Is It Actionable?

Given everything else on your plate right now, is it appropriate for you to take on this action? If not, you have three options:

- File it in your new, improved E-Mail Reference System.
- File it in your SNA Someday Maybe category (we discuss how to do this in the following sections).
- Swiftly delete it, never to be seen again! (We'd like you all to become much more familiar with your Delete key!)

All of these options remove the e-mail message from your Inbox. If you want to take action on this e-mail, move on to the next question.

## Does It Relate to a Meaningful Objective?

Ensure that the action this e-mail message requires maps to one of your personal or business Meaningful Objectives. If it doesn't map to one of your Meaningful Objectives, question why you want to take action on it. Just because a message shows up in your Inbox doesn't mean you need to act on it. Be discerning about what you put your energy into. At the end of the day,

you're measured on your objectives (at work), and so it's important to stay focused on them and not get distracted into other areas.

This is also true of your personal life. Because you're not measured on your objectives, it's easy to abandon the goals you've created and get lost in distractions. Asking whether the message relates to a Meaningful Objective helps you pause and question how you're using your time and energy.

The question "Does it relate to a Meaningful Objective?" leads to both a "yes" and "no" option. If the answer is "no," we suggest you first look to *disengage* from the commitment altogether. This involves contacting the respective stakeholder to let the person know and creating ways of doing this that have integrity. In some cases, you may not be able to disengage from the action because it is too far along the process and you have to complete it. At this point, you can consider *renegotiation*, finding out if the action can be completed later or changing the scope to make it easier to complete along with your other objectives. It can be uncomfortable to back out of an agreement you've already made. However, if you ask this question *before* you make agreements, you can ensure that you only involve yourself in commitments that link to one of your Meaningful Objectives. The key here is asking this question upfront so that you can let people know right away if you can assist them or not.

By disengaging from commitments that don't focus on your objectives, you free up your time and energy, making it easier to stay focused on the objectives you have already agreed to accomplish.

If your e-mail communication does map to one of your Meaningful Objectives, move on to the next question.

## What Is the Strategic Next Action Without a Dependency?

Take a few moments to clarify what your Strategic Next Action is. Make sure it is a one-step item with no dependencies so that you can complete the action immediately. We don't want you to put off this decision and close the e-mail message back into the Inbox.. After you've created your SNA, you're ready to move onto the next section of the Workflow Model, which we call the Four Ds for Decision Making. This helps you decide whether to complete your SNA right away, delegate it, or defer it. We will pick up this discussion regarding what to do with your SNA in the section titled "Do it...If it Takes Less Than Two Minutes."

## Using The Four Ds for Decision Making

The latter part of the Workflow Model is also called the Four Ds for Decision Making, and you can effectively process and organize your e-mail by simply following these four Ds. This part of the Workflow Model is easy to use and helps with large volumes of e-mail that require rapid decisions.

The four Ds are as follows:

- **Delete** it.
- **Do** it if it takes less than two minutes.
- **Delegate** it and, if appropriate, track it in your 1:1 Meeting or SNA Waiting For category.
- **Defer** it to one of your SNA categories on the To-Do Bar or transfer it to a specific time on your Calendar.

### Delete It

Deleting e-mail is not easy for all of us, and it has a lot to do with past experience. Some people are extremely uncomfortable letting go of information, and for good reason. Remember your very first job. Perhaps you were incredibly nervous and wanted to do everything right. It was your fourth day and your boss asked you for a document you didn't have. You'd deleted it two days earlier! He was unhappy you couldn't produce the document and made a big, huge fuss about it. You felt disappointed and beat yourself up for getting rid of it. After this experience, you decided never to delete anything ever again to ensure you didn't have to repeat the experience.

However, not all people are the same. If you delete a document, it doesn't necessarily mean it's going to come back to bite you! What happened 10 years ago may not happen today. So, ask yourself, in all honesty, how many times have you referenced the e-mail messages you've saved? We'd guess maybe 10 percent of the time! The truth is that you really don't get paid to file, you get paid to complete Meaningful Objectives successfully. So, be watchful of how much e-mail you file, how much you use it, and how long it takes you to find it.

Did you know that, on average, clients delete 50 percent of their e-mail? (Deep breaths now, in and out!) For those of you who are uncomfortable deleting e-mail, there are four questions that can help you determine what to keep and what to delete. (Keep breathing!)

- Does this e-mail information relate to a Meaningful Objective I'm currently working on?
- Can I find this information somewhere else? On a Web site, on an intranet, or from a colleague?
- Will I refer back to this information in the next three months?
- Am I required to keep it? Is it legal, HR, or financial?

There are exceptions to all of these questions and you have to be discerning about what those are. The point is to be conscious about why you are keeping messages that you don't really need. We find these questions assist clients to let go of e-mails that don't support their primary focus.

Have you ever lost your entire Inbox in the past as a result of an application crash or virus? Remember what happened? Most of my clients say, "Nothing! I was so surprised. I just got on with business as usual." So, don't be afraid to step outside of your comfort zone, let go of the "keeper" role, and see what happens. We think you will be pleasantly surprised.

## Do It

A "Do It" action is a Strategic Next Action that you can personally complete in less than two minutes. On average, clients complete 30 percent of what's in their Inbox in less than two minutes. It's motivating to complete this many cycles of action, and it proves how much you can get done in less than two-minute cycles.

Here's an example of a "do it in less than two minutes." In an e-mail, my assistant asked me to send her an updated schedule for the book-editing project. I had the updated schedule in my Reference System in My Documents. There was no point in typing this action onto my To-Do Bar; it would have taken longer to do that than it would have taken to send the schedule to her.

If it takes less than two minutes, just get it done and get it out of your Inbox. If it takes three minutes, that's fine, too. You don't have to be too rigid about the time limit. The key is to complete an action if you can complete it faster than you can track it.

We used to work with stopwatches, timing clients while they processed their e-mail. It was inspiring how much they'd get done in two minutes or less. Often, clients would try to convince us that a reply or an action would

take longer, and so we'd say, "Let's time it and see." Voila! It was almost always completed in less than two minutes.

You can also scan an e-mail message in less than two minutes to decide if you really need to read it. Clients say to us, "Oh, I need to defer this e-mail. It will take me 15 minutes to read!" We always suggest scanning it in two minutes or less to decide if you need to spend 15 minutes reading it. Often, the scanning is enough to decide that you do not need to read it. We all underestimate what we can do in less than two minutes.

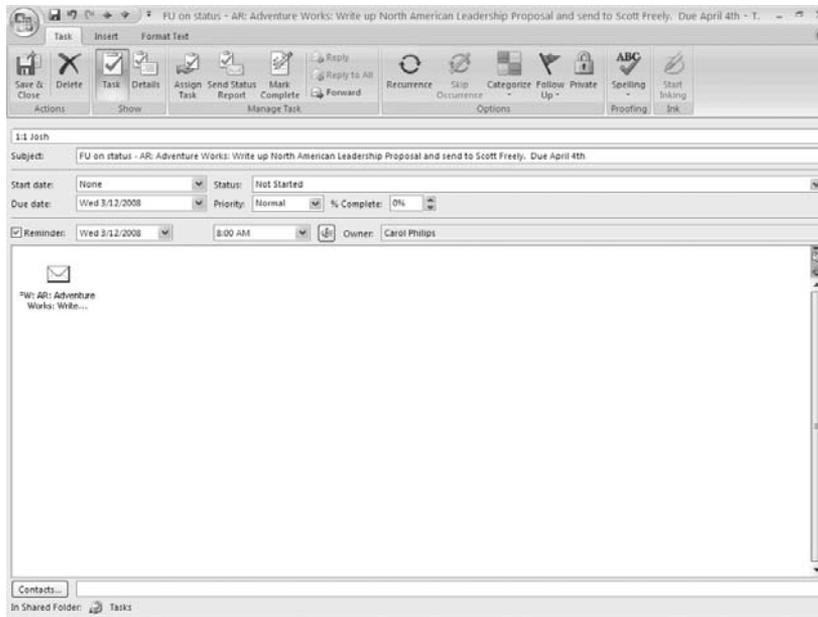
If you can complete your SNA in less than two minutes, do it now. If not, move to the next question in the Four Ds for Decision Making.

## Delegate It

A "Delegate It" action is a Strategic Next Action that you can delegate to someone else. Often, we forget to ask ourselves whether we can delegate an action. We're moving so fast that it doesn't occur to us. Just recently, we worked with a client and asked this question four times in 30 minutes. Each time, the client was able to delegate the item and was thrilled to have one less thing to do.

Let's look at how to organize your delegated items in more detail. Carol received an e-mail message from one of her most important clients, ScottSely, who works for Adventure Works. He requested that she create a sales proposal for a leadership meeting he was having, and he detailed exactly what he wanted in the body of his e-mail communication. Carol recognized that she could delegate this to Josh, her sales director. In less than two minutes, Carol wrote an e-mail message to Josh delegating the task. She decided to track the action to ensure Scott got the proposal, and so she included herself on the Cc line. When the e-mail message arrived in her Inbox, she transferred it into her 1:1 Josh category on the To-Do List and placed a due date on it to ensure Josh completed it on time. This is a very nifty technique that enables you to record items you've delegated so that you can easily follow up with them during your 1:1 meetings.

Now if Carol had moved an e-mail message into one of her 1:1 categories and that task needed to be followed up on before her next 1:1, she could put a due date on the Task with a reminder. The reminder then automatically pops up on the reminder date, and if she clicks the reminder, it takes her to the Task and to the e-mail message she embedded as shown in Figure 11-16. She can then forward this e-mail message asking if the task is going to get done on time.



**Figure 11-16** Following up on tasks you assigned to your 1:1 category with reminders.

The Subject line Carol created for the e-mail message was “AR: Adventure Works: Write up a North American Leadership Proposal and send to Scott Freely. Due April 4.” This heading clearly states what Josh has to do. If your Subject line isn’t useful, you’ll want to modify it. A comprehensible Subject line is important because in your 1:1 meetings you’ll want to avoid having to open and read an e-mail message to clarify its discussion point. You want the Subject line to do that for you. This kind of preparation on the front end saves you time on the back end. Are you tired of hearing that message yet?

If your Strategic Next Action is a delegated item that you want to track in your 1:1 category or Waiting For category, go ahead and Cc yourself and send the e-mail. When the e-mail message arrives back in your Inbox, you can then transfer it into the appropriate 1:1 or Waiting For category using the dragging method. Ensure that your Subject line in the Task reflects the item you want to follow up on, a due date is set if appropriate, and you have all the supporting information you need attached. See Figure 11-11 and the appropriate instructions as a reference for dragging e-mail onto your To-Do Bar.

Clients often ask us, “Why do I need to Cc myself? Why not drag and drop the message from the Sent Items folder?” Imagine that you’ve sent

your e-mail, and you're about to go to the Sent Items folder to drag it into your SNA Waiting For category when the phone rings. You answer the call and get involved in a conversation and completely forget to transfer the e-mail from the Sent Items folder to the To-Do Bar. The only way to ensure you don't forget these e-mail messages is to Cc yourself *before* you send e-mail. This way the messages come back into your Inbox to remind you to file them. Once again, a little bit of effort on the front end saves work on the back end.

If you cannot delegate this e-mail, move to the next question.

## Defer It

A “Deferred Action” is a Strategic Next Action that you can't complete in less than two minutes and that you can't delegate. Therefore, the only option left is for you to complete it personally. This is where the buck stops and the real work begins, especially if you're an individual contributor who has no staff to delegate to.

The number of deferred Strategic Next Actions you have may depend upon your role in the company. Our executive clients delegate most of their tasks, which means they end up with very few deferred items. However, individual contributors, with no one to delegate to, can end up with a considerable list of deferred Strategic Next Actions. The good news about deferred items, however, is that they've gone through a tough prioritizing process to get on to your list, and so they're important tasks to record and complete. You filtered out all the activities that did not relate to your Meaningful Objectives, items that could be deleted, items that could be completed in less than two minutes, and items that could be delegated. The end result of this process is a list of deferred Strategic Next Actions that only you can complete and that will take more than two minutes.

Our statistics prove that, on average, 50 percent of most people's e-mail can be deleted, 30 percent can be completed in less than two minutes or delegated, and 20 percent can be deferred. That means that out of 100 e-mail messages you receive, only 20 of them end up being deferred items in your SNA categories.

Here's an example of a deferred Strategic Next Action: Carol received an e-mail message from John Emory, a Web site project manager, asking her to spend 20 minutes reviewing the new sales site for her edits and corrections, which were due by April 15th. Carol couldn't delete the task, or do it in less than two minutes, or delegate it. She personally had to do it, and so she

transferred the e-mail message into her SNA Online category, with a due date of April 15th. In this case, the e-mail Subject line that John wrote related to the action Carol had to take, and so she didn't have to change the Subject line.

Carol's next e-mail message was from her CFO and asked her to scrub her portion of the sales budget and return it by the end of the month. Carol could not do this in less than 2 minutes or delegate it, and so she was going to have to complete this herself. She needed an hour to do it, and she also needed the budget handy to review it. Carol right-clicked and dragged the message to her To-Do Bar, changed the subject line to "Spend one hour scrubbing sales budget," included a due date of May 1st, and then inserted the Excel worksheet she needed to scrub and an e-mail message from one of her directs listing last year's shortages. In Figure 11-10, you can see how to insert e-mail messages into your Tasks, and in Chapter 9, Figure 9-5 demonstrates how to insert files into your Tasks.

If your e-mail message is a deferred action, transfer it into the appropriate Strategic Next Action category on your To-Do Bar. When it's transferred, check that your Subject line details the Strategic Next Action, starts with a verb, clearly communicates the action, and has no dependencies. Select a due date if appropriate, and insert any supporting information you require to complete the action. (If you need a reminder about inserting, see the section above, "Inserting an E-Mail Message or Document into an Existing Task")

You've now successfully completed processing one of your e-mail messages. I hear you saying, "That took a while!" You're right. However, when you get the hang of this model, you can move through it quickly and process at least 60 e-mail messages an hour. By pausing to use the Four Ds for Decision Making, you're making effective decisions and moving e-mail out of your Inbox.

## **Processing and Organizing Your E-Mail for 30 Minutes**

OK, you're now ready to fly solo and process your e-mail using the Four Ds for Decision Making. You'll do this for 30 minutes because we want you to discover exactly how many messages you can process in that time frame. For example, if you receive 60 e-mail messages a day and can process 30 messages in 30 minutes, you can estimate you'll process your e-mail in one hour a day. That's important information to know!

You'll also learn that using the Four Ds for Decision Making is invigorating because you make a decision for each message and move it out of your Inbox. If your Inbox is particularly full, don't worry; you'll work on emptying your Inbox later in this chapter, but for now we want you to experience processing e-mail for just 30 minutes.

Get a timer and set it for 30 minutes or use your computer's clock. Sort your e-mail in the view you want to work with: by sender, by date, or by Subject line. Work one e-mail message at a time until the alarm goes off or 30 minutes has elapsed on your computer's clock.

A few guidelines before you start. When you open an e-mail message, do not leave it in the Inbox, make sure you take action and move through the Four Ds for Decision Making. Watch yourself when you want to avoid dealing with a message. Push through your reluctance and keep focused on making decisions and transferring mail out of the Inbox. We've never found an e-mail message that couldn't be deleted, done, delegated, or deferred. Somewhere, there's always an answer for every message, but you might need to dig for it. Don't get caught up in responding to an e-mail message if it takes more than two to three minutes. See if you can delegate it or, if not, defer it to one of your SNA categories. No jumping around now—one e-mail at a time, starting from the top. Away you go!

## Awarenesses

After 30 minutes is up, take the total number of e-mail messages you started with, deduct the current number, and subtract the number of new e-mail messages that came in over the last 30 minutes. This will give you the total number of e-mail messages you processed in 30 minutes. It's extremely useful to see how many you can handle in that short a time period, and observe what it's like to make effective decisions on each and every message you touch. Hey, we bet you are surprised by how many you processed and organized in 30 minutes.

So, what were your awareness's while doing this?

Here's what our clients have to say:

- "It's much easier than I thought to complete e-mails in less than two minutes."
- "I deleted at least half of them!"
- "I'm concerned about moving everything onto my To-Do Bar."

- “I like being able to track delegated items in my 1:1 categories.”
- “I got a lot done in a concentrated period of time!”
- “It worked to force myself to make decisions for each and every e-mail message.”
- “It was easy to transfer reference material into my new Reference System.”
- “I like writing clearer Subject lines.”
- “I used the Cc line a lot less!”
- “Deferring e-mail messages to my To-Do Bar was useful.”
- “I still have 2,000 e-mail messages to go, and at 60 an hour, that’s 16 hours!”
- “I was surprised how many e-mail messages I receive that don’t relate to my objectives!”
- “It takes discipline to make decisions about what to do with each and every e-mail message in my Inbox.”
- “Most of what was in my Inbox was reference material that I hadn’t filed.”

Now that you know how many e-mail messages you can process in 30 minutes, we want you to apply that to the number of e-mail messages you actually receive a day and calculate how much time you’ll need per day to process your e-mail. Make sure you answer this question accurately and avoid guessing on the basis of the number of e-mails that are currently in your Inbox. If you have 500 or more messages in your Inbox, it can feel like you’re receiving hundreds a day. However, you may actually be receiving only 50 a day, and so don’t go by the total volume. Find out how many you actually receive a day.

When you know what your daily volume is, you can calculate how much time you’ll need to schedule to process your e-mail each day. You might be pleasantly surprised at this number. If you receive 60 messages a day and you’re able to process 60 messages an hour, you’ll be able to complete your e-mail in one hour each day. The empty Inbox is in sight! All you need to do is book an hour of uninterrupted time each day and follow the Four Ds discipline. This habit will keep your e-mail under control and your Inbox empty. If you have a higher daily e-mail volume, you’ll learn, later in this chapter, how to reduce the number of incoming messages.

By now, we hope you're realizing that by changing your approach to how you process and organize your e-mail you can change your relationship with it. You can gain control of your e-mail and have it be a productivity tool that serves you. Education is a powerful tool, especially when clients are motivated to change.

## Frequently Asked Questions

Before you continue processing and organizing the rest of your Inbox, we'd like to address some of the most frequently asked questions we receive from clients. We believe that these answers can help you approach your e-mail more effectively and make it easier for you to empty your Inbox. We're going for the empty Inbox here. We want you to imagine being at zero e-mail at least once daily. Visualize a completely white screen. Your Inbox is so empty that it echoes!

### When's the Best Time to Process E-Mail?

Before we answer this question, we want to clarify the difference between processing your e-mail and monitoring your e-mail. Processing requires uninterrupted time, allowing you to make effective decisions and create meaningful e-mail communications. Monitoring e-mail is reactive, allowing you to scan your mail for emergency situations and communications from senior staff. You might also monitor your e-mail because you need a distraction. There's nothing wrong with that as long as you know what it is you're doing, and don't get addicted to it! When you've set aside time to process and organize your e-mail, you can still monitor it during the day. Just be clear that monitoring and processing are not the same activity.

We recommend that you create recurring appointments in the Calendar to process and organize your mail. Estimate how much time you'll need based on the figures you calculated earlier. We schedule an hour a day for e-mail processing because we receive 50 to 60 messages each day. Then, evaluate the best time of day to schedule uninterrupted e-mail processing time. Consider when your prime meeting times are so that your e-mail appointment won't compete with other activities. This takes some thought if you have a busy schedule.

Sally processes her e-mail from 8 to 9 a.m. because her meetings generally start at 9 or 9:30. "I have the energy at 9 a.m. to make 60 decisions, and I'm relaxed enough to pause and think about what I am doing."

We are what we  
repeatedly do.  
Excellence, then, is  
not an act, but a  
habit.  
—Aristotle

Look through your Calendar and find a good time to set up a reoccurring appointment for yourself. Make these appointments important so that you don't give them away for other meetings. Be ruthless because that's what you'll need to do to make e-mail work and inspire those around you to do the same.

If you work with a team of people in close physical proximity, ask them to avoid interrupting you during your e-mail processing time. Let them know that if they interrupt you, they'll get a gentle reminder to come back later. You have to be prepared to reinforce your request or people won't take you seriously.

If you're a customer service agent, dealing with electronic customer requests, an hour a day of e-mail time will not work for you. You'll need to be working on your e-mail for most of the day, excluding breaks. Specific roles require more customized e-mail solutions.

## **What's an Appropriate Amount of E-Mail to Receive?**

The volume of e-mail you receive depends on your role and function, but, in general, from 50 to 120 messages a day is a good range. Anything more becomes unmanageable because it takes too long to process each day.

Some of our clients receive up to 300 messages a day, and although they want to receive less, they spend most of their time justifying why they need to get 300 messages. This is understandable, given how much time they've invested in dealing with this kind of volume. We have to gently remind them, "If you always do what you've always done, you'll always get what you've always got." Therefore, you have to do something different for change to take place, and to do something different, you have to let go of something you're currently doing. Deep down, they know they'll need to let go of this to be open to the possibility of receiving less.

As you know, success in a company isn't based on the volume of e-mail you can handle each day. It's based, instead, on your ability to achieve your objectives within budget, timelines, and resources. You have other activities you have to do besides e-mail, and so you need to monitor how much time you spend processing messages. If you receive 40 to 60 e-mail messages a day, it will take you an hour to process your messages, which is very doable. Receiving 60 to 120 messages is still doable, but more time consuming, taking you up to two hours a day to complete. We suggest you err on the side

of less is more when it comes to e-mail. Anything you can do to reduce volume will be productive.

## How Do I Reduce the Volume of E-Mail I Receive?

Daily mail volume is not difficult to reduce when you're willing to make behavioral changes. Here are a few changes you might consider.

- Send less e-mail.
- Write clear e-mail messages so they don't come back with questions.
- Use the Cc line only when it impacts the recipients' objectives.
- Unsubscribe from newsletters and subscriptions.
- Meet with your team to discuss when to Cc.
- Clarify roles so that you're not getting mail that someone else really needs to get.
- Resist getting involved in e-mail threads that don't impact your objectives.
- Post information on an internal Web site so that employees pull the information from a site instead of the company pushing it through mail.
- Establish an e-mail protocol so that team members know when to use e-mail rather than instant messaging, landline phone calls, or cell phone calls.

There are hundreds of ways to reduce mail. You must first have a very clear intention to reduce it, and then you'll start to find solutions that'll help you. Without an openness to change, it won't happen. So, be open to the possibility. Reducing your e-mail volume can only increase your productivity.

## Can I Customize My Own Subject Lines?

Of course you can, and you can request others customize their Subject lines, too. Imagine that you're in the Finance Department of a company, for example, and you ordinarily receive three to five invoice requests each day. Because it's easier to process these requests in a single batch rather than one by one, you can ask internal customers to start the Subject line of an invoice request with the words "Invoice Request." With this system, you can quickly transfer these messages into an SNA Invoice Request category to be processed once a week at a specific time. The same applies to any repetitive

task, such as “Résumés to be reviewed,” “Calendar appointments to be booked,” or “Expenses to be approved.”

Another form of customization is using different e-mail addresses to capture repetitive tasks. For example, if you spend eight hours every Thursday handling accounting tasks, you can set up an alternative e-mail address named “accounting@cpandl.com.” Your internal clients would send all accounting requests to that address. On Thursday, you’d simply download the *accounting@cpandl.com* e-mail and handle the requests. In emergencies, clients could use your regular address, which you download daily. Any kind of customization that helps you use your time more effectively is useful.

## **Didn’t I Only Move E-Mail from the Inbox to the To-Do Bar?**

Yup, it sure seems like you did nothing more than move e-mail messages from one location to another! But be careful not to underestimate the value of what you’ve done. You didn’t just move e-mail; you processed and organized it using the Four Ds for Decision Making. The end result of this process is an extremely well prioritized To-Do List. You determined if the e-mail related to one of your Meaningful Objectives. You created a Strategic Next Action without a dependency. You confirmed that you couldn’t do the task in less than two minutes and that you couldn’t delegate it, and so you decided you had to defer it. You transferred it into a specific SNA category with a clear Subject line and included a due date and supporting documentation (if it is needed). We wouldn’t say you only moved it from the Inbox to the To-Do Bar. Far from it!

Acknowledge what you did. You created a centralized, easily accessible To-Do List that is prioritized and directly maps to your objectives. You still have one step to go, of course, which is to schedule these Tasks onto the Calendar, as you’ll see in Chapter 12.

## **How Will I Remember to View the To-Do List?**

Most of our clients have depended on their Inbox and their memories to track their action steps. Therefore, using the To-Do List to centralize their actions feels uncomfortable. Some clients have never used the To-Do List, and so they’re especially anxious about remembering to look at it. Their concern is valid, much like when you put your car keys in a new location at home. Will you remember where you put them? If you put your car keys in the same place each time, it won’t take long to remember where they are. In

fact, in two or three days, you become dependent on the new location, and you'll say, "Don't move my keys!"

In the Prioritizing and Planning Phase, you'll be setting up a recurring Improving Productivity appointment on your Calendar. You'll use this appointment to prioritize and plan your tasks from the To-Do Bar onto your Calendar. You'll have plenty of time each week to work with your To-Do List, and it won't be long before it becomes a habit, and your To-Do list becomes your best friend.

## **When Do I Put E-Mail Messages onto the Calendar versus onto the To-Do List?**

So far, we've asked you to transfer all of your deferred Strategic Next Actions onto the To-Do List because until you've captured all of your agreements from all of your Collection Points, you're prioritizing in a vacuum! After your To-Do List is complete, you can decide whether to transfer a Task onto the Calendar or onto the To-Do List. The Calendar is the last place a Task goes. When it's scheduled on a date in the Calendar, you're making an agreement to do it on that day. Use the Calendar with great respect. It's not a place to put a Task that you think you only might get done. It's a place to schedule a Task because you've promised to do it on a particular day. More on this topic in Chapter 12.

If you receive an e-mail message that turns out to be a Strategic Next Action that can be deferred but that must be completed on a particular day, simply transfer it from the Inbox directly onto your Calendar for that day. To transfer an e-mail message onto the Calendar, follow the steps given in the section titled "Inserting an E-Mail Message into an Existing Calendar Appointment" earlier in this chapter.

The Tasks on your To-Do List do not have to be done immediately. You're waiting to transfer them onto the Calendar as they come due. More on this concept in Chapter 12.

## **Can I Use the E-Mail Notification Options?**

Clients ask us if it's OK to use the Outlook feature that alerts them to the arrival of a new e-mail message. We highly recommend that you don't use these features except in an exceptional circumstance, or if your role requires it. Being notified when an e-mail message comes in is an interruption and a distraction. You need to stop what you're doing, scan the message, and decide if you'll take action on it right away. Taking action distracts you from

what you're doing. If you don't take action, you're still reminded that the e-mail needs attention, and you'll track it in your head as well as tracking it in your Inbox. All of our clients want to reduce this level of interruption and distraction, so why create more? We recommend you turn off all e-mail reminders.

If you process and organize your e-mail once a day and successfully reduce your messages to zero, there's no purpose in reviewing each e-mail as it arrives other than to distract you. You've spent a full day in meetings without access to your computer, and so you can certainly go eight hours without looking at mail! If you have no valid reason for the chime, eliminate it and create more uninterrupted time for yourself. You'll scan e-mail anyway, and so you don't need each and every e-mail that arrives to remind you! This is your chance to drive technology instead of having it drive you.

## When Can I Use Flagging Effectively?

By using flagging, you can quickly link an e-mail message to the To-Do Bar without creating a Task. If you have a Strategic Next Action where there is no Supporting Information, flagging is an excellent choice. If you have to respond to an e-mail communication that will take more than two minutes, you could defer it by flagging the message, categorizing it into your SNA E-Mail category and changing the subject line to capture the appropriate action. In this way, all of the flagged items become e-mail messages to respond to and won't require supporting information.

If you are in a role where you work primarily from e-mail and do not need to enter any independent Tasks on to the To-Do Bar or do not need Supporting Information to complete your Strategic Next Actions, flagging is excellent. Also, if you do decide to work primarily with flagging, your Inbox can be sorted by Planning and Action Categories. This creates a Categories: (none) section that holds all of your unprocessed e-mail, making this your main e-mail Collection Point. Even though your entire Inbox will not be empty because it will have your Planning and Action Categories in it, your Categories: (none) can then become your Inbox and you can empty this, which means you can still work on the concept of an empty Inbox.

If you're a power user of Outlook, we still suggest dragging as your primary method. However, you can include flagging as a supplemental feature supporting work style preferences and personal customization of your IMS.

## Can I Organize My E-Mail in the Inbox and Not Use the To-Do Bar?

Certain roles and work situations may cause you to use only the Inbox as your “Total Life To-Do List” instead of the To-Do Bar. These roles are usually customer service related and require you to be in your Inbox all day. Your work is answering e-mail, and therefore you have little use for the To-Do List.

Instead of entering Meaningful Objectives and Supporting Projects as Tasks on the To-Do Bar, you would enter them as Subject lines in e-mail messages and categorize them in your Inbox under your Planning and Action Categories as you do in the To-Do Bar. The only difference is that all entries have to come by e-mail and you cannot create Tasks in which you can insert documents and other e-mail messages and write notes. If you do not need to do that, flagging and organizing in the Inbox will work well for you. The theory is exactly the same, it is just a lot more simplified, and in certain roles this can work exceedingly well.

## Emptying the Inbox and Getting to Zero

If you still have e-mail in your Inbox, let’s see what you can do to get it to zero. (If your Inbox is empty, skip ahead to the section titled “What Changes Will You Make?” later in this chapter.)

We encourage you to take the time right now to get your e-mail message count to zero. You can do it! We’ve worked with people who have as many as 7,000 messages in their Inbox and they got to zero, and so we know you can.

Here are three steps you can follow to help you eliminate e-mail.

1. Identify the “shelf life” of your e-mail. It can be anywhere from one week to two months or more, depending on your role. (Legal and financial roles have strict rules with regard to how long to keep e-mail.) After a certain point, e-mail is no longer meaningful, and so there’s no point in keeping it unless it’s helpful to have as reference information. Sort your Inbox by the oldest e-mail first, and then eliminate all of the out-of-date e-mail. This can dramatically reduce your volume.

Erasing lots of e-mail can be scary, but ask yourself, “What am I willing to let go of to get what I want?” Remember Linda from Chapter 1? She elim-

We’re drowning in information and starving for knowledge.

—Rutherford Rogers

inated 1,991 messages in one press of the Delete key! If this makes you very nervous, create a new Archive Folder. Use the date range of filed e-mail as your folder title. Drag the old e-mail into the folder. You can always go back to it later. Meanwhile, it's not cluttering up your Inbox.

2. When you've eliminated the outdated shelf life e-mail, go through what's left and delete Calendar notices, Inbox full notices, E-mail messages from anyone who's left the company or moved to a different department, and project-related messages for projects that are now complete. Do whatever you can do to eliminate unwanted e-mail quickly.
3. Identify how much e-mail you have left and calculate how long it will take you to empty your Inbox. If you have 400 messages and you can process 60 an hour, it will take you 6.6 hours to get to zero. However, you need to ask yourself whether that time is worth it. What could you do in six hours that would add more value than processing e-mail does? After you've answered these questions, you can choose to work through your messages or delete and archive even more e-mail, leaving only the last week's worth of messages to process.

If you have hundreds or thousands of messages in your Inbox, processing the 60 new messages for the day won't help you get to zero. You need to eliminate the buildup to really get on top of your e-mail. When you get to zero, you'll be motivated to stay there because there's nothing like a blank e-mail screen to ease your mind and put a smile on your face! Go for it!

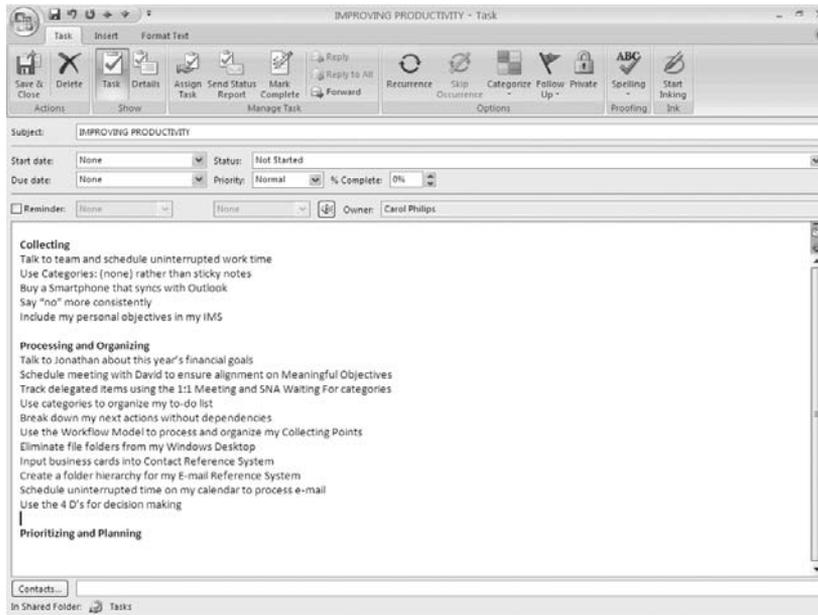
## What Changes Will You Make?

Take a moment to reflect on what changes you'll make as a result of reading the topics in this chapter:

- Using the E-Mail PASS Model to write more meaningful e-mail communications
- Properly using the To, Cc, Bcc, and Subject lines
- Using the Four Ds for Decision Making
- Reducing volume
- Scheduling e-mail processing time

In the To-Do List in Outlook, open the IMPROVING PRODUCTIVITY task that you created in Chapter 4, and under the heading "Processing and Organizing" enter the specific actions that you want to do to support the comple-

tion of the Processing and Organizing Phase. For example, Carol's choices are listed in Figure 11-17.



**Figure 11-17** Keeping track of the changes you'll make.

After you've recorded these changes, close the Task back into Categories: (none). You'll refer to it again at the end of the Prioritizing and Planning Phase.

For inspiration, here are few examples of what our clients have written:

- "Use the Delete key!"
- "Handle e-mail in less than two minutes."
- "Schedule uninterrupted time to process e-mail."
- "Be way more careful about how I use the Cc line."
- "Meet with my team to clarify e-mail standards and reinforce them."
- "Save attachments into My Documents instead of my Personal Folders E-mail Reference System."
- "If I can do it in less than two minutes, do it."
- "Scan long messages in less than two minutes to establish if I really need to read them."

Start with doing what's necessary; then do what's possible, and suddenly, you are doing the impossible.  
—Saint Francis of Assisi

- “Never close an e-mail message back into the Inbox. Make a decision and do something with it.”
- “Talk to my team about how we Cc so that I can reduce my e-mail volume.”
- “Use dragging to defer tasks into the SNA categories.”
- “Don’t save e-mail messages that don’t relate to my Meaningful Objectives.”

## Success Factors for Processing and Organizing E-Mail

Here are success factors that you should keep in mind when you process and organize e-mail.

- Use the E-Mail PASS Model to help you create meaningful e-mail messages so that recipients understand your communication and its purpose. By writing clear e-mail messages, you can effectively move toward your objectives and reduce e-mail volume.
- Use the To, Cc, and Bcc lines effectively to reduce e-mail and increase the effectiveness of your communications.
- Use the Subject line to help recipients anticipate the purpose of your e-mail even before they read your message.
- When you open an e-mail, make a decision using the Four Ds for Decision Making: delete it, do it in less than two minutes, delegate it, or defer it to a SNA category. Never close an e-mail message back into the Inbox!
- Schedule uninterrupted time to process and organize your e-mail each day so that you can empty the Inbox. If you can process 60 messages in an hour and you receive 50, it’ll take you less than an hour to process your e-mail for the day.
- Ask your direct reports and co-workers to respect your scheduled e-mail processing appointments.

Each person can choose to become part of the e-mail solution. The results are so huge that it’s impossible to ignore them and hard not to be motivated by them. Our statistics prove that departments can reduce the total number of e-mail messages in employees’ Inboxes by as much as 81 percent, reduce daily e-mail volume by as much as 26 percent, and increase work/life bal-

ance by as much as 25 percent. Education works, and so take the time to change your approach and work with your team to help them do the same. Everyone will benefit and you'll inspire change throughout your company.

To reinforce the behavioral changes you learned in this chapter, we developed an add-in software product, Take Back Your Life! 4Outlook Plug-In. This product makes it much easier to file and find information, use the PASS model, move e-mails into the Task list, reduce key strokes, and offers coaching support. You can download this from the Products page on our Web site at [www.mcgheeproductivity.com](http://www.mcgheeproductivity.com), or go to the MPS Products page at the back of this book. This product currently runs on Microsoft Office 2000, 2002, and 2003. We're just completing the 2007 Microsoft Office version. Stay tuned.

On to the final chapter, "The Prioritizing and Planning Phase."

