



Email Management

Five Quick Tips



Webinar Companion Handout

Why Care about Email Management?

A recent study showed that, on average, office workers receive over 300 emails in a week¹. Some workers receive that many emails or even more in a single day. Many suffer from email overload.

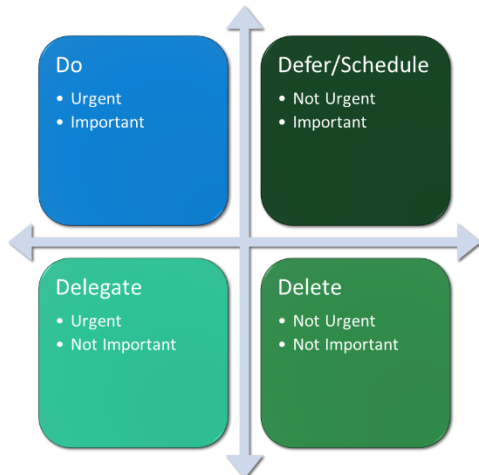
To deal with the influx of messages, the same study showed that 80% of workers always keep their email open. Others resort to checking it at a rate of 36 times an hour!

And it's not just reading emails, writing emails can be a large part of office work. One article reports that "the average employee spends 10 hours and 47 minutes a week drafting emails."²



We can maximize our ability to manage our email by leveraging a combination of technology and behavior change.

Although we will focus primarily on technological solutions, we can use common time management strategies when managing email.



Eisenhower Matrix

Strategies to consider include the **Eisenhower Matrix** (see picture), **Pomodoro Technique**, and the **1-3-5** rule.

Pomodoro Technique:

- Set your timer for 25 minutes and focus on a single task.
- Enjoy a five-minute break and repeat timer session.
- After four sessions, take a longer break.

1-3-5 Rule:

To maximize your productivity, each day focus on:

- **1** large task, **3** medium tasks, and **5** small tasks

Technology provides us with tools to implement these strategies.



Tip #1: Use Search Folders

If you find yourself frequently performing the same searches in Outlook, you can create permanent searches by using Search Folders.

Here's how:

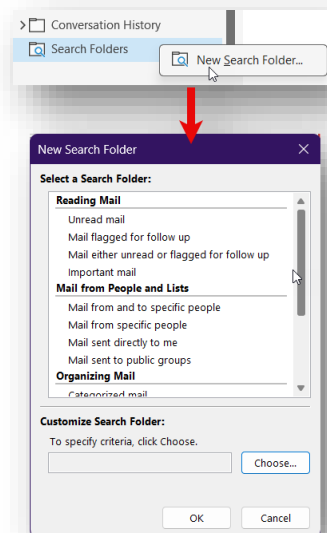
To create a **New Search Folder...**

1. Right click on **Search Folders**
2. In the **New Search Folder** dialog box that appears, select the type of **Search Folder** you would like to create.

There are 13 preconfigured search options in the following categories:

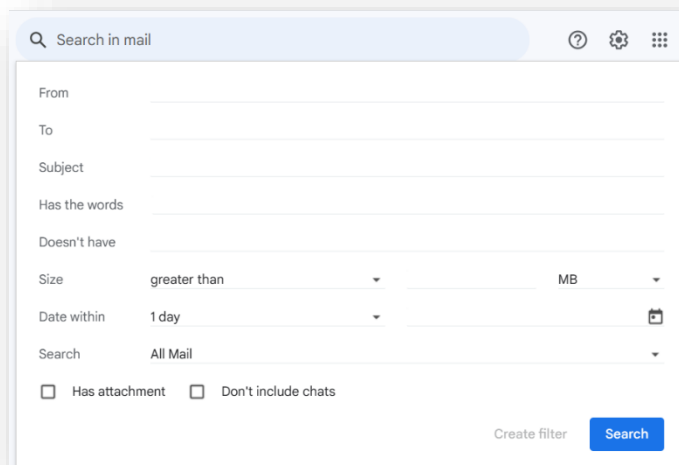
- **Reading Mail,**
- **Mail from People and Lists, and**
- **Organizing Mail**

3. Click **OK**.



Combine the functionality of **Categories** with **Search Folders** to easily find emails that you've already filed no matter where they are stored.

Depending on your account type, you may be able to use **Search Folders** with **Classic Outlook**, **Outlook on the Web**, and **New Outlook**. You can achieve similar results by using filters and labels in Gmail.



You can add multiple categories (or labels when you are in Gmail) to messages. Extend this tip by using **Rules** (or filters in Gmail) to automatically categorize messages as they come into your inbox.

Here are some links to get you started:

- [Create labels to organize Gmail - Computer - Gmail Help \(google.com\)](#)
- [Using Gmail labels, colors & filters to sort important emails \(wisestamp.com\)](#)
- [Manage email messages by using rules](#)



Tip #2: Use Quick Steps

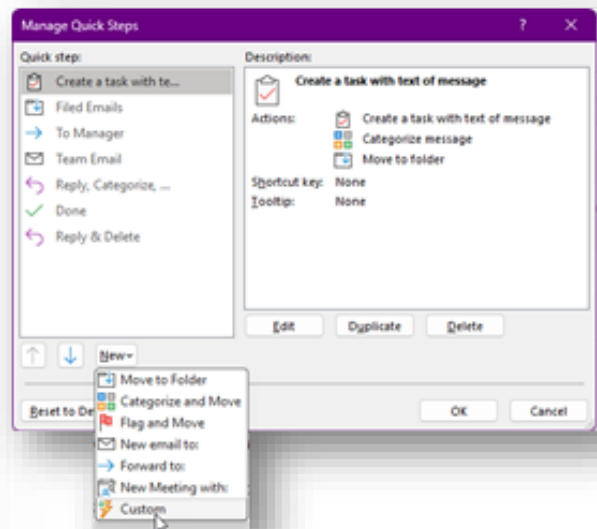
Quick Steps allow you to automate common tasks. By default, you can quickly move, forward, reply, and delete messages as well as clear flags.

To create a **Quick Step**:

1. On the **Home** tab, select **New Quick Steps** from the **Quick Steps** group.
2. Select an action from the list of options.
3. In the **Edit Quick Step** dialog box, configure the action.
4. Click **Finish**.

You can create custom **Quick Steps** by using **New** dropdown and selecting **Custom**.

A total of 24 options falls under the headings **Filing**, **Change Status**, **Categories**, **Respond**, **Appointment**, and **Conversations**.



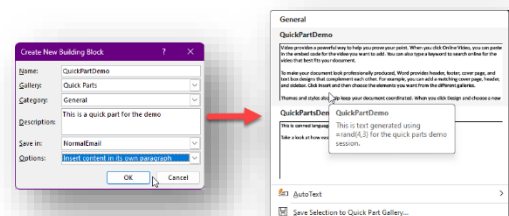
Tip #3: Use Quick Parts

Outlook and Word allow you to save and reuse frequently used language using **Quick Parts**.

Once you save text as a **Quick Part**, just add it to your message when you need it. Some already do this by using signatures. However, one advantage of using **Quick Parts** is that you can organize your text snippets and create keywords to automatically populate them to your messages.

To create a new **Quick Part**:

1. Select existing text in your document or email.
2. In the **Text** group on the **Insert** tab, select **Quick Parts**.
3. Click **Save Selection to Quick Part Gallery...**
4. Complete the fields in the **Create New Building Block** dialog box.
5. Click **OK**.



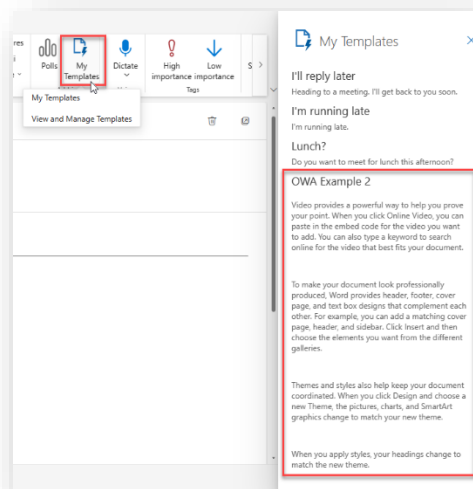
To insert an existing **Quick Part**:

1. Select an area in the body of your email.
2. Go the **Insert** tab, go to the **Text** group and select **Quick Parts**.
You will see a **Gallery** containing previews of all the text that you've saved.
3. Select an existing **Quick Part**.

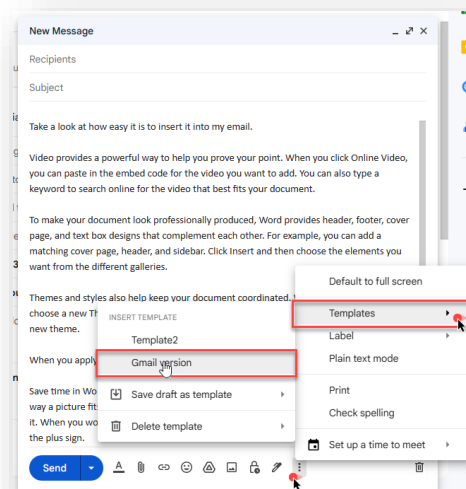
You can mix and match saved text snippets to meet your needs. Although you can add text to **Quick Steps**, you can combine them with **Quick Parts** when you need to preserve formatting.

In Outlook on the Web and Gmail, you can access similar functionality by using **Templates**.

Outlook on the Web/New Outlook



Gmail



These links provide tutorials on how to create templates:

- [How to create an email template in new Outlook and web app](#)
- [How to create and use Gmail templates to streamline your workflow](#)



Tip #4: BLUF Your Subject

By creating clear, meaningful subject lines, you help your recipients help you. For your business emails, it is important to always include a subject line.

By adding a keyword to your subject such as **ACTION**, **FYI**, or **QUESTION**, you assist your readers and help them know how to prioritize your messages.

Here are some other keywords that you may want to use:

FYNA (For Your Necessary Action)
FEEDBACK REQUESTED

FYI
INFO

INFORMATIONAL
ASSISTANCE REQUEST

For emails that require an action, you can extend this tip by including the timeframe.

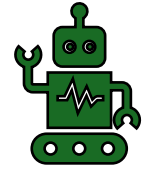
From	To	Subject	Received	Size	Due Date
Microsoft Outlook ... RWG Demo Acc...		Welcome to your new Outlook.com account and ...	Thu 1/4/2024 3:03 AM	63 KB	None
Microsoft Outlook ... RWG Demo Acc...		Welcome to your new Outlook.com account and ...	Thu 1/4/2024 3:03 AM	61 KB	None
Microsoft Outlook ... RWG Demo Acc...		Daily Standup and 2 other events today	Wed 1/3/2024 3:01 AM	60 KB	None
Microsoft Outlook ... RWG Demo Acc...		Daily Standup and 2 other events today	Wed 1/3/2024 3:01 AM	61 KB	None
Microsoft Outlook ... RWG Demo Acc...		Welcome to your new Outlook.com account and ...	Tue 1/2/2024 3:01 AM	68 KB	None
Microsoft Outlook ... RWG Demo Acc...		Welcome to your new Outlook.com account and 4 other events today	IM	68 KB	Thu 1/1/...
Microsoft Outlook ... RWG Demo Acc...		ACTION Due by 01/18/24: Confirm Your Account...	Mon 1/1/2024 3:00 AM	79 KB	None
Microsoft Outlook ... RWG Demo Acc...		New Year's Day and 5 other events today	Mon 1/1/2024 3:00 AM	76 KB	None
Outlook Team	RWG Demo Acc...	Vague email that needs action	Fri 12/1/2023 9:47 PM	729 KB	None
Outlook Team	RWG Demo Acc...	Welcome to your new Outlook.com account	Fri 12/1/2023 9:47 PM	719 KB	None

You may see better results if you include your keyword at the *front* of your subject line because your recipient may view your email on a mobile device or may not see your entire subject for another reason. Of course, you want to stay within your company guidelines.

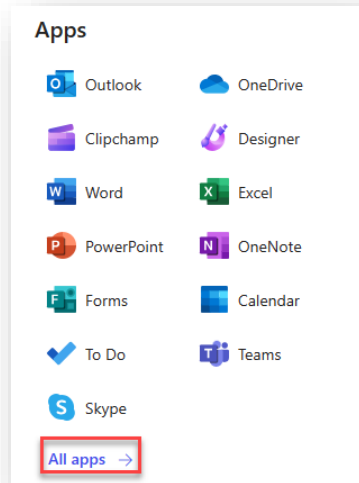
By using keywords as prefixes, you put the **Bottom Line Up Front** or **BLUF** your subject lines.

Once you have identified the keywords that appear most often in your emails, you can use this information to build rules, search folders, and automation to quickly find, file, and categorize messages.

Tip #5: Automate!




Even if you have already automated many of your email actions using a combination of Outlook features such as **Rules**, **Quick Steps**, and **Quick Parts**, you can take your automation to another level by using a tool like **Power Automate**.



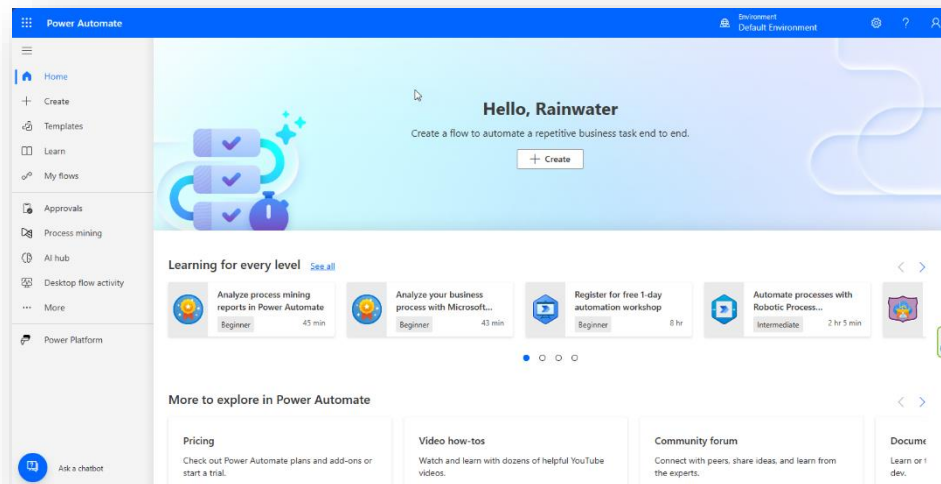
If you've ever used **If This, Then That (IFTTT)**, **Power Automate** is similar tool from Microsoft to create automation using many business applications.

Power Automate flows are ways to create highly customized rules to help you automate many tasks, not just emails.

If you are using **Outlook on the Web**, you can easily get to Power Automate by clicking the  **Waffle** menu and selecting **Power Automate**. You may have to select **All apps->** to see the **Power Automate** menu item.

If you use **Classic Outlook**, you can type <https://make.powerautomate.com> into your browser to get to the **Power Automate** home page.

On the **Power Automate** home page, Microsoft offers tutorials to help you get started. The home page also includes links to the latest updates.



You can search through existing templates and customize one that best meets your needs. You can build **Power Automate** flows to automate many email tasks, including those tied to Google Workspace accounts (if permitted by your organization.)

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- **Flipboard:** <https://flipboard.com/@RainwaterGrowth>
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Additional References

¹ Miller, Lucas. "Employees Check Their Emails 36 Times an Hour — Here Are 5 Proven Tips to Get That Time Back." Entrepreneur, 1 Dec. 2023, www.entrepreneur.com/growing-a-business/employees-check-their-emails-36-times-an-hour-here-are/465172.

² DigitalHubUSA. "Average Employee Spends Nearly 11 Hours a Week Drafting Emails." Digitalhub US, 13 Oct. 2023, www.swnsdigital.com/us/2023/10/average-employee-spends-nearly-11-hours-a-week-drafting-emails/.