

Email Management Made Easy

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I have a walking buddy. My friend and I share over 40 years of history together, so I know her quite well. Both of us are in the corporate world, and encounter the same sort of work situations. We use the time during our walks to share how each other is doing work-wise, commiserating over specific struggles, and (let's get honest here) vent.

One of the things she was struggling with was her email. She was getting over 200 emails a day and just could not keep up with it. In addition, she's finding it harder and harder to locate information stored in an email, due to the growing out-of-control size of her Inbox.

My ears perked up, as records are kind of 'my thing'. I asked her why she didn't clear out her inbox or organize the files? She said she was too busy doing her day job. And anyway, it wasn't HER responsibility to do that cleanup – wasn't that the IT department's job? I feel for her. I know several in her position. I decided the best way to explain email management to her, was to give her an analogy:

ME: "Let's say you have a son who is in high school. This boy is an overachiever. He's on the football team, is taking several AP classes, and has a part-time job after school because he's saving up to buy a car."

HER: "That's not hard to imagine – you know my son."

ME: "I do. I also know how busy he is. He's at school an hour early, goes from classes to work, and then comes home to several hours of homework. So let me ask you a question...who cleans his room?"

HER: "He does, of course! It's his room, it's his responsibility!"

ME: "Exactly. I know you are busy. You are also an overachiever. He gets that from you, you know. You work upwards of 60-70 hours a week. You are always willing to help your fellow co-workers out in other time zones, and you are known to have several different projects going on simultaneously. But just like your son and his room, your records are your responsibility."

I think she got it, because she was quiet for a bit. And then she asked me, "So how do you DO this? My inbox is HUGE, and I just don't have the time!" I'll share with you what I told her, because I'm pretty sure you know someone in this same boat. Maybe even YOU!

1. Set aside 15-30 minutes a day for email management. I would suggest first thing in the morning. You'll need to reserve that on your calendar and be consistent. Don't take calls or take meetings at that time. It's sacred. In my friend's case, she was logging in to work an hour ahead of her scheduled work day, so it was easy for her to devote that first half hour to email management. Your scheduled time may vary. Do what works best for you. The important thing is to stay consistent.
2. Immediately delete all unopened email over 6 months old. This may not work for you but, if you think about it – if you haven't read the email, chances are the person who sent you the email in the first place already received the information he or she needed. And if they haven't, what you have isn't that important. If it WAS, you would have read it already.

3. Create a few folders within your Read Folders area: Records, Short Term, Personal

Within the Records folder, I recommend you place subfolders based on your company's classifications. Under those folders, is where you should place email. You can then create subfolders for your email by topic, but, put your read email under that *Records Classification* folder. That way, it'll be a breeze when it is time to dispose of those records (based upon your company's Records Retention Schedule, of course).

Within the Short term folder, you can organize any way you want. These emails are NOT company records; but you need to keep them for a short time. I suggest not hanging on to them longer than 2-3 years. If you find you don't need them that long, you can delete whenever you like.

Within the Personal folder, place any birthday greetings, your spouse's date night suggestions, confirmation of a purchase, etc. I wouldn't keep that information for a long period of time.

4. Sort the remaining email by attachments. Typically, the items you really want to look at have attachments. I'd review those first to determine if they are records. If they are, they will be moved to the *Records* folder, within the appropriate classification. By the way, ask yourself if you need to keep ALL attachments, or if you only need to keep the LAST revised attachment. In addition, if the email with the attachment is only a *copy* of a record, and not the official record, you should file the email in the Short Terms folder, and delete it as soon as you don't need it any longer.
5. Determine who the sender is on the remaining email, and review by priority. Are they your specific customer contacts? Your boss? Those probably should receive first priority when reviewing. Are they from a vendor? Your coworker who wants you to have lunch? Probably not as important. I would review them by priority: current customer first, followed by boss, then coworker...and on down the line.
6. What stays in your inbox is your 'to do' list. Instead of feeling overwhelmed at the end of the day, you'll feel a sense of accomplishment after you've moved your email out of the inbox and into the appropriate folder.

This process may not suit you. Take what you find useful, and ignore the rest. But I can assure you, email management IS doable, if you take responsibility over your organization and cleanup activities.

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