CITY OF **MADISON**

Email "Hacks" Learning Resource

These tips and tricks have helped a couple of folks in the HR department effectively manage multiple inboxes and still have time to complete their other job duties! We hope this learning resource offers you some new ways to effectively maintain and organize your own inbox. Feel free to mix and match any combination of these suggestions.

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Set Your Cadence

Limit how often and how long you check your inbox to set times throughout the day. You can create a recurring calendar event at the same time(s) each day to encourage you to stick to these designated time slots.

➢ **The Three-Times-A-Day Method**:
- Check your inbox three times a day, starting at the beginning of your workday (after you have organized your day), a second time around mid-day (after lunch), and a third time with about 1-1.5 hours left in your work day.
  - Avoid checking your email right before logging off, this can persuade you to stay past the end of the workday because you might feel the need to respond. *Trust us, 90% of the time, those last minute emails aren't really urgent, and can be dealt with the next day! Don't have those things cloud up your headspace right before logging off or push back the time you were planning on logging off for the day.*
➢ **Limit Your Time:**
- **Set a time limit for how long you can spend in your inbox!** When your time is up, remind yourself where you left off and return to that place in your next email-checking timeslot.

We understand that some positions require more constant inbox checking than the three-times-a-day method. That's okay, in this case, we highly encourage you to utilize some combination of the systems shared in the rest of this learning resource.

ADDITIONAL RESOURCE: Learn about how checking your email just three times per day can decrease your stress levels significantly. Here's another article if the first one didn't convince you.

The Flagging System

Use the flags that are built into the Outlook email system.

➢ Flags include:
- **Today** – Immediate, but not ASAP emails.
- **Tomorrow** – May need to refer to xyz before replying.
- **This Week** – Need to process, but aren't top-priority.
- **Next Week** – Waiting on a reply or answer from someone, and you don't want it to fall off your radar.
- **No Date** – Great for items you want to refer back to down the road.
- *Once completed, you can click on the flag on an email to change to a green checkmark indicating that you've processed/responded/dealt with this email.*
➢ You can also add follow-up reminders:
- Right click on the email you want to set a reminder for, hover over "Follow-Up", select "Add Reminder", enter in your desired reminder details, select "OK".
➢ Did you know you can filter by tags in your inbox?
- On the top toolbar, navigate to "View", select "To-Do Bar", "Tasks". This will bring up a side pane with flagged emails, auto-filtered by the types *(Today, No Date, Tomorrow, etc).* You can use this as a way to work through the items previously flagged – like a built in email to-do list organized by priority that you can check each morning.
➢ Generally, once you've read or taken care of an email, make sure to flag accordingly or mark it as "complete". This way you can easily decipher what information you've already taken in, and what still needs to be taken care of.
➢ If you receive an email and read it, but you don't have capacity to process it then, **mark it as unread** so you can go back and process it when you have the time and headspace to do so.

ADDITIONAL RESOURCE: Learn more about using flags in Outlook.

The Folder System

Create folders and subfolders for the projects/programs/units you work with most often. Sort emails into each folder once you've read/responded/dealt with that email. You can also use Outlook Rules in conjunction with this Folder System – see details in the Outlook Rules section.

➢ Some *examples* of folders include:

- **Needs Attention** or **To-Do** – if you're striving for Inbox Zero, you can use a folder to put any emails that need action into. Just be sure to check this on a regular cadence. ***Please note**, Inbox Zero may work for some, but not for others. This can depend on your role, philosophy, approach, or working style, to name a few.*
- **All City** – emails that have been sent to all staff to refer to later.
- **Projects** – with subfolders named after each active project you're working on.
- **Programs** – with subfolders named after each active program you're working on.
- **Old Projects/Programs** – move the above subfolders of each project/program to this folder once completed.
- **Reference Emails** – with URL's, links, tips, handy information you may want to refer to (your future self will thank you for this!!)
- **MUNIS/Purchasing** – if you're in charge of purchasing or work with MUNIS for your department, it's helpful to have a separate folder for anything related to this. That way you don't have to scroll through endless emails to see whether something's been approved, or to find invoices/receipts, it's all in one handy place.
- **Courses** – this one's an extremely specific example, but a great idea that you could use for your inbox! One role in the Organizational Development unit coordinates courses, so an example could be having a folder labeled **Courses** with the following subfolders:
    - **Courses in Planning** – *any emails regarding potential future courses, or courses that need to be built (things that will require action) – this is checked weekly so the necessary follow-ups can go out to get our courses up and running.*
    - **Courses Built and Done** – *any emails regarding courses that are built or have already occurred. Emails are moved here from "Courses in Planning" once they're no longer needed on an active radar.*
    - **Course Analytics** – *We receive monthly emails from IT regarding analytics of our courses, these are all moved to this folder so we can refer to them when needed.*
    - **Eventbrite** – *any emails regarding our registration software, Eventbrite. We get emails from every single employee registration for courses (literally hundreds), along with whenever an event is created or updated. We set up an outlook rule to filter any email from Eventbrite here.*
    - **Marketing** – *you likely receive weekly emails from OD about upcoming courses, or emails highlighting specific courses from time to time – we file these and any other emails regarding creating the course marketing in this folder.*
    - **SurveyMonkey** – *similar to the Eventbrite folder, we receive emails whenever a survey is completed, created, or updated, so we set up an outlook rule to filter any email from SurveyMonkey here.*

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ADDITIONAL RESOURCE: Learn more about how to organize email by using folders.
ADDITIONAL RESOURCE: To Inbox Zero or Not to Inbox Zero?

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Outlook Rules

Outlook Rules offers a handful of ways to automate the organization of your inbox. In this resource, we've included how to stay organized – AKA rules that auto-sort to specified folders.

Note: *We recommend that you use this for emails you constantly receive, but never need to respond to or process, and want to keep for future reference. An example are bulk or scheduled emails from websites or software that you/your team uses. For us, these are those Eventbrite/SurveyMonkey emails mentioned in **The Folder System** section above – we want to be able to refer to them if needed, but we don't want them crowding up our main inboxes. // Any senders you delete all the time? You can also filter those emails to your deleted items.*

➤ On the top toolbar, navigate to "Home", look for the "Move" section, select "Rules", select "Manage Rules & Alerts". From here, you can create a new rule, or manage already created rules.
- To create a rule, select "New Rule"
- A window called "Rules Wizard" will pop up – this is where you enter the details for your desired rule.
- Below are the steps for a couple common rules you may want to use:
- **Move Messages from Someone to a Folder**
    - Select "Next", select the Conditions you want to include, for this instance, select "from people or public group". Click on the underlined words in the Step 2 box to enter in details.

- o People or public group – enter in the email address(es) you'd like to filter out. Select "OK".
- o Specified Folder – scroll to find the desired folder – use the small arrow next to "Inbox" to expand to see all of your existing folders.
  - ▪ If you don't see one that fits, select "New" to create a new folder to send the emails you receive from the specified sender to. Select "OK".
- o Select "Next", here's where you can add any exceptions to the rule. If you have none, select "Next".
- o Name your Rule.
  - ▪ Determine whether you want to run this rule on messages already in inbox *(good if you know you have a lot of messages from this sender in your inbox that you want to sort in one go)*
  - ▪ Select whether you want the rule turned on.
  - ▪ Once the settings are where you want them, select "Finish".
  - ▪ Select "OK" in the "Rules and Alerts" window to close.
- ▪ **Move Messages with Specific Words in the Subject to a Folder**
  - o Follow the same steps as above, but select the "Move Messages with Specific Words in the Subject to a Folder"
  - o You'll notice in the Conditions page, there will be different underlined prompts…
    - ▪ Specific Words – this is where you'll enter in specific words in the subject that you want to filter out. I.E. If you want to filter any hiring notices to a specific folder, you can include words typically associated with hiring. Select "Add" After each word or set of words you want Outlook to filter out.
    - ▪ Specified Folder – same steps as moving messages from someone to a folder from here.
- ➢ **NOTE:** If you want to create rules for shared inboxes, you need to log into Outlook Online to add rules.
  - • Open a web browser and enter the following URL: http://email.cityofmadison.com/
    - o Log in with your City credentials that you use to log into your desktop
    - o To open a shared inbox, select your name in the upper right-hand corner
    - o Select "Open another mailbox…"
    - o Type in the email address of the mailbox you want to open – *you can only open mailboxes that IT has given you permissions to in your desktop Outlook.* Select "Open"
    - o Select the Gear icon next to the inbox name in the upper right-hand corner
    - o Select "Options", then "Organize Email", follow the same steps as above to create a new rule.

ADDITIONAL RESOURCE: If you want to explore or utilize any of the other Outlook Rules, here's a great resource to refer to for additional details.

The Categorizing System
Use the categories tool to sort out what emails go with what project/program/unit you typically work with.

- ➢ On the top toolbar, navigate to "Home", look for the "Tags" section, select "Categorize", select "All Categories", use the "New" button to create categories and apply your desired color to each category. *If you have categories set in your Outlook Calendar, they'll show up here as well.*
  - • You can name each category similarly to the naming examples in **The Folder System** section of this resource.
  - • Once you create the categories you want, to apply them to an email, you can right click on the desired email, hover over "Categorize", and select the desired category. A small colored square will display next on the email in your inbox.

ADDITIONAL RESOURCE: Learn more about using categories in Outlook.

Use Your Calendar
If an email comes in that you know will require a chunk of time to respond to or deal with – and that time is not now – add an appointment to your calendar to ensure you deal with it within the upcoming few days. This way you can be sure it won't fall off of your radar and you respond in the best possible way!

Use Templates

If you find yourself responding to the same questions or similar messages over and over again, consider creating Outlook Templates.

Pro-tip, if you know others on your team also have this same problem with the same questions, create a shared folder, document, or OneNote that you all can access with these templates and/or template language saved for easy copying/pasting and quick editing for each scenario.

➢ Compose a message in Outlook and save as a template to reuse when you want it.
- Select "New Email"
- Enter the subject and body content you want in your new message
  - Highlight the parts of the text that you'll need to change each time – i.e. the person you're addressing, dates or times, etc.
- When that^ is ready, select "File", "Save As", then navigate to the desired folder location
- Designate a File Name
- Click the drop-down next to "Save as type", select "Outlook Template (*.oft)"
- Click Save

ADDITIONAL RESOURCE: Learn more about creating email message templates.

Other Pro-Tips

➢ If you receive a message that has a simple response or answer, **respond right away.** This way you can quickly respond and move it to its respective folder and move onto your other tasks. *Huge stress reliever!*
➢ If you're able to, **unsubscribe from emails you rarely read.** I.e. newsletters, campaigns, etc. If you find yourself constantly deleting these emails, consider unsubscribing from them.
➢ **Do a Quarterly Audit!** – Remember, this is a continuous improvement effort and will likely change with time!!
- Review flags, folders, categories, which ever items you use and remove flags, re-file, re-categorize, or delete messages as you see fit.
- If you notice senders you frequently file in xyz folder, or messages you process the same way each time without much action on your end, create a new **Outlook Rule** for that.
- This way you can have a quarterly refresh of the items that may be bogging down your inbox!

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Still feeling stressed about the state of your inbox?

We get it.
Reach out to us at OrganizationalDevelopment@cityofmadison.com and we can help brainstorm some other ideas!