Smart Office Support

5 Steps

To Managing Your Emails

About the Author

Rachel

Hi, I'm Rachel and along with my team, we offer several virtual support services that help businesses run more efficiently.

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We like to understand what our clients do and how they do it so that we can help them to make the changes that will make a difference to them.

Having a Virtual Support Team isn't the same as having an employee – we often save you money because we only charge for the work completed.

One of the biggest challenges for a business owner is managing their inbox. I am very passionate about making sure you are not a slave to your emails, which is why I created this guide to help you to manage them better. I hope you find this resource helpful.

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Introduction

How many emails are in your inbox? Let me guess - far too many!

I am sure it was easy when you first started your business. Keeping a track of 2 or 3 leads, keeping track of 2 or 3 proposals that were out and remembering to invoice your 2 regular clients.

But then things got busy, you started getting noticed for offering a fantastic service in your area of expertise but then 'oh my goodness' the overwhelm.

I know that it can be crazy running a Small Business and keeping on top of your emails.

Of course, I could just suggest that you bring in some Virtual Support to help you with this, but not every small business owner is ready for that or even needs to bring someone in to help.

They just need some guidance in understanding how to better manage their emails. Hence this guide!

By following the 5 steps in this guide you will learn some best practices on how to manage your emails.

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unread emails

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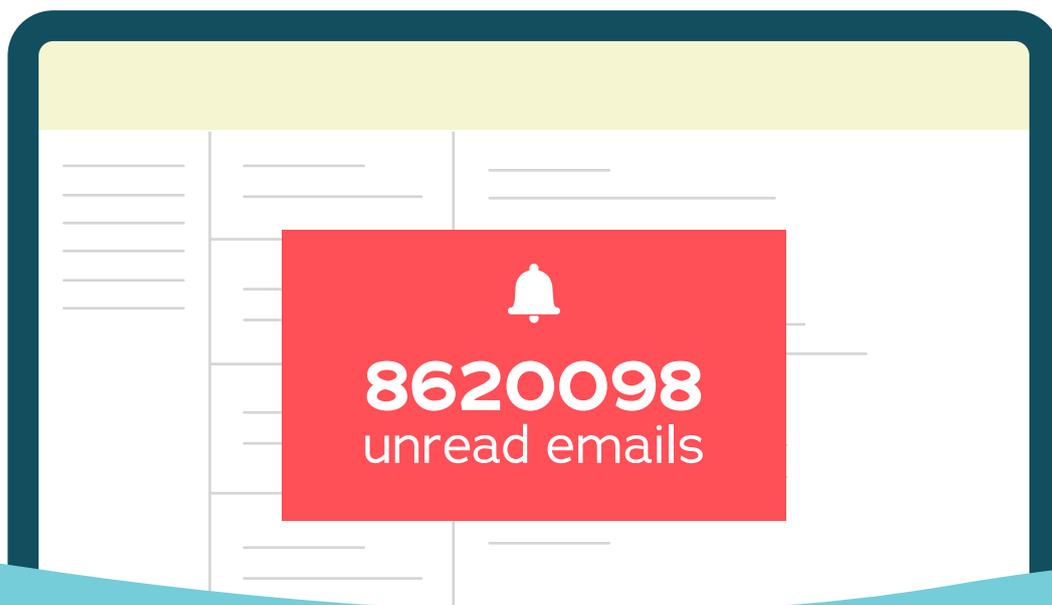
Step ① The 5 D's to Managing your emails

The 5 D's are:

- **Do**
- **Delete**
- **Delegate**
- **Drag**
- **Delay**

Underpinning the 5 D's is the 'Golden Rule' with inboxes - "only read emails once"!

I know this can be a hard principle to action but it can speed up how you manage your emails and remove them from your inbox.

So **DO NOT** open an email, read it, close it, and leave it, instead, open an email, read it, and do one of the 5 D's to remove it from your inbox.

Once you are ready to make a start on managing your emails, and reducing the number you currently have in your inbox, get yourself comfortable and start following the 5 D's.

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Step ①
The 5 D's to Managing your emails

Do

Open the first email and decide, is this something YOU need to do or respond to, and if so can you respond to it immediately, if yes then **DO it.**

DO – is for urgent or easy emails that require YOU to action (like responding to invitations, a quick yes or no to a question), do the action you need to do then either delete it (you have a copy in your sent items with the response) or move to a folder if it contains attachments.

I will cover more about folders in Step 2.

If the email is not something that you need to DO immediately, then is it something that can be DELETED?

Delete

DELETE – is for those emails you know you WON'T ever read – be honest with yourself and DELETE them (and even consider unsubscribing so that you don't keep receiving them).

If the email is not urgent and you can't delete it, can you DELEGATE it?

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Step 1

The 5 D's to Managing your emails

Delegate

DELEGATE – this is for those emails that could or should go to someone else to action, like a team member or an assistant (maybe even a virtual one!), so forward it on. Tell them what you want them to do with it. Then remove it from your inbox – maybe to a folder with their name so you know who you delegated it to, again this is also in your sent items.

So, now you have Done, Deleted or Delegated where you can. The next set of emails are the ones you NEED to keep.

Drag

DRAG – this is for some of the emails that you just need to file – like information to be aware of, copy of invoices/receipts, etc - drag these out of your inbox into a folder.

Delay

Lastly, we have the email that you need to action but not right now.

Most of you will probably just leave this in your inbox!

DELAY/DIARISE ACTION – is for all other emails. If you can, then drag the email to your calendar on the day you need or plan to action it. If you are not able to do this, then set up a new appointment and either make a note in the appointment or copy and paste the email in. Then pop the email into an ACTION folder for you to come back to on the day you have assigned to do it. This folder is NOT somewhere that you just put all your emails so that they are out of your INBOX!

You should now see that each of these Ds removes your emails from your inbox and if you have scheduled the DELAYED ones into your calendar, you shouldn't forget to do them.

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Step 2
Creating Folders for your Emails

When creating a folder, the name should be clear so that you know what and why you are filing things there – a big time waster is looking for something you filed but can't remember where!

If you can't find something, then your filing structure is not right!

Think about how you would ideally find something. If you have a client or a supplier but you also network in the same group as them, where would you naturally look for something relating to them?

I would have separate folders for clients and networking!

Some suggestions to help you structure your filing within your email:

- For Clients, sent up a folder called *'Clients'*, then create a folder for each of your clients within there.

- For Suppliers, again set up a folder called *'Suppliers'*, then create folders for each of your suppliers within there.

- Think about what other information you receive or want to keep and create folders for these i.e., *Networking, Finances* and what folders would you want under each of these i.e., *Networking > Group A, Group B, etc, Finances > Invoices Received, Invoices Sent, etc*

- Depending on how you work you might want to use temporary folders called: *Awaiting Reply, To Read, To Action* - if you do use these folders remember to diarise to check them regularly!

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Step 3
Creating Templates to Save you Time
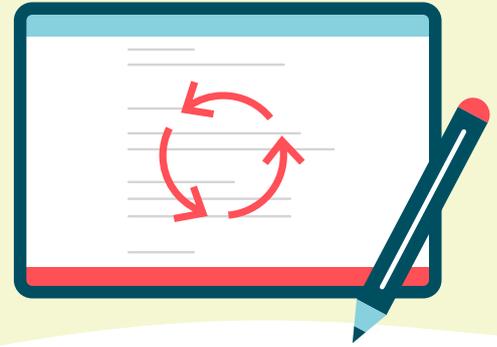
Creating templates is hugely useful and easily missed when we think of using our time and brainpower effectively.

A great example is emails. You receive one from a client and spend time typing up a reply and send if off, then move on. Then you find you get a similar email again a few days later and again you sit down to write a considered response.

This all takes time that is precious and you can do something to make it easier for yourself - create templates.

Save them wherever suits you - email template, word documents, Trello or something similar. They all work fine - the important thing is accessibility.

Now, I am not suggesting that every email should be a copy and paste reply, but there is a surprising amount that will work as a template. Particularly when dealing with customer support or quoting.

What I suggest is thinking about what you write as you reply to your emails.

When you find yourself typing up something that sounds like something you've written before, or answers a question that you believe others might ask, save a copy of it. Or even create a FAQ document.

Then, next time you have this come up, you can grab the document, copy, paste and personalise as needed.

This sounds so simple and obvious but it's amazing how many people don't do this or even if they do, fall out of the habit of doing it. Hopefully, this will be a welcome nudge to start again.

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Step **4**
Don't Forget Your Sent Items

It is worth remembering that your sent emails can be just as important as the emails you receive – you may have sent your approval for something, confirmed status or dates for delivery, or delegated, so manage them as well by filing them as you go.

If you have a lot of emails sitting in your sent items, you should set aside some time to sort and move them into the relevant folders you have created.

The best way to move several emails in one go is to filter the sent emails by who they were sent to. You can then move them in blocks into the folders.

To keep your sent items under control you should file them as soon as you have sent the email.

This way you always know where the information is, rather than having to search through your sent items.

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Step 5

Other things to Consider when Managing your Emails

- Try to only check your emails up to a maximum of 3 times a day. This should fit in with what you are doing that day.

- Turn off your email notifications so that you are not distracted every time an email arrives in your inbox.

- You might also want to consider closing your email so that you are not tempted to check it!

- Unsubscribe from any newsletters or subscription lists that you are no longer interested in.

- Look at creating filters or rules so that specific emails that are received are automatically moved out of your inbox as soon as you receive them.

- You can also do this for delegating emails – if there is something that you receive and always forward it on, then set up a rule, or even better get the email address updated with the sender so you don't even receive them!

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Somebody else's lack of planning does not mean an emergency on your part – they need to understand and accept that you have your own priorities and deadlines to meet.

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Step 5

Other things to Consider when Managing your Emails

Another suggestion is to set up an auto-reply to all emails that you receive. This could provide some general information. for example:

- Telling the sender when to expect a response.

- Including a link to book an appointment with you.

- Maybe giving existing clients another way of contacting you if their request is urgent.

- You might also want to consider attaching your FAQs, as this might answer some initial questions that the sender has.

- Provide a link to your website or other information.

FAQs >

Book a meeting >

Contact details >

Website >

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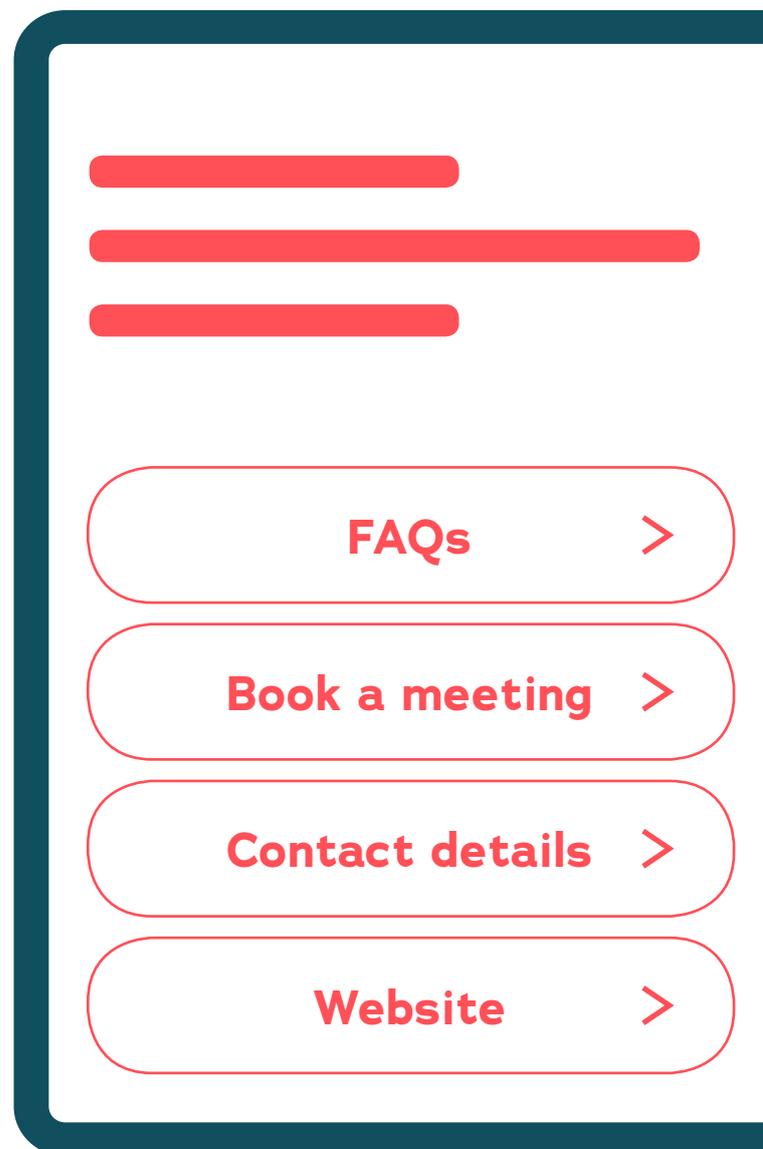
Thank You

Thank you for Downloading my Free Resource!

I hope you found the information contained in this guide useful in helping you to better manage your Email.

If you are interested in finding out more about working with a Virtual Assistant feel free to make contact to schedule a FREE exploratory call.

I would love to learn about your business and help you to decide if a Virtual Assistant could work for you.

Calling SOS ...

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