

THE EMAIL WARRIOR

How to clear your inbox and keep it that way

October 30, 2020

Presented to: AMCTO

Presented by: Frances Biernacki

Speaker. Coach. 'Lightener'.



! 📧 📎 📧 FROM

SUBJECT

▲ Date: Today

Ann Gomez

Research I wanted to share with you

Geraldine Santos-Lee

Workshop details for your review

Marlo Leunissen

Online training at Clear Concept - Program overview

Ann Gomez

Meeting update and notes

Ann Gomez

Meeting prep

Susan Pons

Executive Productivity Boot Camp

Marlo Leunissen

Marketing report

Marlo Leunissen

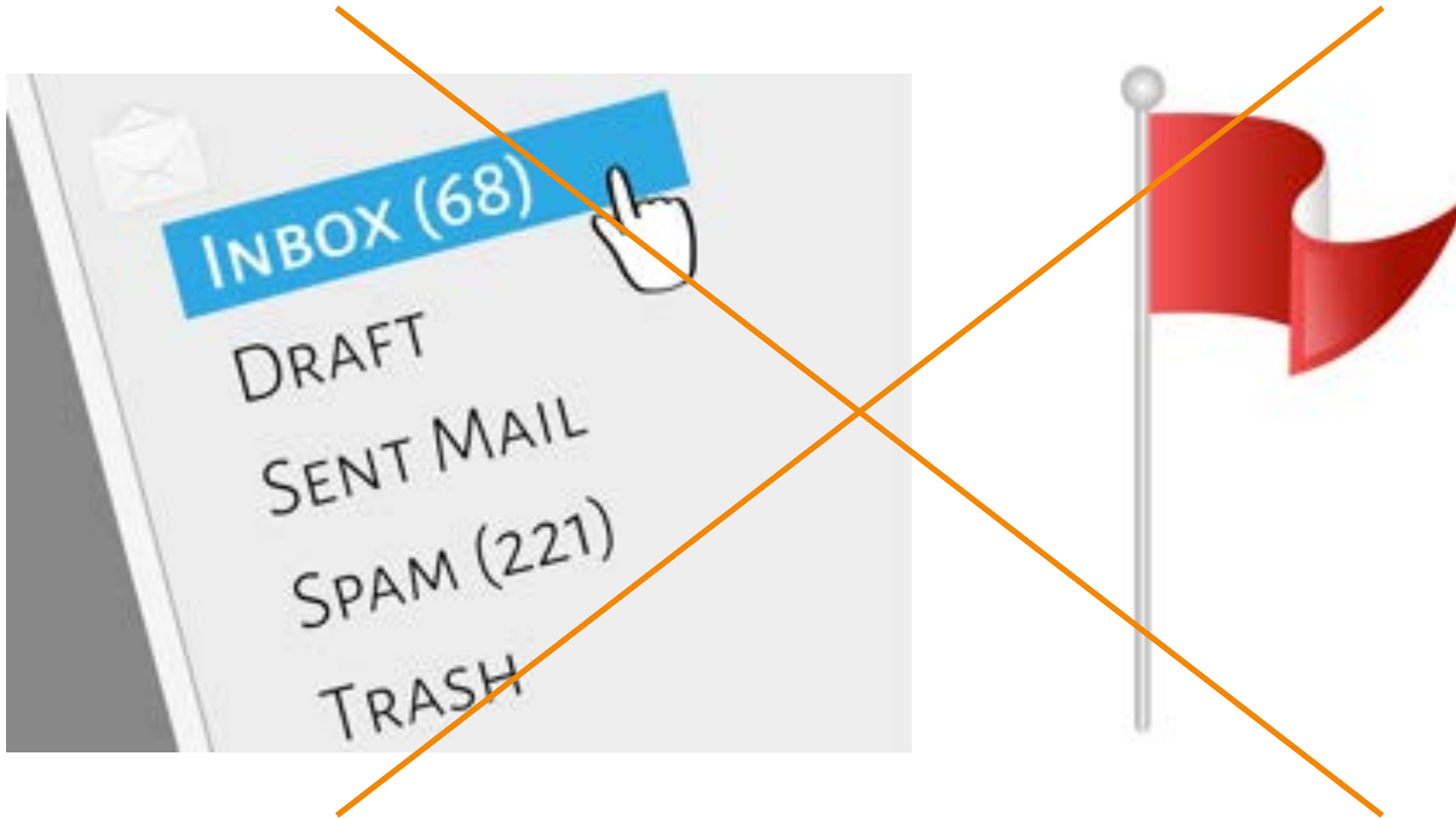
Clear Concept programs



Goal:

Clear your inbox and keep it that way.

Our inbox is not our to do list



POLL

How many emails are in your inbox right now?

- ☐ Less than 10 (I could be teaching this course)
- ☐ 10 – 100
- ☐ 100 – 1,000
- ☐ 1,000 – 10,000
- ☐ >10,000 (who can count this high?)

Today's Plan



Process Email Efficiently



Your Master Action Plan (MAP)



Clear Your Inbox

Interact, Question & Win!



Why does our inbox pile up?





“The inbox is nothing more than a convenient filing system for other people’s agendas.”

- BRANDON BURCHARD

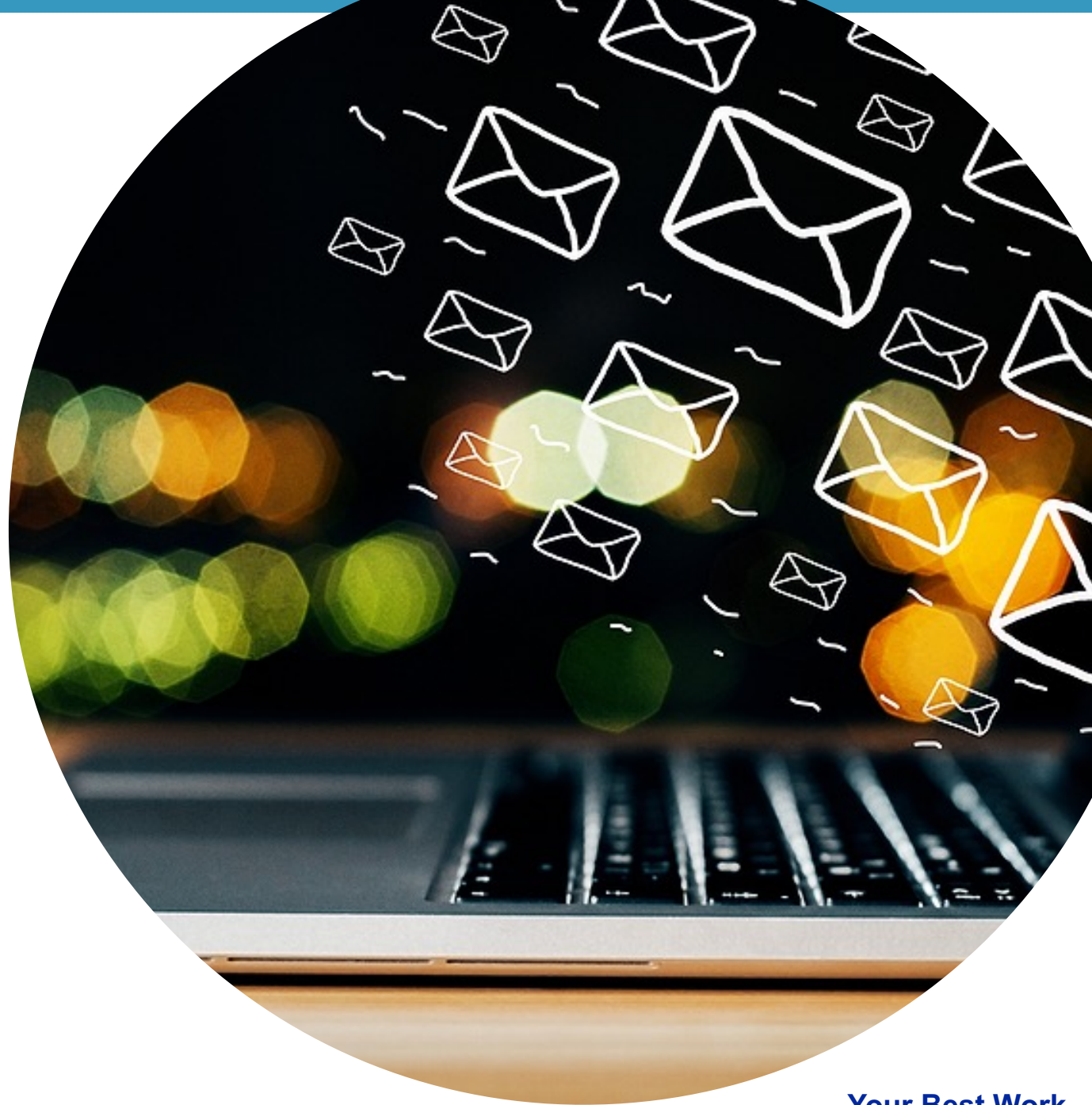
What type of emails?

1. Short-term tasks

~~2. Long-term tasks~~

~~3. Reference~~

~~4. Should delete~~



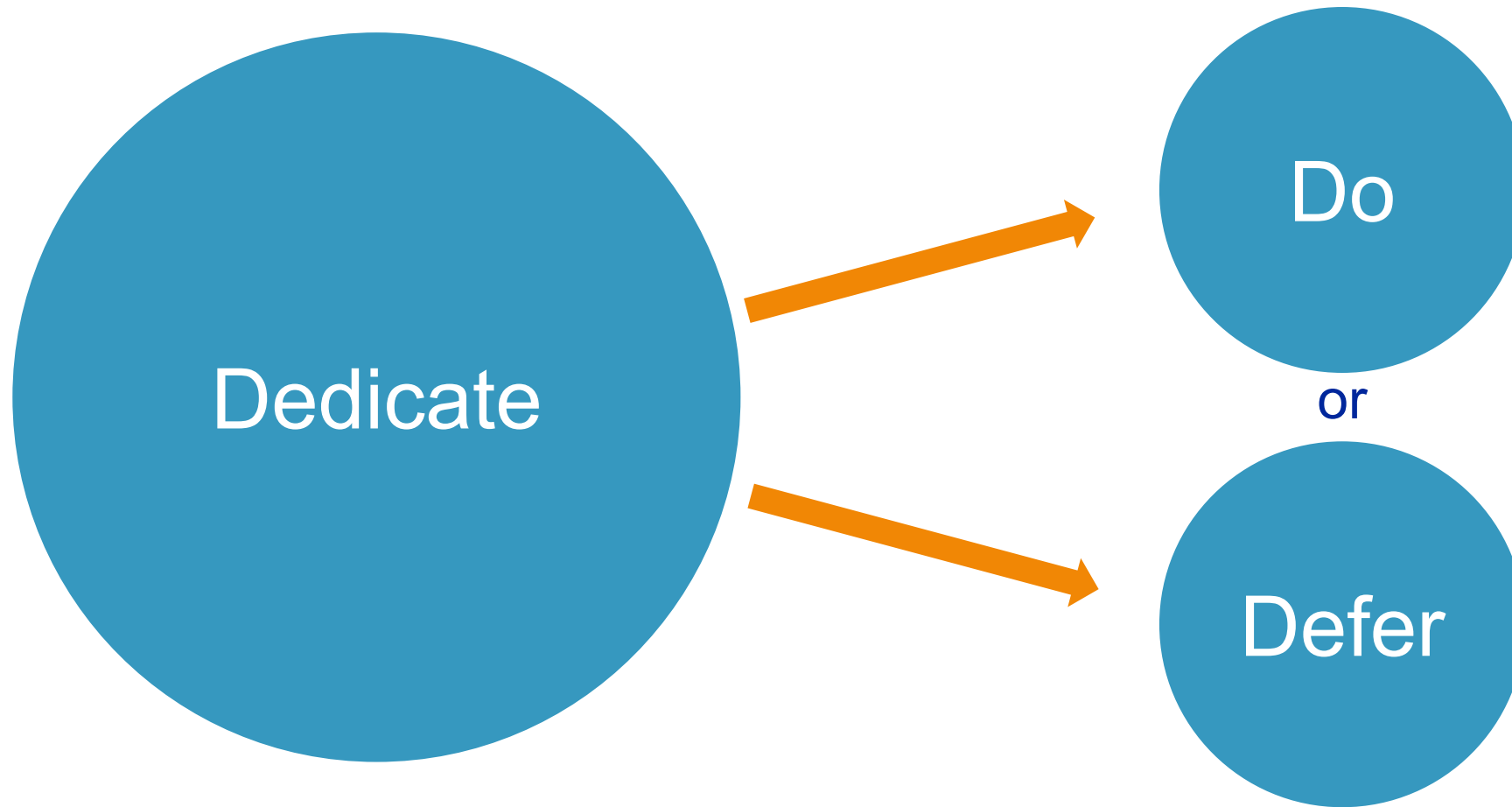


Treat your
inbox like
a line



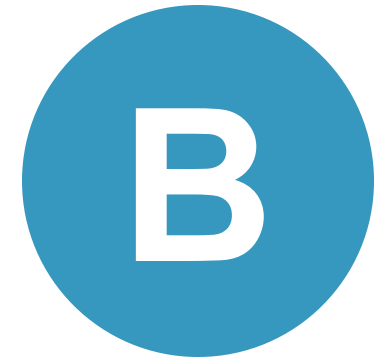
THE EMAIL WARRIOR

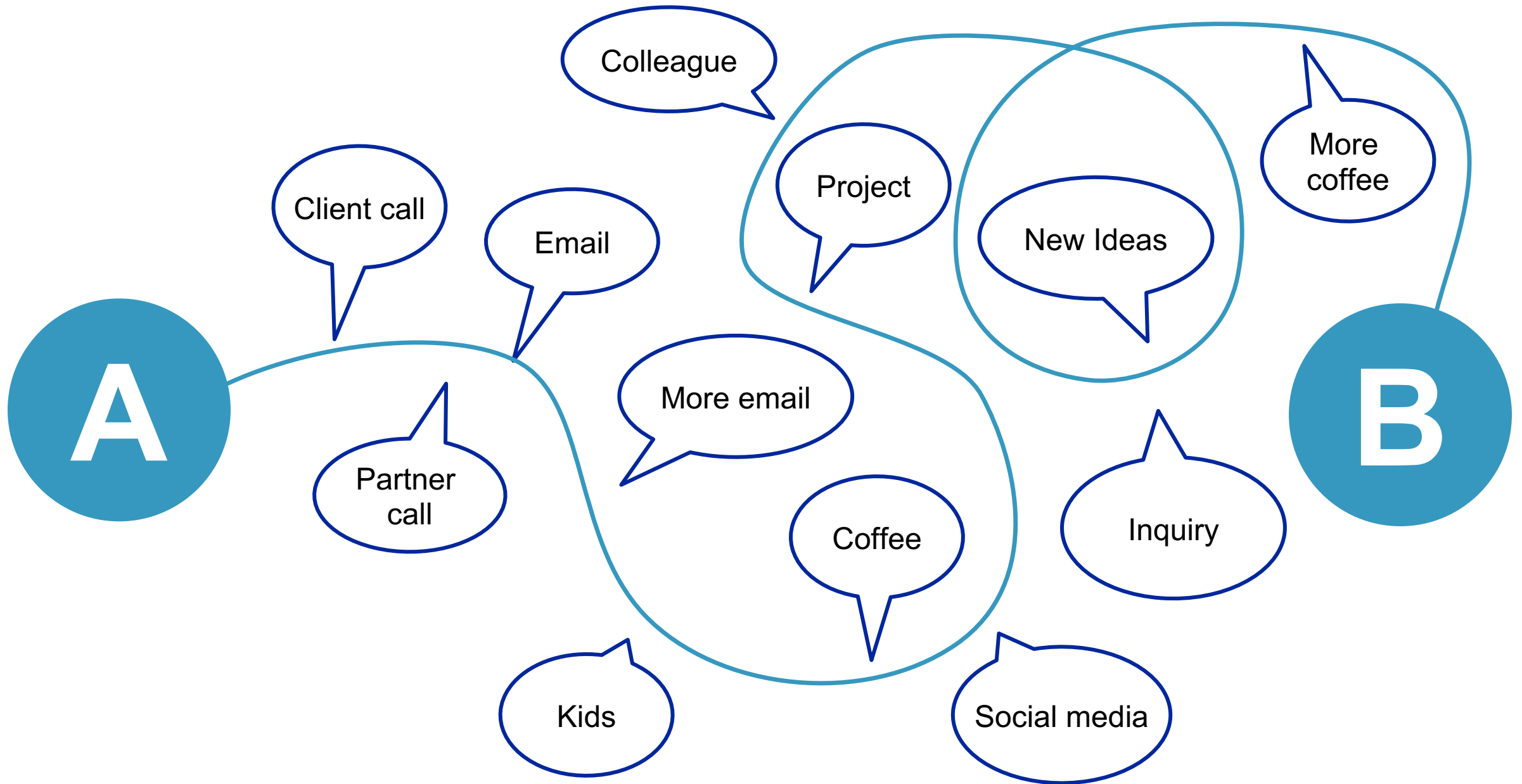
3D Approach





The shortest distance between two points is a straight line.





How Do Our Brains Process Information?



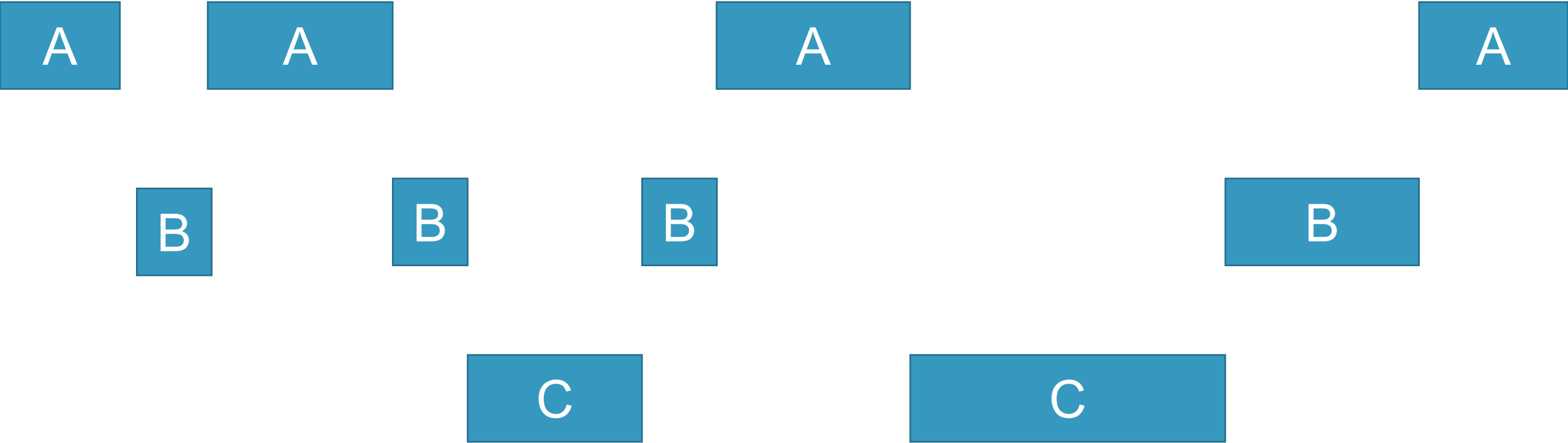
We Don't Parallel Process.

Task A

Task B

Task C

We Sequentially Process.



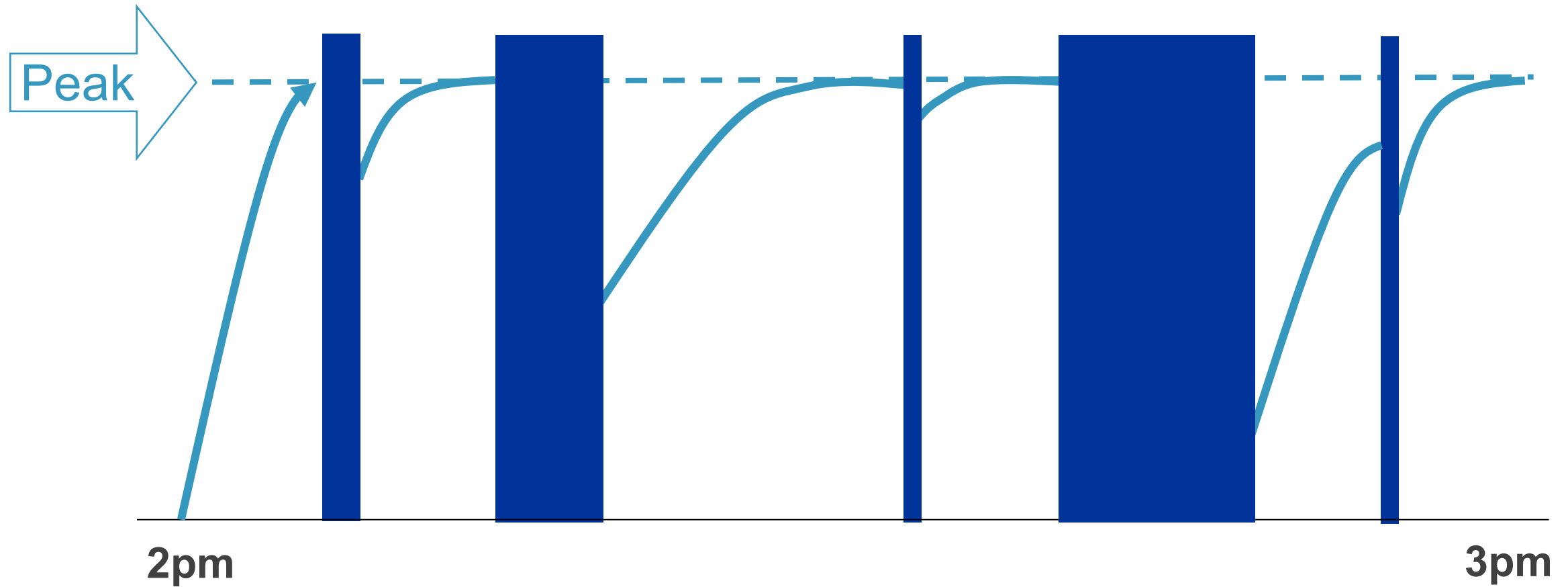
CLEAR CONCEPT →

1 2 3 4 5 6 7 8 9 10 11 12 →

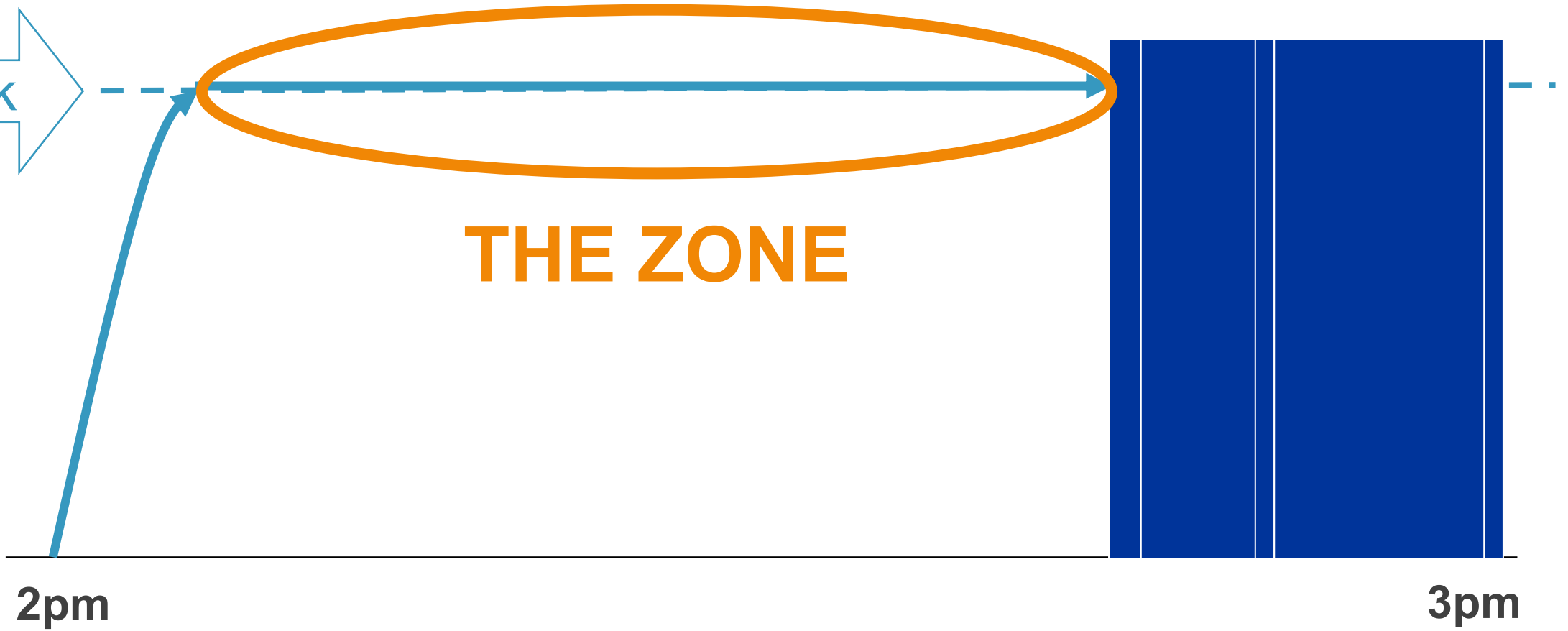
CLEAR CONCEPT

1 2 3 4 5 6 7 8 9 10 11 12

Every 3-5 minutes



A Real Piece of Work?



FOCUSING BEATS MULTITASKING



Faster



Better



Easier

Multitasking is a myth.

We don't multitask.

We **SWITCH** tasks.



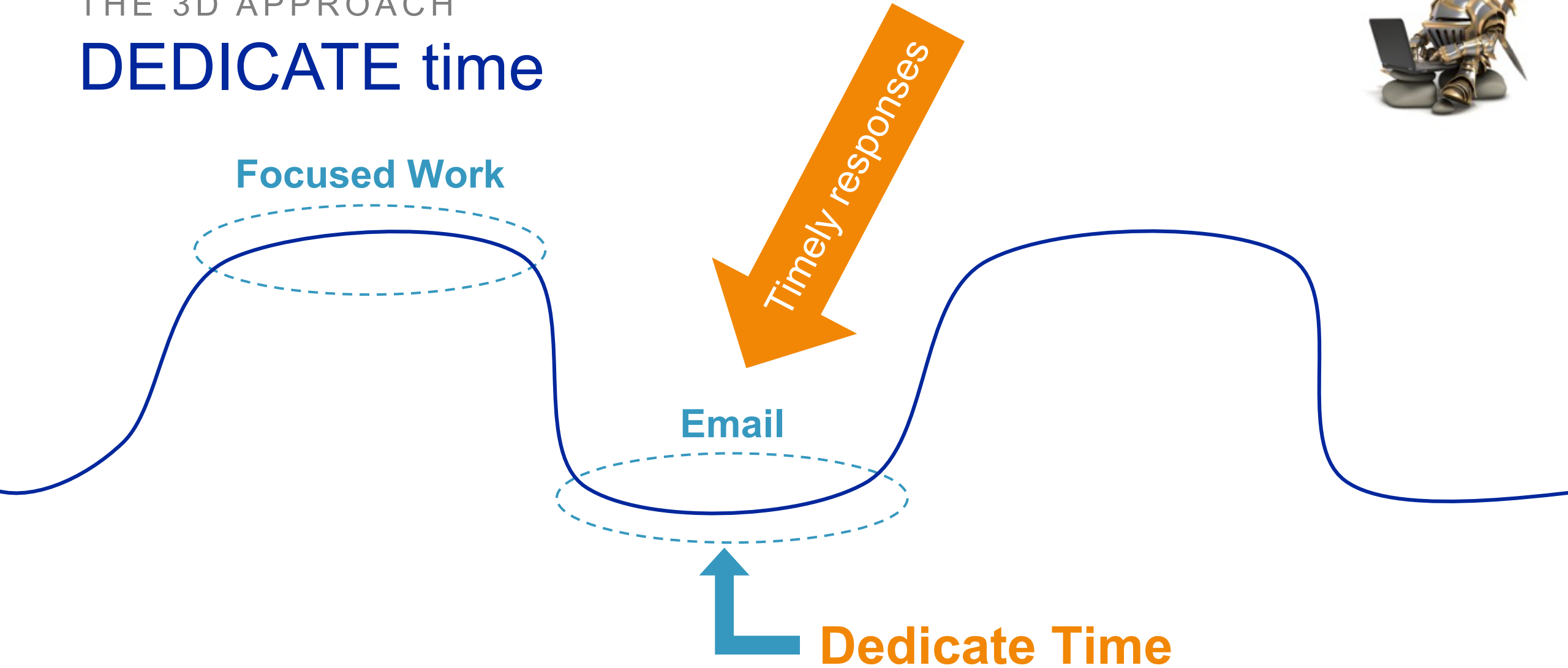
“

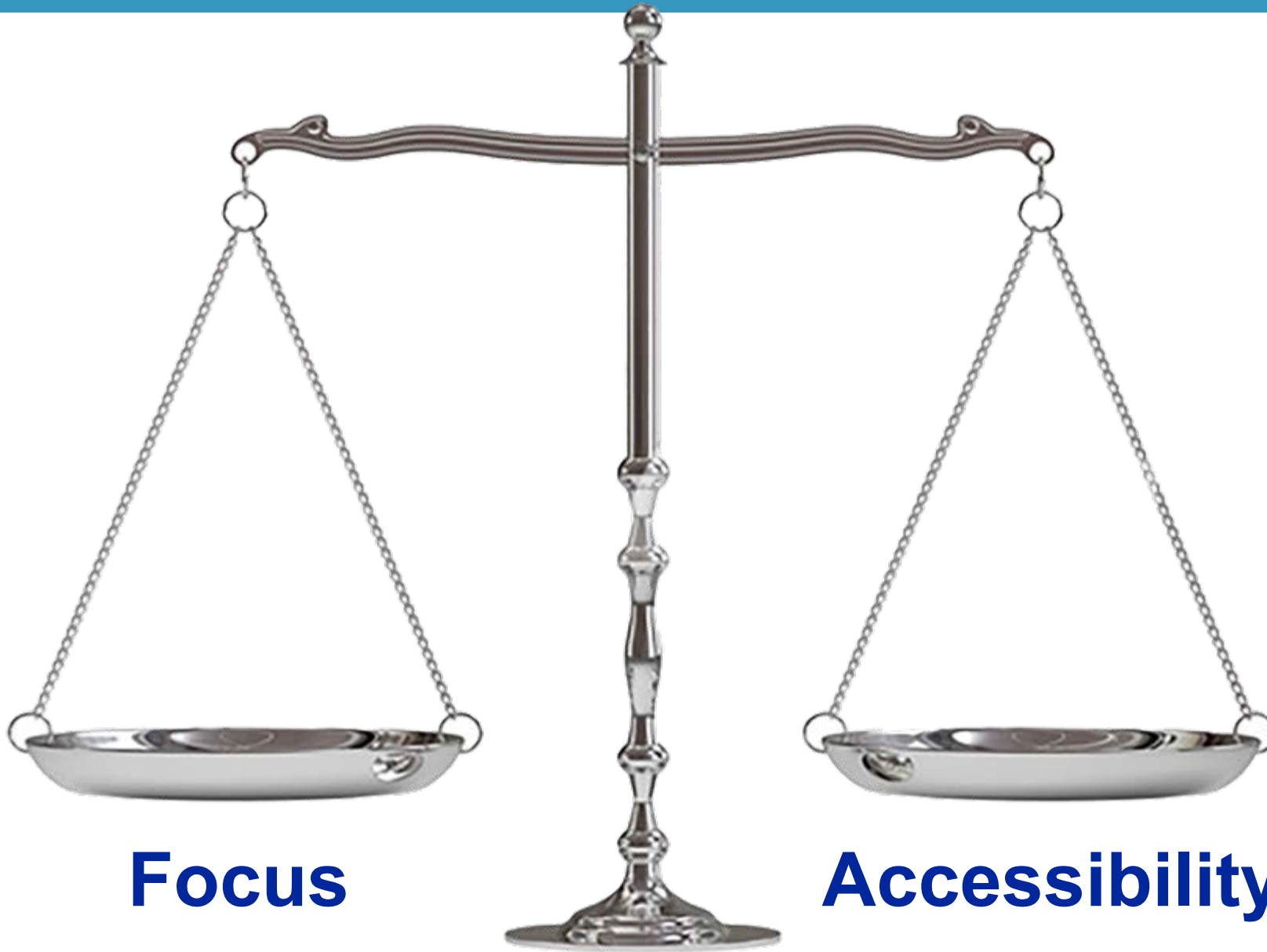
*“One who chases two rabbits,
catches neither.”*

- Confucius

THE 3D APPROACH

DEDICATE time





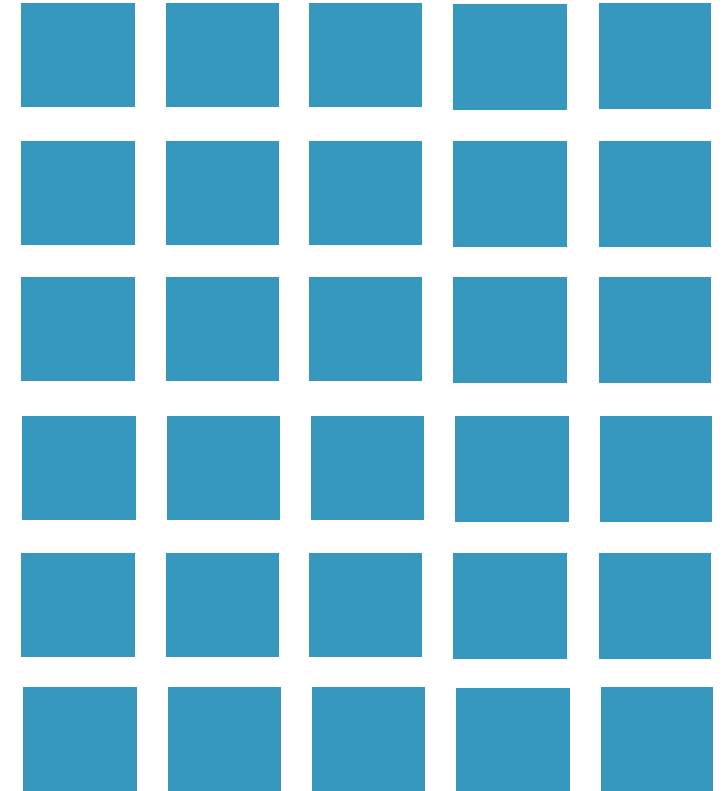
Focus

Accessibility

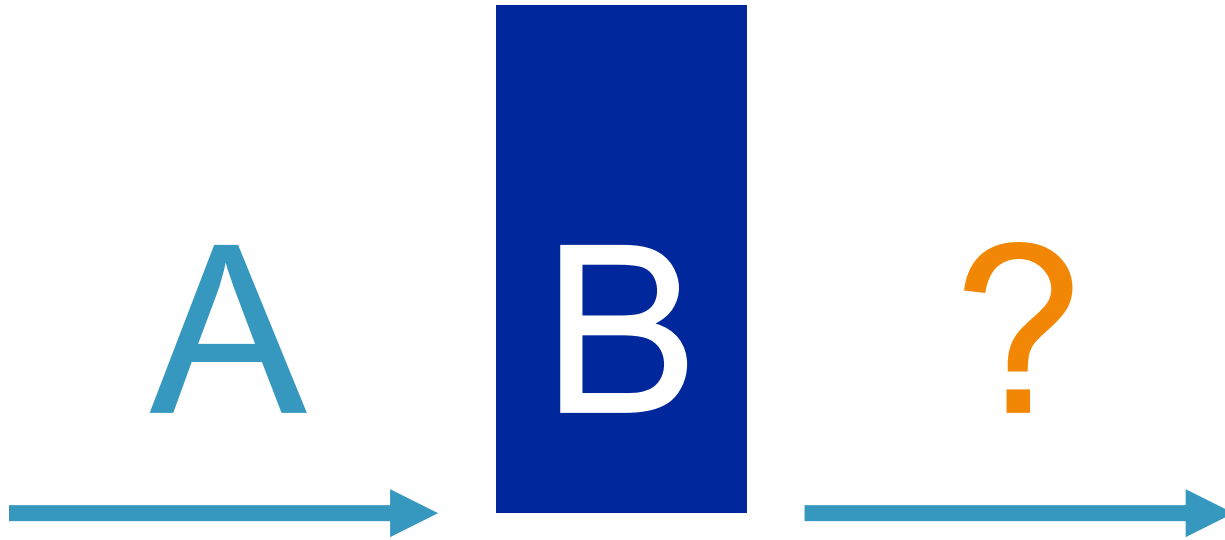
How long is your ideal focus session?

YOU

What is your
big : small
ratio?



Micro Focus



What's Next?



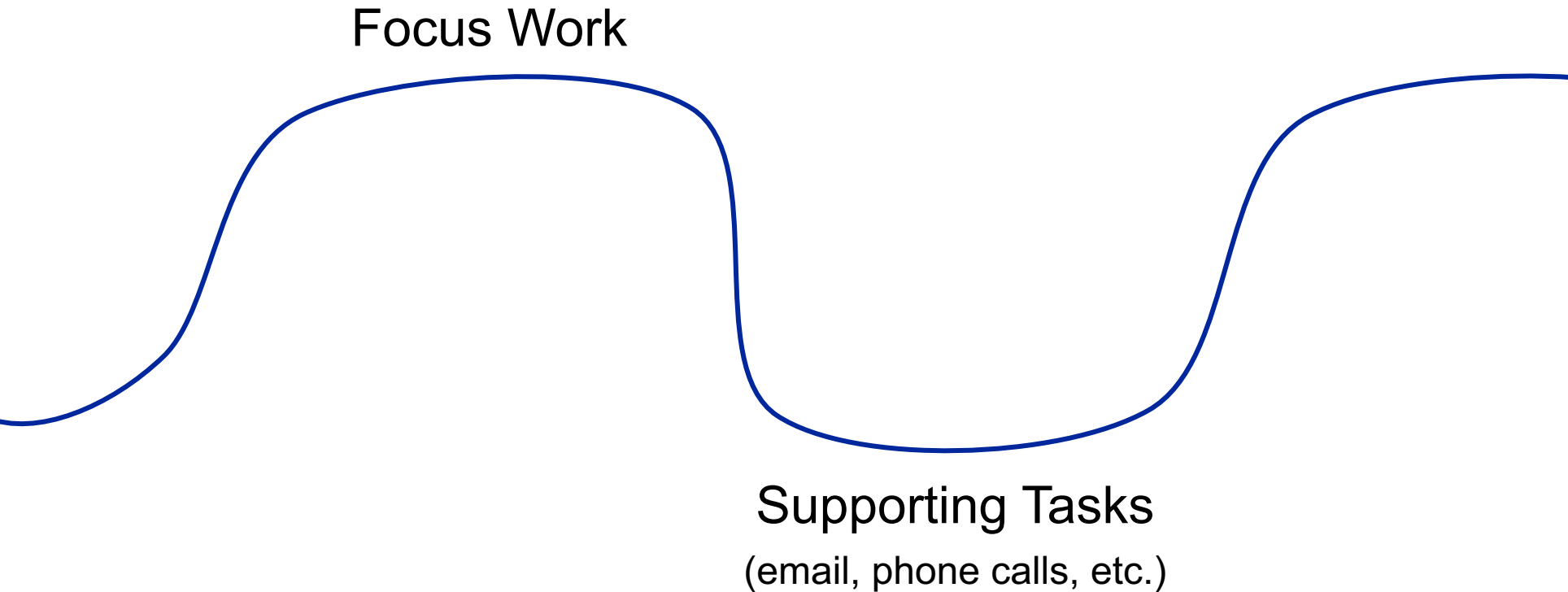
B

Email

Coffee

REFLECTION

How often should you check email?



Focus Routines:

10 / 10 min

20 / 10 min

30 / 30 min

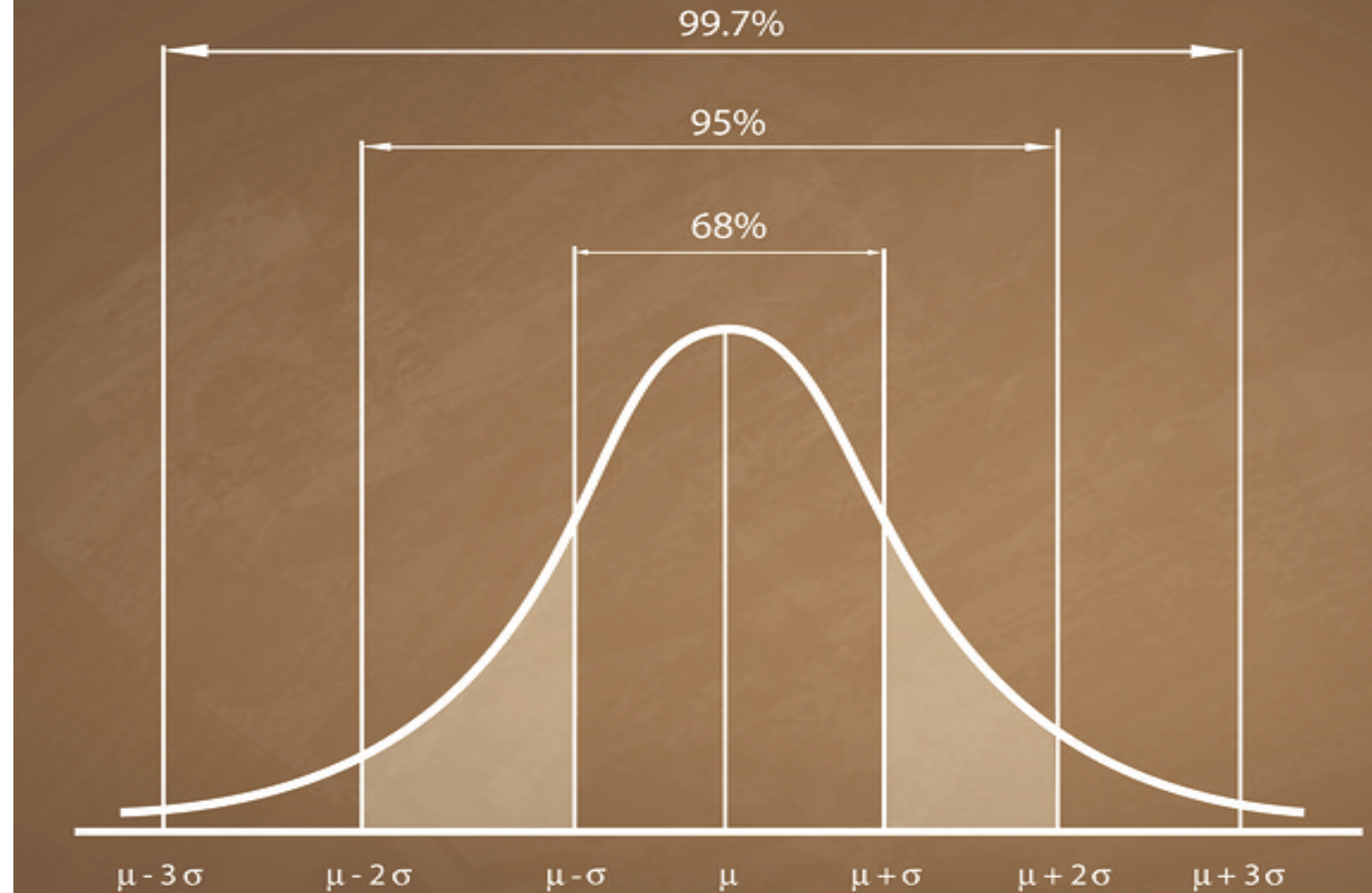
45 / 15 min

60 / 30 min

90 / 30 min

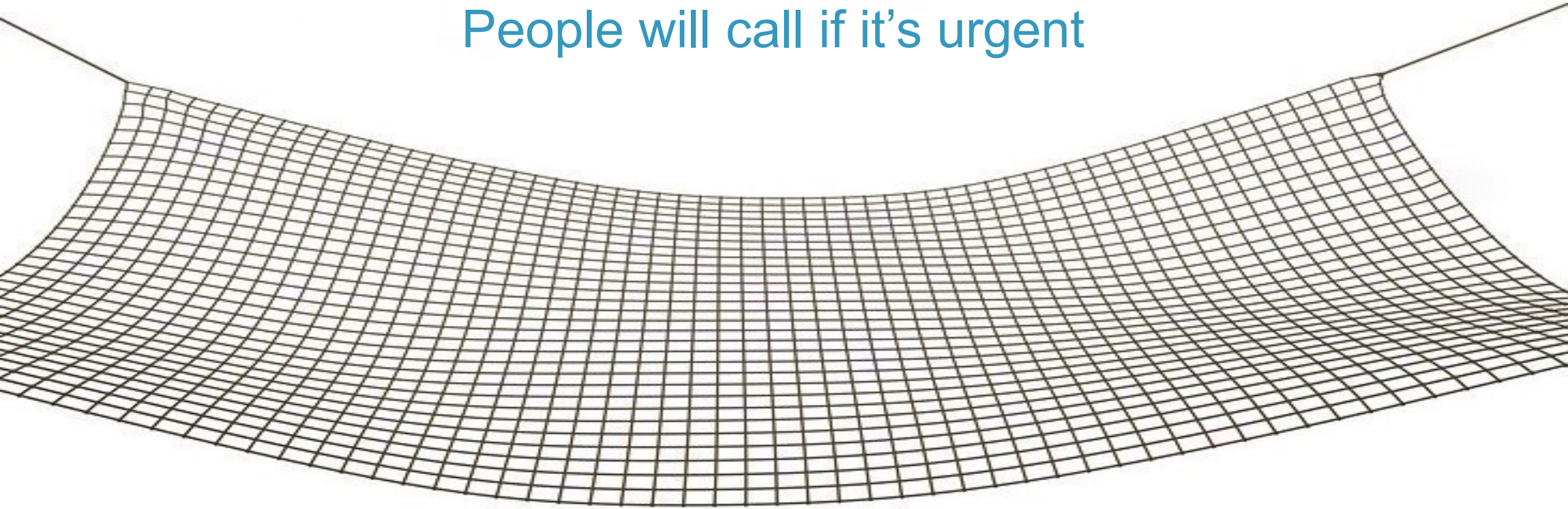
Emails arrive
randomly
throughout our
day.

How long is that
email sitting in
your inbox?



We have a safety net

People will call if it's urgent



Hierarchy of Communications

Call

Text

Email

URGENCY

POLL

To what extent do you protect focus time?

- ☐ 5 (high)
- ☐ 4
- ☐ 3
- ☐ 2
- ☐ 1 (low)

We already protect
focus time,
*when we meet
with others.*

~~Email
Phone Calls
Other work~~



Sources Of Interruptions



Emails



Phone Calls



People



Ourselves



Is email interrupting you?

Or are you choosing to check?

Outlook Options

General

Mail

Calendar

Contacts

Tasks

Message arrival



When new messages arrive:

- ☒ Play a sound
- ☒ Briefly change the mouse pointer
- ☒ Show an envelope icon in the taskbar
- ☒ Display a Desktop Alert

Uncheck All



How can we keep ourselves focused?

1. Goal
2. Duration
3. Reward

REFLECTION

How can we keep ourselves focused?

The Pomodoro Technique



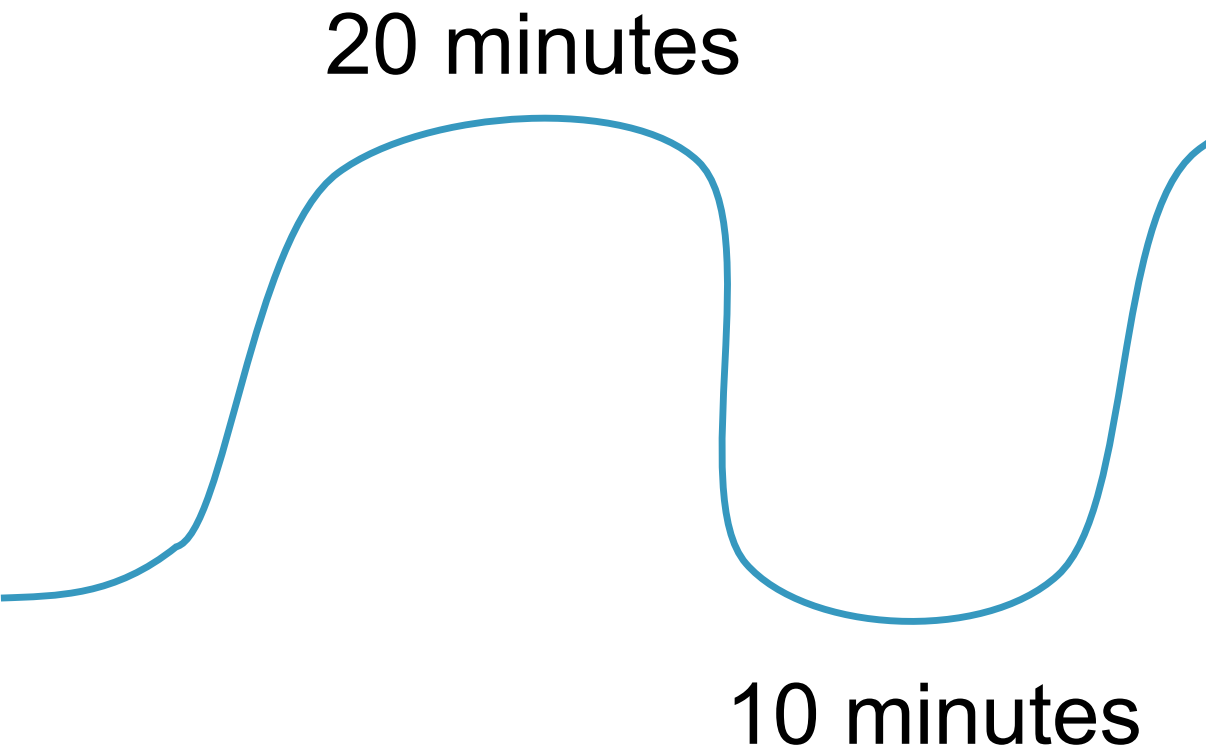
REFLECTION

How often should you check?

- Before work
- Evenings
- Weekends



20 Minute Focus Challenge



- 20-minute focus sessions
- No email alerts

Why:

↑ Efficiency

↑ Quality

↓ Stress

POLL

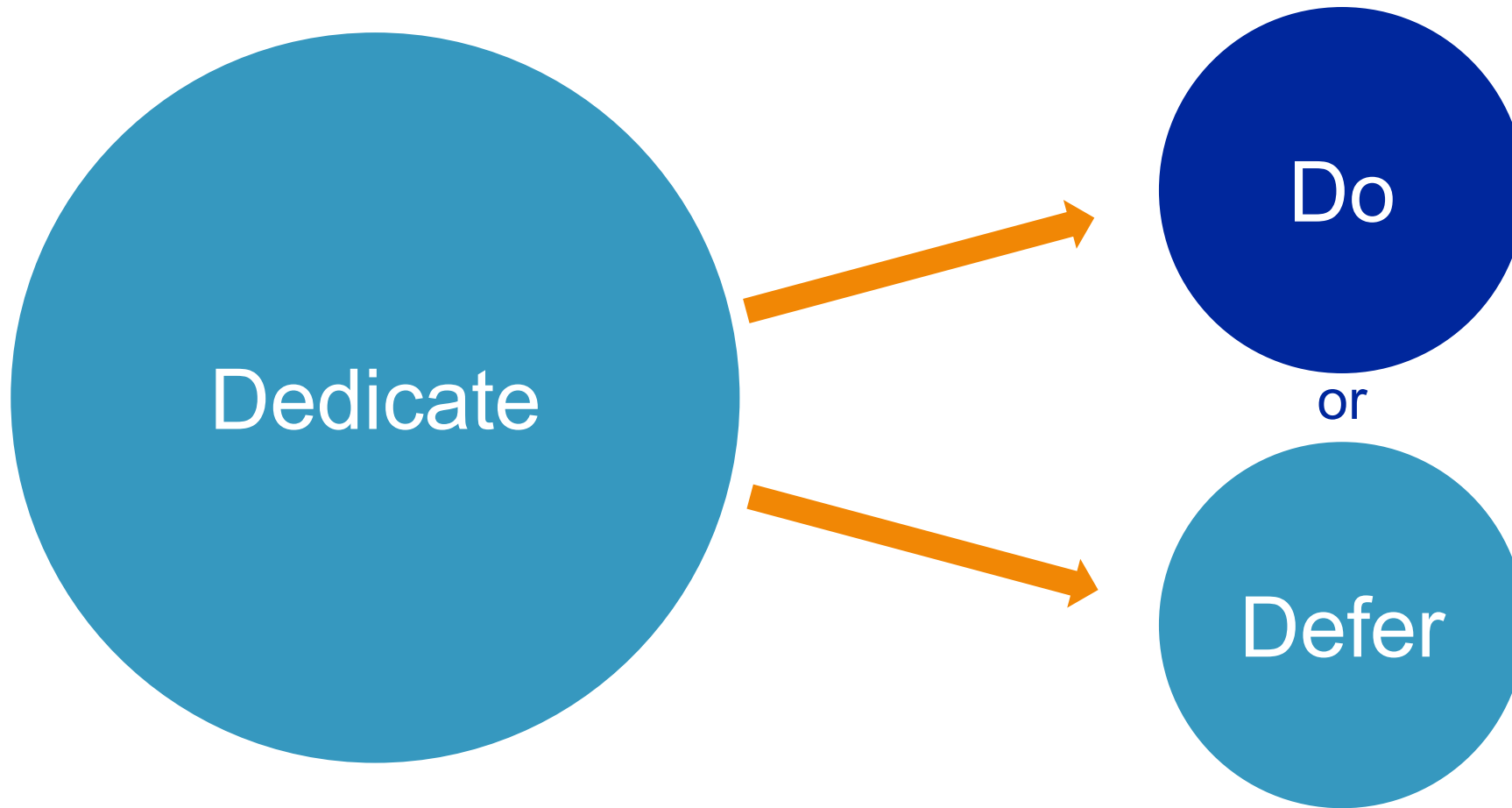
Will you take the 20 Minute Focus Challenge?

- ☐ Yes!
- ☐ Not necessary – I already do this daily
- ☐ No thank you. I like Multitasking all day long.

QUESTIONS?

THE EMAIL WARRIOR

3D Approach





Paper shuffling has gone electronic

3D APPROACH

Do it now



If something takes **less** than
five minutes

DO IT NOW

(read/respond/delegate/delete)



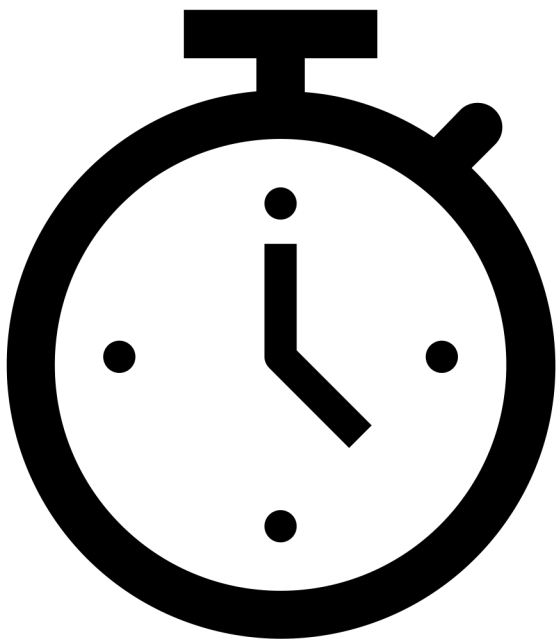
If something takes **longer** than
five minutes

IDENTIFY WHEN

(or do it now)

DO it now

How much time
could you save?



Average Emails/Day	60
1 st read	0.5
2 nd read	0.5
<i>each week</i>	2.5
<i>each month</i>	10
<i>each year</i>	120

“

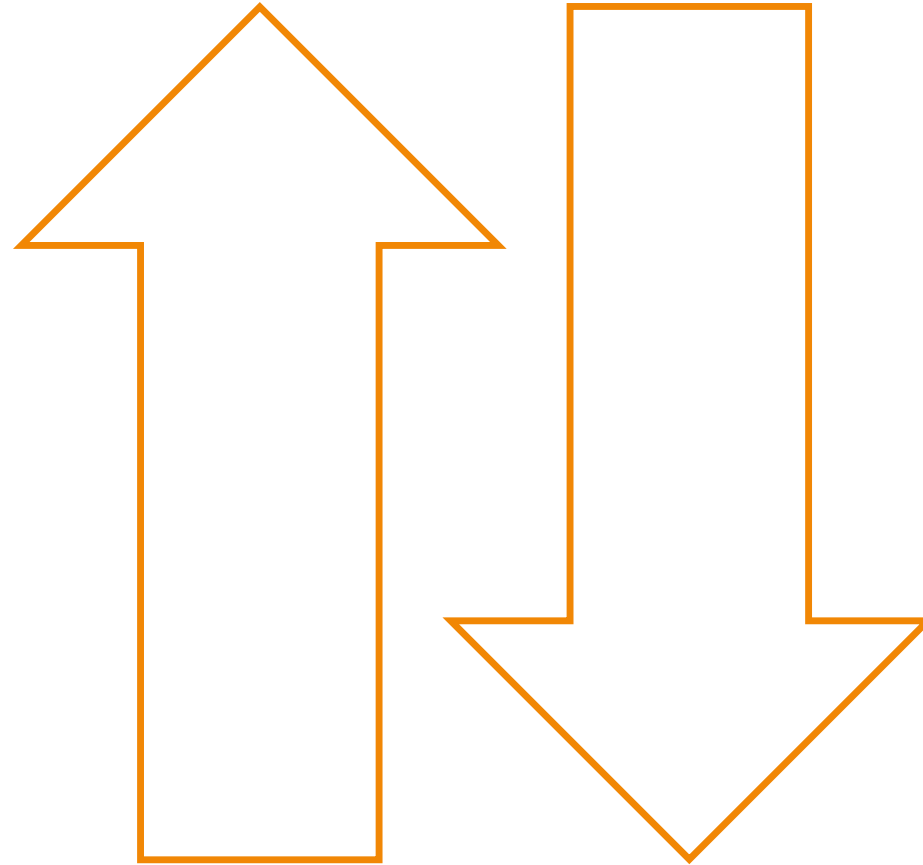
*“I will scan for urgency,
but I will only ever read an email
one time.”*

- Michael Cloutier

3D APPROACH

DO it now

**Top down or
bottom up?**



3D APPROACH

DO it now

Subject: Re: Fwd: Undecipherable message

Change the subject line
please

3D APPROACH

DO it now

Should you bcc
yourself?



A screenshot of an email composition interface. On the left, there are three buttons: 'To...', 'Cc...', and 'Bcc...'. To the right of each button is a corresponding empty text input field for adding email addresses. The 'To...' button is highlighted with a light beige background, while 'Cc...' and 'Bcc...' have a light gray background.

3D APPROACH

DO it now

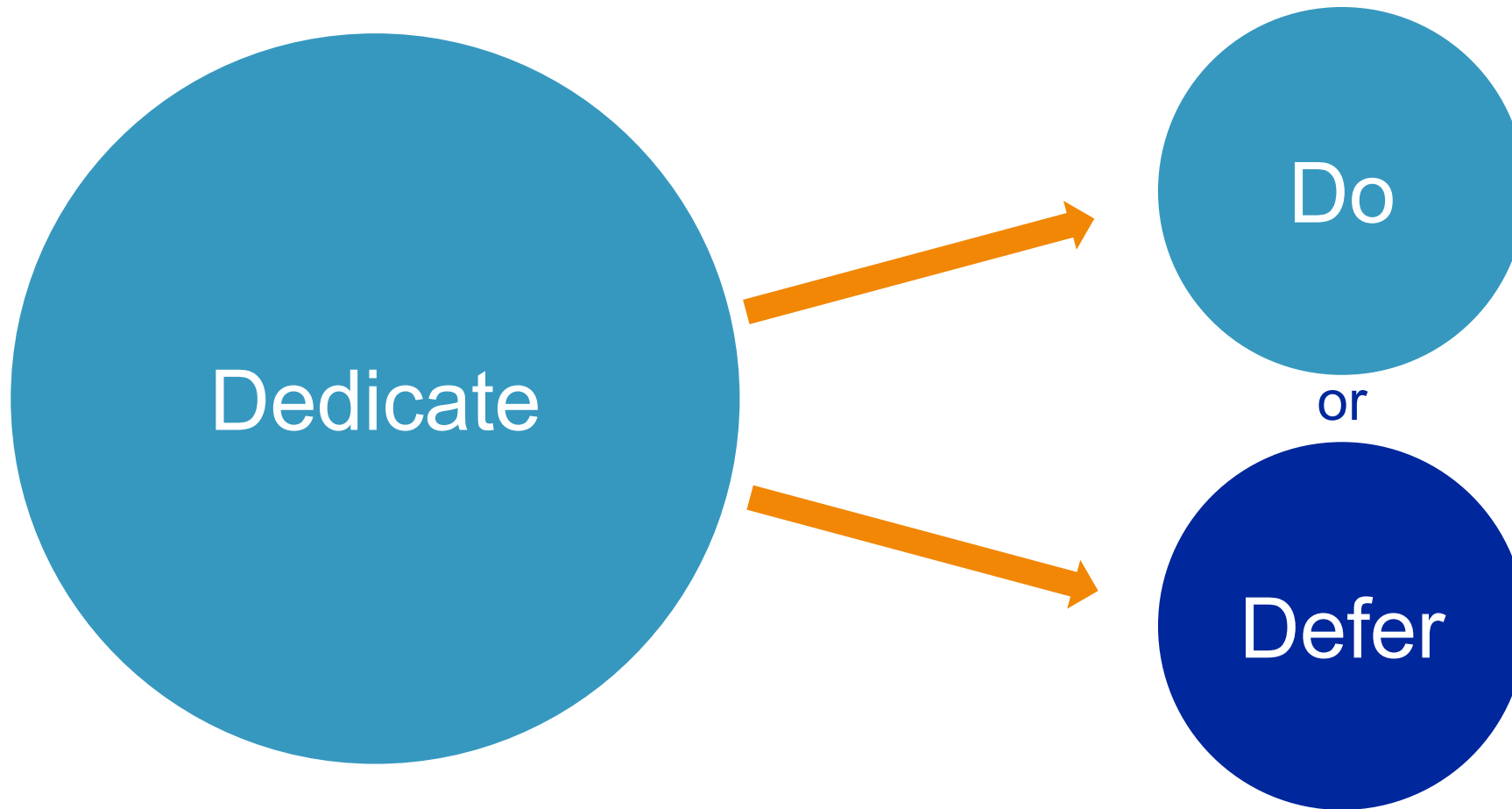
Overcome Procrastination

- Attainable
- Confidence
- Timeline



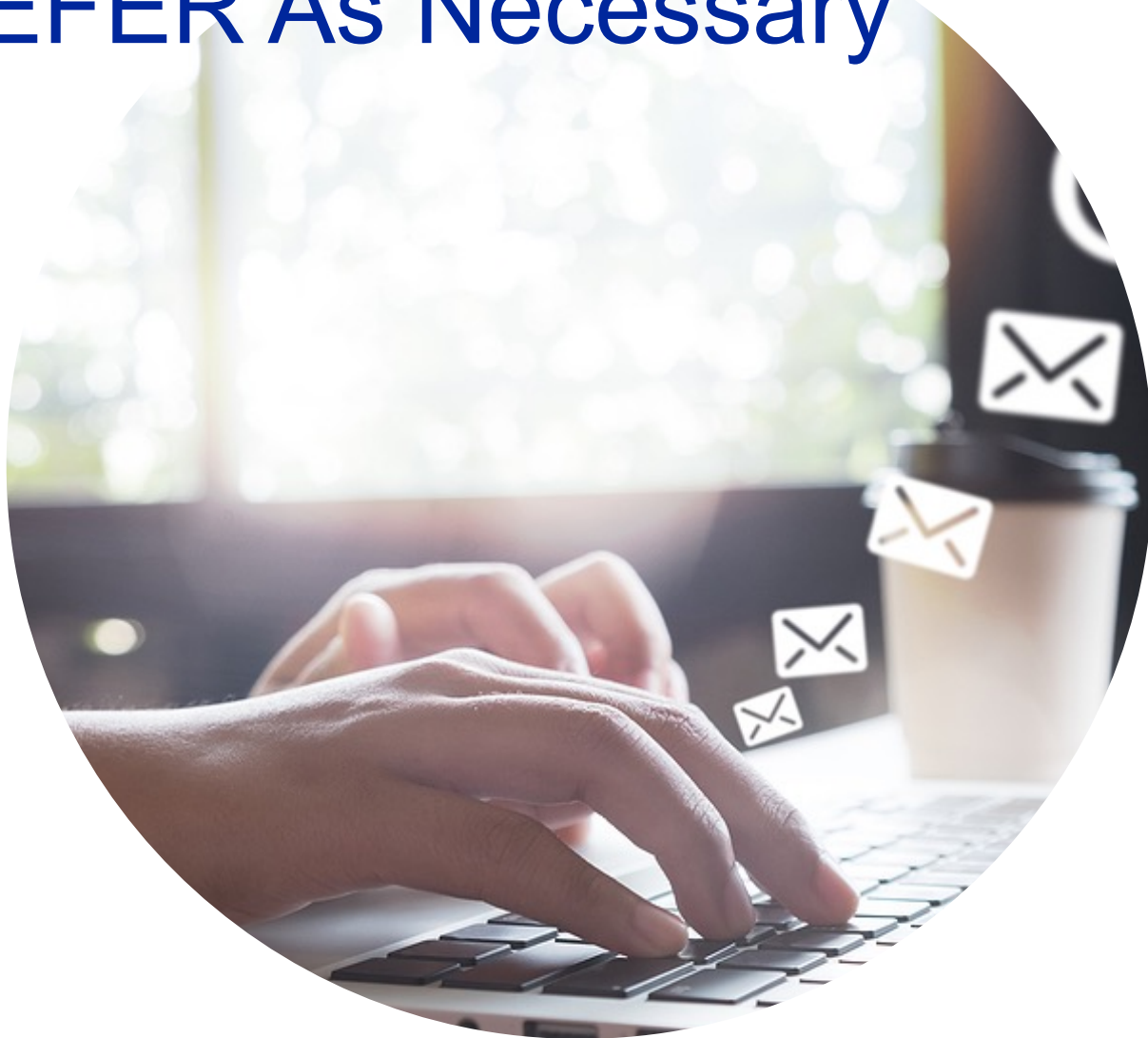
THE EMAIL WARRIOR

3D Approach



3D APPROACH

DEFER As Necessary



What about long, detailed emails?

- Scan for urgency
- Acknowledge
- Confirm deadline

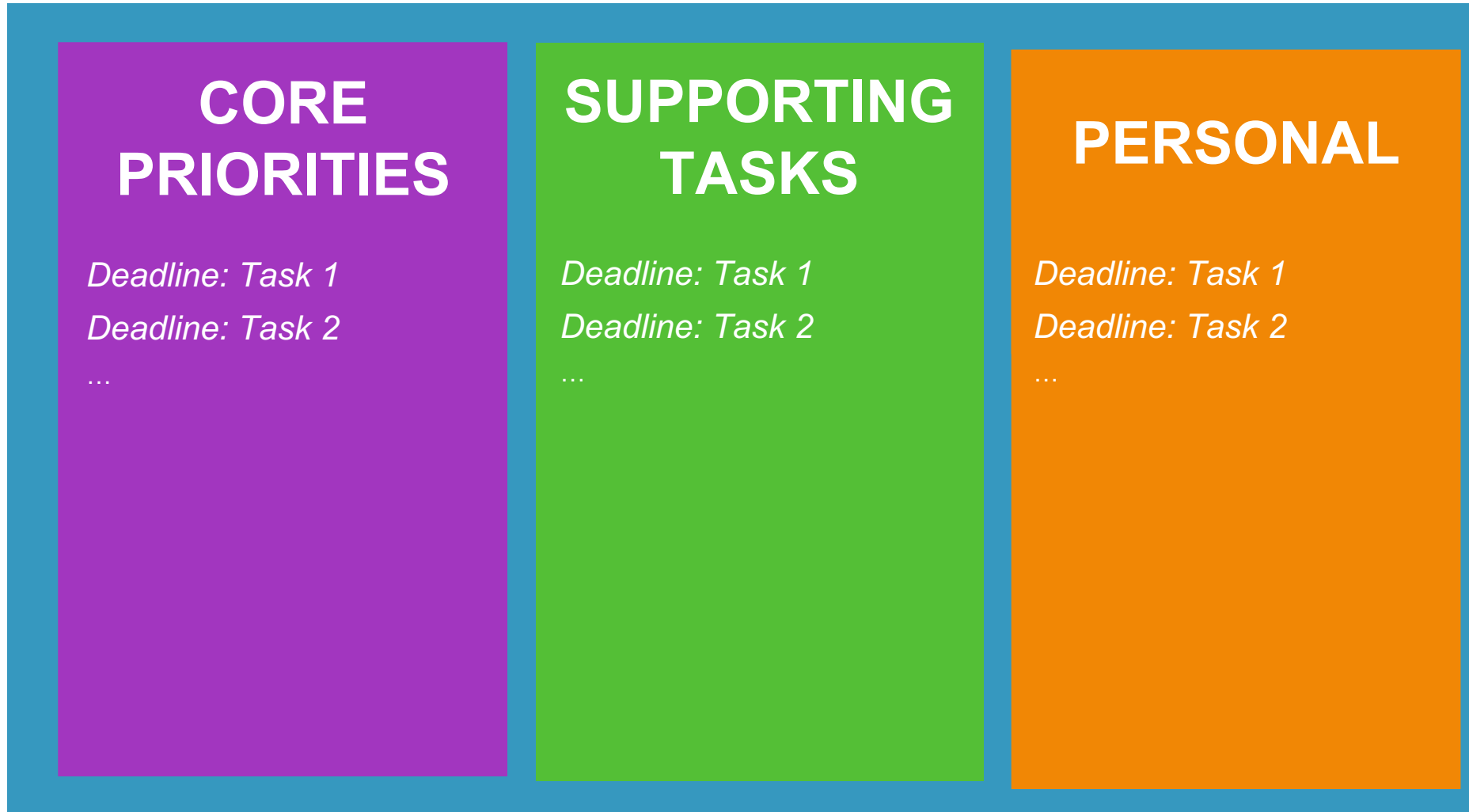
3D APPROACH

DEFER As Necessary

Your Master Action Plan
(MAP)



Your Master Action Plan (MAP)



- ✓ Complete
- ✓ Centralized
- ✓ Categorized

Your Master Action Plan (MAP)

Projects

Deadline: Task 1
Deadline: Task 2
...

Management Activities

Deadline: Task 1
Deadline: Task 2
...

Committees

Deadline: Task 1
Deadline: Task 2
...

Supporting Tasks

Deadline: Task 1
Deadline: Task 2
...

Personal Tasks

Deadline: Task 1
Deadline: Task 2
...

What tool should you
use for your MAP?



Customer Service

*Board
Meetings*

Reports

Research

Planning

Email &

Professional

Mem

calls

We can't rely on memory

*Business
Partners*

Management

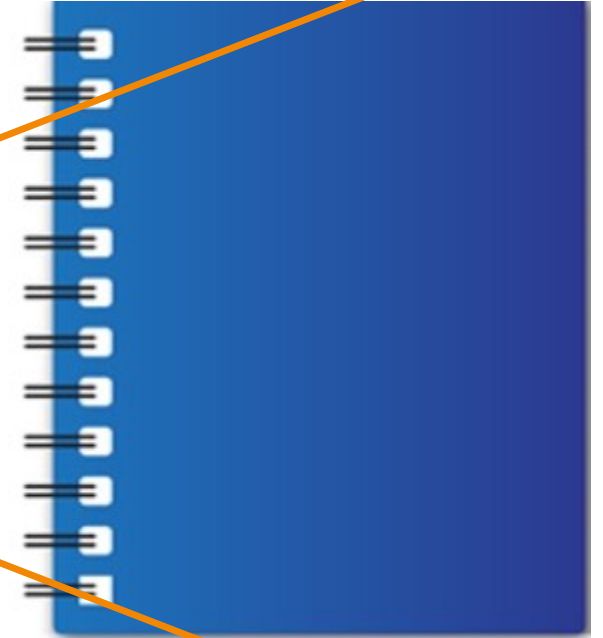
Expenses

Communications

*Personal
Projects*

Time Tracking

We can't rely on these tools either



- No clear ranking
- No deadlines
- Not complete
- Not categorized

Your Master Action Plan (MAP)

CORE WORK

Deadline: Task

Deadline: Task

...

SUPPORTING TASKS

Deadline: Task

Deadline: Task

...

PERSONAL

Deadline: Task

Deadline: Task

...

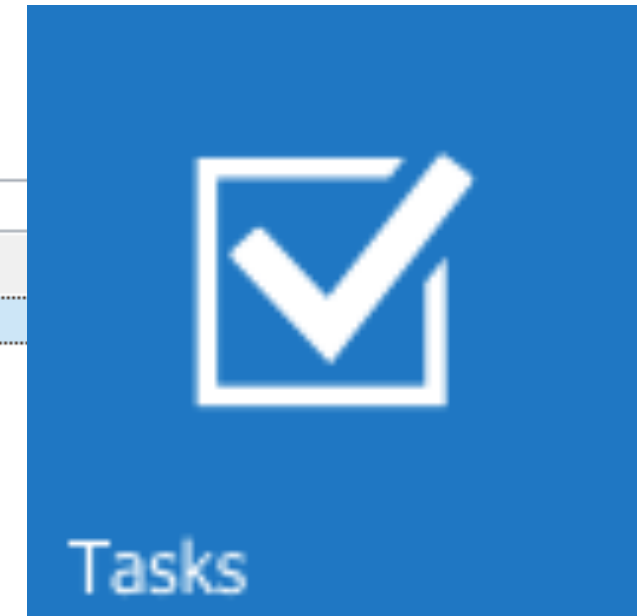


OneNote



Your Master Action Plan (MAP)

📄🔖	SUBJECT	DUE DATE ▲	CATEGORIES ▲
▲	Categories: 1. Core Priorities: 7 item(s)		
✓	Call Client B to confirm documents are in order	Mon 2020-09-28	1. Core Priorities
✓	Review budget for Project B	Fri 2020-10-09	1. Core Priorities
✓	Prepare analysis for meeting with Client H	Thu 2020-10-15	1. Core Priorities
✓	Follow up with Client ABC re: documentation	Fri 2020-11-13	1. Core Priorities
✓	Book status meeting re: Project XYZ	Mon 2020-12-21	1. Core Priorities
✓	Call Frances regarding speaking engagement with Client B	Thu 2021-01-14	1. Core Priorities
✓	Develop a new client engagement report	Wed 2021-03-24	1. Core Priorities
▲	Categories: 2. Supporting Task: 4 item(s)		
✓	Register for professional development event A	Fri 2020-09-18	2. Supporting Task
✓🔖	Review the attached Outlook Tips Sheet	Tue 2020-09-22	2. Supporting Task
✓	Book the team meeting	Thu 2020-10-22	2. Supporting Task
✓	Follow up with Justin re: P&L statment	Thu 2020-11-12	2. Supporting Task
▲	Categories: 3. Personal: 5 item(s)		
✓	Book a dentist appointment	Fri 2020-09-25	3. Personal
✓	Book appointment for car repair	Tue 2020-10-27	3. Personal
✓	Book family photos	Tue 2020-12-01	3. Personal
✓	Download passport renewal forms	Mon 2020-12-14	3. Personal
✓	Register Lauren for swim team	Tue 2021-01-12	3. Personal



Which features should you use?

Tasks

~~To Do~~

- Subject
- Due date
- Category
- Notes

The screenshot displays the Microsoft To Do application interface. At the top is a blue ribbon with tabs: File, Task (selected), Insert, Format Text, Review, and Help. Below the ribbon is a toolbar with icons for various actions: Save & Close, Delete, Forward, OneNote, Task (selected), Details, Mark Complete, Assign Task, Send Status Report, Recurrence, Categorize, Follow Up, Private, High Importance, and Low Importance. Below the toolbar is a task entry form titled "1. Core Priorities". The form contains the following fields:

Subject	Call Client B to confirm documents are in order		
Start date	None	Status	Not Started
Due date	Mon 2020-09-28	Priority	Normal
<input type="checkbox"/> Reminder	None	% Complete	0%
		Owner	susanpons@outlook.com

Editing your “All Categories” list

Color Categories [X]

To assign Color Categories to the currently selected items, use the checkboxes next to each category.
To edit a category, select the category name and use the commands to the right.

Name	Shortcut key
<input type="checkbox"/> 1. Core Priorities	
<input checked="" type="checkbox"/> 2. Supporting Tasks	
<input type="checkbox"/> 3. Personal	

New...
Rename
Delete

Color:

Shortcut Key:
(None)

OK Cancel

How to create a new task

Option 1: New task

- “Home”
- “New Task”

Option 2: Drag and drop

- Right click on an email
- Drag to Outlook Tasks

Active vs. Completed tasks

Task	Due Date	Category
Priorities: 7 item(s)		
Client B to confirm documents are in order	Mon 2020-09-28	1. Core Priorities
Review budget for Project B	Fri 2020-10-09	1. Core Priorities
Pre analysis for meeting with Client H	Thu 2020-10-15	1. Core Priorities
Follow up with Client ABC re: documentation	Fri 2020-11-13	1. Core Priorities
Status meeting re: Project XYZ	Mon 2020-12-21	1. Core Priorities
Discussions regarding speaking engagement with Client B	Thu 2021-01-14	1. Core Priorities
Develop a new client engagement report	Wed 2021-03-24	1. Core Priorities
2. Supporting Task: 4 item(s)		
Register for professional development event A	Fri 2020-09-18	2. Supporting Task
Review the attached Outlook Tips Sheet	Tue 2020-09-22	2. Supporting Task
Book the team meeting	Thu 2020-10-22	2. Supporting Task
Follow up with Justin re: P&L statement	Thu 2020-11-12	2. Supporting Task
3. Personal: 5 item(s)		
Book a dentist appointment	Fri 2020-09-25	3. Personal
Book appointment for car repair	Tue 2020-10-27	3. Personal
Book family photos	Tue 2020-12-01	3. Personal

FileHomeSend / ReceiveFolderViewAdd-insHelp

Change View

View Settings

Reset View

Message Preview

Categories

Start Date

Due Date

Type

Importance

Assignment

Modified Date

Reverse Sort

Add Columns

Expand/Collapse

Use Tighter Spacing

Folder Pane

Reading Pane

To-Do Bar

Reminders Window

Open in New Window

Close All Items

Current ViewArrangementLayoutWindow

My Tasks

Tasks

To-Do List

Search Tasks

Icon	Subject	Due Date	Categories
1. Core Priorities: 7 item(s)			
✓	Call Client B to confirm documents are in order	Mon 2020-09-28	1. Core Priorities
✓	Review budget for Project B	Fri 2020-10-09	1. Core Priorities
✓	Prepare analysis for meeting with Client H	Thu 2020-10-15	1. Core Priorities
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✓	Download passport renewal forms	Mon 2020-12-14	3. Personal
✓	Register Lauren for swim team	Tue 2021-01-12	3. Personal

Viewing tasks by category and due date

Advanced View Settings: Active

Description

Columns...

Icon, Attachment, Subject, Due Date, Categories

Group By...

Categories (ascending)

Sort...

Due Date (ascending)

Filter...

Tasks: Advanced

Other Settings...

Fonts and other Table View settings

Conditional Formatting...

User defined fonts on each message

Format Columns...

Specify the display formats for each field

Reset Current View

OK

Cancel

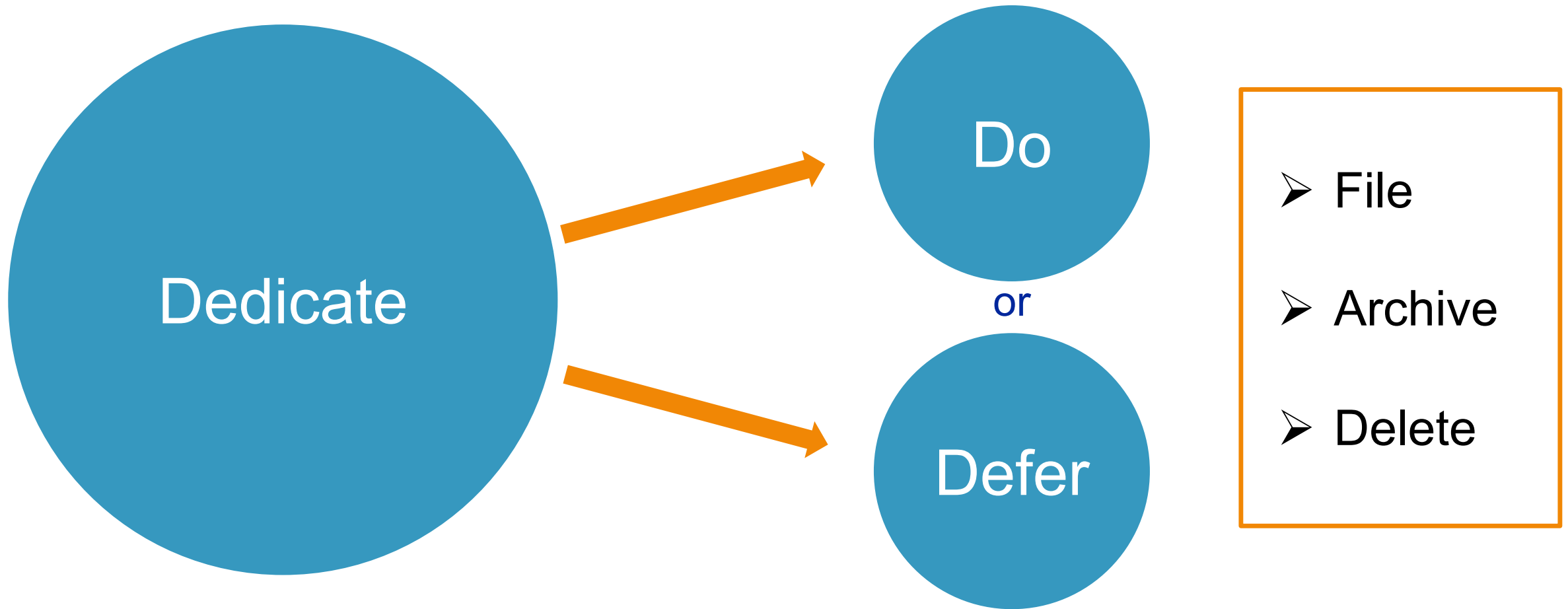
POLL

How would you rate your current to do list?

- ☐ 5 (high - it's consolidated & supports me very well)
- ☐ 4
- ☐ 3
- ☐ 2
- ☐ 1 (low - it's scattered & some things fall through the cracks)

THE EMAIL WARRIOR

3D Approach



Let's clear your inbox!

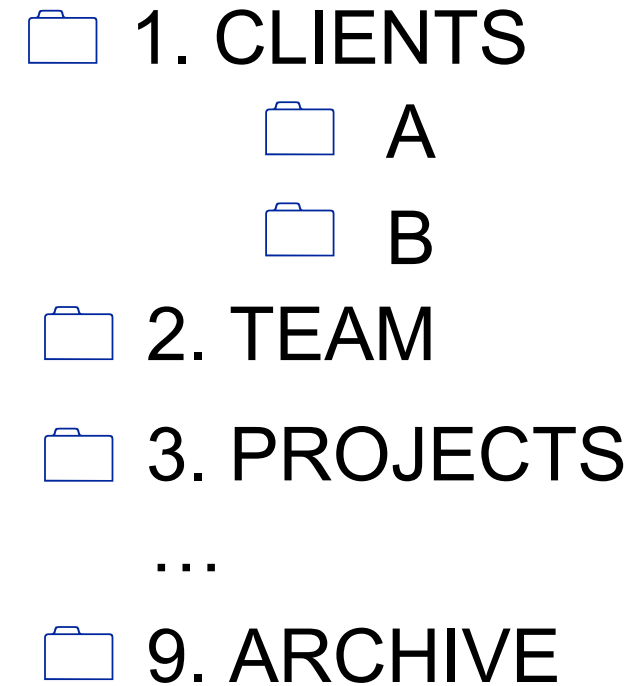
Clear Your Inbox

Step 1: Streamline your email folders

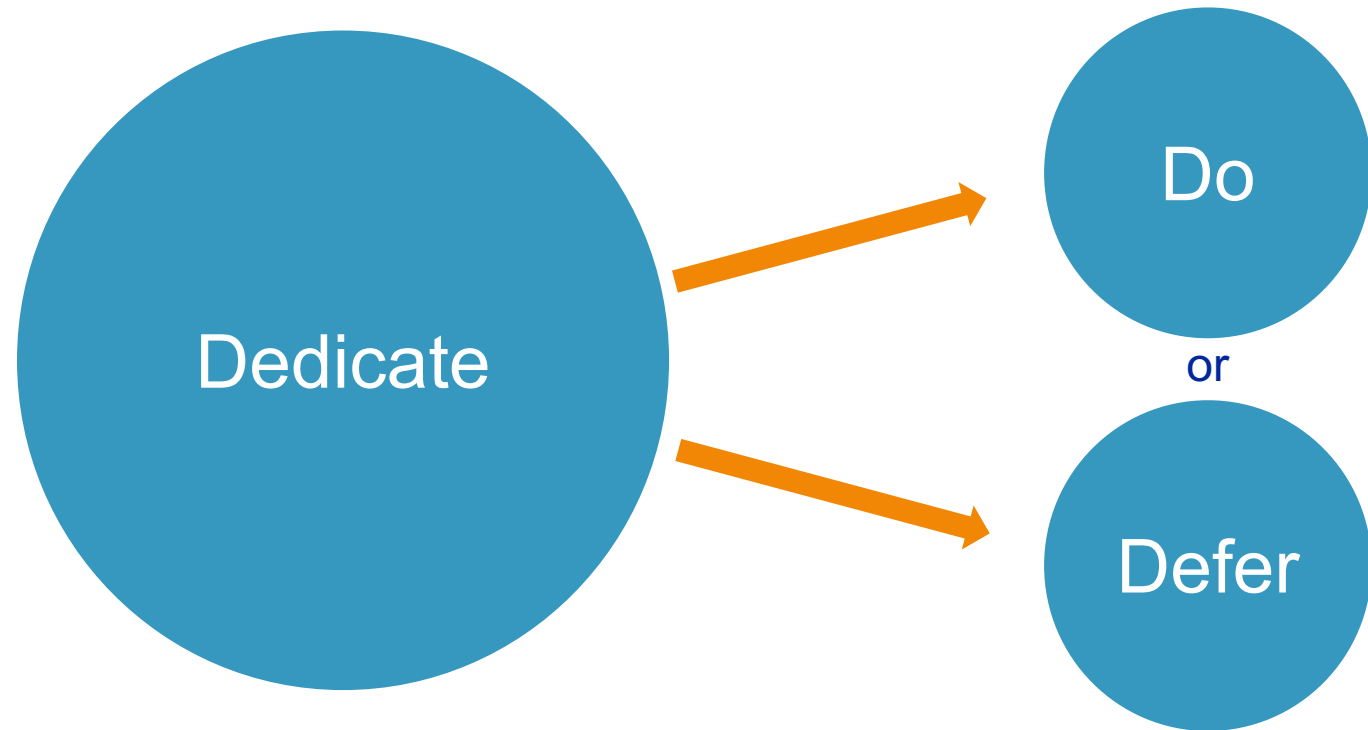
Step 2: Move old emails



Step 3: Clear your inbox



Clear Your Inbox



Move all emails out of your inbox

Email Warrior Challenge

21 (work) days
with a clear
inbox ends:
December 1

POLL

Are you interested in joining the Email Warrior Challenge?

- ☐ Yes!
- ☐ Not necessary – I'm already an Email Warrior.
- ☐ No thank you. I like having an overwhelming inbox.

The Email Warrior Oath

I will adopt the 3D Approach to email.

I will dedicate time to batch-process email.

I will resist multi-tasking and will turn email off when doing other work.

I will choose to “Do it Now” whenever I look at email.

My time is valuable, and I know reading any email more than once wastes my time. Yes, I might scan for urgency, but I will only ever read an email one time. Even on my Smartphone.

I will put bigger tasks on my Master Action Plan.

I will not leave these emails in my inbox.

I will strive to clear my email inbox each day.

I AM an Email Warrior!



Next steps

- Adopt the 3D Approach
- Build your Master Action Plan
- Clear your inbox
- Conquer the 21-Day Challenge

20 min
Focus



OWN YOUR TIME

**YOUR PROACTIVE
ROUTINE**

**THE EMAIL
WARRIOR**

**THE POWER OF
FOCUS**

**YOUR CORE
PRIORITIES**

OVERCOMING PROCRASTINATION

DIGITAL & PHYSICAL ORGANIZATION

Questions?

Feedback?

We'd love to hear it!



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info@clearconceptinc.ca



Clear Concept Inc.



@ClearConceptInc

Email Volume Tips:



Still too
many
EMAILS!

- Avoid email conversations
- Cut back on cc's
- Rarely reply to all
- Book regular status meetings
- Add structure to your email
- Strive for brevity; <100 words
- Improve email writing, bullets
- Outlook shortcuts



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