SUPER EFFICIENT

EMAIL MANAGEMENT

Super tips on how to efficiently manage your email

BY SARAH MACGREGOR

Super Efficient Email Management

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Introduction

Holy Bikini Batman! Look at that Inbox!

Getting swamped with emails?

Want to learn better ways to efficiently manage and utilize your email?

Never fear! SMac To The Rescue is here!

Batman aside, you don't need to be a Superhero to keep on top of your email.

In this e-book SMac To The Rescue will share some of the best "super" tips on how to efficiently manage and utilize your email, no matter which email client you're using.

Enjoy!

Super Tip #1 ~ Email Signatures

I'm sure that most of us are already using email signatures for our business. Most of us have the usual blurb consisting of our name, business name, maybe a logo, a couple of relevant links, contact info, etc.

Here's an example of my own signature:

Sarah MacGregor

SMAC TO THE RESCUE!

YOUR SUPER EFFICIENCY EXPERT!

Box #103
Ymir BC V0G 2K0
250-357-9267
Skype: smactotherescue

http://www.totherescue.ca

For some useful info & fun reading, check out my blog: SMac To The Rescue! - A Superhero's Diary
http://www.totherescue.ca/blog/

Every email client out there whether it's Outlook, Gmail, Entourage (for you Mac users), Yahoo or whatever, will give you the ability to automatically include a signature at the bottom of your emails. As entrepreneurs we must constantly put ourselves forward and email signatures are an easy way of doing this.

But did you know that there is another way that you can use email signatures that will save you loads of time? They can be so much more than just a simple calling card tacked onto the end of each email.

Email Signatures as Templates

Any time that you find yourself repeating an email response there is an opportunity to create an email signature as a template.

In the past some folks have kept a document on their computer, a template of their email response(s), that they copy and paste into an email whenever they need to send a common response.

Instead, why not create an entire email signature that includes both the body of the email *and* your usual signature combined? Instead of going to find your template document, opening it up, copying the text, and pasting it into your email, all you'd have to do is select that signature from your list and you're done!

Here's an example: Let's say that you often get requests from potential clients wanting to list their event on your website. You want to send them a response telling them how much the listing will cost, what's included, a link to make their payment, and the next steps they need to take in order to proceed. The gist of this email will be pretty much the same every time that you send it out, so it's a prime example of a situation where an email signature can be put into action.

Here's what it could look like:

Dear <first name>,

We have received your recent event submission, thank you very much.

Our event listings are $125 each plus tax, and here is what is included:

- One photo or logo
- Colored title text
- 2 active links
- A custom URL to increase search engine results
- A link to the event ad is added to our Facebook page and Tweeted
- Each event is listed for a maximum of 6 months

Please use the following link to make your payment: **www.yourpaylink.html**

Once we have received payment your event listing will be activated and we will send you the link to your event.

If you have any questions please let me know. Thanks!

Your Usual Signature

So all you'd have to do is reply to the enquiry, select this signature, fill in their name at the beginning, and send it out. Done!

Even if the response you want to send isn't completely generic you can create your signature with all the different options already included - that way when you select that signature you simply have to delete the options that don't apply. Super easy! And, there is no chance that you will forget to include something by accident.

Here's an example of this type of response: Let's say you are sending invoices to clients and there are a few different ways that they could be paying. You want to give them only the instructions that apply to them:

Dear <first name>,

Please find your invoice attached.

We will be processing the first payment on your credit card shortly, and we will automatically process the subsequent installments as laid out in your signed agreement.

OR

We will be sending you a PayPal payment link shortly, please make your payment as soon as possible. We will send subsequent payment requests for each installment as laid out in your signed agreement.

OR

If you have not done so already, please mail your post-dated cheques to:

Your Company Name
Your Company Address

If you have any questions please don't hesitate to ask. Thanks!

Your Usual Signature

Special tip: I find that if you make all the options a different colour then you will remember that you need to do something to that particular bit of text. Once you've chosen the part that you need and deleted the rest you can change the colour back to normal before you send it out.

Super Tip #2 ~ Using Folders to Organize Your Emails

There's nothing more overwhelming than trying to look through an inbox that has hundreds of emails in it. Just thinking about trying to find anything in that pile is enough to drive anyone crazy!

Organizing your emails into relevant folders can save you loads of time. It may be time consuming to set up in the beginning, especially if you have hundreds of emails, but in the end it will be so much smoother and simpler.

There are many different ways that you can set up folders for your emails: by client; by team member; by topic; etc.
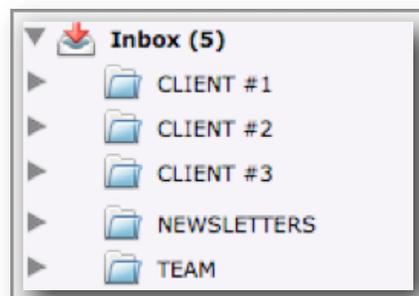
Important Rule: Keep It Simple

Going from hundreds of emails within one folder to only a couple of emails in a hundred different folders isn't going to solve anything! You'll be scratching your head wondering which folder you put this or that email into.

Try to be as generic as possible when setting up your folders. For example, if you are working within a team you may want to set up a folder for each team member. Or, if you work on your own for a number of clients you may want to set up a folder for each client.

You'll most likely end up with a combination of a few different "themes", but always try to keep it simple.

Here's an example: let's say that you work on your own with a number of clients, and also with a very small team from time to time. In addition you receive a few different newsletters periodically that tend to fill up your inbox.

Based on this example, the following is what your email folder structure could look like:

Every time you check your inbox you can move the emails to their appropriate folder for easy searching later. Easy, right? Now to make it even better...

Super Tip #3 ~ Subfolders

To take our email organization one step further let's think about utilizing subfolders.

Here is my favourite super tip on how to use subfolders to help you be able to see at a glance which emails in any given folder require some attention/action from you:

Within each folder that you create, create a subfolder called Done.

Let me explain in more detail:

First of all, the title of this "Done" folder really doesn't matter, you could just as easily call it "Finished" or "Completed" or "Does Not Require Any Further Attention". Whatever works for you is just fine.

Secondly, how would you use this new subfolder? Whenever an email needs no further action on your part, you move it to the Done folder. Super simple! That way whenever you are looking in one of your higher level folders, you know that everything you're looking at requires something from you. This keeps the main folder from getting cluttered, you can indeed see at a glance what you need to focus on, and your main folders essentially become your To Do folders.
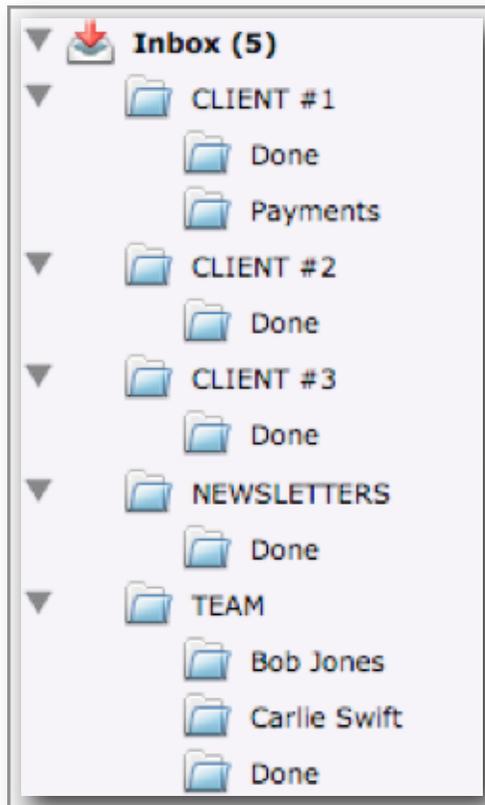
For example, let's say that your Client #1 has sent you some tasks that need to be done via multiple emails. You've already filed all of these emails in their Client #1 folder. When you're ready to do work for Client #1 all you have to do is look in their Client #1 folder, and each time you complete a task you move that particular email to the Done folder.

With this system, every time you look in the Client #1 folder all you will see is work that needs to be done. Sweet! What a huge time saver!

Of course you can create any other subfolders that you deem necessary, but I strongly recommend that you at least create one Done subfolder for each folder.

Have a look at the following to see what your email folder structure could now look like:

Inbox (5)
CLIENT #1
Done
Payments
CLIENT #2
Done
CLIENT #3
Done
NEWSLETTERS
Done
TEAM
Bob Jones
Carlie Swift
Done

Very slick! Simple and efficient, just how we like it. And just when you thought we had reached the peak of efficiency, just wait until you utilize the next tip...

Super Tip #4 ~ Email Rules

Email rules are part of every email client and can be one of the top time savers when it comes to email organization.

Basically what a rule does is when an email is received into your Inbox certain actions are taken based on rules that you've defined.

For example, you can set up a rule that will direct any emails that come from Client #1 directly into the Client #1 folder. With Outlook and Entourage you can even assign these emails to a Category and therefore a colour. Colour coded emails - how fun! And how easy to spot at a glance.

With rules there is no more manual sorting and therefore no buildup of emails in your main Inbox - everything gets automatically sorted to where it is supposed to go. Super efficient!

Think about how this can help to save you time, not only by taking the sorting out of your hands, but by helping you prioritize your work.
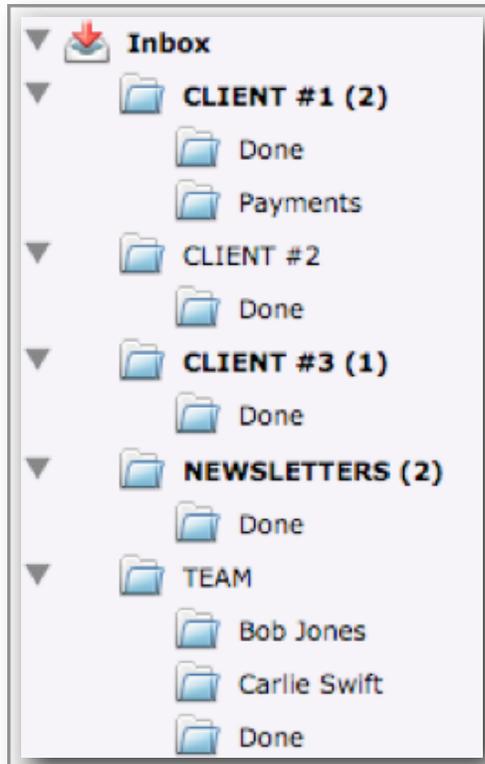
Let's say that you've already created your folders and subfolders, and now you've set up your rules: one for each client, another for your team, and another for your newsletters.

Whenever new emails are received you'll now see a number appear beside that folder and the folder will become bold. You can see at a glance exactly how many emails you have received from each client, from your team, and how many newsletters you've got.

If you've been waiting for an email from Client #1, you can spot it as soon as it arrives and go straight to it. You can ignore everything in the Newsletter folder until you have some free time to read up. If Client #3 has higher priority than Client #2, you can keep an eye on their folder and attend to their emails as soon as they arrive.

Have a look at the following to see how much more organized your folders could look:

You see how much more streamlined your email can become?

Super Tip #5 ~ Manually Sending & Receiving

What?!? How the heck can doing something *manually* make you more efficient?!?

Trust me! Would I have taken you this far only to lead you astray now?

Turning off your automatic Send & Receive schedule and switching to only manually clicking the Send & Receive button CAN make you more efficient, and I'll tell you how through a story about how I stumbled across this super tip by accident:

I was moving to an area that had no internet services to speak of and I was going to have to switch to a mobile internet stick in order to do my work. For those of you that have ever used one of these sticks you'll know that the amount of data that you are allowed per month with these things is not very high. So, because I was not going to be connected to the Internet at all times, I had to switch my email to manually sending and receiving only - if I didn't then anytime I wasn't connected to the Internet my email client would send up a bunch of error messages every few minutes telling me that it was unable to connect. So really, there was no choice.

At first I felt a bit nervous - what if I missed something really important? Something urgent? I was afraid that I would forget to check for new emails so I checked quite often. After only a day or two of this I realized that my emails didn't pour in quite so often as I had imagined and unless I was waiting for something specific I would simply periodically click the Send & Receive button.

And then after a day or two more I suddenly realized that I was getting a lot of work done. Hmmm, was I on a roll or something? What was the difference in how I was doing things? Don't get me wrong, it was a great feeling to be so on top of everything, but I was curious as to why so that I could continue to repeat it. And then it dawned on me - I had become more efficient simply by not being interrupted by new emails arriving! Who knew?

Once I really sat down and thought about it I realized that whenever new emails used to automatically arrive I would always go and take a peek, and sometimes I would end up changing what I was doing based on what had just come in. Not altogether a bad thing, but it is a lot harder to finish any tasks if you're jumping around all the time, right?

So now I like that I have control over when new emails come in. I can work on whatever I want, and when it's finished *then* I will go check my emails.

I know it sounds simple, and maybe a bit bizarre, but give it a try and you'll see that taking control of your sending and receiving will indeed increase your efficiency.

Super Tip #6 - How to Tackle Your Inbox After Being Away

Holy Bikini Batman! Look at that Inbox!

Ah, the dreaded return from holidays - that moment when you have to open up your email and begin to tackle all the emails that have piled up.

At least we've got our folders, our subfolders, and our rules to make it easier, right?

But still, in this type of situation it's easy to get overwhelmed by the numbers. My suggestion is to take it all one small step at a time. You simply can't answer everything all at once, even though you'd love to. So, do a very quick initial scan to ascertain that there are no emergencies that need your immediate attention, and then begin the process of checking all your emails.

What I like to do next is eliminate the easy parts first. Got 36 emails that contain info that's getting entered into a database? Easy! That quickly drops the number of emails left to tackle in that particular folder and can get you thinking, "Hey, this might not be so bad after all". Bit by bit throughout the day rotate through your folders taking care of big chunks of their emails, and before you know it, you've gotten through them all by the end of the work day! Super easy.

Believe me, you will be much worse off if you decide to shunt a bunch of things forward in your calendar simply because you're getting flustered and feel like you can't take care of it all. Of course you can, just do it in stages and remember to take breaks when you need them.

So, don't get discouraged if you're presented with a whopping list of emails when you get back from being away. Just take a deep breath, work through it piece by piece, and you'll be done before you know it.

Conclusion

Now you're all set! You've now got six super tips to help you efficiently manage your email, and they're all super simple to implement and use.

Remember, there may be a little big of legwork required at the beginning, but in the end you'll have a streamlined email system that no longer hinders you, and can actually increase your efficiency in the rest of your business as well.

I wish you the best of luck, and every success!

About the Author

Sarah MacGregor (a.k.a. "SMac") officially started out as a Virtual Assistant (VA) in 2007. After careful planning SMac To The Rescue started off with a bang and it just keeps growing, having now evolved into a Multi-VA practice.

SMac quickly realized that some things that seemed like common sense to her were in fact a real struggle for other business owners, and she naturally fell into the role of breaking down projects into manageable pieces, coaching business owners on how to become more efficient, and coming to the rescue of every solopreneur that crosses her path!

SMac has been a teacher/trainer in many different capacities over the years, she's insanely organized, and she gets excited every time she's faced with a new situation where her organization and efficiency can be put into action! She's a software developer to boot so you can rest assured that she is truly a techno-geek.

SMac

Sarah MacGregor a.k.a. "SMac"
CEO, SMac To The Rescue!
Your Super Efficiency Expert!

SUPER EFFICIENT EMAIL MANAGEMENT

Super tips on how to efficiently manage your email