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# SHOW NOTES

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## Inbox Detox – Tips to More Effectively Manage Your Email

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### Why focus on performing an “Inbox Detox”?

- Our email has become a major source of frustration, distraction and a drain on our productivity (at times it feels like a drain on our soul!).
- Email, itself, is not the enemy and we actually have more control over our email than we know.
- We need an approach to help deal with email that can decrease our email-associated stress. We need an “Inbox Detox”!

### A mindset shift about our email

- Email is *information*
  - Consider your Inbox as just that, an entry point for information that's coming at you.
  - Begin to think about your Inbox as you would a “physical” Inbox.
    - Your Inbox isn't a place to store everything that comes at you.
    - Your Inbox isn't a task list manager.
    - Your Inbox isn't a project management system.
  - You'll want to get clear about what your goal is - An empty Inbox? A systematic approach to processing emails?
- “Inbox Zero” - this doesn't mean an empty inbox. It means having a sense that you've processed your emails and have a systematic approach that allows you to not continually think about what is and isn't in your email Inbox
- The “Getting Things Done (GTD)” methodology – [David Allen](#)
  - If you haven't heard about the GTD approach, becoming familiar with this approach should be one of your top priorities
    - Here's a [brief YouTube video](#) to give you a taste of the GTD approach
    - If you haven't used the GTD approach before or it's been a while since you've thought about it, consider beginning with [the GTD workbook](#)

**“Email, itself, is not the enemy - we actually have more control over our email than we know.”**

Randy Clinch, DO, MS

- Clarify your habits and expectations around email
  - If you find yourself checking your email multiple times per day on a variety of different devices (smartphone, tablet, laptop, desktop), you're not alone! You're also not as productive as you could be by approaching email in this "always on" fashion
  - What are your expectations (and those of your boss) with respect to how promptly a response to email is expected?
    - For many of us, those expectations are not specified. This leads to imposed expectations of being always available and it feeds the cycle of constantly checking and worrying about emails. This detracts from our well-being!
    - Have a conversation around communication expectations to clarify things.
      1. When you need me to respond **immediately**, how will you try to reach me? (phone, pager, Instant Message)
      2. When my response is expected **within a half-day** (e.g., by lunchtime or before the end of the day), how will you try to reach me? (phone, pager, Instant Message, email)
      3. When my response is expected **within 1 day**, how will you try to reach me? (phone/voicemail, email)
      4. When you send me a message, please include a "**Please Respond By**" specification so I know when you'd like me to get back to you.
      5. If I receive an email **after regular business hours, on weekends or holidays**, what are your expectations about me returning your message?
    - Taking the time to clarify these communication expectations among your colleagues, staff, and your boss(es) will help you in getting your work done and is a positive component of your well-being.

### **Recommendations about how to implement an Inbox Detox:**

1. Begin with the mindset that your email Inbox is just that - an information retrieval station. You begin by **scheduling time on your calendar to *process*** your email.
  1. You will likely need to begin with 3 times during your day when you process your email and aim for narrowing that down to 1-2 times per day (or less).
  2. **Processing your email doesn't mean that you *answer* your email right then!**

3. Ask yourself what you need to do with any given email. This will typically fall into one of four moves:
  1. **Do It**
  2. **Defer It**
  3. **Delegate It**
  4. **Delete It**
4. **Do It** - with experience, you'll come to recognize those emails that should be addressed by you and that you can address in **fewer than 2 minutes**. If that's the case, Do It and be done with it.
  1. These emails may be rare and we might get sucked into responding to emails quickly and taking longer than we desired (i.e., >2 minutes).
  2. Learn from these experiences and calibrate your understanding about which emails you can address in fewer than 2 minutes and which you need to Defer.
5. **Defer It** - this means you've recognized that something has to be done related to this email and that *you* are the person who should do it.
  1. Move this email into a **trusted system** to capture it and any related attachments (files, links, etc.).
    1. Many systems exist
      1. Our institution has a site license for Microsoft Office365 and we can access OneNote. This can be your "trusted system" to move your emails into that require action.
        1. Here's a [brief video about OneNote](#)
      2. I've included a brief set of instructions (see separate document with this podcast episode) that walks you through how to export and tag an email in OneNote and one to ensure OneNote is active in your Outlook email program (screen shots are included in these documents for clarity).
      3. Randy uses [Evernote](#) as his trusted system. He pays for the Evernote Premium version and *very much prefers* this program's interface and features over OneNote. (FYI: Randy has no conflicts of interest to report related to Evernote or any other products mentioned).

4. Another cross-platform system for Mac and PC is [Todoist](#). It's a task management system that can help you capture your emails and turn them into tasks.
2. **Set a due date** (or a "reminder") to the email that you're deferring so you're sure to have it come back to you before it becomes a critical issue.
  1. Setting a due date/reminder is a little more work in OneNote and requires setting-up a Task in Outlook (a link is provided in the additional documents about how to do this).
  2. Setting a due date/reminder is *very streamlined* in Evernote and Todoist.
3. Consider **tagging your email** in your trusted system **with a "context"**, such as "@phone", "@clinic", or "@home" so you can quickly find some of the things you have to get done when you find yourself in a specific setting/context. All 3 of these systems allow you to customize Tags for your emails (the desktop version of OneNote, not the mobile version, has this functionality).
  1. You may also find that a particular email is really a part of some larger project. You can tag your email with that project's tag so it's easy to filter your system to display only those emails that relate to a particular project.
  2. If it's not part of a project, consider tagging it as a "Single Action", which will make it easier for you to find those things that you've determined are one-step things you can work on when you have the time to do so.
4. You may not have to actually act on an email in the future but you do want to save it for reference. In that case, Defer It to a **reference file**.
  1. You can set-up a notebook (or section) in your trusted system that acts as your "Cabinet" where you store emails that you may want as future reference.
6. **Delegate It** - not everything can or should be done by you! Give some serious thought about what needs to happen related to the email your processing. If you aren't the one who should be addressing it, send it to someone who should address it.
  1. Give that person the same courtesy of providing a "**please respond by**" time frame so they know if they're supposed to get back to you about the email or if they are supposed to move things on to someone else.

2. **Email Ninja tip:** you can set a reminder to yourself in your trusted system to go off X number of days in the future (when you had asked the person to respond to you). You can tag the email you sent to them with "Waiting For" so you can quickly see who owes you a response.
7. **Delete It** - not every email needs to be answered. The "Delete" button is available for a reason. It is OK to use it if you've processed your emails and have determined that you don't need to do any of the other steps with a given message.
2. **Periodically review** the emails you've exported into your trusted system
  1. Part of your systematic approach to managing the information that comes at you involves getting those email items that you Defer into your trusted system and tagging/prioritizing them so you know when you want/need to act upon them.
  2. **Implementing a regular review process for a few minutes at the end of each day** to look at those items you've tagged as a current or upcoming priority will allow you to have that sense of security that you're not letting important things get lost or sneak-up on you. It also allows you to know what you want to address tomorrow and helps with your daily planning.
  3. **Implementing a weekly planning session** with yourself, allocating 30-60 minutes prior to starting your next week to look over your tagged exported emails to reevaluate your priorities and the items that you determine you want/need to act on in the upcoming week that will move your projects and goals forward that week.

A word about email folders...

- Randy and Angie are both organization freaks and like a good folder structure as much as the next nerd. Randy has come to minimize the folders within his email program, however.
  - Back in the day, searching for things in your email program was not very helpful.
  - Today, the search functionality in all of the major email programs (e.g., Outlook, Gmail, others), are robust.
- **Many folders vs. Few folders**
  - If you are processing your emails and you have a great number of folders in your Inbox where a given email might be placed, this presents a few issues:
    - You **have to make an extra decision** after you process your email message about where you want to store your email message in your folder structure.

- When you want to find that specific email message, **you'll have to search within the folders** in your Inbox since one email might actually "fit" in a few different folders and you don't remember just where you stored it.
- Recommendation - for almost every email message, after you've processed it and either replied to it (Do It), moved it into your trusted system as a task or for reference (Defer It), or you've forwarded it to a more appropriate person (Delegate It), just take that email message and, if you don't want to Delete It, just **put it in the Archive folder**.
- The Archive folder is your saving grace! It is the one place where all of your email messages can live and can be easily searched if you desire to pull them up later and reply to them.
- There are also often shortcuts to getting messages into your Archive folder in your email program that allows one click to mark the message as "read" and move it into your Archive folder.

### Wrap-up and Action Step recommendations

- **So how do you begin?**
  - Don't worry about just how many emails you have staring at you in your current Inbox! No email shaming here!!! Just **start where you are** and begin to chip away.
  - Chances are, emails you have not addressed over the past 2-3 months may not truly need to be addressed.
    - For now, don't delete them.
    - Start by **highlighting all messages older than 3 months** and then **moving all of those messages into your Archive folder**.
      - This should significantly decrease the number of emails sitting in your Inbox!
    - Now **sort the emails in your Inbox from Oldest to Newest**, so the emails you received about 3 months ago are at the top of your Inbox.
    - Begin by **processing your emails one at a time**.

- Ask the questions we reviewed above and try to **"touch it once"**, meaning don't just keep looking at the email message, storing it in your Inbox, and coming back to it over and over again.
  - Decide what you want to do with it and make the processing move that is appropriate at that moment.
- **Set up your email processing times on your calendar and stick to them.**
    - Don't keep checking your emails throughout the day just to "keep up"! That's a sure way to kill your productivity.
    - Apply your new system of processing your email and use your trusted system to ensure you've captured those messages you have decided to act upon.
  - **Enjoy the moment of "Inbox Zero"** and, over time, your mindset will gradually change from "always on" to "I've got this!"