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Emerge from the Chaos and Disorder: Tips for Taking Control of Email

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Emerge from Chaos and Disorder:
Tips for Taking Control of Your Email

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Introduction

Just about everyone agrees that email is an essential communication tool. Yet, these same people routinely complain about how much time they waste with email, how often email has led to miscommunication or overloaded their storage space and how utterly impossible it is to find an important email they received last week.

With a combination of time and data management, a command of even a few of the built in capabilities of common email systems and a strict code of email best practices and etiquette everyone can take advantage of the benefits email offers for communication while suffering few of the frustrations.

This paper and accompanying presentation will explain some of the worst aspects of using email and offer both personal practices and technology tricks to overcome these problems. For most technology tricks, I will provide step by step instructions and screen shots to enable you to set up Outlook on the desktop, Outlook on the web or Gmail to help you organize your time and your data. The instructions and screen shots are collected at the end of the paper.

Email Overload

Everyone gets too much email. There are many studies by efficiency experts, IO psychologists and business consultants suggesting that the average email user in a business or knowledge profession receives between 80 and 120 emails every day. This average user checks email as often as 11 times each hour, looks at every email 3-7 times, opens every email within 6 seconds of receipt and spends nearly 30% of working time dealing with email. If you are anything close to ‘average’ in your email load and habits, email is more of a productivity drain than an efficiency boost to your practice.

A lawyer who receives 100 emails a day, looks at each one 3 times before resolving it completely and spends only an average of 30 seconds on each viewing is spending 150 minutes (2 ½ hours) clearing the day’s email. The experts I mentioned above also have studies that show
that every email interruption continues for between 60 seconds and 3 minutes after the email itself has been dealt with. So if you check email even three times an hour, you could be giving away nearly 10 additional minutes of that hour before you effectively get back to work (another hour plus lost to email on any given day (and this does not even factor in the time it will take to completely handle those emails that require real work).

**Time Management**

No small part of making email work for you is simply time management. You must first understand your email habits -- how often do you check your email? how many times do you open an email without dealing with it? how do you organize the email that you get? If you can establish a workable (for you), efficient plan for each of these issues, email will drain much less of your productivity.

First, set a goal of limiting the number of times you check email during the day—both on your office computer and on your phone. The most workable goal for you should be one that fits with your normal work cycle. For instance, if you need to concentrate on a serious project for extended periods, limit yourself to checking email three times during the day – before you begin the project, right before your lunch break and at the end of the day. Or, if you work best by taking breaks every 60 or 90 minutes, check email right before each break. The important result is to stop checking email multiple times an hour, and especially to quit checking email every time a new message arrives.

Do you use email notifications (a sound, a snippet of the email text or some symbol appearing on your screen each time an email arrives)? Even if you resolve to limit the frequency with which you check email, the alert system of notifications will continue to distract you as you do other work. All three of the email systems we are looking at allow you to limit or completely turn off notifications. Do it. Even after turning off general notifications, you can use another capability of the email systems to recognize email from specific users and notify you when those
emails come in, so you don’t have to risk missing a message with a looming deadline or from a particularly important client.

When you do check your email, have a plan. Consider trying a triage approach. Immediately delete any junk messages. If you can handle a message in 2-5 minutes, do it, right then. Respond or delegate, then move the message out of your inbox—either to a folder within your email system or to a file for the matter in another system. For messages that will take some time, use the tools in the email system to create a task from the email. In Outlook, both on the desktop and on the Web, tasks are created using the flag that appears when you point your mouse at the sender information to the left of the message. Right click on the flag to get a drop down that lets you assign a time for the task to be due. The desktop version allows you to set a customized time and a reminder. On Gmail, the ‘More’ dropdown that you see when a message is open allows you to create a task. After the task is created, you have options to add notes and assign it a due date. Once you get accustomed to moving time consuming email requests to tasks, they can simply be scheduled like your other work rather than demanding your attention every time you open your email.

Saving Time with Automation

You can also automate many functions to help you save time. Here are just a few examples.

**Junk Mail** Both Outlook and Gmail can be ‘trained’ to recognize junk email. If you move messages to junk in Outlook or spam in Gmail, the software will take note of the sender and the subject. Repeatedly moving messages from the same sender or with similar subjects will result in the software automatically relegating future messages to junk. In desktop Outlook, right click anywhere in the box with the sender’s name and subject line and hover over Junk in the selections to see options which include blocking the sender, which sends all messages from that sender directly to your junk mail folder. Moving the message to junk begins training the
software. The Outlook Web app allows you to mark a message as junk by performing the same right click. To block the sender you must add them to your blocked sender list. In Gmail, there are buttons above an open message. One reports the message as spam, also moving it to the spam folder. Google uses reports of spam to help formulate rules for their automatic spam filters. The other button simply moves the message to spam. Needless to say if messages automatically go to the junk or spam mail folder, you will have fewer items to deal with in your inbox.

**Rules** You can establish rules for emails from specific people, domains or countries or for messages with specific words or phrases in the subject line or body. With a rule you can be alerted when specific messages arrive (even if you have generally turned off notifications), automatically move messages to designated folders, flag defined items as important, and automatically delete messages or forward them to another person. The easiest way to create a rule is to start with a message that meets the criteria for the rule (it’s from the person or domain or country, has the words...). In Outlook, ‘Create a Rule’ is another of the options in the list that appears when you right click in the area with the sender's name and the subject. A similar command, ‘Create a Filter’, is an option in the More dropdown list in Gmail. Both systems offer a menu of choices that walk you through creation of the most common rules.

**Quick Steps** Quick steps is a functionality specific to Outlook on the desktop. With a quick step, you can automate a series of actions such as moving a message to junk or another folder and marking it read, bringing up a reply message for you to complete and deleting the underlying message when you hit send. I use quick steps to send messages to my classes because it allows me to set up a form that automatically puts the string of individual addresses into the bcc line. The university provides other systems to accomplish this, but they require going to that system. Email is much easier for me because I leave my email open all day.
Quick parts/smart templates This feature of Outlook on the desktop and certain Gmail add-ons allows you to create bodies of text that you can reuse over and over. FAQ’s or directions or more extensive contact information that you include in your signature block can be ‘canned’ and retrieved at the touch of button. I’ve entirely quit hunting for my often repeated messages in sent mail (what a nightmare!). Now I have a handful of quick parts and can swiftly pull up response. To accomplish the same thing in Gmail, you must find one of the free or paid add-ons: Canned Responses is available in Google Labs, and Mixmax and Nimble are two companies offering an add-on for Gmail with this capability.

Saving Time with Data Management

Often, email problems and headaches are simply a function of having too many messages in your inbox. Though the search function in most email programs is powerful, finding messages that need a response or that have necessary information becomes difficult if you have more than a few messages in a common folder like your inbox. Each of the email systems we are looking at has a number of features that can help you minimize the size of your inbox, or at least organize what is there.

Of course, the best advice is to never use your inbox as a working area. Instead, use it as the space in which you process incoming mail, using the triage system described in the previous section. Respond to those messages that can be responded to quickly, then delete them or move them to an appropriate email or other folder for storage. Individual folders specific to the client or matter should store messages with information you need to keep – if you are going to keep such information in your email. To complete the triage: delete messages that can be deleted; move messages requiring further action to your task list.

Using email folders to organize messages can be done in two very different manners. The first is to use your inbox as your processing center, and move messages to folders only when you have done the work they require. Another strategy takes advantage of rules (which were
discussed in the previous section). You can write rules that send incoming messages directly to specified folders. Then use the folder as your processing area. If you create logical folders and solid rules to send the appropriate incoming mail to each of them, you can separate your work areas in email—by client, by matter, by type of work.

Creating folders is simple. The “Folder” tab on the top bar of Outlook on your desktop includes a “new folder” command. It also includes a variety of tools to work with folders including renaming a folder, marking all messages in a folder as ‘read’ or deleting all messages in a folder. The web version of Outlook has a + sign that appears beside your name in the left hand column when you point your mouse into that column. Clicking on the + creates a new folder. Within the “label” category in settings, Gmail gives you a number of system labels which you can choose to show or hide in the left column (which Gmail calls the label list). Below the system labels are Categories (which I will explain below), then Labels, with a button to create new Labels and again the choice to have these appear in the left column or not.

If you already have three too many sets of files to which you are trying to route work, you can utilize tools within your email other than folders to help keep your messages useful and manageable. Both Outlook and Gmail have categorization tools that are easy to use (once you have an understandable system). In addition, the systems allow you to sort any mailbox or folder by various identifiers (sender, date, subject, etc).

Outlook offers eight default categories you can assign to messages. The categories are color coded and simply given the color’s name. You can change the names. In fact, the first time you use a category, a box will pop up asking if you want to change the name. When you have an email open, use the “categorize” button in the broad band across the top of desktop Outlook or the “categories” drop down right above the message in Outlook on the Web. In the dropdown menus, you choose ‘all categories’ in the desktop version or either ‘new category’ or ‘manage categories’ on the Web to create additional categories. A small square the color of the category
will appear beside the sender, subject information when you assign a category to the message. These squares are visible, but not really prominent. I would not find them useful as a visual sorting mechanism if I had many messages to look through. In desktop Outlook, you can separately sort messages by your assigned categories, but I have not seen a way to do that in the Web version.

The sorting and filtering tools in Outlook are easy to find and can be another powerful tool to organize your messages. Filters show only the messages described by the filter. Sorting simply arranges messages of certain types together. The desktop Outlook sorting tool is an arrow at the top of the sender/subject column which expands to show the various sorting options. The filters tool is a separate button to the left of ‘Categorize’ in the broad top band. In the Web version, the arrow above the sender/subject list is labeled “Filter” and your first choices in the dropdown are filters. Below the filters is a “sort by” option which expands to show the various types of sorting you can do.

In Gmail, you have the option to “star” or mark any message as important. The star and the important message box are both beside the sender’s name. Simply click in the star or box. The default setup in Gmail only uses one color of star, but you can go into settings in the general category and change that to either four different stars or all (11) stars. To assign different stars, simply keep clicking the star until the right one appears. If you have set up your system labels in Gmail to have Starred and Important show in the left column, you can easily find messages you have so marked, because clicking on the label will filter to show only those messages.

Data Management to Conserve Storage Space

Although computer storage is seldom a problem, some Outlook email systems are set up with limited storage capacity—especially for folks who never delete anything from their email. Several capacities built into Outlook (some in the desktop version, some in the Web version),
delete permanently, clean up, extract attachment and sweep, can provide an easy way to reduce the storage space your email requires.

To delete a message permanently, depress the Control key while you hit delete. This works exactly the same in the desktop and the Web versions. For messages that you never needed to see in the first place, this is ideal. Otherwise they take up space, sitting in your deleted items folder.

Clean up is available only on the desktop version. It will review messages within a conversation stream and delete all of the redundant language, removing the second third and fourth time someone in the conversation included every previous message with their response. The clean up drop down is in the broad band across the top, and from there you can select to clean up messages in a single conversation or those in every conversation within a folder and its subfolders.

There is a drop down arrow beside every attachment, both in the desktop and in the Web version of Outlook which allows you to choose to save the attachment to your computer. In the desktop version, you can follow up by extracting the attachment from the message and deleting it, but keeping the message. One of the options in the dropdown menu is “remove attachment”.

Sweep is a function in the Web version of Outlook (the Sweep command shows up in the ribbon above a message) that allows you to sweep your inbox of all messages from the sender. You can elect to delete all of the existing messages from the sender, all and all future messages, keep the most current and delete all the rest or keep all messages from the sender for 10 days and then delete them.

**General Tips for Being Effective with Email**

Email can be a vital tool for your practice, speeding up and simplifying communication. It can also overwhelm your day, create yet another collection of unorganized ‘documents’, and
contribute to stupendous misunderstandings. The previous sections discussed dealing with the first two. Let’s tackle the last.

Email is generally used as a quick, relatively informal communication tool. Never lose sight of the fact that quick, informal communication sometimes lacks nuance. At the same time, your words are the only cue to meaning offered to an email recipient. They can’t see your smiling eyes or your expression of sympathy, read your body language or instantaneously signal confusion with a quizzical look. Consequently, always follow two simple email rules—be cordial and never write an email when you are angry. If you do write an email in an extreme state of mind and you use Outlook on the desktop, take advantage of the option of delaying delivery (in case a little time will save you from yourself). From the message text, choose Options from the top bar, then Delay Delivery.

Be respectful to the folks you email in other ways as well. Help them save time. Use good, descriptive subject lines, get to the point right away, put the most important parts of the point first, don’t forward junk, copy only people who truly need to see your message. If your email is about a case, your subject line should include an easily identifiable case name and the precise issue covered in your text. If your email is time sensitive or important, include that in the subject as well. Don’t reflexively “reply all”, when only one or two of the folks on the distribution need to see your answer. Outlook on the desktop makes you choose reply or reply all. Both the Web version of Outlook and Gmail allow you to set the default response to reply, so that you actively have to choose to reply all. In Outlook the choice is in Mail Options; in Gmail under the General tab in Settings.

Finally, know when not to use email. If your message is critically important or highly sensitive, it probably is better delivered face to face or at least by phone. If you know that you might be misunderstood, same rule applies. Use email for what it does best—speeding up simple communication.
Appendix

Turn Off Notifications –

Outlook on your Desktop
Choose: File: Options: Mail
Uncheck all of the boxes under message arrival.
Outlook on the Web
Choose: Gear: Notifications

Be aware that in Outlook on the Web not all settings show up when you click on the gear. There are many more than appear in the list. Once you know what the various settings are called, you can use the blue box at the top to search for the specific setting you need.

Uncheck the boxes next to new mail and new mail sound.
Creating a task from an email message

Outlook on your Desktop

Point your mouse at the sender, subject information (in my setup to the left of the message in the center column) and you will see a flag; right click on the flag to see your task options. Notice the custom option (I used that a lot the week before Christmas to make tasks due in January) and the Add Reminder option right below it.
Outlook on the Web

On the Web version, you don’t get the options to set a custom date or a reminder.
In the screen shot above, I opened a message and hit the down arrow beside More.

When you choose Add to Tasks, this box appears in the lower left corner. Select Actions, Edit Details to add notes and a due date.
Junk Mail

Outlook on Your Desktop

Right click in the sender, subject area to get this dropdown.

Outlook on the Web – Send to junk

You can send to junk without blocking or send to junk and block all subsequent messages from the sender or the sender’s domain.
Outlook on the Web – Block Sender

Gear: Settings (then may have to search for message options – see my beginning search for op(tions))

In Mail Options, Choose Accounts, Block or Allow. In the box below Blocked Senders, fill in the sender’s email or the domain of a group you wish to block.
Options

Shortcuts
- General

Mail
- Automatic processing
- Automatic replies
- Clutter
- Undo send
- Inbox and sweep rules
- Junk email reporting
- Mark as read
- Message options
- Read receipts
- Reply settings
- Retention policies

Accounts
- Block or allow
- Connected accounts
- Forwarding
- POP and IMAP
- Attachment options
- Layout
- Calendar
- People

Save  Discard

Block or allow
- Automatically filter junk email

Safe Senders and Recipients
Don't move email from these senders or domains to my Junk Email folder.

Enter a sender or domain here
annualmeeting@call.org
customerservice@sierrabindingpost.com
educause@educause.edu
formmailer@call.org

Trust email from my contacts

Blocked Senders
Move email from these senders or domains to my Junk Email folder.

Enter a sender or domain here
72164.2147@verizon.net
Gmail

Rules

Outlook on your desktop
The first choice allows you to create a rule that always moves messages from the sender of the message you have open from your inbox to another folder. Here are the choices presented to me when I choose that option:

The next option allows you to accomplish tasks other than simply moving the item to another folder with messages similar to the one you have open (from the same sender, with a similar subject line). You can choose any one or more of the options.

Notice that this is where you can request an alert when messages from specific senders or with special subject lines come into your inbox.

Advanced Options allows you to choose many other actions.
The final option takes you to the general command box for creating and changing both rules and alerts. If you choose New Rule, the system presents you with a ‘wizard’ that walks you through creating a rule with a wide selection of specific commands.
Rules Wizard

Start from a template or from a blank rule
Step 1: Select a template

Stay Organized
- Move messages from someone to a folder
  - Move messages with specific words in the subject to a folder
  - Move messages sent to a public group to a folder
  - Flag messages from someone for follow-up
  - Move RSS items from a specific RSS Feed to a folder

Stay Up to Date
- Display mail from someone in the New Item Alert Window
- Play a sound when I get messages from someone
- Send an alert to my mobile device when I get messages from someone

Start from a blank rule
- Apply rule on messages I receive
- Apply rule on messages I send

Step 2: Edit the rule description (click an underlined value)
Apply this rule after the message arrives
from people or public group
move it to the specified folder
and stop processing more rules

Example: Move mail from my manager to my High Importance folder
Outlook on the Web

Clicking on the three dots above the message offers the option to create a rule for the messages similar to the one you have open. Using the gear to access Settings and searching for ‘rules’, gives you a link to the general rule creation functions. The rules wizard on the web is very similar to that in the desktop version.

Gmail

The More dropdown gives the option to ‘Filter messages like these’
First you set the conditions which select the messages for the filter.

Then choose Create filter with this search

And choose the commands you want automated.
Quick Steps

This is what my quick steps look like right now. SEAALL commit... 1L Research, Tech class email and CDD email give me emails automatically addressed to those specific groups; Legal Tech moves received email to the Legal Tech folder and marks it as read; Done and Reply & Delete do just what they sound like. If you choose Create New,

You get this form to name and define a series of steps, choose a shortcut if you like & give yourself a hint of the steps included.

Actions you can invoke include moving, marking, flagging, creating new messages, forwarding & creating appointments or meetings.
Quick parts

First, draft the message that you want to automate. Select all the text (including tables or images); go to the Insert tab at the top, then choose Quick Parts.

You get two options there: choose the second, ‘Save selection to Quick Parts gallery’.

Give it a name and description; if you have lots of these you can create categories and file each entry where it’s most findable. The Options allow you to save only the content or the content in a paragraph by itself (so that your cursor appears ready to start a new line after the duplicated text).

After this you can delete the message.
When you want to use the saved message, open a new message, go to the insert tab, then to quick parts and choose the text you want.

Create Folders

Outlook on the desktop

Outlook on the Web

Clicking on the + gives you the ‘create a new folder’ command.
Gmail categories separate your inbox into different pages. The software assigns incoming messages to one of the categories you have chosen to use. I use three: primary, social and promotions.

From here you create new labels (remember, Gmail labels are the same thing as Outlook folders). In my list above you can see Fitbit, Goodreads, Personal and so forth.

System labels can be marked to appear in the left column or not.

As you can see, I show starred, important, sent mail and drafts, then hide the rest.
For the first message, I’ve not changed anything. For the second, I’ve assigned the red star; and for the third, I’ve chosen to make the message important. As you can see on the left, I have visible labels (folders) for both starred and important messages.