Email Organization

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I get a lot of email. I get messages that go to other people and I'm copied on; I get messages through the 25 or so professional lists that I'm on; I get the messages sent to the general OLRC mailbox; I get spam; and I get messages sent just to me. And that's just my primary work email account – I also have 3 other work email accounts and a couple of personal accounts that I have to check as well. Even on a holiday or a weekend all of these accounts will deliver around 50-75 messages per day. During the workweek I could get anywhere from 150-250 messages depending on project timelines, time of year, reauthorization progress, grantwriting, and phases of the moon.

Four or five years ago, I was reviewing evaluations from a day-long workshop that I'd just finished. Under "Suggestion for Improvement" there was a comment that I'll never forget. Generally that section contains suggestions for improvement *of the workshop*, but amid the inevitable "workshop should be longer/shorter," and "room was too hot/too cold" was "Please answer your email in a more timely manner." After bristling at this comment – not only was it a suggestion to improve *me* (and not the workshop), but it hit a little too close to home. Due to the onslaught of email, my responsiveness had dipped below a level that was acceptable even to someone who thought was willing to spend an entire day listening to me yammer on. So I made some changes which have allowed me to keep up with all of the email that I get.

Although it sounds counterintuitive, you have to treat email like you would regular paper mail. Because it's electronic, people tend to allow conditions that they would never allow with paper mail. It's this attitude which is causing your email to get out of control.

GET ORGANIZED AND STAY ORGANIZED - FILE, FILE, FILE

Why you need to file email

You want to keep mail around, but you need to keep it in an organized manner so that you can get to it when you need it. If all of your mail stays in a single location (or if you don't keep any of it), this can't happen. Once you've read or acted on an email, it should be filed immediately – get it out of your sight, but put it in a location where you'll be able to get to it. I tend to use the Inbox as a task list – these are the issues, messages, or topics that I need to address.

How to do it

Nearly every email client has the ability to create folders to move email to – even the free, online email sites allow you to store email. Create a folder for every project you're in-volved with, every list you're on, and every grant you have. You can then just drag and drop emails into the folders. Generally, folders can also have subfolders so you can break them into fiscal or calendar years. You can also create folders for specific topics: newsletters from your Regional Resource Center, advocacy alerts, interesting websites that people send you, policy updates from ODE, pictures of your grandkids, or things you think you might want to keep around, but you're not sure of yet. Folders don't cost anything to set up and can only help make you more organized.

> **Paper mail comparison**
> Keeping all of your email in the Inbox is like throwing all of your paper mail in a large box. To find the specific bill, letter, or card you're looking for you have to go through the strata. Keeping bills in files, cards and letters in boxes or scrapbooks, and other documents organized allows you to be able to get to things quickly.

Caveat emptor

If you save emails with large file attachments, your hard drive could begin to fill up. Be sure you have a sufficient amount of space on your computer. If you begin to run out of space, most email clients have a utility that will allow you to archive old email into another file – take advantage of this. If you really do need to retrieve a 1998 policy update, you can get to it, but it's not clogging your email.

FILTER, FILTER, FILTER

Why you need to filter

If you're getting tens or hundreds of email messages a day, they're all coming into your Inbox and they're starting to get overwhelming. Just looking at the amount is depressing, and you haven't even started reading any yet! Coming into work and seeing 150 unread messages is not a good way to start your day. The good news is: most of that email isn't something that you have to respond to as soon as you get in the door.

How to do it

Your email client can help you get and stay organized by filtering things for you. I filter all email. The only email that gets to my Inbox are messages *to me* and email that is relatively urgent; all list messages, other accounts, anonymous messages, automatically-generated mail, etc. go in their own folders, not to my Inbox.

Most email clients have a filtering system included

in them which is separate from any spam filters that your ISP or district may have in place. The filtering system might be called "rules," "filters," "organizing," or something close to one of those. Regardless of the name used, the filtering system will sort your email for you as it is delivered. You already know how to create folders for your email and you can have mail automatically sorted to them. Take advantage of this! Once the email has been sorted, you can read it as you have time.

Most filters or rules allow you the option of "Running now" on messages that are in your Inbox already – as you're setting them up, go ahead and run them for messages you already have.

As an example of a type of filter you might want to start with:

Most people are on some type of email list, and most lists messages start with a common subject that can be used for sorting. For example, the subject may include the name of the list or it comes from a common address. We maintain an electronic list at the OLRC for Ohio ABLE programs. It's called Ohiolit and averages 5-10 messages a week. Most of the messages are of general interest to ABLE practitioners, but the information is generally not urgent. Even though it's an OLRC list, I filter Ohiolit mail into its own folder. I have a rule set up that says "if mail comes in with [Ohiolit] in the subject, move it to the Ohiolit folder." Because Ohiolit comes from an automatically-generated email address, I could sort it a different way by saying "if mail comes in from owner-ohiolit@literacy.kent.edu, move it to the Ohiolit folder." Either way, Ohiolit mail comes in and is immediately placed in my Ohiolit folder and I read it as I have time. It's not sitting in my Inbox among important email from funders, partners, or OLRC staff.

If I get an email that references Ohiolit, for example a request for a publication mentioned in an Ohiolit email, I answer the email and then move that email into the Ohiolit folder as well.

> **Paper mail comparison**
> You get home from work, stop at the mailbox, grab the mail, and bring it in the house. Then you sort it – bills in one pile, junk in a pile to shred and recycle, and anything else like cards or reminders go into another pile. Most likely you don't grab the first piece of mail, open it, read through it, think about it, and put it back in the pile before going onto the next piece of mail. You separate it so you get to the important stuff first, then deal with the other stuff later.

GET RID OF THE "ETERNAL INBOX"

Rationale

Do you keep all of your email in the same place where the server delivered it – The Inbox? If you're like many (if not most) people, you do. A message is delivered to the Inbox, you read it, maybe act on it or reply, and then leave it sit – condemning it to spend all eternity within the endless list of other important and not so important email.

How to do it

Since only email that's run through your filters should now be coming into your inbox, you should now be looking at a more manageable amount. Even if you've run your new filters on mail that's already in your Inbox, you may still be looking at a sizeable amount of mail. This is not a good way to start off your new, organized email handling. There are only two ways to deal with this:

1. Go through mail individually and move it to the appropriate folder or delete it.
2. Create a new folder called "Stuff I don't feel like dealing with right now" and move your whole inbox into that.

Believe it or not, I advocate #2 for a couple of reasons. Going through existing email is something that's probably too daunting to work with, there's a good chance you won't make it all the way through it anyhow and you'll just be right back where you started, and you're only moving the messages to another folder – you're not deleting them after all. You can go through them at your leisure and file them, you know that if you need a message you can find it in that folder, and you're starting off with something you haven't had in a long time – a completely empty Inbox.

Now you can actually start managing your mail! Make two new rules for yourself:

1. Only keep mail in your Inbox that has something that you need to do, follow up on, or respond to. As soon as you've completed whatever the email is for, move it a folder or delete it. The only mail in your Inbox should be unread mail or "to do" mail.
2. Never allow the mail in your Inbox to drop below the bottom of the screen. Once the mail goes below the screen, you probably have a tendency to forget it's there. This isn't a problem if you're just storing all of your email there, but if there are messages you need to follow up on, then the "out of sight, out of mind" rule kicks in.

> **Paper mail comparison**
> Would you *ever* keep all mail you've ever received in a big pile on your kitchen table? That would mean if you needed to find the tax bill from two years ago, the card from Aunt Janet that had a check in it, or the notice about your next dentist appointment, you'd have to sort through junk mail, old bills, ads from flooring companies, chain letters, and pizza coupons. Of course you wouldn't do that. That would be ridiculous. So why let your email get that way?

DECREASE THE AMOUNT OF MAIL YOU GET AND KEEP

Stop with the jokes and stories email

Just say "NO" to email jokes, heartwarming stories, silly email movies, and other nonsense.

Rationale

My rationale is: I don't have time to read this kind of email message. Period. Not interested, don't want them, don't want my email address included in the email message that gets forwarded to the next batch of emailees. People who've just gotten email access for the first time seem to be the worst offenders – they don't get much email, so they still have a positive reaction to getting and sending it! They don't realize that a great number of the email jokes, stories, and multimedia have been around for years.

Thankfully, I don't get many, but it's not because people know me to be a humorless and heartless person, it's because I tell people not to send them. If they continue to send them after I've asked them not to, every message they send (whether important or a joke) is filtered into a special folder which I go through once a week. When I've explained to people how to do this, the usual reaction is "oh, it's not that bad," "I don't want to hurt their feelings," or "I can just delete them." These may all be true, but if you're getting 5 joke emails (not an unusually high or low number) per day, that's 1,300 per year. *1,300 joke emails a year*. That's a lot of deleting, and none of those emails are helping your students, making your program run better, or getting your program supplemental funding. If you were wading through 1,300 funding offers a year, I'd be cheering you on…

Yes, you can delete them because you don't want to ask someone to stop sending them, but there's a bigger problem. Someone sends a joke email to you and 24 others of their closest friends and they put everyones' email addresses into the CC: instead of BCC: (blind carbon copy, which doesn't display the email addresses of other recipients). And those 25 recipients

> **Paper mail comparison**
> Before you send a joke email, think to yourself "Is this so hilarious that I would be willing to spend the time and money to mail it to 25 people?" The answer is generally "no," but because email is so convenient, people tend to take liberties that they wouldn't with paper mail. And what if your friend, Sally, was mailing you 5 heartwarming stories a day in 5 different envelopes...wouldn't you call her and say "what on Earth are you doing?"

then turn around and forward it on without stripping out the email addresses, and like the old Breck commercial…and so on and so on. What this means is that your email address is getting forwarded all over the place, and is just waiting for a spammer to come and strip the email addresses out and start sending you even more unwanted garbage.

How to do it

In addition to not signing up for "*whatever* A Day" lists, you need to take the offensive for things mailed to you. People will not stop once they get you on their distribution lists because they select all email addresses in their address book and click "Send." You need to let them know that even though you don't want the email, you still like them. *Clarification: this process is NOT for commercial spammers, but for friends and family who include you in their "send to all" lists.*

First junk email:
I reply with a message that says "Please take me off of your distribution list for this kind of email. I get between 150-200 email messages a day and don't have time to read these. Thank you for understanding." (Most of the time, people *are* understanding, and I don't have to re-sort to steps 2 or 3.) If they're sending to your work account, it's a good idea to mention how inappropriate that is and if you, like me, are paid at least partially with tax payer funds, it's good to mention that.

Second junk email:
I reply with "Just a reminder to take me off your distribution list– I'm still getting the same amount of email and still don't have time to read this type of message. In order to keep my mail manageable, I have quite a few filters. When I do start getting a lot of joke-type emails, I'm often forced to filter all email from the sender into a folder that I read once a week. I'd hate to have to filter you!"

Third junk email:
Filtered. No message.

That's it. That's all you have to do.

SET UP A SECONDARY ACCOUNT FOR REGISTRATIONS AND MASS LISTS
Rationale

Your primary account will, hopefully, be with you a long time. Junk mail and distribution is cumulative and the longer the account is around, the more you'll get. To try and reduce the amount of garbage mail, setting up alternate accounts for junk reduces the amount that comes into your main account. If you use a single account for everything, you're on all sorts of lists which get distributed around the globe. Your single account is used for important work email, not-so-important work email, jokes, registration confirmations, travel confirmations, spam, etc. etc. etc.

> *Paper mail comparison*
> This is very similar to getting a Post Office Box that you use for most correspondence. The only people who mail things to your house are people that you know very well or whom you choose to give your address to; otherwise, any other mail goes to the P.O. Box, and you can retrieve it at your leisure.

How to do it

Register for a secondary, free account from Hotmail, Yahoo, Bigfoot, or one of the hundreds of other free email sites. Use this account for all registrations and sites where your email address will be posted to the web. Also give this website to all Internet newbies and people who you think might be prone to sending you junk email. Use this address for non-urgent mail, and keep your main account for important email that impacts your regular work life. I check mine once a week-ish unless I'm looking for something important like a travel reservation, registration password, or account confirmation.

USE YOUR EMAIL CLIENT'S SPAM FILTER
Rationale

Many email clients and ISP's use a spam filter to weed out email so that you don't have to sort through it.

How to do it

In the settings on your email client, there should be a section for Spam or Junk Email. If you can't find it, check the Help file to see if you can locate it. Once it's turned on, it should start sorting for commonly-formatted or –worded spam or junk email. Most of the time, the suspect email is dumped into a folder labeled "Junk Email" or "Spam." Occasionally, this filter will deliver email right to the Deleted Items folder.

Caveat emptor

Be aware that some filters are more strict than others and might filter email that you want! It's not a good idea to set a spam filter to automatically delete email it finds suspect. Periodically (once a week) go through your spam folder and see if anything of importance has been delivered there. If you find anything, see if you can detect why it was filtered. The reasons aren't always obvious – I once presented a workshop on finding grants online, and it was titled "Make $$$ Fast on the Internet." I didn't receive any confirmations from the hosting center, although they said that they'd sent them. Looking now, it's obvious – both the title itself and the "$$$" were all flags for spam.

> *Paper mail comparison*
> In an ideal world, the mail carrier would weed through your mail and only deliver the stuff you want. However, this not being an ideal world (and this scenario being illegal), you still have to sort through the junk mail yourself when you get home.

PERMANENTLY DELETE MAIL
Rationale

Most of the time when you delete an email it goes into the Deleted Items folder where it sits forever until it's permanently deleted. If you're like me, you may want it out of your way, don't really need to file it, but you're not 100% comfortable with getting rid of it. That's okay. However, there is mail that you want to permanently delete and never see again.

How to do it

Most of the time deleting email from your Deleted Items folder will permanently delete it, so that's one option. Also, most Windows-based email clients will allow you to permanently delete a message in your Inbox or other folder by by pressing and holding <Shift> while you press or click <Delete>. It will generally ask you to confirm that you want to permanently delete the message before it zips it out existence.

What should you permanently delete? All spam, jokes, server errors, email that you may have in another location or in hard copy, very old mail, etc. Don't let this junk fill up your Deleted Items folder that you may need for other, important mail…

> *Paper mail comparison*
> You shred and recycle (or *should* shred and recycle) all mail that you don't want. You don't shred it, put it in a bag, and then throw the bag in the basement where you keep adding to the bag forever and ever. No, you permanently remove un-wanted mail from your house.

IN CONCLUSION
Not all of these steps may be possible with your email system, and some may not work for you. Hopefully, though, you'll be able to use one or two suggestions to help you organize your email so that it can be a help and not a hindrance to your regular workday. Good luck!

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