the
Inbox
Overhaul

TRANSCRIPT

Introduction

Welcome to the Inbox Overhaul! I'm Justin Baeder and in this program it's my goal to help you go from overload and overwhelm to a complete inbox overhaul so that you feel in control of email and you're able to use it effectively as a leadership tool.

Far too many people are feeling like email just does not work for them. As a leadership tool, it is just dysfunctional for so many people and in this program, we're going to talk about why some of the common approaches— extremely common techniques and tactics that people use to manage their email— simply don't work. So if any of these sound familiar, then you are in the right place. I find that many leaders are checking email constantly all throughout the day and yet feel like they're falling farther and farther behind as new emails come in faster than they can be processed. And we feel this pressure as leaders to reply instantly to be supportive to get back to people in a timely manner but it creates this sense that email is just endless and that it's hopeless to keep up with it.

Along with that, I see a tendency for people to just allow emails to stick around— to sit there in their inbox until the work is done as some sort of reminder, right? As some sort of physical clutter in the inbox to create a reminder of work that needs to get done. And that might work a little bit, you know, it works to have two emails in your inbox as a reminder of something you need to do. But it doesn't work to have 2,000 or 5,000 or 10,000 but I'm finding that that's extremely common among people in leadership positions due to an issue that we'll tackle early on in the Inbox Overhaul called asymmetry.

So we're going to talk about how to break through that clutter, how to deal with the huge volume of email that you get and not have to set aside some huge block of time to get it all organized and to get it all cleaned up—but really to develop new philosophies and systems and habits that will allow you to get current and stay current with your email. So if you feel like you are just overwhelmed and you're constantly dealing with email and never catching up, just know that that is normal but

that there is a better way. And that's what we're here to talk about. I find that the number one cause of people feeling overwhelmed with email is this false belief—this mistaken idea—that in order for an email to go out of your inbox it needs to be completely dealt with.

So many people feel like they can't get rid of an email—they can't remove it from their inbox—until it's totally finished, completely handled and then and only then can it disappear from the inbox. And if that is an approach that you're taking currently and it's working for you, great. I'm going to guess that such an approach is not working for you. If you're in this program, you are probably looking for ways to improve your effectiveness with email. So if you're ready for a better system you are in the right place and let's get started. Here is what we are going to talk about in the inbox overhaul. First of all, we'll talk about some specific concerns for leaders. I'm going to assume that you're in some sort of leadership position and that's why email is such a challenge for you. We'll talk about some of the inherent properties of email and some of the design features that go back all the way to the 1970s that really inform how we can and should use email effectively. We'll talk about the core practice of getting current and staying current and clearing out your inbox every single day which, believe it or not, is a possibility and is what I'm going to recommend that you do. And I'm going to show you how in this program we'll talk about your smartphone—your mobile device—and how to use that in conjunction with your laptop or desktop computer to effectively handle email.

And then we'll talk about a technique that most people don't know about that that really is central to staying on top of email called timeshifting—how to get an email into your inbox at the right time and get it out of your inbox when it doesn't need to really be there and in order to do that we'll talk about some additional tools that can be part of your repertoire so that it's not just email that's allowing you to stay organized and keep track of everything, but you're using the right tool for the right job. So with that let's get started!

Leadership & Email

One of the key features of being a leader when it comes to dealing with email is simply the asymmetry that you face. One of the key challenges is that there are so many different people who can send you so many different kinds of emails and there is only one of you to deal with it all.

Now The Asymmetry Problem takes a number of different forms. You have multiple different stakeholder groups, and if you are in a leadership position, by definition, there are more people than there are of you. It's not just one person that's emailing you—it's lots of different people in lots of different roles. And in fact, even people you don't know, that you'll never meet, salespeople, vendors, companies, can email you and you have got to figure out how to deal with that. And there is also an asymmetry when it comes to the work itself.

If someone else makes a request of you, it may only take them a few seconds to make that request to ask you for something. Maybe they'll ask you to fill out something or write them a letter of recommendation, something like that you might be called upon frequently to do as a leader. And that maybe hours of work for you, even though writing the original email on the other person's part only took a few seconds. So we have these massive asymmetries that result in leaders—people in any kind of leadership position, getting tons and tons of email and really struggling to keep up.

So in this first section, we're going to talk about how to level the playing field so that, as a leader, you are not facing such a stark asymmetry and being at the whim of so many other people who send you email. One of the first things we can do to level the playing field is to work with our various stakeholders—people who are emailing us that we have some sort of obligation in return to get back to them, to handle their issue, to be responsive and supportive and to not simply take full responsibility and make ourselves feel guilty until we're done dealing with their issue. But we can take some steps to level the playing field. We can start by just briefly acknowledging it and there is a symmetry there if all we need to do is acknowledge the email. We can reply

with something quick like, "Thank you for sharing this with me, I'll get back to you."

We can also route that request to an existing forum. If we have an upcoming committee meeting where we'd discuss issues like that, we don't necessarily have to stop and take time out of our day as leaders right in that moment to deal with that issue if it can be handled in existing forums. So that can be an option. And we can also ask other people to follow-up with us. Just say, "Hey, I might be able to get back to you this week, do me a favor though—check back with me on Friday and we'll see where it stands and I can get back to you then. But please check back with me." So we can ask the other person to be proactive if they want their request to be handled.

So with stakeholders, obviously we have a greater obligation to be responsive and to negotiate what we are going to do and how we are going to spend our time to support the people that we are accountable to. We also have people that we are not accountable to who email us. And if you are in any kind of leadership role in an organization—if you are a school principal, if you are an executive—then you probably are in the crosshairs of many marketers and salespeople.

And commercial email lists are a big business. I get contacted all the time by people who want to sell email lists of people who would be hot prospects. It is lucrative, and believe it or not, it is legal for companies that you have never contacted and never done business with to email you out of the blue without permission. And I'm going to guess that if you are in a leadership role, if your contact information is public, then this happens all the time. I'm going to guess that if you are a school principal, you are probably on 1000 or more mailing lists, which email you with different frequencies—maybe it's only once a month or a couple times a year.

Maybe it's every week or even every day, and they will not stop unless you tell them to. But the good news is, if you tell them to stop emailing you, that have to and they will. By and large, they will stop if you tell them to stop. You can simply click unsubscribe. You can reply to the email and say, "Please remove me from your list." And that works no matter how they are emailing you. So we'll talk more about unsub-

scribing later on in the Inbox Overhaul. But just know you can fight back—if people are emailing you out of the blue, without your permission—you can tell them to stop.

The third strategy that we can use to level the playing field is by asking for an increased commitment from the other person. In other words, you can ask them to put some skin in the game if they are going to ask you to do some work via email. For example, if someone wants to take up your time with a phone call or a meeting, you could say, "Hey, send me a draft agenda with some idea of what you'd like to talk about in that meeting." Or if you'd like me to write a recommendation letter, "Could you write up a few key points that you'd like me to speak to and then I'll have something to start with." And that's a very great way to make sure that something is not a huge amount of time for you and a small amount of time for the other person. If you are being asked to intervene in a conflict, get involved in a situation that you are pretty sure the other people can handle on their own, you can say "I'm happy to help, but I don't want to escalate the situation by becoming involved if you can work it out together. Why don't you talk to her directly first, and let me know how it turns out?"

If people need paperwork filled out, maybe they can fill out most of the paperwork for you, that kind of thing. If it would be a very difficult issue to address via email— maybe it would take you an hour to write back a lengthy and detailed and respectful response—maybe that just needs to be an in-person meeting or a phone call. So you can ask people to make an appointment.

Sometimes you can put the ball in their court and say, "Hey, thanks for bringing this to my attention. What do you think we should do?" Or if the ball is already in someone else's court, you can simply say, "Hey, thanks for letting me know. Thanks for the heads up—let me know how it turns out." We don't always have to take responsibility for other people's issues simply because they bring them to us.

There is an old management parable about the employee who comes into the managers' office with a monkey on his back and says, "Hey boss, I've got this monkey, what are you going to do about it?" And as the leader, as the boss in that situation,

one of your key ways of protecting your time is to make sure that everybody who brings you a monkey leaves your office with their monkey. We do not want anybody to leave their monkeys with us. So we want to ask for skin in the game, and we want to encourage people to take ownership and not just dump their issues on us via email—or else our inboxes will get out of control.

Now over time, we can develop some habits around handling those asymmetries and asking other people to put some skin in the game. So one of the things you can do is you can save your replies, your responses, the text you use to get back to someone—and ask them to take some action to solve their issue and not leave the whole thing with you. You can save that either in an app, like Text Expander—I personally have used Text Expander for probably more than a decade. I love Text Expander because it allows you to type in abbreviations and give a respectful and detailed response with-out a lot of typing. You can also do this in specific apps like Gmail—there is a feature called templates in Gmail that you can use to write rewritten responses that you can very quickly respond with. But I personally like Text Expander and I would put things like this in my Text Expander.

For example, an all-purpose reply that you can use quite often is, "Thanks for letting me know. I'll look into this and get back to you." And then, you can see in brackets here I've got an abbreviation.

I like to start all of my Text Expander abbreviations with a comma, because a comma, in normal typing always has a space after it. So any time I type a comma and then anything else, it's going to be a shortcut in Text Expander. I've got ,look for that first one. Maybe you need a quick reply for acknowledging something, "Got it. Thanks!" ,got. Maybe you have a more detailed response to a specific issue that people ask you about all the time. Maybe you, like I was, maybe you're an elementary school principal and you are constantly getting emails from parents saying, "Hey, I would really like to request that my child be in this certain teacher's class." Well maybe you have a page long policy and explanation about that and you can save that as a cus-tom response. "Hey, thanks for reaching out. We're committed to making sure that

THE INBOX OVERHAUL

every student is in a class where blah blah blah." You know, you don't want to have to write that email 1000 times even though you may get asked that question 1000 times.

So write it once, save it, and reuse it. And that's a great way to fight that asymmetry of a very quick question needing a very lengthy and detailed reply. Another way you can use those saved responses is to delegate. You can pass something on to Karen, for example, someone on your team. "Karen, could you follow up and with this person?" Boom we've got an abbreviation for Karen.

So those are some ways to fight the asymmetry that you face as a leader. It is not necessarily a fair fight when we have all of these people emailing us about all of these different things and there is only one of us to respond. But you can use these strategies to level the playing field a little bit.

Email's Properties

Let's talk now about some of the inherent design features and properties of email because if we understand how email was designed to work and how it actually does work we can make sure that we're using it for the right purposes and in the right ways so that it doesn't become overwhelming to us. The first thing we've got to understand is that email is fundamentally a tool for communication. It is not a to-do list. It is not a day timer. It is not a planner. It is simply a tool for communication.

And most of the problems that we run into with email come from using it for purposes other than the purpose that it was designed for. And if we use it for communication it works very well. Now one of the things that's happened over the last couple of decades, you know gradually, and now it might feel like this happens completely with our work, is that so much of our work arrives via email. Yet it would be a mistake to simply characterize your work as email. "What's your job? What do you do all day?" " Well, I answer email." Well probably not, right? Unless you're in a role where literally all you do every day is email people back, the email probably carries other work that you need to do and then email is really just the communication medium for that.

And with that realization in mind we can start to distinguish between two things that might seem the same but that are not— processing email and actually doing the work involved in fully resolving those emails. If somebody sends you a task that needs to be done if they make a request of you, answering the email could be very quick, right? You can get back to somebody in a few seconds and say sure I'll do that, but actually doing the work might take much more time. And we need to be care- ful not to blame email for the amount of time that that actual task takes up. And, of course, a lot of that work doesn't need to be done while we're checking email. It can be done at another time and we can stay focused on getting through email if that's what we're doing at that particular moment.

So email does not have to be out of control even if you have a lot of work. You don't have to be overwhelmed by email if you have a good process for staying caught up with it. And that's what you'll learn here in the inbox overhaul. It's important to un- derstand that as email is designed to be a communication tool, it's not designed to be a to-do list, a strategic plan, a dashboard of priorities, an agenda for the day. And yet if we allow it to, email can take over your day. If you sit down in the morning and say, "all right, I need to get caught up on email."

It is not difficult to spend all day doing nothing but reading and responding to and doing work that has arrived via email, if we allow that to happen. But that only hap- pens if we don't have an effective process for processing email—for triaging it—for dealing with it—so that we can get on to all the other work that we need to do as leaders. The thing we need to remember is that email is just a communication tool. And it's not even just a mediocre communication tool—I think email is an excellent communication tool. And the fact that it's stood the test of time and been in use for more than 40 years is a testament to just how useful a tool it is. Compare email. if you will, to a tool like a two-way radio. If you had a two-way radio and that was how you communicated with other people, what would be some of the drawbacks of us- ing that two-way radio to communicate about your work?

Well for one thing a two-way radio is a kind of proprietary device, right? Only other

people who have that same type of radio could communicate with you and when they do they have to interrupt you. There's no voicemail with a two-way radio they've got to get you right now they can't leave a message, you know, they have to really interrupt what you're doing right now. They can't necessarily reach you if they're in a different time zone or a different location they have to be physically close enough to reach you.

So compared to either a face-to-face conversation or a two-way radio, email is fabulous because it was designed to be asynchronous. It was designed to not necessarily interrupt you but to wait for you to check it. It was designed to be flexible so you could send file attachments and all sorts of messages and not just with people who were within a closed system. You don't have to have the same email service as someone else; it's universal. You can communicate with people in other organizations all around the world and those messages will simply sit there and wait for you to check them—to process them—to deal with them—and that is a tremendous gift to leaders who are trying to get work done without being interrupted.

 But too often we allow ourselves to be interrupted. We say, "well I'm getting emails. I can see them on my phone. So I'm just going to have to stop what I'm doing and check those emails." But that is not true. That is a choice that we have control over. And I think what we have to do is really be disciplined in the choices we make about what to use email for. It's kind of like using a butter knife as a screwdriver, right? You can use a butter knife as a screwdriver, but it's not going to work especially well. You can use your email inbox as a to-do list, but it's not going to work especially well. You can use it to store files, you can use it in place of conversations that really should be face-to-face or phone calls. If you want to email back and forth at length with it with someone, sometimes we realize after the fact you know what we should have just picked up the phone and I could have saved an hour of typing.

We can, if we want to, use email as an instant messenger where we're constantly replying and typing out messages with our thumbs on our phones, but it was not designed for any of those purposes. It was designed to be an asynchronous commu-

nication tool and it works best when we use it that way. It was also designed to be an inbox based rather than a stream based communication medium. Now what do I mean by that? If you look at how your inbox is designed, it will collect emails even when you're not looking at it. Like, nothing bad happens if you sign out of your email, turn off your device, and check it again tomorrow. All of those emails will still be there. Nothing bad happens when those emails pile up. Now it can be stressful when those emails pile up, if you realize that they have piled up on top of other emails that you haven't dealt with. But because they're all safely there waiting for you in your inbox, it's very easy to get caught up get current on what's there without being inter-rupted.

And given that you probably have other work to do other than email, it's essential that you be able to shut off those noisy streams that otherwise are pinging you all day long with notifications. You probably get notifications from social media, from text messages, from email—all kinds of notifications are coming in and we've got to be able to shut those off if we really want to get work done. So email works as an inbox style communication medium and does not have to interrupt you. It is not like the two-way radio. You can ignore it and all of the messages will still be waiting for you and that is essential for protecting yourself from the asymmetry that you face as a leader.

All of those streams where people are pinging you and you're getting push notifica-tions—you've got to be able to turn that off and focus or else you're going to be con-stantly overwhelmed. You're going to realize, I've been staring at my phone all day when I could have had the phone turned off and put the phone down. I could have gotten some serious work done if I had only shut off those streams and allowed my inboxes to do their job. So how can we minimize stream based communication well?

First of all, I think we have to be very selective about who if anyone can contact us with an interrupting form of communication, right? You probably will answer the phone if it's an immediate family member or somebody that you work with very closely. There's probably a short list of people who you trust to interrupt you if they

need to because you know that they're going to respect your time and they're going to use good judgment about whether they interrupt you. But if other people are interrupting you, we get annoyed, right? We get annoyed when we get sales calls. We get annoyed when people text us about things they could have emailed us about, and so on. And I want to recommend that any time you realize that people are interrupting you when they don't need to—ask them to send you an email.

And this is a little bit of a generational challenge I think with younger and younger generations, there is a greater tendency to text about everything and there is a real asymmetry that comes in for leaders when it comes to texting. You might have 20 or 30 people who expect to be able to text you and get an immediate response and frankly that's not fair. It's not fair to you because you can't keep up with all of that and still get other work done. And it's not fair to them because they don't have any clarity in terms of their expectation about when you're going to get back to them.

 So I think we've got to dramatically shift the expectation that we don't text unless there is something that is truly urgent and really does need an immediate response. Everything else goes to email. Now along with that though, if we want people to email us and allow their messages to sit and wait in our inbox, we have to do our part and actually get back to people. People are going to learn very quickly if we say, "Hey just email me." If we never get back to people on email they're gonna learn, "okay, I'll say I'm going to email you, but I'm really going to text you. I'm really going to come and knock on your door so that my issue gets dealt with." We train other people to interrupt us or not by our behavior. So you've got to handle your inboxes well if you want people to use them. We've got to build the expectation and the trust in order to allow inboxes to do their job and prevent those interruptions

Get & Stay Current

The process of getting caught up with email and staying caught up with email involves learning a system for getting through all of your emails that have come in, making a decision about them, and then, getting back to work on your other work. So I'm going to show you in this section how to get current and stay current with email. But that doesn't mean simply doing all of your work right now so that you are totally and completely caught up forever.

What it means is that when you get current, you are triaging everything that is in your inbox and you're making the initial decision what to do with it. And then you're able to repeat that process on a frequent enough basis that you are never allowing emails to pile up in your inbox. So here is a starting point if you are feeling overwhelmed with email, if you are 10000 emails behind and you're not going to get caught up, here is where you start with what I called the inbox cleanout.

This could be a critical step in your inbox overhaul. Let's say you've got 10000 emails in your inbox right now. You've kind of looked at all of them, but you realized that you are never going to go through every single one and figure out exactly what to do with it. What you can do is, you can create a new folder or new tag if you are using Gmail or another tag-based email system. Call it "inbox cleanout" and include the month and the year. And then simply move every single message that is currently in your inbox into that folder, or if you are using a tag-based system, add that tag to all of those emails and then archive them. And instantly, your inbox will be empty.

And you think, "Well, that might feel good for a second, but am I losing track of things that I need to take a look at?" I mean, that's a fair question. But let's be realistic here—if you had 10000 emails on your inbox, you are not going to get to all of them anyway, right? it would take months to get to all of those emails. So probably, it was lost cause to begin with. And it's better to start fresh. But we're also not deleting those emails. If you need to go back through them and check, maybe you'll wake up in the middle of the night and you'll think, "Oh, somebody emailed me. I know I need

to get back to that one person." You can always go and search for that email and get back to that person. But the emails will be out of your inbox. And of course, if you never remember to follow up, the other person can still follow up. And if somehow you do make time to triage those old emails, you can always remove them from that cleanout folder or remove the tag from them. And then you'll know that what's left in that folder really is messages that you actually have not seen or triaged. But you want to get that inbox empty initially so that it can do the job that it was designed to do.

Your inbox was designed to hold new communications. And once you've cleared it out for that process, you can start to use it on a frequent basis to actually keep track of new communications that come in. Now for most people, if you are in a leadership role and email is a frequent tool that people use in your organization, you probably want to check email about 3 times a day. But you don't just want to check it and scroll through and look at it and get a sense of what's there, you want to specifically and carefully and rigorously process every email in your inbox.

Now that may sound crazy. that may sound like something you could never do because you're not going to be able to get all of that work done in just a few minutes. But set a timer, give yourself maybe 20-25 minutes. Maybe less in the morning, maybe more in the afternoon—just depending on your schedule. But set time, give yourself a specific block of time where you can briefly go through all of your emails and get to zero in your inbox. Now how do you do that?

Well, there are a couple of different things that we'll need to do to make that possible. On is that there may be some tasks that need to go on your to-do list, or there may be some appointments that may need to go on your calendar so that you can block off the time you'll need to do those more time-consuming projects. But simply reading through your emails should not take that much time. But what we have to do is not just look at them, not just click on a few of them and cherry-pick, we have to actually go through every single one.
And to understand how this can work, I think it's helpful to think of your email inbox just like a mailbox. Just like a postal mailbox. What would you do with your postal

mailbox every day? You would go to your mailbox, you would check it, probably just once, cause the mail only comes once a day, if we're talking about postal mail. But you wouldn't leave anything in it, right? You would take everything out, you would quickly go through it and you'd throw out the junk. You would probably save the bulk of it, you might open some of it right away. You might open some of it later, but you would not look through it and then put it back in the mailbox. Once you review it, you take everything out. Nothing goes back in the mailbox.

And I think we've got to treat email in the same way. We've got to see the email inbox as the place from unprocessed messages, not a place to hold all of our unfinished work. And if you are overwhelmed by email right now, I'm going to guess that this is probably the single biggest factor that is causing that. That you are using your inox to hold all of your unfinished work and you are telling yourself, well as long as I have it in my inbox, I won't lose track of it. That may have been true at one point, but if you have 1000 or 5000 or 10000 emails in your inbox, you know it's not really working anymore. So I believe that no emails truly belong in your inbox long term.

It is simply like a mailbox. Things come in, they get processed, and they get taken out of the inbox. If you allow them to pile up, you really are not going to be able to tri-age quickly to scan and prioritize and to see what communications have come in. So you want to get that email inbox completely empty probably multiple times per day. It's pretty simple to do that really. Once you get a fresh start and you get a process down here is all you have to do. Set a timer, 20 minutes is probably enough for the new emails for the day and for every email, simply make one of these four decisions about it.

First of all, you can delete it. You could Delegate it. You could Defer it to later. Or you could simply Do it. And then, once you've done one of those things, you can archive the message and it's out of your inbox. So again, we're not doing the work that's rep-resented in the email necessarily, unless it takes less than 2 minutes. We're not going to do that work now. We're simply going to triage it and make a decision. So let's tall about each of those four possibilities. The first is of course to simply delete it. To say,

you know what, this does not need to be in my inbox anymore. Maybe it is a nice FYI, but I'm going to get it out of my inbox because I am done with it.

Now I call this delete because I think it's nice to have the alliteration of all of this starting with the letter D, but I don't want to encourage you to actually delete those emails. Just archive them. Because deleting really is a decision that you can agonize over for no reason. Storage space is cheap, it is almost free. My Gmail account has 100 gigabytes in it at the moment. And there's really no reason to think, oh should I delete this? Should I save it, should I archive it? Should I put it in a folder? Don't even worry about deleting it—it's not worth it. I say delete because you are deleting it from your inbox. You are getting it out of your inbox and you may even choose to unsub-scribe yourself from the mailing list. That can be a huge time saver in the long run if you get yourself off email lists that you don't really need to be on. Okay, so delete is our first option.

Our next is to delegate. You can of course forward it to someone else on your team, either without an explanation or with maybe a brief explanation. You could also pos-sibly add a little note to the original sender and loop in the person who will be han-dling it. "Hey Pam, Steve can help you with this. Steve, could you look into this and get back to Pam?" Of course, really easy to delegate by forwarding, so that is our second option.

Our third option is to defer the email. And for most leaders, this is the missing key. Most people don't have an effective way to defer or timeshift emails that they will be able to effectively answer later, but they can't effectively deal with right now. So we'll have a whole section of the Inbox Overhaul on timeshifting. But briefly, when you are going through your inbox, all you have to do is make a decision about when you will make a decision about what to ultimately do with that email in the future. And then timeshift it and archive it. Now if there is a task you need to do, you may need to put that on your to-do list or schedule some time on your calendar when you can do that work, especially if other people are involved, you may need to work on it in a particular setting or in a particular day and time. But make that initial decision, time-

shift the email, and then archive it and it's out of your way. The fourth possibility is to do the email—to deal with whatever task is involved in the email right at that exact moment. And I like to have a 2-minute rule. If I can do this right now and it will take less than 2 minutes, I'm just going to get back to the person or do what they've asked me to do and not really put it off. Because it's going to take more time to put it on my to-do list and to follow up later or timeshift the email compared to just getting it done. And you may even adjust that rule at different times of the day.

If you only have 5 minutes to check your email, you might give yourself a 30-second rule, and you're done with work for the day and now you're just catching up on things, you might even make that a 10-minute rule at night. Figure out how much time you want to allow yourself to get sidetracked with specific emails because the goal here is to get through everything. And if you can get something completely done, archive it, you never had to think about it again. It's this kind of touch it once and be done with it principle that's been around in time management productivity forever. We don't want to deal with things more times than we have to. So if you get it done in 2 minutes, get it done.

Those, basically, are our options. Delete, delegate, defer, and do. Pick one of those. And then archive the message. Get it out of your inbox, don't really delete it. Don't move it to a specific folder, just get it out of your inbox and you are done with it. So you can get current and you can stay current and email will no longer be the source of stress that it has been. Now I'm saying archive it, don't delete it, don't put it into a folder, because one of the things that we're trying to optimize here is we're trying to eliminate unnecessary decision making. Now, email can involve all kinds of high stakes decisions about policy and the work you're doing itself, but we don't want to add unnecessary small decisions, like hey, which folder should I put this in, does this go under budget or does this go under purchasing?

There are all of these different options that we can consider and every "where should I file this?" decision that we make creates a future, "where did I file that" decision that we're going to have to try and reconstruct in the future when we are trying to find

that email. But you know if you are going to find that email in the future, you proba-bly are not going to go poking through a big system of folders. You are just going to do a search. And because search has gotten so good—especially in Gmail and Gsuite and of course in other apps as well, search is really good now. You don't really need to have a whole bunch of folders to organize your email. So simply archive them. Just make one archive folder, put any emails that you're done with into that folder and don't worry about it. Don't add all of these unnecessary layers of decisions, sim-ply put the email in that archive folder, or hit that archive button and you are in good shape.

Now if you are onto using Gmail and there is no archive button, just make a folder and call it archive. Put all of your messages there. There may be a few things that you say to yourself, "well, I really need to have all of my emails about this one topic in a specific folder. Maybe you need to have your expenses all in a specific folder, okay. But don't give yourself 100 folders to choose from. Really be sparing with those fold-ers and then put everything else in that archive folder. Sometimes you will get emails that are intentionally vague, you know, somebody will be trying to not create a paper trail.

If you need to be able to find that email later, you can always forward it to yourself and add additional context. If somebody gives you a piece of information, but they are vague in writing about what it was about, you can forward it to yourself and say, "oh this is so and so's statement about the..."You can fill in the specific details there so that it is searchable later. But that is it for getting your inbox emptied. Delete, del-egate, defer, and do.

Those are the options, make the decision and get through every email in your inbox.

Mobile vs. Computer

Section 4: Handling email on your mobile device vs. dealing with it on your computer. Now it's a little bit of a double-edged sword that we can access email from our smartphones, from other mobile devices, but just because we can doesn't mean we should. Sometimes we get into something on our phones and then we realize, this would have been 10 times faster to handle when I had a real keyboard. If I was sitting at the computer, I could look up the information I need. I should not have tried to handle this on my phone. It's a trap that we get into all the time.

So in this section, I want to give you some guidelines on what to do on your phone vs. what to do save for a real computer with a keyboard and all the other tools that you have available to you on your computer. Now, first of all, we need to be careful that when we're using a mobile device for email that we're not ruining some of the benefits of emails asynchronous design. Email was designed to be an inbox, not a stream. It was not designed to be an instant messenger or a text messaging kind of thing where people could just ping you at any time. It was designed to be asynchronous so you could allow messages to pile up and then you deal with them when you were ready to deal with them. And because it's possible now for you to get instant notification for every single email that comes in, those notifications might even make a sound or it might make your phone ding or buzz and that can be very distracting.

In some organizations, it has even become standard for people to expect an instantaneous response to an email. And I want to suggest that you will be much less stressed out by email if you create a culture where that is not what people do. If people need to interrupt you, they reach you some other way and they stop expecting and instantaneous response to their emails. So one of the first things you can do to reduce the stress that comes from those emails hitting your mobile device constantly in simply turn off notifications.

Now you might leave on the on-screen notifications, personally, I do. I have my iPhone set to show me a notification when I get an email. But I turned off the sound

that can accompany those emails. If you go into your device settings and find the app setting for email, turn off sounds. And that has the effect of turning off the vibration or buzz when you get an email.

Of course, you can make your own decision about this, but chances are good you do not really need the audio or the vibration alert every single time you get an email. It's counterproductive. It's distracting and it's stressful. Don't worry about forgetting to check email. You are going to check email and you do not need to see those messages instantaneously. So what are we going to use our mobile devices for if we're not going to constantly check email on them?

One thing we can do is we can take advantage of those times when we're standing in line, waiting for something to happen, waiting for a meeting to start and we have a few minutes. It can be a great opportunity to triage messages that really don't require anything of you. If you are going to send a big long reply, don't worry about that message yet, but you can get through the messages that are just advertisements, FYIs, people sending you things that you really need to see. Just swipe to archive it. In the Gmail app in particular, you can set the swipe actions to mark things as unread or to archive them, get them out of your inbox.

This is how I have mine set up, right swipe marks it as unread and left swipe archives it and I never have to think about it again. But I also never have to worry about it, because it's not deleted. It's there if I need it. I can very quickly find it. But if I have made the decision that I don't need to see it again, it is out of my inbox.

One other thing you may want to do from your mobile device is unsubscribe. This is a great use of time, it's a little bit of a pain, but it's a wonderful investment because every company that emails you is going to email you again and again and again. Just today, I unsubscribed from a Starbucks mailing list. They are always emailing me about my points. I never go to Starbucks just because I want to take advantage of some promotion. It depends on where I am. So there's no reason for me to ever get this email again. So I hit unsubscribe. And in a lot of apps—it depends on the app that

you are using and the service you are using—sometimes there is even a button at the top—if you click the three dots you might see and unsubscribe option. You don't even have to scroll down to the bottom of the message if its a mailing list, often that is an option. Down at the bottom—if your app doesn't have a real quick unsubscribe button—down at the bottom you will find an unsubscribe link. Those are required. There is required to be an unsubscribe mechanism. Almost always, if it's a big company that is fully automated, you won't have to complain to anybody. Just click the link and you are off the list. It is easy to not worry about that. It is easy to just ignore the email, let it come in, let more messages come in, and just never take action to unsubscribe. But if you are on thousands and thousands of mailing lists, then this is a problem that just gets worse and worse over time. So I want to encourage you to use that time when you are on your mobile device to actually unsubscribe and get off of mailing lists that you don't need to be on.

Now you can also unsubscribe from humans and you can do this very briefly from your mobile device, you can hit reply and say please remove me or please do not contact me again. I want you to understand that it is standard now for vendors and salespeople to use a multichannel, multistep campaign—what they call a high-touch campaign—to contact you.

If you are a high-value prospect, if you are a decision-maker who controls an organizational budget, it is very common for them to have a multichannel campaign where they are contacting you on LinkedIn, they are sending you emails, sending things in the mail, they are calling you, they are giving you robocalls, they are sending you instant messages on other platforms. And there are whole systems that are taught and they are software designed to make this efficient for the salespeople. So don't be afraid to say to those salespeople who are constantly pinging you and trying to get your attention and trying to get you to set up calls with them—don't be afraid to just say, I'm not interested, please do not contact me again. I have to do that all the time. You probably do also, and you are not being rude by doing so. Just give yourself a little text shortcut or save a snippet of text that says, please remove me from your list or stop contacting me.

You are going to have to do that. You've got to be able to unsubscribe from humans and you can. They will stop contacting you if you ask. So what else can we do on mobile devices? What should we save for the desktop? When it comes to those more complicated emails that are going to require a longer response, I don't like to answer those on mobile. But I do like to have the opportunity to think about them. And sometimes when I think about a difficult email, I realize, you know what? This really needs to be a phone call. I don't need to get back to this person on my computer. I need to actually pick up the phone and talk to them or go see them and have a face-to-face conversation.

Most of the time, it simply is not going to be the best use of time to send a long reply from my mobile device. So save it for your computer, save it for face to face conversation, or just pick up the phone—you're on your phone anyway so why not? While we're talking about mobile devices, I want to say a word about text messages, because text messages in my view have just gotten completely out of control over the past few years.

People are constantly texting about non-urgent things. They really see everyone else in the universe as instantly accessible to them for any reason whatsoever. And it can be hugely distracting. Now depending on the circles that you are in and the way that people around you use technology, it may also be a messaging app. If there is a group messaging app that people use all the time, you may want to just turn off notifications for that. And really set the expectation that if people need something from you, they can email you. And if they need to interrupt you, they can call you.

But I think text messaging really has almost no place in a professional setting. I think it's really unprofessional, it's really unproductive, it's really inefficient. So we really want as few people as possible to have access to us by text message. And when they are texting us, of course, it's useful to be able to get a quick question answered, but we don't want people to be giving us work to do. We don't want people to be making requests from us that we need to follow up with later, because texting is a stream communication format. There's no marking things unread, there's no forwarding a

text message. There's no putting something on your calendar from a text message, it's just not designed the way email is to be that kind of inbox based tool. So if people are texting you, get them to stop. Train them to stop. Ask them to email you and then follow up on those emails and you will have far fewer interruptions from your mobile device.

Timeshifting Email

We come now to section five of the Inbox Overhaul: Timeshifting Email. And I'm very excited to share timeshifting with you because I found in my work with tons of clients who need help with their email— that almost nobody knows about the possibilities of timeshifting email. And once you discover these possibilities you will wonder how you ever got through your inbox without the ability to time shift or snooze an email here is what this is for and how it works now because email is asynchronous we are getting messages at a time other than the exact moment that we need to deal with them.

People send us things in advance and then we decide when to follow up with those messages that people send us. Sometimes we need to make a decision. Sometimes we need to take action, but what we don't need to do is let that email sit in our inbox forever. But we also don't want to just archive it and hope that we remember it later. We don't want to lose track of that email forever, but at the same time if we just leave everything in our inbox until we deal with it that's how we get in this situation where we have 10 000 unread emails in our inbox.

So here is how timeshifting works. First, you simply decide when you want to see that email again. You forward it to a certain service that will send it back to you at a certain time and date, and then you archive the original message. So it's simply a three-step process: Decide when you want to see it again. Forward the message to the appropriate address, and then archive it. And here's how it works with the service that I use which is called followupthen.com. And they have a shortened web address, fut.io—so you can very quickly forward an email even from your mobile device. The way this works is it's entirely email-based. It doesn't require an integration with your employer's email system. It doesn't require a certain app. It doesn't require a certain device. It is completely independent of all of those. It works only over email and it works through forwarding.

There are a couple of other services that work this way. Some of them are more of

a Gmail extension or a plug-in. I like followupthen.com because it works with ev-erything. Now it's not a free tool, but it is one of the most valuable productivity tools that I have ever used, so I think it's well worth paying for. Here's how it works. You simply forward the message to an address like tomorrow at followupthen.com or the short version fut.io, and whatever is before the @ symbol is the specific time or date that you are specifying when you want to receive that email back. And this particular service will recognize a ton of different formats both absolute and relative dates and times it'll recognize recurring dates and times and you can see all of these at follow-upthen.com/how.

But just a couple of examples that I've got on the screen here. You can say send this back to me in one year— 1year@fut.io you can give it a specific date like Jan1 for January 1st. You can give it a specific time or a time and date like 4 p.m or 2pm-Monday@fut.io or you can even have it figure things out for you. Like 2ndFriday or 8am2ndFriday. You can combine these in any way you want to very quickly and—without having to consult a calendar— get that email back at exactly the time and date that you want it. So lots and lots of different options. Again followupthen.com/how illustrates this really well. They also have some additional advanced features. I don't use all of these but they have response detection so you can—tell the service can tell—if someone else has gotten back to you and remind you to follow up with them if they haven't. You can set recurring reminders if there are recurring tasks that you need to do at a certain time every week. You could use your calendar for that, of course, but sometimes it's better to have the email that has specific information—maybe login information in it. And you can also use Follow Up Then for tasks. al-though I recommend other apps for tasks.

So what are some situations where you might want to timeshift a particular email so you can get it out of your inbox now but not forget about it—not lose track of it? Well let's say someone sends you an agenda for a meeting that's coming up. If the meeting is on Friday you can forward it to 4pmThursday@followupthen.com and you'll get that email back right before you need to have it in hand. Maybe you need to solve a problem with someone who's absent today? Maybe they're not here, you

can't work with them, you can't contact them but you know they'll be on Thursday so you forward it to Maybe there is a decision that you'll need to make in the future but you're not ready to make that decision yet, for example, maybe you got an invite to a conference and that conference is coming up in a couple of months and you're not quite ready to make a final decision yet well you can forward that to 1month@followupthen.com and then that email will come back to you and you'll realize, oh yeah I need to make a decision about that conference. And that way you're not relying on other people to follow up with you.

If you think they might not or you think you might lose track of it that way, you can make sure that you see it again. This also works if you have put the ball in someone else's court and you're worried that they're going to drop the ball. If you are worried that they are not going to get back to you, you can send an email to them but bcc followupthen.com so that you get a reminder.

Again you can use response detection for that as well, so you don't get a reminder if they have gotten back to you. You can use it for an ongoing situation that you need to monitor. Maybe you're just kind of keeping an eye on something, oh, have we had any more complaints about this? You can give yourself a reminder and see that and think, "oh yeah, we haven't had any more issues with that so I'm going to let it go or maybe I do need to uh to do something about that." You can also use timeshifting and services like followupthen.com to put off a task, to kind of postpone that task, but of course there we've got to be careful about procrastination. The goal here is not to just constantly snooze all of these different reminders so that we have reminders coming in at all times of the day and night. The goal here is to send that email into the future at a specific time and date when you will be more capable of dealing with it, but you don't want to put off the initial triage decision about delete, delegate, defer or do.

You really want to make that initial triage decision on the spot and then snooze that email if you need to to a specific time in the future when you can actually deal with it. If you overdo this, if you use it as a procrastination tool, it's just going to create

additional clutter from all of those reminders. And it may be that if you're repeatedly snoozing something, you might just need to make a decision about it or you might need to schedule time on your calendar or you know talk with a particular person to get that handled.

But I've fallen into this trap personally, several times when using timeshifting and you just want to be careful about procrastination but I want to give you the encourage-ment and the opportunity to give this a try. So very quickly if you want to pause this video right now, go to your email, just fire up a new email and send it to 1min@fol-lowupthen.com and all kinds of abbreviations will work. I think 1min is one minute. 1m might be one month, but give that a try and what they will do is they will actually send you an email back with full instructions on how to use the service, how to sign up. Very, very easy to get started with and one of my top recommendations for email productivity.

The Right Tools

Section 6: The Right Tools. Being productive with email is all about using email for what it was designed for and allowing other tools to do their job and not trying to use email to do everything. There's the old saying, "when all you have is a hammer, everything looks like a nail." We want to be ready to use the appropriate tools. We don't want to use email for things it wasn't designed for. So here are some other tools you'll need for optimum productivity with email to manage your time.

You don't want to be looking at your inbox every day and try to mentally construct your schedule. You want to have an actual calendar, whether that's on paper or electronic. I personally keep both. I keep long-term appointments in my Google calendar and I keep a daily agenda in a paper planner so that I can think through my day as I write out my schedule. Similarly with your to-do list. You might keep a paper to-do list for the day. You might have an electronic to-do list that you use to organize your tasks and projects more long-term. Definitely helpful to have a place other than email to keep track of your tasks.

As we mentioned in section 5, you want to have a timeshifting service for your email like followupthen.com. Most people don't know about timeshifting emails. They don't have a service like that so that probably is one of the biggest gaps in your portfolio of tool for handling email. So definitely check out followupthen.com. And of course, you don't want to keep things in your inbox just so you have easy access to file attachments, so you want to have another way of keeping track of your files— whether that's Google Docs or Google Drive or Evernote or Dropbox.

Whatever it is that you use. Make sure that you have a good system in place so that you are not relying on email to just hold files long term. Let's talk first about an electronic or paper to-do list. Again, email is not great as a to-do list because the messages are not sorted by priority or project or anything like that. They are sorted by who they came from and when they arrived and that's not optimal for keeping track of your tasks. If it is less than 2 minutes, of course, you can just handle it right in

your inbox. But if it's going to be more time consuming, you might want to put it in your to-do app or on your calendar. And then timeshift the email. You know, if you are going to work on this on Tuesday, forward it to Tuesday@followupthen.com and then archive the original email. There are lots of productivity task management and project management tools out there. Things like ToDoist, I think Todoist is a very nice one.

There are tools that are built into what you are probably using already for email, like in Mircosoft Outlook or in Gsuite, you've got Google Keep, Google Tasks, there is probably a task feature on your phone. You could use a paper planner. I personally would recommend ToDoist if you are looking for something because it allows you to send emails to it and turn them into tasks, but that is a bit outside of the scope of what we are going to cover in the Inbox Overhaul. And if you have more complex needs, if you are coordinating with other people you might need a tool like Asana, which is what I personally use.

Your calendar, of course, should easily be able to make appointments from an email. You should be able to click on the email and very quickly make an appointment or if you can't do that with just a few clicks, you can do that manually. Just make an ap-pointment on your calendar to work on a particular issue and that way you'll ensure that you'll have time blocked off during the day to do that work. And then you want to snooze that email—you'll want to forward that email to your timeshifting service so that it arrives back in your inbox when you are planning to work on it. And then you can reply or you have the reference information that you need. And you want to make sure that you have that in front of you but you want it to just sit in your inbox until then.

One thing to watch out for with your calendar—make sure that on your mobile de-vice, you aren't adding something to a built-in calendar that was there by default that doesn't synchronize with your other devices. So it's very common on iPhones for the iPhone to have its own built-in, but hat might not be the one that you use in your organization. So make sure you turn off or delete any extra calendars that you are

not using on your mobile device. Let's talk about file storage. Again, there are lots of considerations we could talk about here that fall outside the scope of the Inbox Overhaul. Things like Dropbox, Evernote—there are lots of good options out there. Probably some that are preferred by your organization—but generally I would recommend not using email for file storage. If there are random things that you might want to hold on to and you don't want to put a lot of effort into saving them to a folder—personally I do pay for extra storage in my Gmail account. I have 100 gigabytes at the moment.

So there are plenty of things that I never download from my email. I archive the message and then I can search for it and it lives happily there in my email account. So lots of options. But have a good system so that you are not keeping things in your inbox perpetually just for access to frequently used files. Now let's talk about the ultimate collaboration tool—it is not software, it is not a device, it is not an app. It is good old face-to-face conversation.

It is easy to forget that anytime we are messaging someone else with a device, whether that's a text message or an email or a voicemail, that ultimately all of those are just twists on a good old-fashioned conversation. And so much business and work gets done—so many professional relationships happen through those face-to-face conversations. We have to be careful not to lose that in a desire to be efficient or in a desire to use technology. So don't overlook the possibility of just good old-fashioned conversation. If that conversation can happen in person, great! If not, second-best is picking up the phone.

Now it's easier than ever to pick up the phone, because you probably have your phone with you at all times. Your email is already on your phone. So if you decide, you know what, I don't actually want to answer this email. I want to call this person and talk to them. By all means, do it. Use email for what it's good for, and use better tools including conversation whenever it is possible. And I want to leave you with a couple of final thoughts here about communication and about working together.

Email is ultimately about human behavior much more than it is about technology. The technology is simple, it's reliable. It's been in place for decades. The challenges that we have around email are mostly challenges around human relationships and expectations. And if we want other people to use email more productively, if we want people to stop emailing us in a hurry and expecting an instant response. If we want to end some of those dysfunctional practices, we have to teach and model the behavior that we want to see. We have to follow through.

If we want people to send us something so that it sits in our inbox until a convenient time for us to deal with it, we have to actually deal with it and not wait for other people to interrupt us in order to be responsive. So I want to give you a framework for thinking about everything we've talked about in the Inbox Overhaul. A framework that I call the High-Performance Triangle. Any system for high-performance has 3 key components—strategy, tools, and habits. And what I've shared with you throughout the overhaul is, primarily, strategy and a little bit on the tools side. I've shared several specific tools that I think could be very helpful to you. But what is going to make this all work for you is the habits that you develop.

Now already, you're understanding of the strategy has probably shifted quite a bit because of this program, but the actions that you take to develop habits to start using new tools are what are really going to create the consistency and the long term impact from the improvements in how you handle email. So what are some of the strategies that we've talked about in the Inbox Overhaul? We've talked about using email as a communication medium and not as a Swiss Army knife. Email is not good for everything, we want it to do a pretty narrowly defined job so that it can do that job well. Strategy-wise, we've talked about the asymmetry that we face as leaders.

So many different people can email us about so many different things that might take us much longer to deal with than it took the original person to send us an email about. So you can review that section if you need to about asymmetries. We've talked about the core practice about getting current, getting all of the emails in your inbox dealt with, triaged, and out of your in box so that you can stay current. You can

check email a couple times a day, get everything processed and you never have the clutter and the overwhelm. We've talked about using your mobile device as part of that strategy, but using it judiciously. Not trying to send long emails. Making phone calls when that is the best way to handle an issue and saving the things that need to be saved for your real computer, so that you can answer those more efficiently when you have a real keyboard and other reference information.

We've talked about timeshifting and how timeshifting tools are often the number one missing piece in leader's system for handling email because it does come in at asynchronously. People don't know when we are going to when we're going to be ready to make a decision. You have got to be able to snooze or timeshift an email to the appropriate time and date when you are ready to deal with that or make a decision. So using a service like FollowUpThen.com is a wonderful strategy.

And then of course you want to use the right tools, so that is the second part of our high-performance triangle. We've talked about using your mobile device in conjunction with your computer. We've talked about using Text Expander and saved email templates to make it faster to respond to certain issues that come up over and over again. We've talked about timeshifting with services like FollowUpThen.com. We've talked about other apps that you may need to use as part of your productivity eco-system, like a task app, a calender app, maybe a paper planner. Some place to store files, like Dropbox or Google Drive.

And we've talked about good old-fashioned tools like the phone and having face-to-face conversations. Now it is up to you to develop the habits that you need to make this high-performance system work for you. One of the biggest shifts that I want you to encourage you to make long-term as you adjust the way you deal with email is to stop just checking email. Stop constantly looking at your inbox and instead start processing your inbox and getting everything out of it at certain times of day. I recommend 20 minutes 3 times a day. That's probably going to be enough, if you also set aside time for the actual tasks that are arriving via email.

Processing the email, triaging it, making that initial decision is a separate process from doing the work and you are going to be much less stressed and much less overwhelmed with email if you can create that separation between deciding and doing.

So once you have this system set up, it's not difficult to get your inbox empty every day, to stay current, to keep timeshifting or snoozing those emails until the appropriate time when you are ready to deal with them and make a decision. And as long as you are using the right tool for the job, you will find that email truly can be an effective leadership tool.

So I hope you have enjoyed the Inbox Overhaul. I want to encourage you to take action and implement these systems in your work as a leader right away so that you can start staying on top of email more effectively, be more responsive to the people that you work with, and being less stressed by your inbox. I'm Justin Baeder and this has been the Inbox Overhaul.