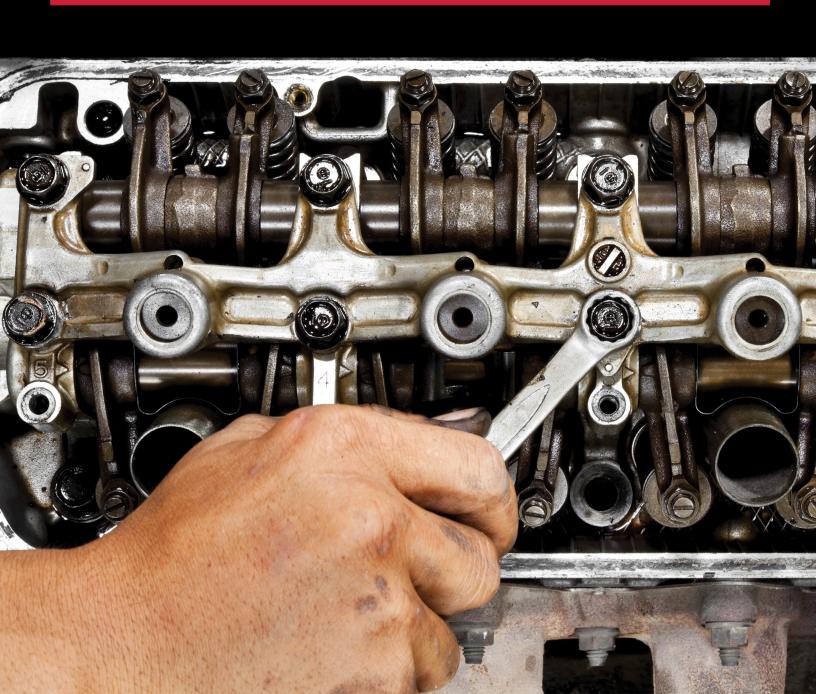# THE ✉ INBOX OVERHAUL

EMAIL AS A
LEADERSHIP TOOL

Watch the Day 1 video in your course dashboard and complete the following exercises.

- Email is a _____ and _____ tool.

- There are _____ tools for most of the other purposes we use email for.

- The most important tool: An electronic _____ such as _____

- You can save emails for future reference in _____ rather than in your inbox.

TAKING ACTION

1. Ask yourself, "What do I use email for?" List as many functions and purposes as you can think of.

_____

_____

_____

_____

2. Circle one or two functions in your list above that are compromising your ability to use email effectively.

3. If you don't have an electronic task app, try ToDoist.com.

WHAT BELONGS
IN YOUR INBOX?

*Watch the Day 2 video in your course dashboard
and complete the following exercises.*

- The purpose of email is _____.

- Everything else in our inbox needs to _____ of there because there's a
  better _____ for it.

- The right number of emails to keep in your inbox long-term is _____, so it's
  not _____ and we can make good _____.

- In Gmail, you can hit the _____ button, or "y" on your keyboard, to get
  emails out of your inbox permanently.

- If you're not using Gmail, make an archive _____ to hold emails that no
  longer need to be in your inbox.

- Every folder you create is one more _____ you have to make when
  clearing your inbox, so just make a _____ archive _____.

TAKING ACTION

1. Archive any emails that don't need to be in your inbox. If you need to, create an
   archive folder, and move emails out of your inbox.

PICK AND CLICK:
THE PRODUCTIVITY KILLER

*Watch the Day 3 video in your course dashboard
and complete the following exercises.*

- The biggest email productivity killer: pick and _____.

- Instead, open your _____ message _____.

- Then, instead of closing this message, go straight on to the _____ message.

  Use keyboard _____.

- This is powerful because you're more likely to _____ a message instead

  of playing the _____ game.

- Pick and click just increases the average _____ of the remaining

  messages. Just go one by one and _____ the inbox.

- Learn your keyboard shortcuts—they'll make you dramatically _____ and

  more _____.

TAKING ACTION

1. Learn keyboard shortcuts for processing messages from newest to oldest, full-

   screen, so they become encoded in your muscle memory.

4 THE TWO-MINUTE RULE

*Watch the Day 4 video in your course dashboard
and complete the following exercises.*

- If you come across a task in your email that you can do in _____ or less, do it on the _____.

- If it'll take longer, _____ it using your _____ to-do list. Otherwise, you won't get through your _____.

- Email is for _____. It's very clunky as a _____ management system.

- You probably need to be able to process email from a _____ device—not just desktop Outlook.

- Electronic _____ apps should be able to receive tasks via email, so you can just forward a message to create a new _____.

TAKING ACTION

1. Process your inbox using the 2-minute rule. Do or defer each task, and get to the bottom of your inbox.

PROCESSING YOUR
INBOX

*Watch the Day 5 video in your course dashboard
and complete the following exercises.*

- It's tempting to treat every message as _____, but there are very strong

  recurring _____ in our work.

- What are the options when you're processing a message?

  - Delete, _____, or mark as spam

  - Reply or _____

  - Leave it in your _____ for now and come back to it later

  - If it's a _____, put it on your _____ list.

  - Defer it to a later _____.

- The options aren't _____, and you can use specific tools to make

  those options _____.

- We can start by cutting down on email _____.

- Put any that you plan to read into a folder and schedule a time to _____

  them.

TAKING ACTION

1. Unsubscribe from any newsletters you haven't read in six weeks (search your

   email app for the word "unsubscribe" or "opt out")

2. Move any newsletters you plan to read into a folder, and schedule a specific

   time to review them

6 THE IMPORTANCE OF FOLLOW-UP

*Watch the Day 6 video in your course dashboard
and complete the following exercises.*

- If email is a leadership and _____ tool, followup is critical—we can't just hope that everything we _____ will get taken care of. We have to _____ that it does.

- We can use other tools for follow-up, like the to-do list and _____, but email is a great place to keep anything that's just _____.

- Unfortunately, there's no built-in feature that lets you snooze an email for later _____.

- A great service you can _____ messages to is FollowUpThen.com. You'll get these _____ back whenever you specify, e.g. 2weeks@followupthen.com

TAKING ACTION

1. Find some emails in your inbox that you need to follow up on in a few days or weeks.
2. Sign up for a service like FollowUpThen.com and forward a few messages to it.

THE RIGHT AND WRONG WAY
TO FOLLOW UP

Watch the Day 7 video in your course dashboard and complete the following exercises.

- You can "snooze" emails by forwarding them to _____ _____, so you can follow through on whatever action is necessary.

- You can also snooze emails that you aren't ready to deal with yet, but the wrong way to use this is for _____. Resist this temptation.

- Snoozing unpleasant messages to just makes your work _____ tomorrow. Make the tough decisions immediately—don't put them off.

- The right way to snooze your email is to follow up, or to _____ a decision you can't make yet, because you need more _____.

- You can snooze a message again if you need more time.

TAKING ACTION

1. Follow up on all of yesterday's snoozed emails

2. Continue to snooze emails that you need more time or information to make a decision about

BREVITY IS THE
SOUL OF WIT

Watch the Day 8 video in your course dashboard and complete the following exercises.

- It's all too easy to get sucked into writing email replies that are far too _____. When you're writing an email, your goal is to _____. The shorter we keep our emails, the more likely people are to _____, pay _____, and _____ what we're saying.

- Our emails get too long when we try to use email for communication that isn't _____ for email, and needs to be handled _____-to-_____ or with a _____.

- _____ replies will allow you to answer email dramatically _____.

- You don't need to _____ by email just because someone _____ you by email.

TAKING ACTION

1. Start limiting your emails to five sentences.

2. Consider adding a note inviting people to set up a phone call or meeting to your email signature.

9

TEXT
EXPANSION

*Watch the Day 9 video in your course dashboard
and complete the following exercises.*

- The most important—but _____ to set up—tool to use with your email is a text-_____ app.

- These tools allow you to type a few _____, and have them expanded into an entire _____ or even an entire _____.

- You're probably already using an email _____—but you can take this idea farther if you use an app that lets you use _____ to type dramatically faster.

- The iPhone app _____ lets you use your TextExpander Touch _____ to handle your email.

- You'll become more _____ and you'll save an incredible amount of time if you take this action.

TAKING ACTION

1. Review GoingDigital: TextExpander tutorial series

2. Install PhraseExpress for Windows, TextExpander for Mac, and/or TextExpander Touch for iPhone & iPad

3. Consider Dispatch for iPhone

4. Start using shortcuts to type common phrases, sentences, and messages dramatically faster

WHAT WE'VE LEARNED &
WHERE WE'RE GOING

*Watch the Day 10 video in your course dashboard
and complete the following exercises.*

- The real power of strategies emerges when you turn them into _____, but 10 days isn't really enough to develop a solid _____.

- You can restart this challenge and turn the actions you've already taken into _____. You may have used tools like an electronic _____, _____, and a text-_____ app, but not consistently.

- Go back through the Overhaul and start to develop the habit of using each of these _____ to handle your email. You can expect this to take more than 10 days.

- Habits make the greatest difference in your _____ to handle email and use it as a _____ and _____ tool.

TAKING ACTION

1. Let Justin know how it's going: justin@principalcenter.com.

   - What did you learn?

   - What are you struggling with?

   - What are your biggest successes and victories from The Inbox Overhaul?