



## ***Triage: Rescuing Your Inbox*** Executive Summary

### Introduction

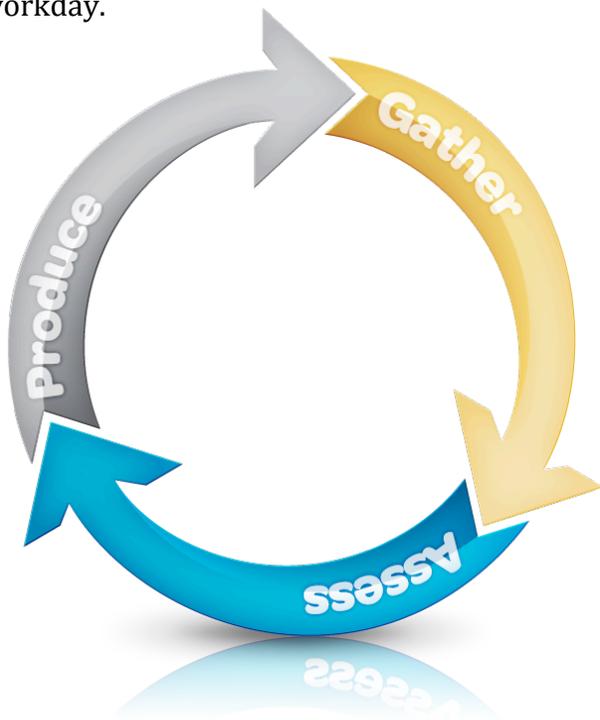
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Business use of email is growing at eight percent per year. Finding a better way to handle the increasing flow of email is one way we can stay responsive to clients while continuing to produce high-quality work. This guide explains an effective method for handling large amounts of email by borrowing ideas from the medical process of triage.

### Simplified Workflow

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Workflow is the ability to identify and describe the repeated steps involved with producing a result. The following graphic describes the never-ending circle of a professional's workday.



#### **Email Workflow**

- **Gather.** Email is automatically delivered to the Inbox.
- **Assess.** Unread email is reviewed to determine what it is and its relative priority.
- **Produce.** Email is used in creating or contributing to the creation of work product.

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Introducing a triage-like process to email reduces the assessment period. By shortening the time it takes to assess email, you'll have more time to actually work. The following is what email triage looks like:



## Three Types of Email

- **Trash.** Emails that require no further action by anyone and do not need to be saved.
- **Filing.** Emails that require no further action by anyone but **do** need to be saved. Examples of Filing include finished work product, working papers, correspondence and any reference materials.
- **Work.** Emails that require some further action by someone.

## Three Actions to Sort Email

- **Delete Trash.** These are emails we no longer need, and they can be deleted. We'd throw it away if it were paper.
- **File Filing.** All work product, related items, and reference materials should be filed as appropriate. If it was in paper form, we'd file it away in a client/matter file or in a reference library we've created.
- **Queue Work.** Work emails should be set up to give reminders so they get queued up based on their priority.



Identifying what each message is – Trash, Filing or Work – is the sorting aspect of email triage. Decluttering the inbox involves the three actions – Deleting, Filing or Queuing. Queuing – setting reminders – is the prioritization aspect of email triage.

### Email Queuing Example

Here are three email scenarios that illustrate prioritization:

- **Scenario One:** A client needs a draft document by Thursday for review with her board of directors. It's Monday.
- **Scenario Two:** A colleague needs an informal strategy opinion from you by 5:00 p.m. today. It's 11:00 a.m.
- **Scenario Three:** The firm's CFO needs the Q3 billing projections by the end of Q2. It's May.

These are all important items, but we can quickly determine their *relative* priority. We'd prioritize them like this:

1. Scenario Two
2. Scenario One
3. Scenario Three

Taking the example one step further, we set reminders for each email as follows:

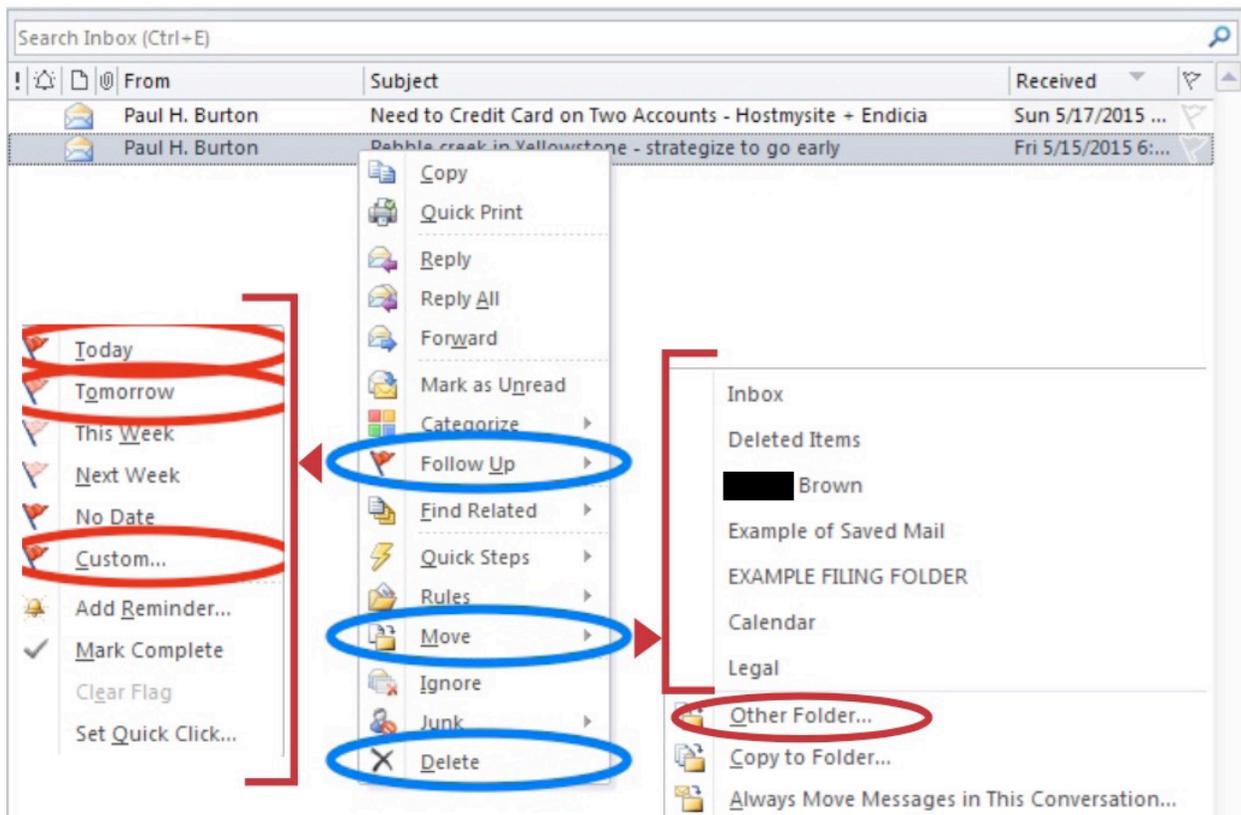
- Scenario Two = Today
- Scenario One = Tomorrow (or possibly the following day depending on our existing workload)
- Scenario Three = Sometime in mid-June

## Outlook's Triageing Tools

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*Preliminary Note: All instructions below work for Outlook versions 2010, 2013, and 2016. Also, turning on Reading Pane – View > Reading Pane > Right – makes triaging email faster.*

Triaging email in Outlook involves the right click function of the mouse. Right click on any email and a fly-out menu appears. The items circled in blue below – Delete, Move and Follow Up – correspond to the triage actions of Delete, File and Queue. The items indicated with red are sub-functions of their related blue-indicated functions.

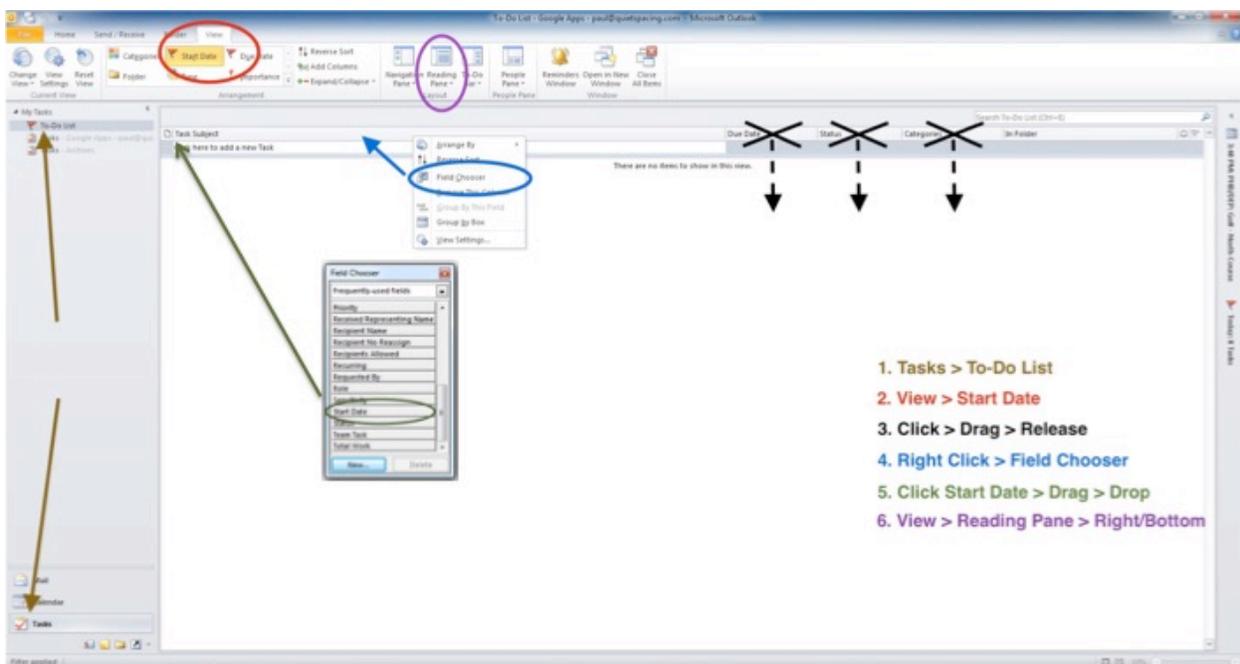




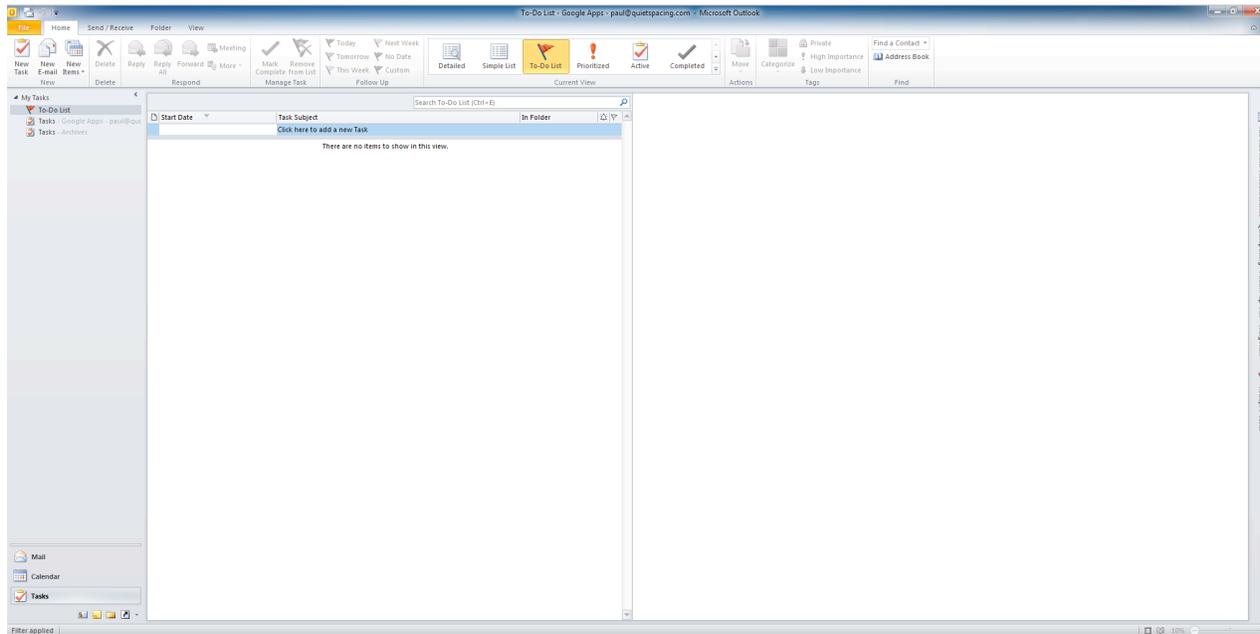
Right Click Function Chart		
<i>Function</i>	<i>Explanation</i>	<i>Action</i>
<b>Delete</b>	All Trash emails can be deleted	Click Delete
<b>Move</b>	There are three options for moving Filing emails	
	<ul style="list-style-type: none"> <li><i>Frequently Used:</i> The last ten or so folders used appear in a secondary fly-out menu</li> </ul>	Click Move > Select Visible Folder. Result = Email moved to selected folder
	<ul style="list-style-type: none"> <li><i>Other Folder:</i> Navigating to another folder is done via this function</li> </ul>	Click Move > Other Folder > Navigate to Desired Folder > Select Desired Folder. Result = Email filed in selected folder
	<ul style="list-style-type: none"> <li><i>New Folder:</i> Creating a new folder is also done under the Other Folder function</li> </ul>	Click Move > Other Folder > Navigate to Desired Location > Click "New" > Enter New Folder Name > Ok > OK. Result = Email filed in new folder
<b>Follow Up</b>	There are three options for setting follow up reminders on Work emails	
	<ul style="list-style-type: none"> <li><i>Today:</i> For emails that need attention today</li> </ul>	Click Follow Up > Today
	<ul style="list-style-type: none"> <li><i>Tomorrow:</i> For emails that need attention tomorrow</li> </ul>	Click Follow Up > Tomorrow
	<ul style="list-style-type: none"> <li><i>Custom:</i> For emails that need attention someday, but not today or tomorrow</li> </ul>	Click Follow Up > Custom > Start Date > Reminder Date

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The Tasks screen must be setup to take full advantage of the email triage system. Follow the instructions below to setup the Tasks screen properly.



The completed Tasks screen looks like this:



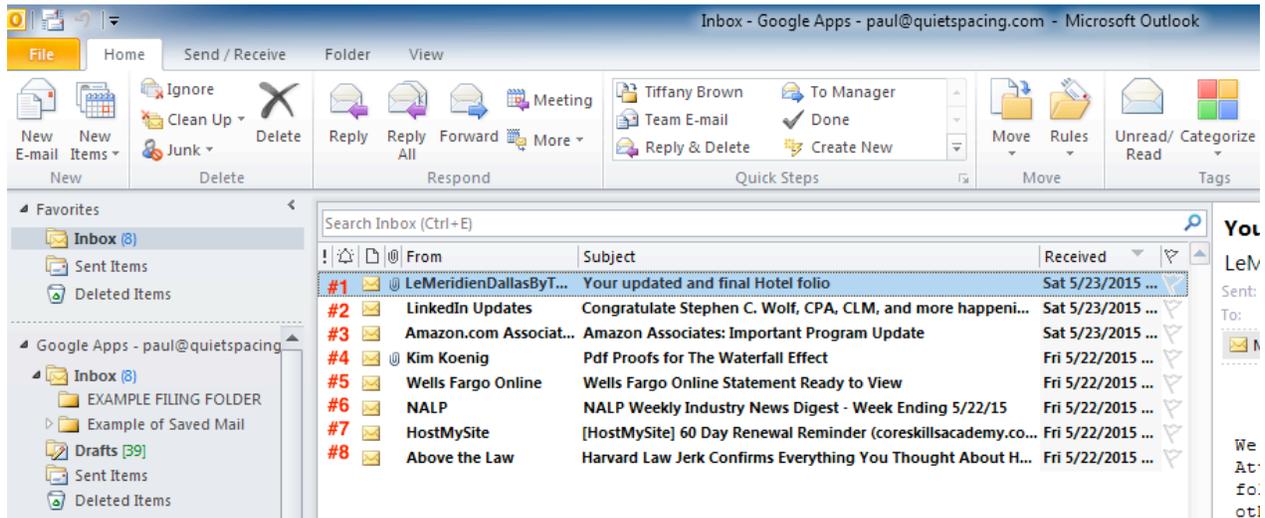
Click on Start Date to arrange all items in this screen by the Start Date. The end result is that all Work email set with a Follow Up reminder will be displayed chronologically. Essentially, the long to-do list in the inbox folder is parsed into daily to-do lists in this view.

## Demonstration

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Here's a demonstration batch of emails to triage:

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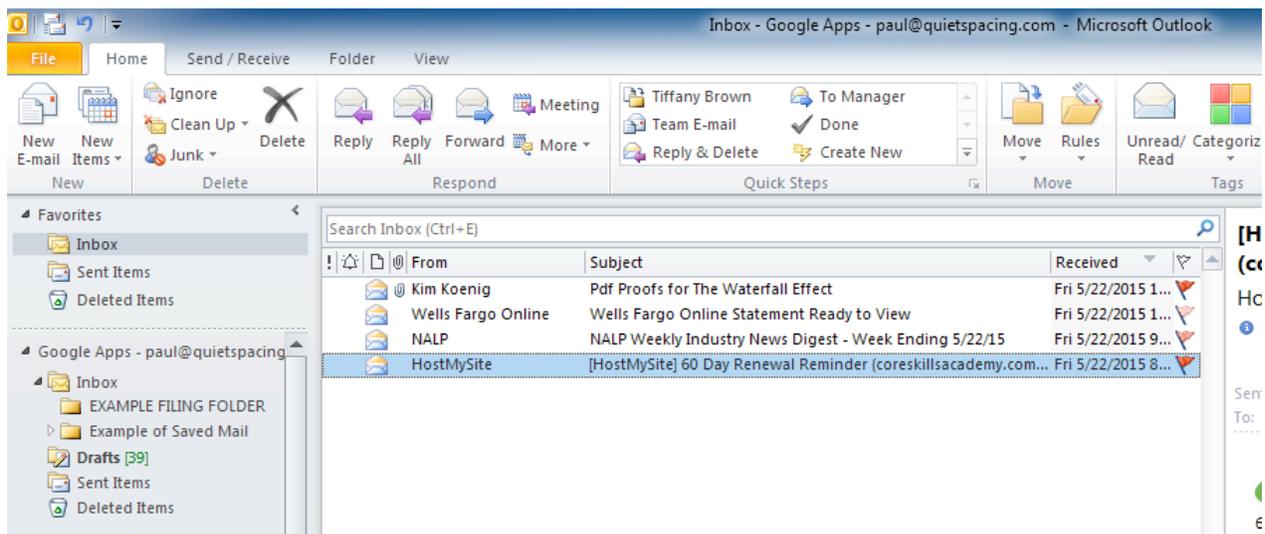


Triageing Chart		
Email #	Trash, Filing or Work?	Action
1	Hotel Receipt = Filing	Right Click > Move > Navigate to Appropriate Folder > Select Folder
2	LinkedIn Update = Trash	Right Click > Delete
3	Amazon Terms = Trash	Right Click > Delete
4	Publisher W/Proofs = Work	Right Click > Follow Up > Today
5	Monthly Bank Statement = Work	Right Click > Follow Up > Custom > Start Date > Next Wednesday (for example)
6	Newsletter = Work	Right Click > Follow Up > Tomorrow (to review Table of Contents)

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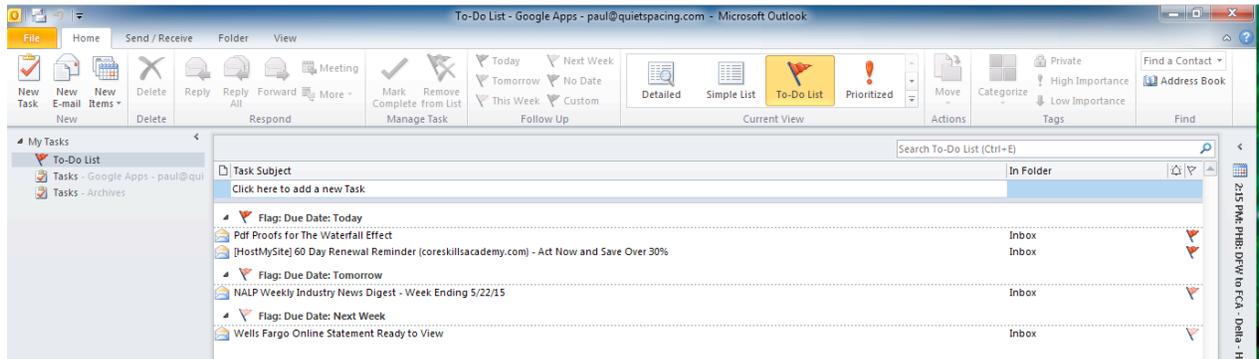
7	Domain Renewal Notice = Work	Right Click > Follow Up > Today
8	Newsletter = Trash (nothing of interest in Table of Contents)	Right Click > Delete

With the Trash and Filing eliminated, the triaged inbox now looks like this:



Switching to Tasks view, the Work emails are parsed into daily to-do lists:

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Triage new messages in the inbox; do productive work in the Tasks screen.

## Keeping Up

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Here are some additional considerations to stay on top of the never-ending flow of email.

*Working in Tasks View.* All emails can be opened and executed upon right in the Tasks view. Message content appears in the Reading Pane, and the Reply, Reply All and Forward functions are all available.

*Frequency of Inbox Checks.* Return to the inbox regularly to triage new messages that have arrived since the last visit. Frequency is determined by the day's demands, but every fifteen minutes is a good starting point.

Update Work that Becomes Trash or Filing. Every email's status changes when the work related to that email is completed. Re-triage completed Work emails to Trash or Filing by conducting the appropriate action – Delete or Move. Here are the steps:

1. Navigate to Tasks.
2. Identify which emails are now Trash or Filing.
3. If the email is now Trash, click the Delete button up in the Ribbon.
4. If the email is now Filing, two steps are required:
  - a. Right-click on the email, select Move, and move the email to the appropriate filing folder, then



- b. Right-click on it again and select Remove from List.

*Updating Flagged Email.* Keeping flagged Work current is imperative. Many items flagged for "Today," for example, won't get done. There are myriad reasons for this – extensions, emergency projects, etc. Before leaving for the day, reset the Follow Up flag for a new, appropriate date. Keeping the Tasks screen current increases focus and improves productivity.

*Clearing the Backlog.* What to do about all the existing email in the inbox? Short answer: Nothing. Just triage the last two or three weeks of email by beginning at the top of the inbox and working your way down. That will capture ninety-nine percent of the current Work. Then, switch to the Tasks screen to get back to being productive!

## Conclusion

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The email triage system's greatest benefit is the knowledge that everything has been reviewed and that a reminder has been set for things that require attention. The net result is more focused effort and greater productivity.