Using The 4Ds Outlook inbox

Presented By

Geoff Prior

Lingford **C**onsulting
Services Pty Ltd

ABN: 73 115 303 118
PO Box 1593, Wodonga
Victoria, Australia 3690
Telephone: 02 6056 8887
Facsimile 02 6056 8883
Mobile: 0417 370 652
www.lingfordconsulting.com.au
gprior@lingfordconsulting.com.au

Copyright 2022

© Lingford Consulting Services

This work is copyright. No unauthorised use is permitted unless prior written permission is obtained from Lingford Consulting Services.

Any requests or enquiries for copying or reproduction should be addressed to Geoff Prior, Managing Director & Principal Consultant, Lingford Consulting Services. PO Box 1593 Wodonga Vic Australia 3690. Telephone: 02 6056 8887

Index

Productivity with Email 4
Checking Email 4
Probably Overkill 5
Dilutes your Focus 5
Causes you to Multitask 5
Turn off your Email Alert – Stay Focused 6
Email Alert by Exception 6
Process your Emails – The 4Ds 8
Do not let Emails fall off your Radar 8
Handle Emails ONCE 8
Introducing the Four' Ds 9
(1) Delete 9
(2) Deposit 10
(3) Do Now 11
(4) Do Later 11
Do Later (Option 1) - Move to an Email Folder 12
Do Later (Option 2) – Insert email to existing Meeting or Appointment 13
Do Later (Option 3) - Create a new Calendar Appointment 14
Reply with Meeting - directly from an email 15
Do Later (Option 4) - Flag the email 16
Using Email Flags - Reminders 17
Custom (Flag)Dialog Box 18
Flag emails you send to others 19
Tracking your Email Flags 20
Use a Search Folder 20

Productivity with Email

We are getting bombarded with emails. **Email Overload** has become a real thing!

The average worker gets about 620 emails/week and spends apparenty about 1.1 mins/email. That's around 11+ hours/week or about 28% of their time on email…

What are the results of Email Overload?

- Increases stress
- Inability to focus on complex
- Tendency to Multitask
- May miss important emails
- We are too reactive/not proactive
- We live in our Inbox

Email is a Great servant, but Poor Master!

For many people, their Inbox is almost their *de facto To Do List*…. The problem is, using your Inbox as your To Do List is not a great idea. It forces you to become very reactive! You are bound to lose focus on other important Tasks.

Or another way to look at it is that, by living in your Inbox, you inevitably end up responding to the latest email… In effect, your To Do List becomes someone elses To Do List. You are allowing others to "jump the ahead of others already in the queue.

Checking Email

How often should you check email? *Maybe not as much as you do now…*Naturally, it will vary for each person according to their role.

What causes us to "overcheck emails"? Sometimes it is the little things. We have all become accustomed to just checking. Consider these causes:

- FOMO – Constantly jumping in your Inbox...just in case an email has arrived.
- Having an email screen always open.
- Email notifications that constantly pull us back into our Inbox

I want to suggest you should avoid "Over checking your Inbox" for several reasons:

- It's probably over-kill anyway.
- It interrupts your flow & dilutes your focus
- It causes you to Multitask

We are probably overserving people with when we respond to most emails. Sure, we need to be responsive, but maybe not as responsive all the time.

Probably Overkill

Think about emails you typically receive... How often do they require an instant response? Do they all have to be dealt with the moment they arrive? Well for some people, that may be the case, but certainly not for everyone!

Depending upon your answer to this question, you may benefit from reassessing how often you jump into your Inbox.

Indeed you may be guilty of over-checking for no good reason!

Dilutes your Focus

It's all about ***focus***! Every time you jump into your Inbox, there is a potential for you to lose focus on what you were working on. You end up trying to multitask…which is just not productive.

Continuous Partial Attention

In fact, you may not even multitask, but still your productivity will suffer. Let me introduce you to Continuous partial attention (CPA)

It sounds like multitasking, though really multitasking is just one form of CPA. Where multitasking means trying to do two or more things at once, CPA means having part of our attention directed elsewhere even when we think we are focusing on just one task.

Here is one common example; how many times have you found yourself writing an email while holding a conversation at the same time – only to find that you have been typing the words you were listening to rather than the message you were intending to send?

The deleting and rewriting resulting from that….is a product of CPA.

Causes you to Multitask

Multitasking obviously means you are trying to do more than one job at a time. We know that for most people, this just does not work! We can easily fool ourselves to think we are just being more productive when in fact, everything we do takes almost twice as long as it should…AND…we make more mistakes as a result.

Why is that emails cause us to lose focus or even multitask?

Well our Inbox is so accessible for one thing but also, we are often alerted everytime an email hits our Inbox. If not by a sound, at least via the Desktop Email Alert. We see an email has arrived and we are tempted to check it. Most times people just automatically check it!

Check email on your terms!

This might be as often as every 30 minutes or every hour perhaps…. or as little as 4-6 times per day! Maybe set yourself a specific time each day to process your emails.

Consider blocking out a recurring appointment time in your calendar if you think it is appropriate.

The point is, you should only really check emails when you have some time to deal with them. If you are *not* able to spend some quality time looking at, and processing your emails, then why look at all?

You are more likely just going to open, read and close emails without really processing them properly.

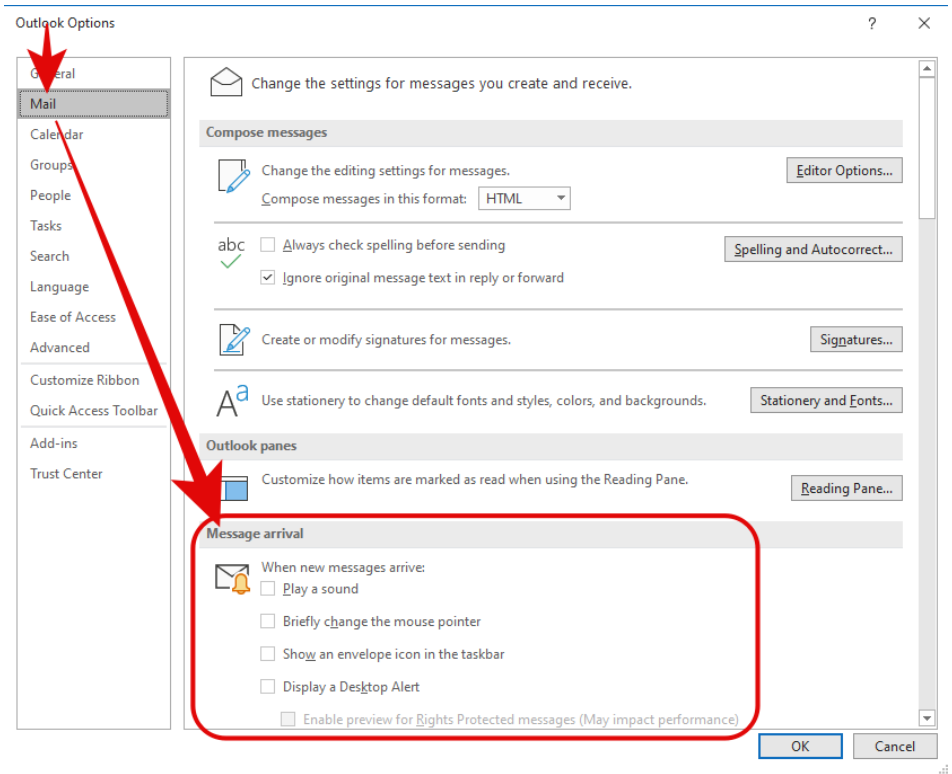
Turn off your Email Alert – Stay Focused

Consider turning off ALL *email notifications*. This is the most constant interruption or distraction you can have. It even interrupts you when you are typing in another program.

It is so easy to lose your train of thought when you see or hear that an email has arrived in your Inbox. Removing this can help keep you focused on the task at hand. ***Consider checking your email when you want to, not when Outlook alerts you!***

The **Desktop Alert** allows you to see a newly arrived message preview that fades in then out again whilst you continue working. Sounds good in theory BUT…this little feature in Outlook causes us to lose focus and may even result in multitasking more than any other.

To turn off ALL notifications - from your Inbox, select: **File > Options> Mail -** Then uncheck all the relevant boxes including the Desktop Alert. (See below)



Email Alert by Exception

You can create a rule to be alerted when an email arrives with certain conditions that you determine. Say, a Sender, or Subject Line or even Importance etc.

Email Alert by Exception – Sender

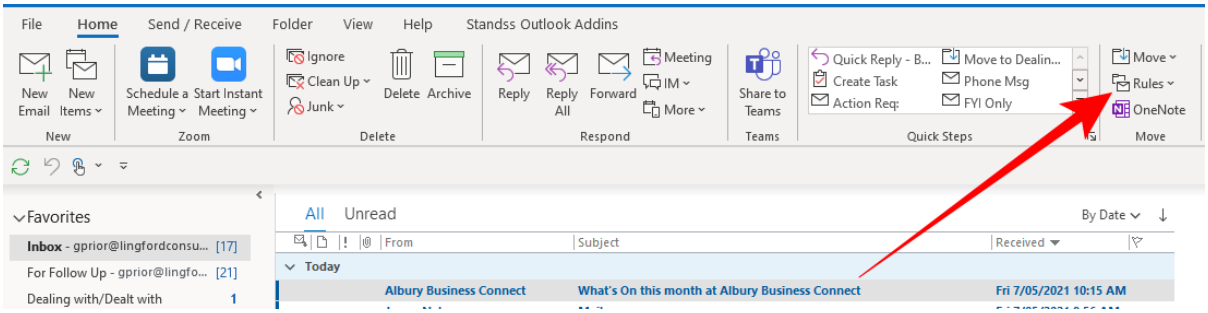
Step 1

Select an email from your Inbox from the **Sender** (say your boss) or with a particular Subject name.

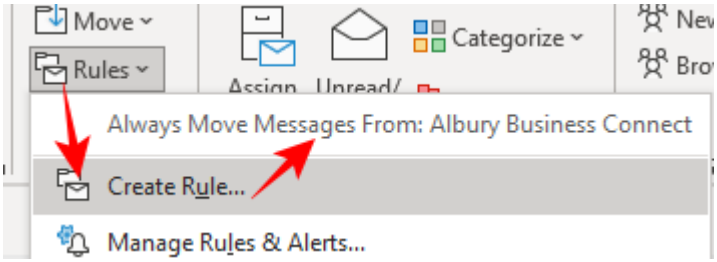
Using the 4Ds – Outlook Inbox

Step 2

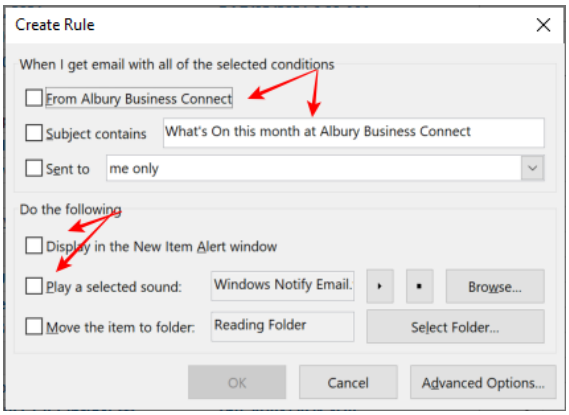
Then, from your Inbox – Choose Rules in the "Move" set of Icons as shown below.



Then choose "Create Rule". Notice how the email I have selected above is automatically selected. That is, Outlook assumes I wish to create a Rule from this type of email.

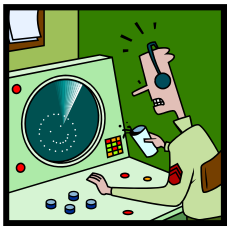


Now simply choose your Alert Options as you see below.



Process your Emails – The 4Ds

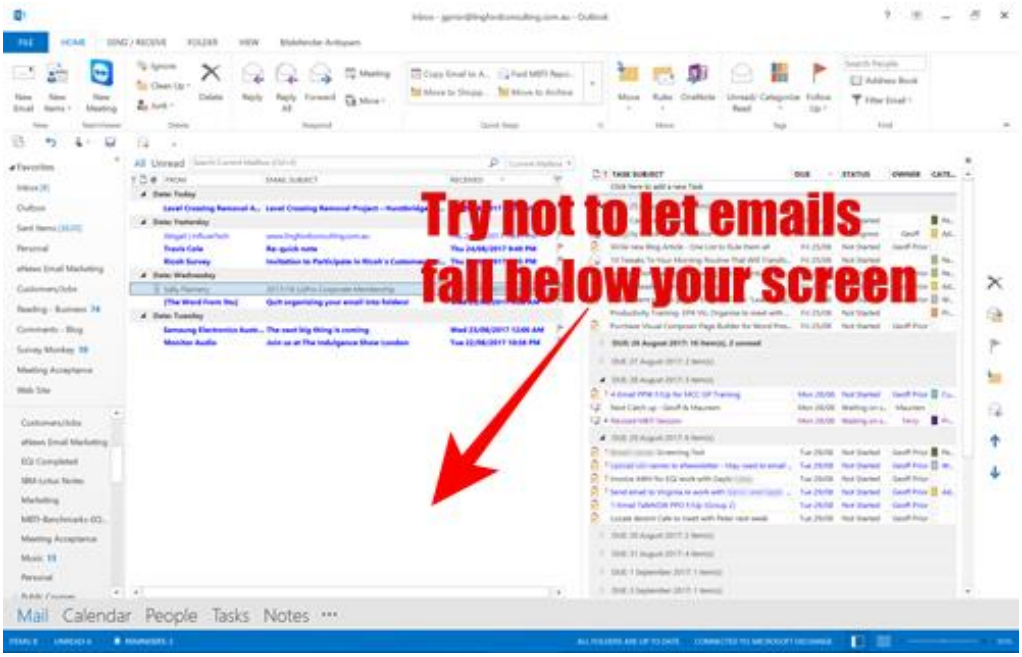
Do not let Emails fall off your Radar



Once emails in your Inbox fill up your Screen and then go past the screen, you are in dangerous territory.

It is far too easy to start missing important emails. You will need to start scrolling to find emails you may have missed. This happens very easily of course given the amount of emails we all constantly get.

To avoid emails constantly falling off your **radar**, set yourself a target of not allowing emails to go below your computer screen.



Handle Emails ONCE

Are you guilty of double handling emails? You have a quick read and then leave them in your Inbox when you realise you are unable to respond right now? Perhaps you need more time to consider the contents…. Or you need to speak to someone first etc….

So, you mark the email **Unread** again as a reminder to yourself that you need to come back this email. Problem is of course, this email then is pushed further down your Inbox as more emails arrive!

You end up having emails that require further action scattered throughout your Inbox. You now need to scroll up and down to find those emails. This is incredibly inefficient when you think about it…. Not to mention unreliable!!

Is there a better way? I say YES there is. Every time you open an email, consider processing them using the using the 4D's.

Introducing the Four' Ds

Use the **4D** process as a way of ensuring you only handle an email once and that your Inbox *only* contains emails that you have not yet opened. So, the 4D's are:

(1) Delete

Quickly scan your Inbox and DELETE what you don't need. Clear the clutter quickly. The email will sit in your Deleted items until you empty it. And remember to:

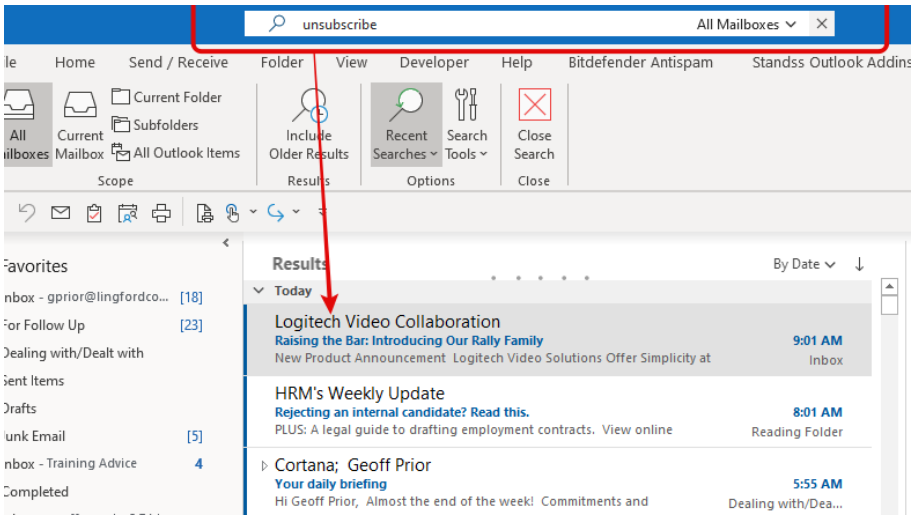
a. Unsubscribe from emails if you no longer wish to see them

b. Mark emails as Junk if it is Spam

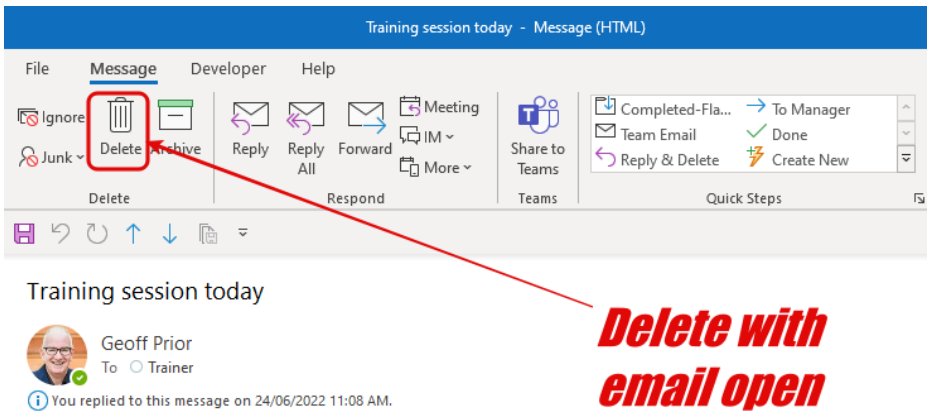
The idea is to permanently declutter your Inbox & avoid being distracted by emails that are unimportant and allow you to remain focused on important emails you receive.

Unsubscribe Tip

Type Unsubscribe into your Search Bar to show all the emails with an unsubscribe option.



Delete the email with it open.



(2) Deposit

Assuming there is no action you need to take, simply Deposit or *File* emails you wish to keep. Importantly, don't leave opened Emails in your Inbox.

a) Once you have read it, file it away for later reference in one of your Email Folders

b) Consider creating some "Rules" to Deposit emails in an Email Folder automatically (See below)

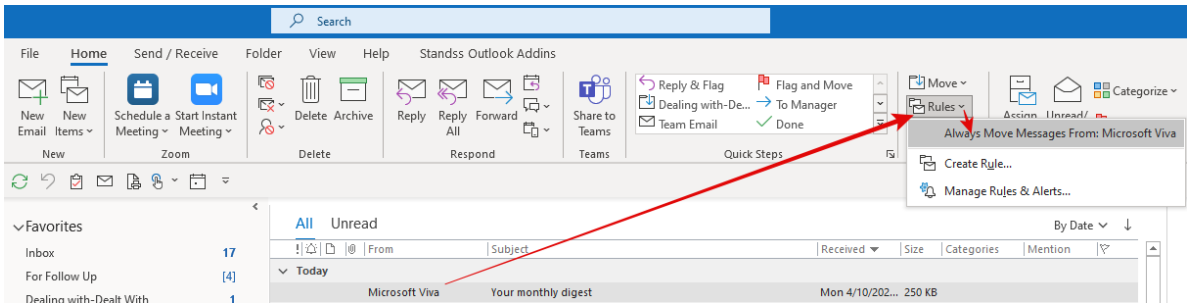
Email Rule to automatically move emails directly to a Folder

You can set up an Email Rule to automatically move certain emails into you Folders. Very handy for your Newsletter emails. It helps eliminate clutter from your Inbox making it easier to focus on the important.

Step 1

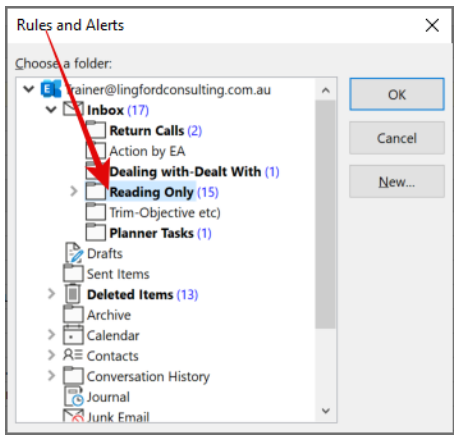
Select an email in your Inbox that you wish to automatically move to a Folder in in future.

In your Home ribbon, select the **Rules** dropdown then . **Always Move Messages From:**



Step 2

In the **Rule & Alerts** Dialog Box, select the Folder you wish to move these types of emails too. In the example below, I am choosing my Reading Only (next action folder)



If you don't have a Folder, you can create one at this point by slecting **New** and creating a new folder now. This will be automatically selected.

Step 4

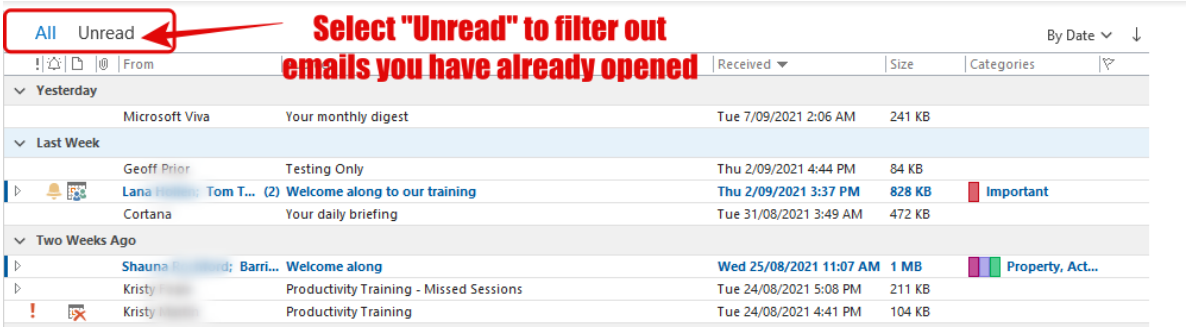
Select OK… the Dialog box will now close and your rule is now created. The next time you get that type of email again, it will be auto0matically moved to your selected Folder.

This is a great way of keeping your Inbox focused on important emails.

(3) Do Now

Now scan your Inbox for what can be done quickly. If it can be done quickly or needs to be done quickly, then do it there and then. A quick Reply or Forward.

If you are faced with a lot of unread emails…scan and triage first. Use the All or Unread Filters in your Inbox to quickly deal with those emails you have not yeat opened.



Once you have replied, forwarded or completed the email, make sure you Deposit (File) the email as per previous step.

Don't leave the email you have responded to in your Inbox as a reminder that you are waiting for some information to come back to you. Use some of the 4th "D" tools I will show you now.

(4) Do Later

This is the most important step! If you cannot do the required action on the email immediately, then, *Determine* your next action and *Decide* when you can do it. At this point you have several options.

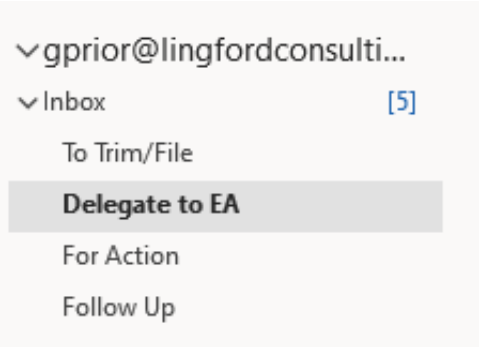
1. Move to an Email Folder (Next action folder)
2. Move to an existing Meeting/Calendar Appointment
3. Create a new Calendar Appointment or a Task from the email
4. Apply a Category to the email
5. Apply a Follow Up Flag to the email

The idea here is that rather than continually searching your Inbox for emails that require action on your part, you use some of the smart features in Outlook to help you track the action you need to take.

So, let's look at each one of these 4 options in more detail.

Do Later (Option 1) - Move to an Email Folder

You could set a up a few email folders that indicate the *NEXT ACTION you need to take* and drag the email in the relevant folder.

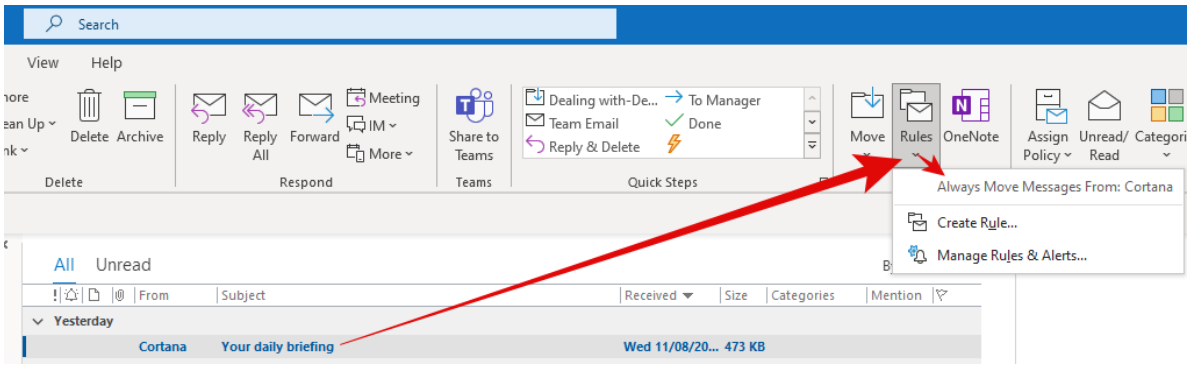


You might use Folders such as:

1. Reading only
2. For Follow Up
3. Phone Messages
4. For Action
5. Delegate to EA
6. File in Doc Mgt System (Trim, Objective etc)
7. Monthly Report

This type of system can work well…BUT you need to build regular times in your Calendar to come back your **Next Action** folders to action the emails in them. Otherwise, they could easily get forgotten.

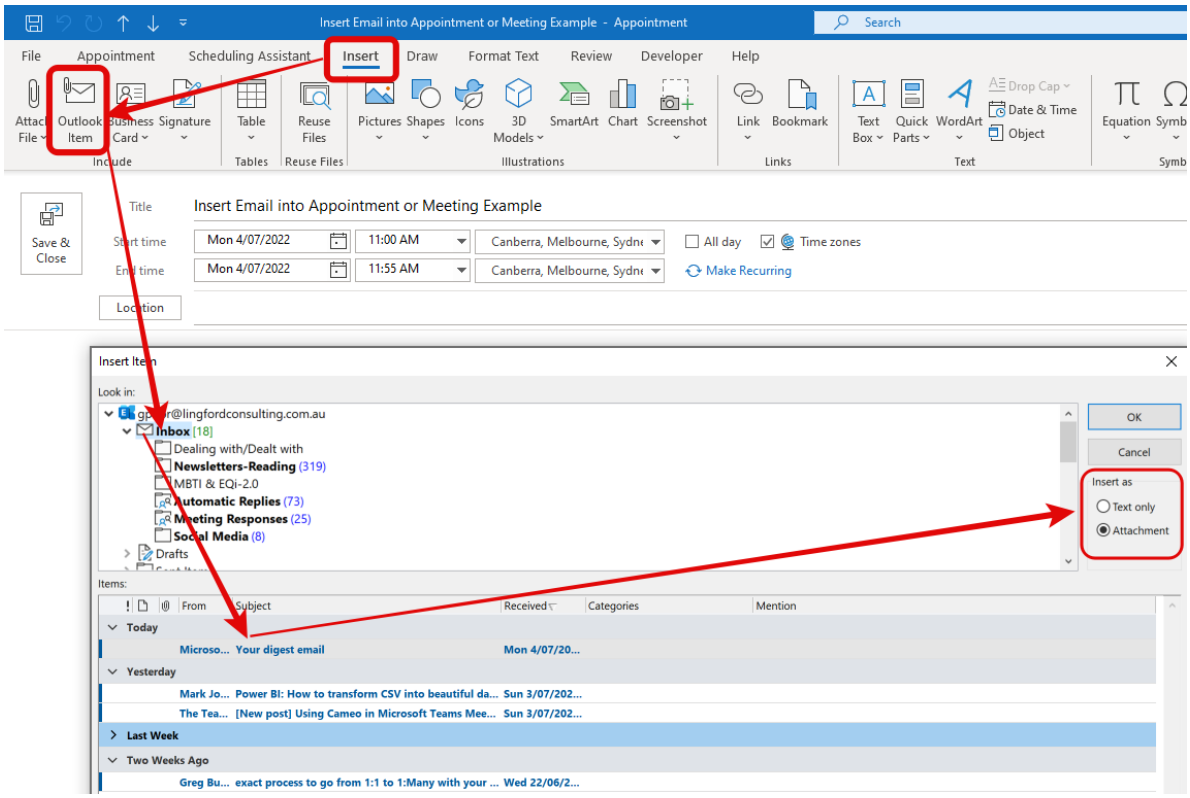
Create more Email Rules if you can to automate this



Do Later (Option 2) – Insert email to existing Meeting or Appointment

If the Email relates to an existing meeting or appointment you already have in your Calendar, then you can:

1. Copy the email contents into that meeting/appointment. (Copy /Paste Text) OR
2. Open the Meeting/Appointment and copy the email into it that meeting.
3. Use the Insert Menu in the Calendar event to insert a copy of the email into that appointment. **Insert** > **Outlook Item** > **Choose the email/emails** > **Insert as Text only or Attachment**



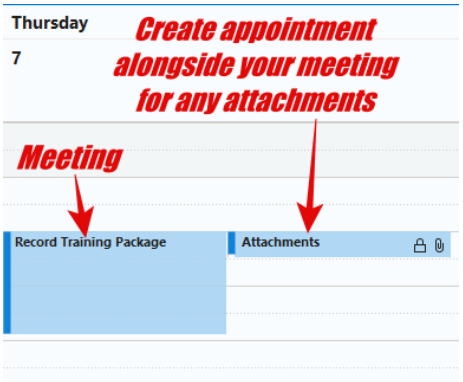
The idea is to not have to go searching for emails you need in your Meeting/Appointment.

Additional Tip

You can also create a new appointment alongside an existing meeting to insert your emails (or other attachments)

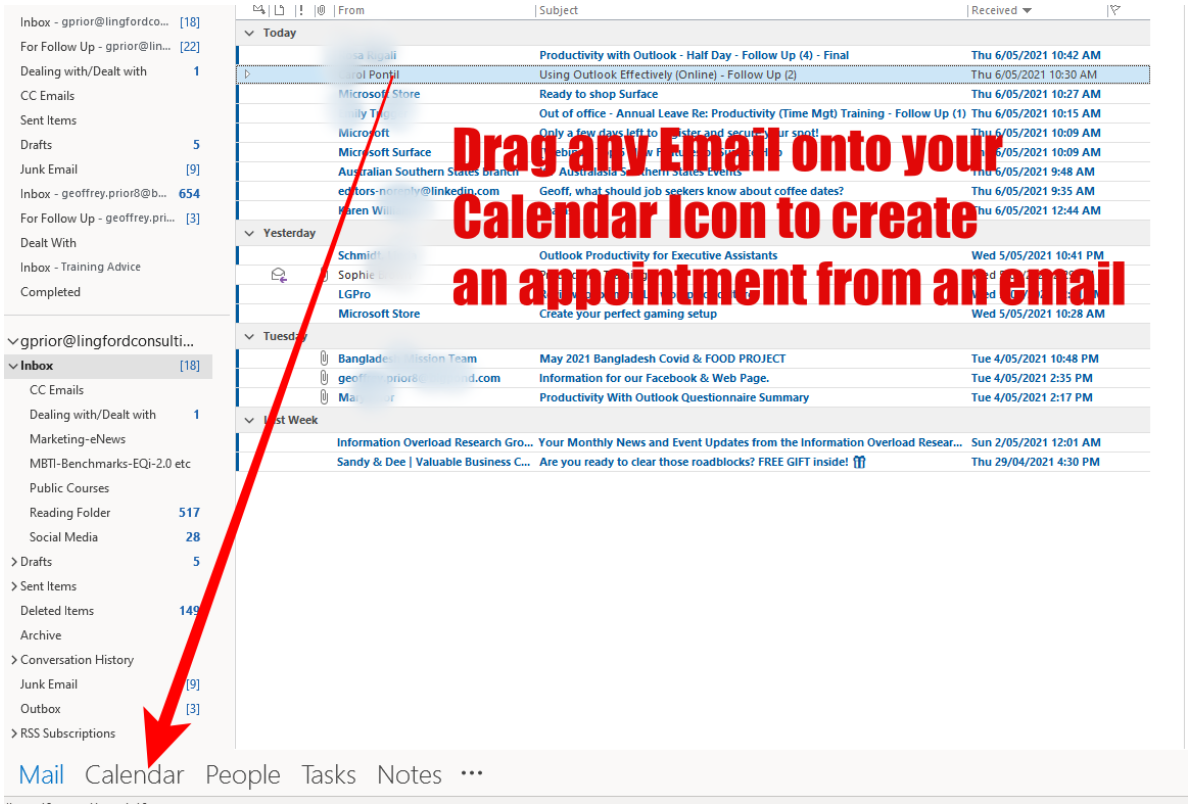
This ensures no one else can see your attachments!

This also works great on your Phone as well…especially of you use Outlook Mobile.



Do Later (Option 3) - Create a new Calendar Appointment

To do this - Left Click and Hold the Email…then drag it to drop on your Calendar or Task Icon as shown below.

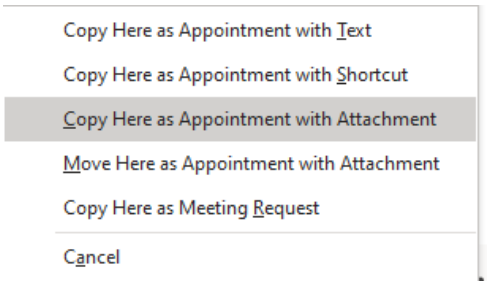


This turns a "*copy*" of the email into a New Appointment/Meeting.

The Text of the email is included in the new Task/Calendar item.

Try Right-Click & Drag

You can also try **Right Mouse Clicking** and dragging the email as shown below. This then gives you a few other options as shown opposite.



It's worth experimenting with what will work best for you.

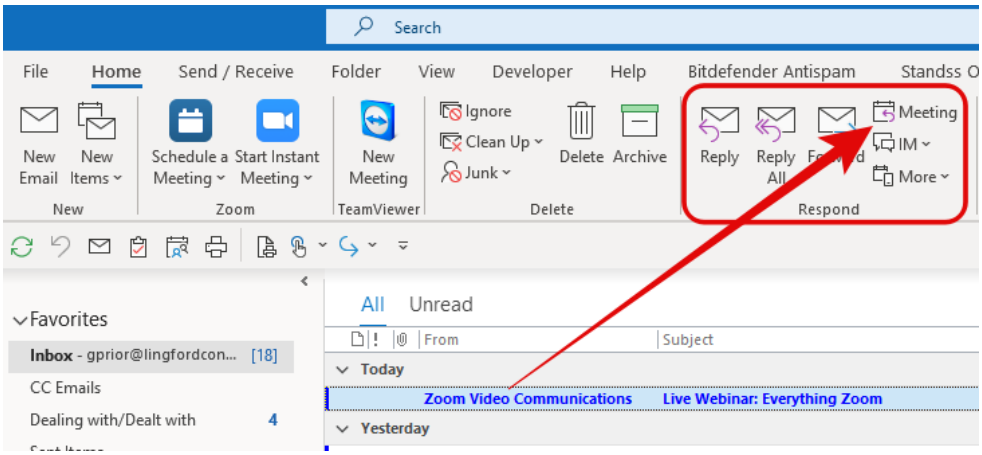
Reply with Meeting - directly from an email

Another option here is that you can also create a Meeting directly from an Email by clicking on "Meeting" in the "Respond" section of the Ribbon.

You can do this with the email *open* or *closed* directly from your Inbox.

With the Email Closed (*Below*)

Select an Email in your Inbox and then choose 'Meeting" in the Respond group of Icons in the Ribbon as shown here.

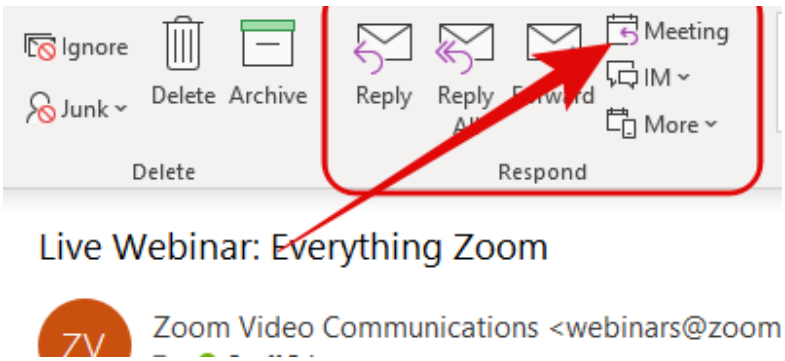


With the Email Open

Open the email you wish to Reply with Meeting. (See opposite)

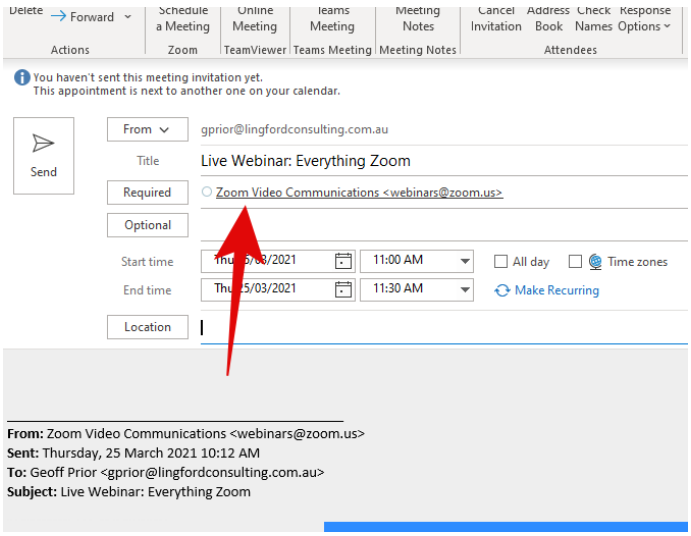
Select Meeting in the ribbon.

This will create a Meeting or Appointment from the email. (see opposite)



The "Required" field is automatically updated from the Reciever(s). You can now enter the remaining meeting details.

The formatting of the text, links and images stays the same.



Do Later (Option 4) - Flag the email

Finally, you can Flag the email with a date to come back to **do later**.

Many people just Left Mouse Click on the Flag column in their Inbox to flag an email and then then scan their inbox for any Flagged item. These will turn red the next day. (meaning it is overdue)

But this is quite an inefficient method of tracking your Email Flags and I think…I know, there is a much better way built into Outlook for you to use.

Let us now look at a better way to use Email Flags to track important emails.

Using Email Flags - Reminders

Flagging emails in Outlook is a simple and effective way to be reminded about an email that requires some action.

In my experience, most people don't use them as well as they could. They apply a flag to an email to try and remember to come back to it later…but then no system in place other than scrolling up/down their Inbox searching for flags they have applied.

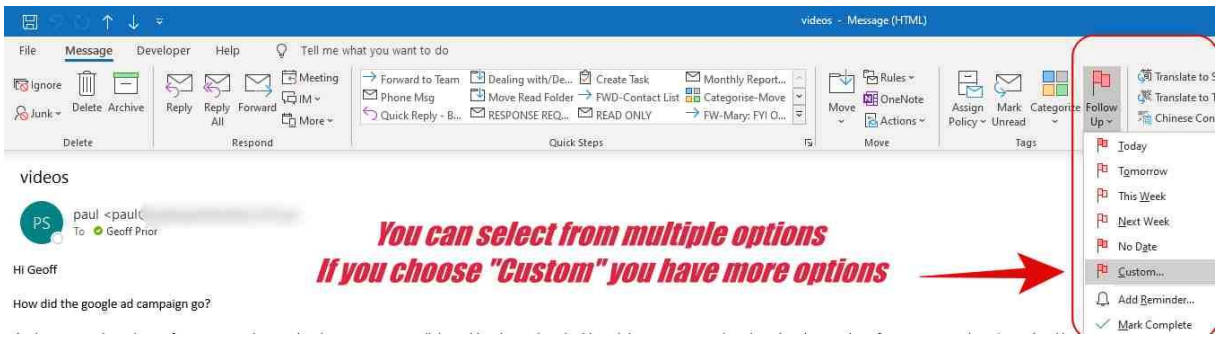
Here's my suggestions to use Flags more effectively:

1. Flag intentionally with a Date!
2. Remove the email from your Inbox after you have Flagged it.
3. "Mark Complete" or "Clear the Flag" when done.
4. Track your flagged emails using the smarts of Outlook.

There are several ways to apply a Flag on an email.

Method 1

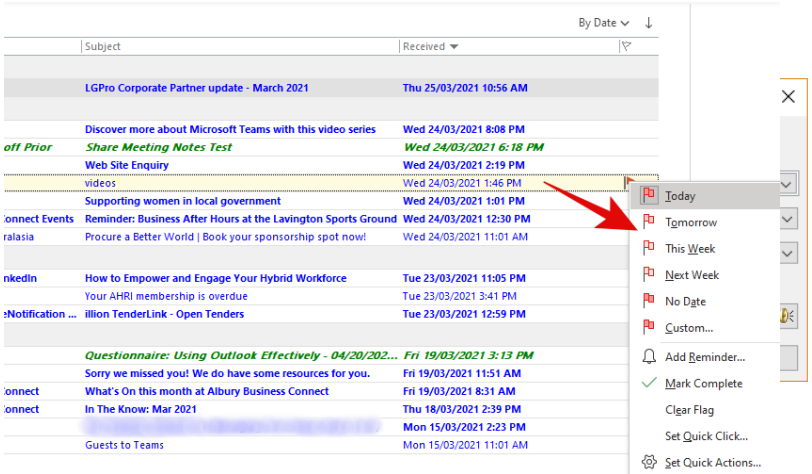
With the email open, click on the "Follow Up" Flag menu to reveal the Flagging options.



Method 2

With the email selected in your Inbox, you can Right Mouse Click on the Flag.

You can select to add a Flag by using one of the "Quick Flag" options. (Today, Tomorrow etc)… or you can open the "*Custom*" window to see further options as shown opposite.



You can select a **Start Date**; a **Due Date** and even a **Reminder** time. Each date/time can be independent of each other.

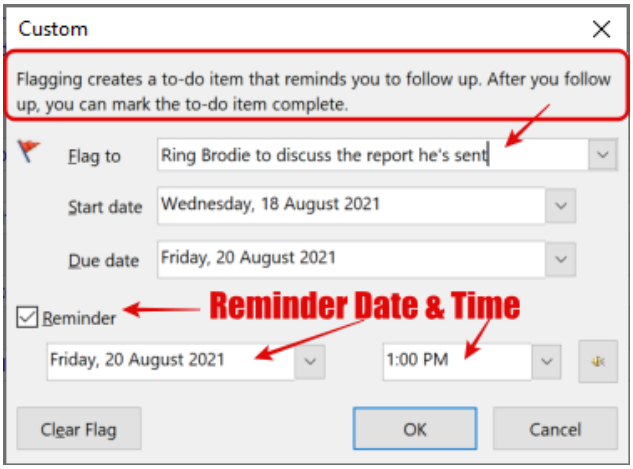
Once you flag an email, a copy of the email also appears in your To Do Bar/To Do List and also in your Follow Up Folder. (In your Search Folders).

You can Flag an email to take some action on a day and time, then remove the email from your Inbox and file it away. (Remember the 4D's).

You will see your email in your To Do List or in your Follow Up Folder as the Flag Date approaches.

Custom (Flag)Dialog Box

When you open choose the "Custom" option, a Custom Dialog box appears and gives you numerous options.



You can select a **Start Date**; a **Due Date** and even a **Reminder** time. Each date/time can be independent of each other. (See below)

Flag to

You can actually insert the action you need to take in this area.You can write yourself…or another person (EA's take note), quite a detailed message to remind yourself of the *Next Action* you need to take.

Start Date Reminder

Personally, I ignore the Start Date. It will default to the date you opened the Custom Box.

Due Date

Always choose a Due Date. The best guess date by which you need to complete the action you need to on this email.

Reminder Time

I also recommend ignoring the Reminder Time. I think it is better to keep reminders for your Calendar Events.

I will show you later how to get an Email Flag in your Calendar if the time is critical. IE…you need to call someone at a particular time.

Mark your Flagged Emails Complete.

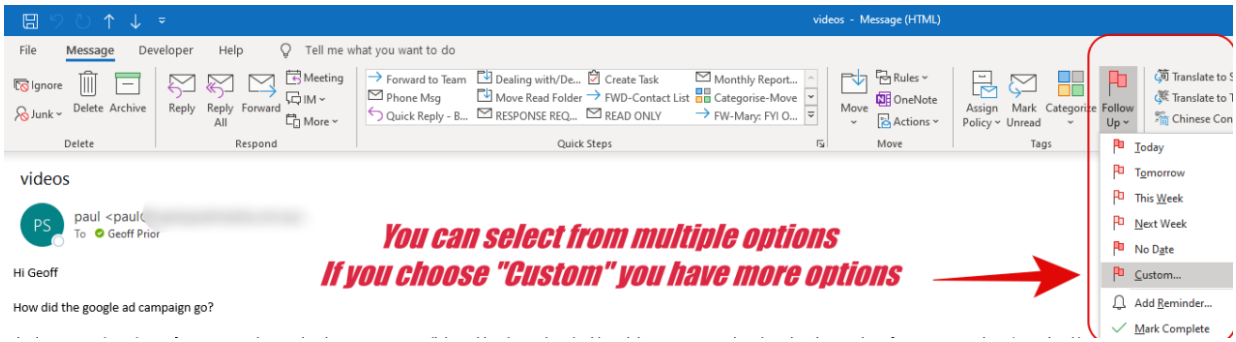
Once you have completed the action you intended to take on the email, close the loop by marking the Flag Complete.

Don't leave the email in your Inbox at this point. I will show you several ways to track this email other than leaving it in your Inbox.

Flag emails you send to others

You can also add "Reminder Flags" on emails you send.

This is a powerful Follow Up system right at your fingertips within Outlook.

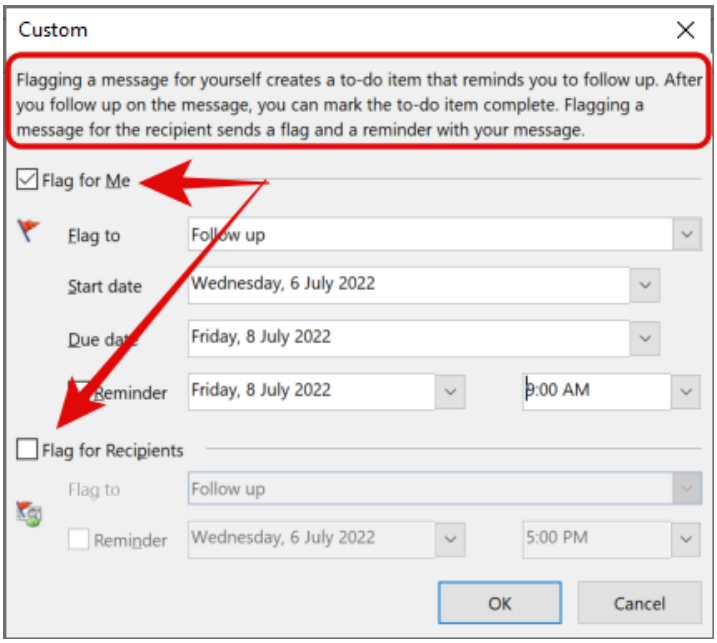


Before you send your email, insert a Follow Up Flag as shown above.

Remember to select the time etc as shown previously. Use the Custom option to reveal more date options.

The email is stored in your "Sent Items" folder but is displayed in your To Do Bar for follow up on the date you choose.

This is a fail-safe way to ensure nothing gets lost in the system!



The Flag/Reminder is just for you….

You can add a Reminder Flag for the recipient. (See here) But be careful in using this. You are imposing your timelines and reminders on someone else which is not ideal.

But this can really helfpful if all parties agree for this to be done!

A better option is for the Sender to state when they require some action and for the onus is on the Reciever to place a Flag as their own reminder.

Tracking your Email Flags

Once you've flagged the email, Outlook has several options you can use for automatically tracking it. Again, don't leave the email in your Inbox.

You can track your Flagged Emails from your To Do List/Tasks or by using a "Search Folder".

For this training, I'm going to show you how to use a Search Folder to track your Flagged Emails.

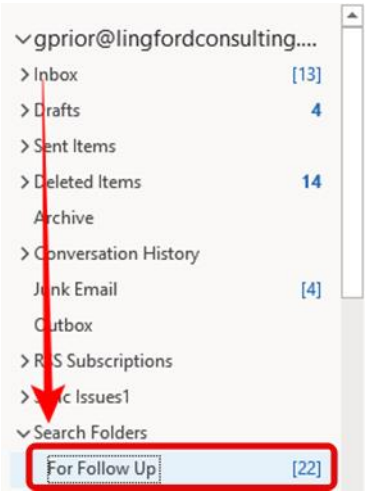
Use a Search Folder

You will notice that there is a group of Folders (usually under your Outbox) called; "Search Folders". These are "Virtual Folders" in a sense. They don't actually contain emails.

Outlook can automatically Filter emails based on certain criteria. Large Mail, Unread Mail or Emails you have flagged etc. (see opposite).

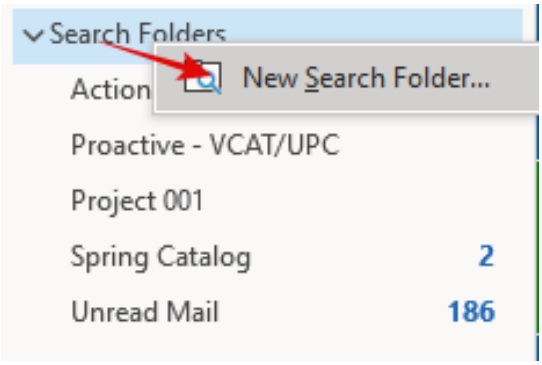
They can be customised to show ALL emails based upon the pre-defined conditions you set

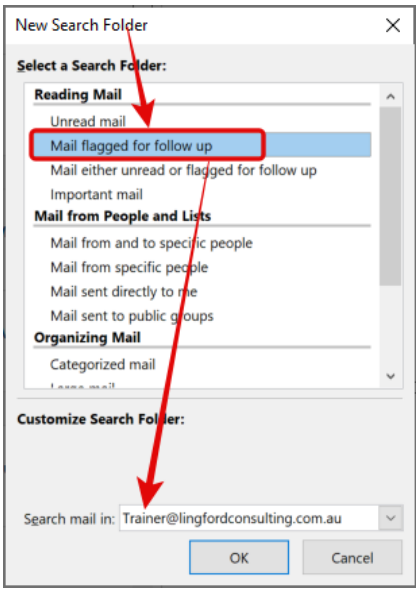
We are going to create "**For Follow Up**" search folder to track emails you have flagged. (See opposite)



To create a New Search Folder called Follow Up if it is not already there.

Right click on **Search Folders** > **Select New Search Folder** > Select **"Mail Flagged for Follow Up**" as shown here.



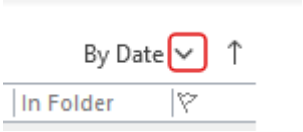


Using the 4Ds – Outlook Inbox

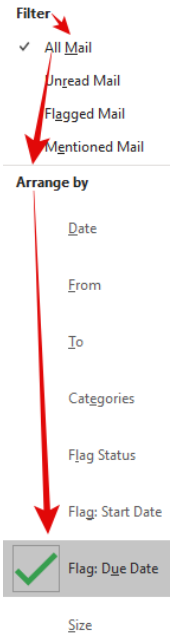
Once you have created your new Search Folder, you will notice that Outlook will retrieve all your Flagged Emails from every Folder….WARNING - there may be a lot of Red ones! 😊

But note below, the order with which these should be shown. “By Flag Due Date”

If they are ordered by Date, then select the small Down Arrow beside Date as shown opposite. This will reveal the options you have to Filter this Search Folder.



Choose to Filter by “Flag Due Date as shown here.

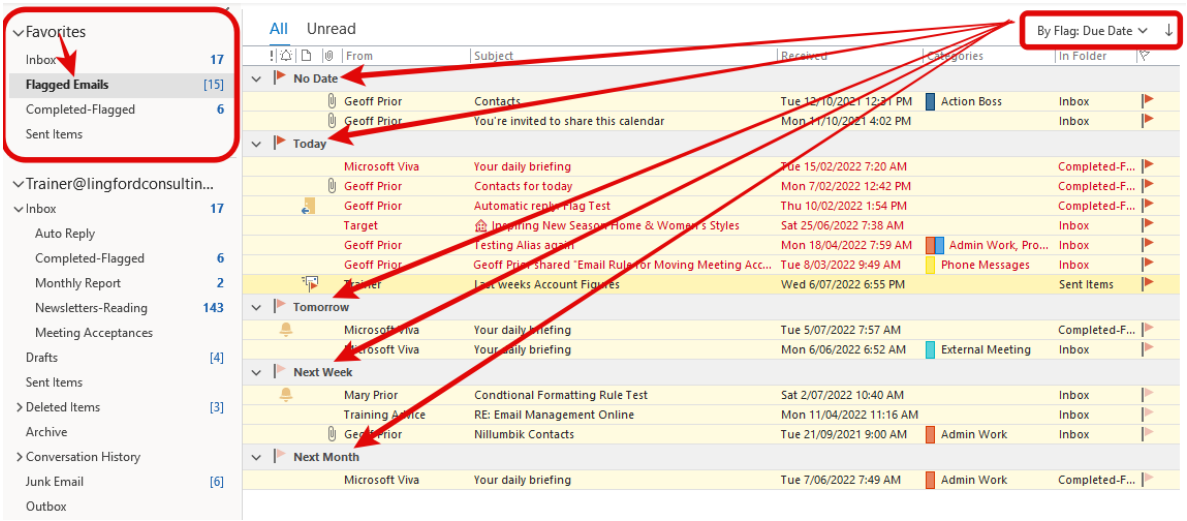


Your Email Search Folder should then be sorted as below.

Emails Flagged with “No Date” are shown first.

Then those that are overdue are next. (These are shown in Red, because they are overdue.

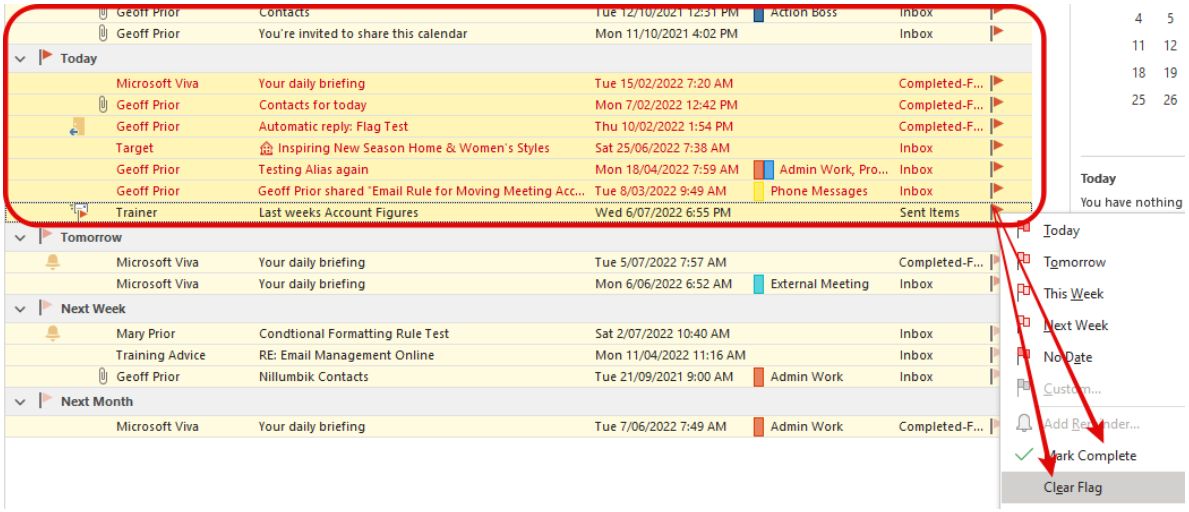
Then Today, Tomorrow, Next Week etc.



It may take some time to clean up this Folder, but thankfully you can highlight the very old ones and either:

1. Clear the Flag or
2. Mark Complete

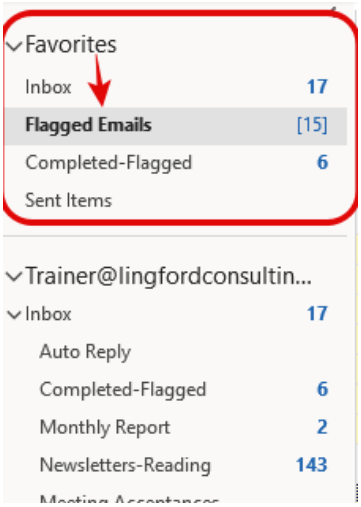
Simply use the Shift and Arrow keys to highlight all the emails you need to Mark Complete or Clear.



Neither of these actions will delete the email, they just remove it from view in this "search Folder".

You can alsow "Rename" your Search Folder as you would do with any other Email Folder.

And don't forget to Add or Show this Folder In your Favourites as seen below.



And that's it. Thanks for purchasing this "On-Demand" training package. I hope you have found it helpful.

Geoff Prior - Lingford Consulting