

Presented By

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## **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
- May miss important emails

We are too reactive/not proactive

• Inability to focus on complex

• Tendency to Multitask

• 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.

#### <u> Email Alert by Exception – Sender</u>

### Step 1

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



### Step 2

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

File Home	Send / Receive	Folder View Help Sta	andss Outlook Addins		
New New Email Items ~	Schedule a Start Instant Meeting ~ Meeting ~	Ignore     IIII     □       IIII     □     □       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Reply Reply Forward All	Create Task Share to Teams Action Req:	Phone Msg  -  -  -  Rules -
New	Zoom	Delete	Respond	Teams	Quick Steps 5 Move
ට <sup>(</sup> ) ද					
∽Favorites	<	All Unread			By Date ∨ 🔱
Inbox - gprior@	lingfordconsu [17]	🖼 🗅 ! 🖉 From	Subject	/	Received 🔻 🕅 🕅
For Follow Up -	gprior@lingfo [21]	∨ Today			
Dealing with/De	alt with 1	Albury Business (	Connect What's On this month at A	Albury Business Connect	Fri 7/05/2021 10:15 AM

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.

Create Rule		×					
When I get email with all of the selected conditions							
Subject contains What's On this month at Albury Business Connect							
Sent to me only		~					
Do the following	Jert window						
Play a selected sound:	Windows Notify Email.	• Bro <u>w</u> se					
<u>M</u> ove the item to folder.	Reading Folder	Select Folder					
	OK Cance	Advanced Options					





## **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.





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## (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)

#### <u>Email Rule to automatically move emails directly to a</u> <u>Folder</u>

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.

	All Unre	ad 🔶		Select "Unread" to filter out			By Da	te∨↓
	今  日  0	From		emails you have already opened	Received 🔻	Size	Categories	17
~	Yesterday							
		Microsoft Vi	va	Your monthly digest	Tue 7/09/2021 2:06 AM	241 KB		
v	Last Week							
		Geoff Prior		Testing Only	Thu 2/09/2021 4:44 PM	84 KB		
$\triangleright$	🐥 🌇	Lana Hollen;	Tom T (2)	Welcome along to our training	Thu 2/09/2021 3:37 PM	828 KB	Important	
		Cortana		Your daily briefing	Tue 31/08/2021 3:49 AM	472 KB		
~	Two Weeks A	Ago						
⊳		Shauna R	ord; Barri	Welcome along	Wed 25/08/2021 11:07 AM	1 MB	Property, Ac	t
$\triangleright$		Kristy F		Productivity Training - Missed Sessions	Tue 24/08/2021 5:08 PM	211 KB		
	! 🕵	Kristy		Productivity Training	Tue 24/08/2021 4:41 PM	104 KB		

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

	𝒫 Search						
	View Help						
nore ean nk N	Up ~ Delete Archive	Reply Reply Forward All	Share to Teams	<ul> <li>Dealing with-De → To Manager</li> <li>M Team Email</li> <li>✓ Done</li> <li>✓ Reply &amp; Delete</li> </ul>	< > 1>	Move Rules OneNo	
_	Delete	Respond	Teams	Quick Steps		Always	Move Messages From: Cortana
						Create	R <u>u</u> le
٢	All Unread					Bj 🖏 Manage	e Ru <u>l</u> es & Alerts
	![☆ 凸  0  From	Subject	/	Received 🔻 Size Ca	ategories	Mention 🕅	
	✓ Yesterday						
	Corta	ana Your daily briefing		Wed 11/08/20 473 KB			

✓ gprior@lingfordconsulti...
✓ Inbox [5]
To Trim/File
Delegate to EA
For Action
Follow Up





## 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.
- 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

🖫 今 🔿 个 🦆 👻 Insert Email into Appointment or Meeting Example - Appointment 🛛 🔎 Search	
ile Appointment Scheduling Assistant Insert Draw Format Text Review Developer Help	
Image: Second	
Title Insert Email into Appointment or Meeting Example	
Save & Styrt time Mon 4/07/2022 📅 11:00 AM 👻 Canberra, Melbourne, Sydne 💌 🗌 All day 🗹 🎯 Time zones	
Close Ent time Mon 4/07/2022 📅 11:55 AM 👻 Canberra, Melbourne, Sydne 👻 🕂 Make Recurring	
Insert Rein	×
Look in:	~
Index (18) Inbox (18) Dealing with/Dealt with Newsletters-Reading (319) MMBTI & E(0:-2.0) [CA utomatic Replies (73) [CA wetting Responses (25)	OK     Cancel     Insert as
Sodel Media(8) > ≥ Drafts	Text only     Attachment
Escolar Media (8) > ▷ Drafts Items:	
Items:         Items:           Image: Source Hard         Received ←         Categories	
Social Media (8)       > Drafts       Items:       ! D @ From Subject       Received ← Categories       Mention	
Items:         Items:           Image: Source Hard         Received ←         Categories	
Social Media (8)     Drafts      Items:      I □ 0 From Subject Received Categories Mention      ✓ Today      Microso Your digest email Mon 4/07/20      Yesterday      Mark Jo Power BI: How to transform CSV into beautiful da Sun 3/07/202	
Sociel Media (8)         > Drafts         Items:         I □ □ From Subject       Received ⊂ Categories         Microso Your digest email       Mon 4/07/20         ✓ Yesterday         Mark Jo Power BI: How to transform CSV into beautiful da Sun 3/07/202         The Tea [New post] Using Cameo in Microsoft Teams Mee Sun 3/07/202	
Social Media (8)     Drafts      Items:      I □ 0 From Subject Received Categories Mention      ✓ Today      Microso Your digest email Mon 4/07/20      Yesterday      Mark Jo Power BI: How to transform CSV into beautiful da Sun 3/07/202	

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.

Copy Here as Appointment with $\underline{T}ext$
Copy Here as Appointment with <u>S</u> hortcut
<u>C</u> opy Here as Appointment with Attachment
$\underline{M}oveHereasAppointmentwithAttachment$
Copy Here as Meeting <u>R</u> equest
C <u>a</u> ncel



## 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.



### Live Webinar: Everything Zoom



Zoom Video Communications <webinars@zoom





## **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)

□ !     Ø     From     Subject       ✓ Today     Hover the Mouse over an email       Zoom Video Communications     [Offer Ends Today] Your Last Chance tailti the Flag option will appear	All Unread	Flag Column By Date ~
Zoom Video Communications [Offer Ends Today] Your Last Chance tail tife Flag option will appear 8/05/2021 10:29 AM	🗅 🕂 🔟 From	Subject Received 🔻 🎽 🕅
	∨ Today	Hover the Mouse over an email
	Zoom Video Communications	[Offer Ends Today] Your Last Chance to first offer Flag ontion will anne Sat 8/05/2021 10:29 Am
✓ Yesterday	✓ Yesterday	and no ridy option win appear
Envato Market [ThemeForest] Update available for 'Bridge - Creative Multipurpose WordPress Theme' Fri 7/05/2021 9:55 PM	Envato Market	[ThemeForest] Update available for 'Bridge - Creative Multipurpose WordPress Theme' Fri 7/05/2021 9:55 PM

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.

			By Date ∽ ↓		
	Subject	Received 🔻	10	_	
	LGPro Corporate Partner update - March 2021	Thu 25/03/2021 10:56 AM			
	Discover more about Microsoft Teams with this video series	Wed 24/03/2021 8:08 PM			
off Prior	Share Meeting Notes Test	Wed 24/03/2021 6:18 PM			
	Web Site Enquiry	Wed 24/03/2021 2:19 PM			
	videos	Wed 24/03/2021 1:46 PM			
	Supporting women in local government	Wed 24/03/2021 1:01 PM		<u>T</u> oday	
onnect Events	Reminder: Business After Hours at the Lavington Sports Ground	Wed 24/03/2021 12:30 PM		Tomorrow	
ralasia	Procure a Better World   Book your sponsorship spot now!	Wed 24/03/2021 11:01 AM	P	-	
				This <u>W</u> eek	
nkedin	How to Empower and Engage Your Hybrid Workforce	Tue 23/03/2021 11:05 PM	Ρ	Next Week	
	Your AHRI membership is overdue	Tue 23/03/2021 3:41 PM	P	No Date	
Notification	illion TenderLink - Open Tenders	Tue 23/03/2021 12:59 PM			
			P	<u>C</u> ustom	
	Questionnaire: Using Outlook Effectively - 04/20/202	Fri 19/03/2021 3:13 PM	Q	Add <u>R</u> eminder	
	Sorry we missed you! We do have some resources for you.	Fri 19/03/2021 11:51 AM		Made Consultate	
onnect	What's On this month at Albury Business Connect	Fri 19/03/2021 8:31 AM	~	Mark Complete	
onnect	In The Know: Mar 2021	Thu 18/03/2021 2:39 PM		Clear Flag	
		Mon 15/03/2021 2:23 PM		Cat Out all Clinic	
	Guests to Teams	Mon 15/03/2021 11:01 AM		Set Quick Click	
			<8	Set Ouick Actions	



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.

Cus	tom		×					
	Flagging creates a to-do item that reminds you to follow up. After you follow up, you can mark the to-do item complete.							
٣	<u>F</u> lag to	Ring Brodie to discuss the report he's sent	~					
	Start date	Wednesday, 18 August 2021	~					
	<u>D</u> ue date	Friday, 20 August 2021	~					
⊠₿	Reminder Date & Time							
	Friday, 20 August 2021 1:00 PM 🖌 🧹 👍							
С	Cl <u>e</u> ar Flag OK Cancel							

#### 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.

⊟ ७७↑↓ ≖			videos - Message (HTML)		
File Message Developer Help To Ignore III To Reply Reply For Junk Delete Repl	→ GIM ~ More ~ Phone Msg UM ~ SQUICK Reply - B C RI	ealing with/De <sup>1</sup> <sup>2</sup>		Assign Mark Categorit Policy VInread Y Taqs	Up ~ 🦰 Chinese Con
videos PS paul <paul( To • Geoff Prior Hi Geoff</paul( 	You can so	elect from multiple ( 'Custom" you have n	options		Ioday         Ioday           Iomorrow         Tomorrow           Inis Week         Next Week           No Date         Custom
How did the google ad campaign go?		GUSLUM YUU NAVE N	iore options —		Custom       Q     Add Reminder       V     Mark Complete

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!

Cust	tom					×
you f	ollow up on the	or yourself creates a to-do ite message, you can mark the t ient sends a flag and a remir	o-do item c	omplete. Flaggi		After
<b>⊡</b> FI	ag for <u>M</u> e					_
٣	Elag to	Follow up				$\sim$
	<u>S</u> tart date	Wednesday, 6 July 2022			~	
	<u>D</u> ue date	Friday, 8 July 2022			$\sim$	
	Beminder	Friday, 8 July 2022	$\sim$	9:00 AM		~
E FI	ag for Recipients					
-	Flag to	Follow up				$\sim$
<b>S</b> 3	Reminder	Wednesday, 6 July 2022	$\sim$	5:00 PM		$\sim$
			(	ОК	Cancel	

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.









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.

By Da	te <b>∨</b> ↑	
In Folder	17	

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.

✓Favorites	)	All Unr	ead			Ву	Flag: Due Date	$\sim$
Inbox	17	! \$ B  0	From	Subject	Received	Categories	In Folder	8
Flagged Emails	[15]	🗸 🕨 No Dat	te					
Completed-Flagged	6	(	Geoff Prior	Contacts	Tue 12/10/2021 12:21 PM	Action Boss	Inbox	
Sent Items			Geoff Prior	You're invited to share this calendar	Mon 11/10/2021 4:02 PM		Inbox	
Sent items	)	V 🏲 Today						
			Microsoft Viva	Your daily briefing	Tue 15/02/2022 7:20 AM		Completed-F	. 🕨
✓Trainer@lingfordconsu	ultin	(	Geoff Prior	Contacts for today	Mon 7/02/2022 12:42 PM		Completed-F	. 🕨
✓ Inbox	17	2	Geoff Prior	Automatic replanding Test	Thu 10/02/2022 1:54 PM		Completed-F	. 🕨
Auto Reply			Target	lipsening New Season Home & Women's Styles	Sat 25/06/2022 7:38 AM		Inbox	
Completed-Flagged	6		Geoff Prior	Testing Alias again	Mon 18/04/2022 7:59 AM	Admin Work, Pro		
1 33			Geoff Prior		Tue 8/03/2022 9:49 AM	Phone Messages	Inbox	
Monthly Report	2	1		Last weeks Account Figures	Wed 6/07/2022 6:55 PM		Sent Items	
Newsletters-Reading	143	✓ ► Tomorr	row					
Meeting Acceptances		Ļ	Microsoft viva	Your daily briefing	Tue 5/07/2022 7:57 AM		Completed-F	.  >
Drafts	[4]		arosoft Viva	Your raily briefing	Mon 6/06/2022 6:52 AM	External Meeting	Inbox	
Sent Items	1.0	🗸 ╞ Next W	Veek					
		Ļ	Mary Prior	Condtional Formatting Rule Test	Sat 2/07/2022 10:40 AM		Inbox	₽
> Deleted Items	[3]		Training Advice	RE: Email Management Online	Mon 11/04/2022 11:16 AM		Inbox	
Archive		į.	Ger Gerior	Nillumbik Contacts	Tue 21/09/2021 9:00 AM	Admin Work	Inbox	
Conversation History		∨ 🕨 Next M	Ionth					
Junk Email	[6]		Microsoft Viva	Your daily briefing	Tue 7/06/2022 7:49 AM	Admin Work	Completed-F	.  >
Outbox								



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.

	U	Geott Prior	Contacts	Tue 12/10/2021 12:31 PM	Action Boss	Inbox			4	5
	U	Geoff Prior	You're invited to share this calendar	Mon 11/10/2021 4:02 PM		Inbox			11	12
∽ ト	Today									
		Microsoft Viva	Your daily briefing	Tue 15/02/2022 7:20 AM		Completed-F			18	19
	Û	Geoff Prior	Contacts for today	Mon 7/02/2022 12:42 PM		Completed-F	Þ		25	26
		Geoff Prior	Automatic reply: Flag Test	Thu 10/02/2022 1:54 PM		Completed-F	•			
		Target	🏦 Inspiring New Season Home & Women's Styles	Sat 25/06/2022 7:38 AM		Inbox				
		Geoff Prior	Testing Alias again	Mon 18/04/2022 7:59 AM	Admin Work, Pro	Inbox			Todav	
		Geoff Prior	Geoff Prior shared "Email Rule for Moving Meeting Acc	Tue 8/03/2022 9:49 AM	Phone Messages	Inbox			-	
	:1	Trainer	Last weeks Account Figures	Wed 6/07/2022 6:55 PM		Sent Items			You have no	thing
	Tomorro	w					T	Toda	y	
		Microsoft Viva	Your daily briefing	Tue 5/07/2022 7:57 AM		Completed-F	P / 1	Tom	orrow	
		Microsoft Viva	Your daily briefing	Mon 6/06/2022 6:52 AM	External Meeting	Inbox	<u>ا ا</u>	-	M1-	
/	Next We	eek					1	Inis	<u>W</u> eek	
		Mary Prior	Condtional Formatting Rule Test	Sat 2/07/2022 10:40 AM		Inbox	P P	Next	Week	
		Training Advice	RE: Email Management Online	Mon 11/04/2022 11:16 AM		Inbox	i A	NoD	ate	
	Û	Geoff Prior	Nillumbik Contacts	Tue 21/09/2021 9:00 AM	Admin Work	Inbox	P 🔒		-	
-	Next Mo	onth			-			Cust	om	
		Microsoft Viva	Your daily briefing	Tue 7/06/2022 7:49 AM	Admin Work	Completed-F	p 🗘	Add	<u>R</u> er inder	
							~	ark	Complete	
								Clear	. 51	
								Clear	riag	

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.

✓Favorites	
Inbox 🔶	17
Flagged Emails	[15]
Completed-Flagged	6
Sent Items	
∽Trainer@lingfordcons	ultin
∽Trainer@lingfordconsu ∽Inbox	ultin 17
2	
∽ Inbox	
✓ Inbox Auto Reply	17
✓ Inbox Auto Reply Completed-Flagged	17 6

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

#### Geoff Prior - Lingford Consulting