HOW TO SAVE TIME WITH AN

INBOX MANAGEMENT SYSTEM

prialto

INTRODUCTION

A survey from Adobe found that the average professional spends over five hours per day in their inbox. This is a massive loss of productivity that distracts people from strategic projects that create value.

To be successful, you need to gain control over your inbox.

This guide will walk you through the three steps to create an efficient inbox management system that limits the amount of time you spend on email while preventing important messages from slipping through the cracks.

prialto

OVERVIEW OF GUIDE

Here's a quick summary of what you'll learn.

1. **How to choose a sorting approach**
This section explains three methods of sorting your inbox and helps you decide which one is right for you.

2. **Best practices for creating clear sorting rules**
Clear rules are vital to keeping your inbox management system running smoothly. This section contains best practices for creating them and plenty of examples you can use.

3. **Tips for implementing your inbox management system + productivity hacks**
This section contains tips for successfully using your system and additional email best practices that will significantly reduce the amount of time you spend in your inbox.

4. **Pro Tip: How to delegate your inbox management to an assistant**
The most productive way to manage your email is to offload it to an assistant. Learn how to train them to keep your inbox organized.

prialto

CHOOSE YOUR SORTING APPROACH

Sorting emails boosts your productivity by allowing you to focus on the conversations that are most important to you at the moment rather than wasting time reacting to emails, regardless of their relevance.

Here are three easy-to-adopt sorting approaches:

1. Urgency-focused
2. People-focused
3. Project-focused

Choose the one that best fits your role and organization preferences.

prialto
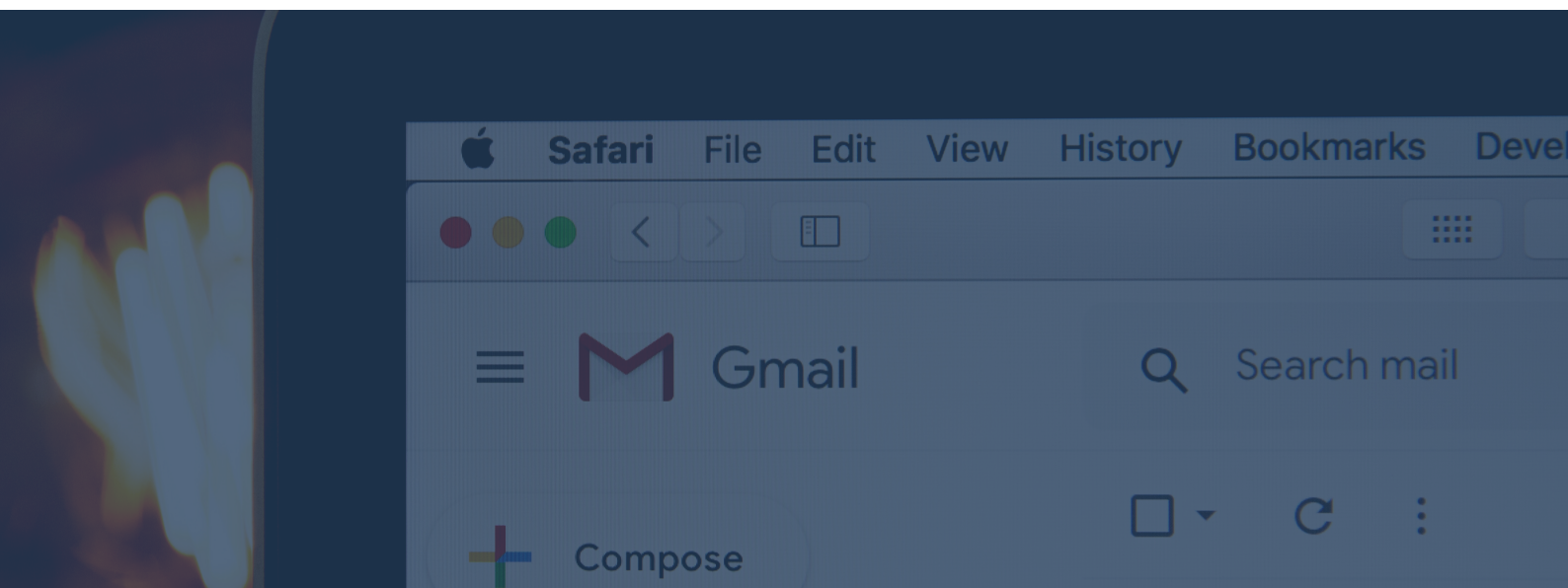
URGENCY-FOCUSED

If you're concerned about urgent emails slipping through the cracks, the urgency-focused approach will keep all of your critical messages top of mind.

To use it, create folders based on when you need to respond.

Here are the ones we suggest:

- Needs attention today
- Needs attention this week
- Read when you have time
- Delete-store emails here until you verify they are irrelevant
- Delegate to someone else (If you're assistant is managing your inbox, these are the emails that they will automatically deal with themselves)

This approach is also often the best if you want to delegate inbox management to an assistant. It's easier for them to assess urgency than the subjective criteria used in the other two approaches.

prialto

PEOPLE-FOCUSED

The people-focused approach is ideal if your day revolves around connecting with various groups of people, such as clients, prospects, partners, etc.

To use it, create folders for each of the types of people you speak with regularly.

Here are some examples:

- *If you're in sales,* create folders for each stage of your sales funnel and sort your prospects that way.
- *If you're a recruiter,* create folders for each of the positions you're seeking candidates for.
- *If you're a leader who manages several groups*, create folders for each one.

Your goal should be to create a folder scheme that encompasses the majority of emails you receive each day.

prialto

PROJECT-FOCUSED

If your days revolve around juggling multiple projects, you should create an email system that makes it easy to quickly dive into all the things you're working on.

Here are some examples:

- *If you're a marketer,* create folders for each of your campaigns.
- *If you lead a product team,* create folders for each product (or product component) that you oversee.
- *If you're a data scientist,* create folders for each of the projects you're working on and the various stakeholders who are involved.

Note: If you choose a people or project-focused approach, create two additional folders for emails that don't fit into your existing categories.

- **Miscellaneous - Urgent.** Use this folder for conversations involving short-term projects and relationships.
- **Miscellaneous - Non-Urgent.** Use this folder for the random newsletters and offers that you may want to read eventually and don't require your attention

prialto

SET CLEAR SORTING RULES

The success of your inbox management system depends on how consistently you sort your emails. To prevent messages from slipping through the cracks, you need to set clear rules for what goes into each folder.

Feel free to mix and match folders and sorting rules from each of these approaches as you design your inbox management system. To be successful, you just need to commit to your categories so that your inbox is organized and easy to use.

Let's dive into some sorting examples for each of the three approaches.

prialto

URGENCY-BASED SORTING CRITERIA

It's often challenging to assess urgency until you've read an email. Here are some criteria to speed up your sorting process:

- **Make a list of contacts who you need to respond to within 24 hours.** Include contact types (ex. Prospects, potential partners, etc.) who fall into this category.

- **Make a list of contacts who you need to respond to within the week.** Include a list of contact types who fall into this category.

- **Make a list of contacts whose emails you want to read, but there's no urgency.** This category often includes newsletters, pitches, and unimportant external communications.

- **Set criteria for emails should go into the delete folder.** Define precisely what makes an email unnecessary.

- **Set criteria for what emails you're going to delegate or are already being taken care of by others.** For example, most BCC emails can go into this folder as well as tasks other people in the email thread will do.

prialto

PEOPLE-BASED SORTING CRITERIA

Due to your constant influx of new contacts, this can be the most ambiguous sorting approach. Here are some ways to keep it focused:

- Define the scope of people that each of your folders encompasses. For example, you can sort by company type, professional titles, contact source, type of relationship, etc.
- Make a list of regular contacts that fit into each group. Use your inbox setting to automatically send emails from them into their corresponding folders.
- Be consistent with your CRM. If you use a CRM, consider sorting emails based on their contact status.

PROJECT-BASED SORTING CRITERIA

The approach is the most dynamic since it must continuously adapt to your changing workflow. Here's how to keep it organized:

- **Create folders for all of your main projects.** Add and delete folders as you create and complete projects.
- **Create folders for small, on-going tasks.** This helps prevent them from slipping through the cracks.
- **Create a folder for miscellaneous internal emails.** Ex. Company info, random requests from superiors and colleagues, etc. If you get a lot of these emails, consider breaking it down into an urgent and non-urgent folder.
- **Create a folder for miscellaneous external emails.** If your role frequently requires you to engage with external contacts who are outside of your projects, consider creating urgent and non-urgent versions of those folders.

prialto

IMPLEMENT YOUR INBOX MANAGEMENT SYSTEM

Once you've created your folders and sorting criteria, implementing your system is easy. As you receive emails, sort them, and then dive into your folders throughout the day as you focus on the various topics.

You may find that the first iteration of your sorting system is ineffective.

Here are some reasons why:

- You're rarely using one or more folders
- A large percentage of your emails don't fit into your categories
- Your folders are too broad and aren't improving your ability to focus

If you're experiencing any of these challenges or others, you need to change your folders and/or sorting criteria to be more relevant. Keep in mind that having an effective sorting system isn't going to solve all of your inbox management problems.

prialto

EMAIL RESPONSE BEST PRACTICES

If an email takes less than two minutes to address, respond immediately. This prevents small things from slipping through the cracks.

Schedule a couple of times throughout the day to deal with emails that require a longer response. This prevents you from spending your day reacting to the emails you receive.

Use clear, concise language when you send emails. Preventing miscommunications saves a ton of email ping-pong.

Make sure to respond to all emails by the end of the day. If you are unable to complete the task, the email is requesting that day, reply saying when you will get it done; this prevents you from holding other people back.

Unsubscribe from any email newsletters you haven't read within the last two weeks. This will clear a ton of clutter from your inbox.

Archive messages that you've dealt with but may need to review later. This clears your inbox while holding onto key messages.

prialto

PRO-TIP: DELEGATE YOUR INBOX MANAGEMENT TO AN ASSISTANT

Even with an organized system, managing the overwhelming amount of emails you receive each day can still be frustrating and time-consuming. To boost your productivity, delegate the sorting process to your assistant.

Here's how:

- Give them a document that clearly explains your folders and sorting rules.
- Walk them through several examples of how you sorted ambiguous emails.
- Have your assistant sort fifty emails and review their sorting accuracy. If they sorted correctly, offload your inbox management to them. However, if they made mistakes, provide additional coaching.
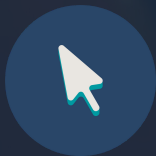
prialto
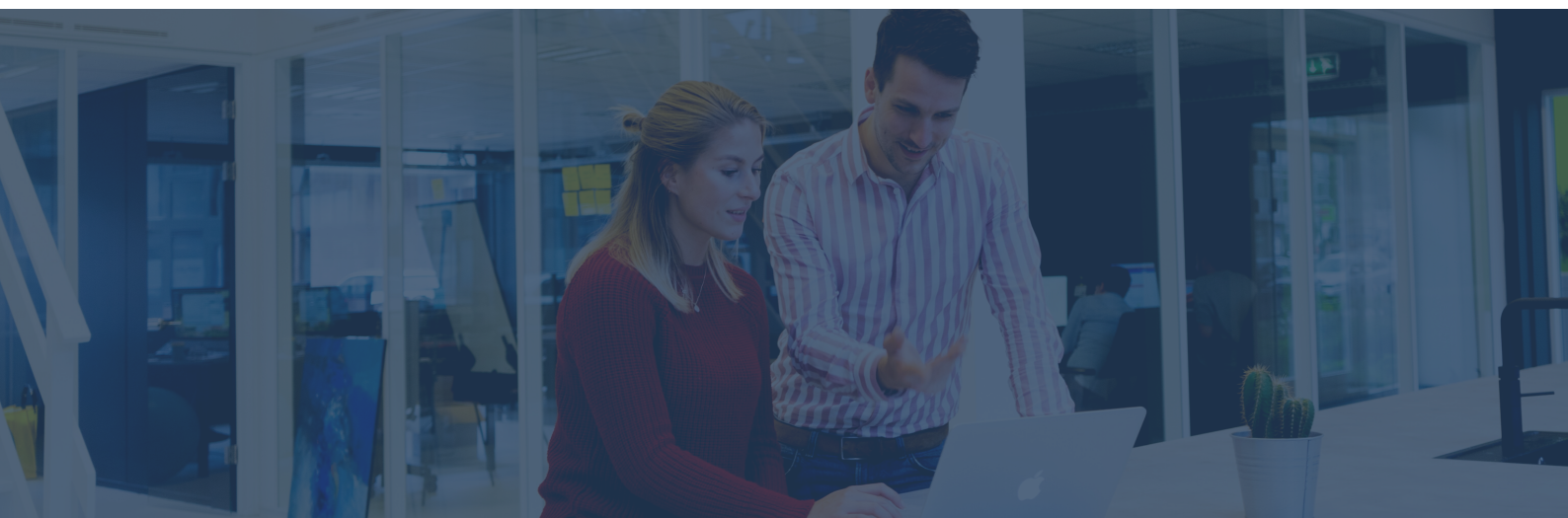
MANAGE YOUR INBOX WITHOUT THE HASSLE

If you don't have an assistant or your in-house admin support is too busy working on other tasks, consider hiring a virtual assistant through a managed service.

A managed service like ours will give you an Engagement Manager who will help you create your inbox management system and train your assistant to use it. Plus, they'll help you offload additional admin tasks such as scheduling, data entry, travel, follow-ups, etc. so that you have more time to focus on the activities that drive your success.

GET IN TOUCH

Feel free to contact us if you have any questions or want to learn how we can help you.

www.prialto.com   sales@prialto.com   +1-888-873-6101

prialto