HOW TO
HANDLE
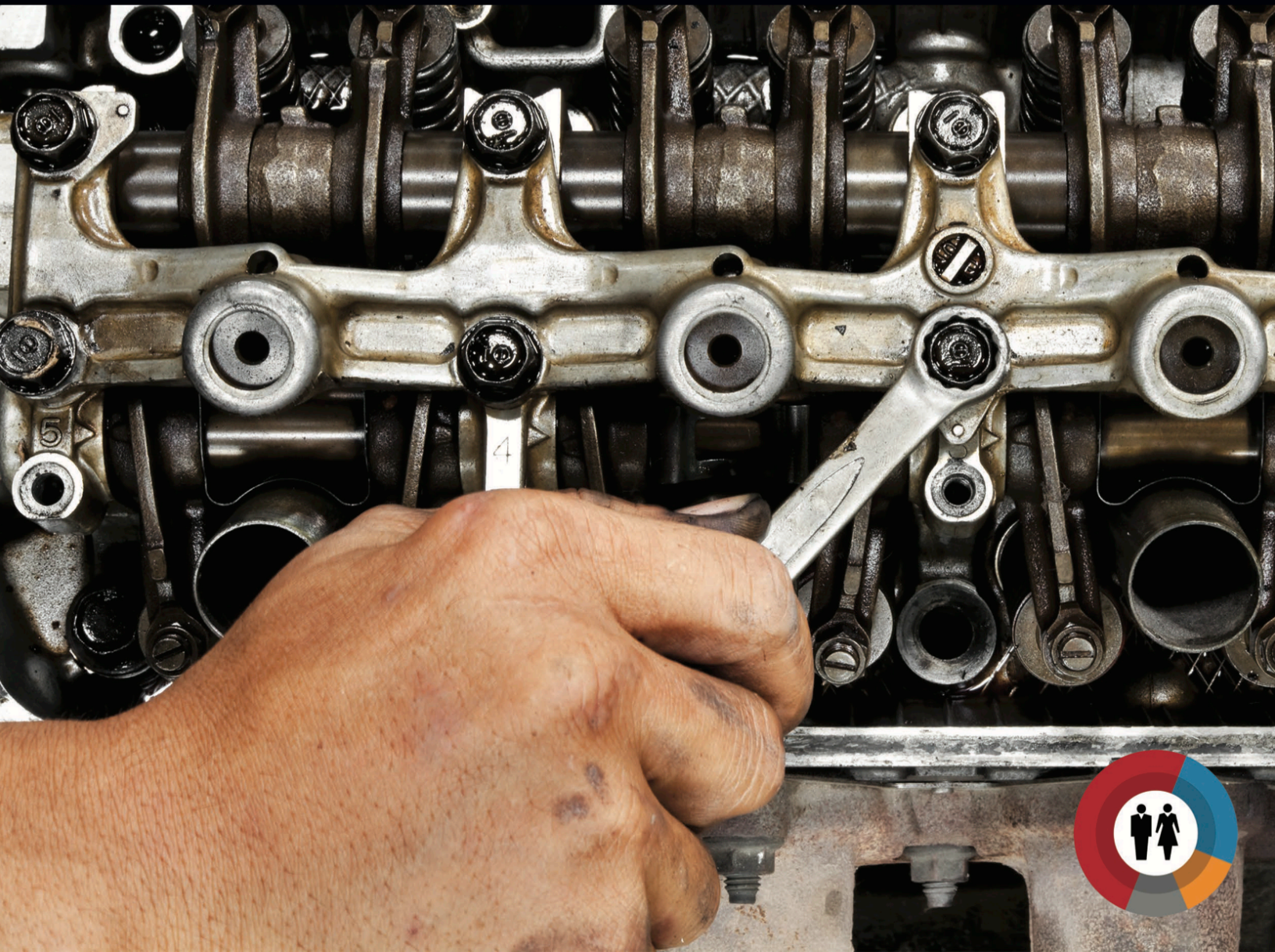## EVERY KIND OF
EMAIL
FOR MAXIMUM PRODUCTIVITY

HOW TO HANDLE YOUR EMAIL FOR
MAXIMUM PRODUCTIVITY

Email can be a great tool for school leaders, yet it can also be a terrible burden. If you're like most people, you probably find yourself spending more and more time on email, without necessarily feeling more productive. Why is this?

- Anyone can reach us via email—and more parents and community members are taking advantage of this
- An email can involve work that needs to happen offline, yet we still need to keep track of the issue in our email system
- As leaders, we get CC'd on or asked about a huge range of issues, and the volume seems to keep growing each year

Ultimately, email is really just a communication medium like any other. The problems we have with email are just digitized versions of the challenges we face in the physical world. But as more and more communication and work happens via email, we need more powerful strategies and clearer systems for handling it.
In this guide, you'll learn how to get through your inbox in a fraction of the time it usually takes, by using the right strategy for each specific type of email you receive.

Thanks for taking the time to read through this guide. I encourage you to print it out, mark it up with your notes and reflections, and review it periodically to ensure that you're handling your email in as effective a way as possible.
To get started, fill in the following blanks to reflect on your current challenges:

> The type of email I get the most is
>
> _____.
>
> The type of email I find it most challenging to
>
> deal with is _____.
>
> I normally get about ___emails per day. Right
>
> now I have about ___ emails in my inbox.
>
> My goal is to spend about ___ minutes per day on email.

Your email inbox is just like your physical mail-box—a place to receive new mail, not a place to keep things forever. It may sound impossible, but there's tremendous power in clearing out your inbox daily, or as close to daily as possible. It's doable, but it requires a different approach than most people take.

The key is to stop treating your inbox as a to-do list, calendar, and storage bin. If you allow it to just be your inbox, you'll do a much better job of staying on top of your email.

The Wrong Way to Deal with Your Email
- Open up your inbox
- Stare at it, shocked and overwhelmed
- Pick off the easy messages and deal with them
- Get tired, distracted, or interrupted
- Go deal with something else

The result? Your inbox grows larger and larger, and the messages in it get tougher and tougher to deal with, because you've saved the worst for last.

Doesn't sound like much of a plan, does it? Yet it's totally normal. But there's a better way to handle your email.

The Right Way
You'll need two essential tools that a lot of people don't think about when they're handling email: your to-do list and calendar. Without these tools, you'll leave messages un-handled in your inbox.

With the right tools in place, the process is pretty simple:
1. Open the first message in your email app full-screen (don't even look at the inbox)
2. Deal with the first message with some combination of these actions:
   - Reply/Forward
   - Archive/Delete/Unsubscribe
   - Add to to-do list & flag for follow-up
   - Forward to Evernote for safekeeping if necessary
   - Forward to NudgeMail as needed
3. Go on to the next message
4. Get through every message so your inbox is empty
5. Close your email program and go do something else!

It's really that simple. If you can deal with the message on the spot, do it. If it's more involved, add it to your to-do list.

Then comes the hard part: follow your to-do list. Trust it as the guide to how to spend your time.

HANDLING EVERY
TYPE OF EMAIL

Newsletters

What it is: You probably get regular updates from organizations you've interacted with in the past. Newsletters tend to accumulate since we never really have time to read them, yet we may want to stay updated on causes and organizations we care about.

How to handle it: If you're no longer interested, unsubscribe. If you are interested, skim & delete. If something really catches your eye, forward the newsletter to yourself or a colleague, adding a note at the top about what you want to do with the information.

What doesn't work: Letting them accumulate, either in your inbox or in a folder, in the hopes that you'll read them someday. You won't, and even if you can make time in the future, they'd be out of date.

Physical-world parallel: When we have physical piles of paper in our offices, it's clear that we have a mess that needs to be cleaned up. With email, our "space" may not be as limited, but it can get just as cluttered.

Advertising

What it is: You probably get a substantial number of advertisements about products, conferences, books, and other things someone thinks you might want to buy. Typically these are from legitimate vendors.

How to handle it: Skim & delete. This is a great thing to do from your phone or iPad in spare moments, since it's quick and easy. If you're getting repeated email advertisements for something that you have no interest in, scroll to the bottom and look for the unsubscribe link. It only takes a second, you can do it from your phone, and it works – legitimate companies will stop emailing you if you click the unsubscribe link.

What doesn't work: Staying on thousands of high-volume marketing lists that you aren't interested in. If you've hit delete a dozen times and you're tired of hearing from a company, next time, hit unsubscribe.

Physical-world parallel: If you don't want to hear from someone, let them know. The good news with email is that they won't be offended.

Spam & Phishing

What it is: Deceptive or fraudulent messages from shady senders, peddling things like get-rich schemes, prescription medication, and luxury goods. Phishing messages may try to persuade you to login to a fake version of a bank or social network website.

How to handle it: Mark as spam in your email program. Unlike mail from legitimate senders, this junk needs to be flagged as such.

What doesn't work: Clicking on anything in these messages is a bad idea — spam/phishing senders won't respect unsubscribe requests, and you may end up on a fake website that will steal your information.

Physical-world parallel: Don't give scam artists the time of day.

A quick note about "Mark as Spam":
Be sure to unsubscribe rather than "mark as spam" for anything that is education-related and from a legitimate company or real person. If you mark education-related messages as spam, the algorithms that filter your mail may start to mark other messages as spam simply because they contain the same words.

I was reviewing my spam folder today and found at least four legitimate education senders that were getting sent to spam, presumably because other people had marked them as spam instead of unsubscribing.

An extra note about phishing emails:
If you receive an email asking for passwords or other login information, it's likely that other people in your organization are being targeted by the same scam. You'll want to forward any messages like this to your tech staff so they can block them and deal with any fallout.

HANDLING EVERY
TYPE OF EMAIL

FYIs, CYAs, and CCs

What it is: Email from your colleagues that may not require any action on your part, but has been sent to you to keep you in the loop, obtain your tacit approval, or give you a heads-up about issues that may escalate.

How to handle it: Read quickly, then archive or delete. If you know you want to save a copy for future reference, yet your email program automatically deletes old messages, forward it to your Evernote account for safekeeping.

You might sometimes want to send a reply, such as "Sounds good to me – thanks for letting me know how you handled it." On your iPhone or iPad, you can create shortcuts for phrases like this, so they're only a few letters, like "sgtm." Go to Settings » General » Keyboard » Shortcuts.

What doesn't work: Some bad ideas for dealing with CCs include:
- Letting them accumulate, without reading them
- Reading oldest to newest, and replying to a now-outdated message in an active discussion
- Using mailbox rules to divert them to a folder – even CCs may contain extremely important information that your colleagues intend for you to see
- Remaining silent when you don't want to provide tacit approval – if people CC'd you, they probably think they have your go-ahead

Physical-world parallel: If you hear something you're not OK with as a leader, say something. If people give you information and you want to do something about it, the ball's in your court.

Requests for Your Action

What it is: Someone wants you to do something that will take up your valuable time.

How to handle it: You can either decline the request, do it, delegate it, or defer it.
If you agree to do something at a later date, let the sender know, and add it to your to-do list. Get to it whenever you can.
If it's time-sensitive, add it to your calendar. If there's no time on your calendar to squeeze it in, this is an important realization to come to.

What doesn't work: Letting requests accumulate, unanswered, in the hopes that we'll have time some day to deal with them all. If we're honest with ourselves, we know this will never happen. Instead, we need to put these requests in our to-do lists or calendars, where we can realistically make decisions about what we can get done in the time available to us.

Physical-world parallel: Email is kind of like fresh fish – keep it around too long, and it starts to get unpleasant.

Eye-Rollers

What it is: Substantive inquiries from well-meaning people who deserve respectful responses...that we really don't have time to write.

How to handle it: Write a good response once, save it, and re-use it next time someone else asks the same question. As a school leader, you probably get the same questions around the same time each year, so there's no reason you should have to re-think and re-write your reply to things like requests to change teachers, ideas to start unfeasible new programs, unsolicited job applications, and so forth.

What doesn't work: Responding tersely from your phone at 11pm. When people take the time to write to us, they expect some degree of reciprocity, even though they know we're busy.

Physical-world parallel: People don't expect us to say yes to everything, but it would be strange indeed for someone to ask a question face-to-face and get a blank stare. If we don't respond to people's emails, clearly and honestly, they'll track us down in person to get a response.

HANDLING EVERY
TYPE OF EMAIL

Data & Documentation

What it is: Stuff people send you to let you know they're doing their jobs and what's going on with students.

How to handle it: Designate a place to keep it – an app such as Evernote, a folder, etc. – and put it there as fast as possible. If it needs to be logged, have your administrative assistant take on the task. If it needs to be reviewed, schedule time every two weeks (or however often you need to).

What doesn't work: If you aren't keeping track of what you've received, you can't follow up with people who aren't on track. And if you have to think long and hard about where to save every single thing you receive, your system needs to be clarified and streamlined.

Physical-world parallel: Piles get out of control fast, whether they're physical or digital. Decide where it goes, and don't make a big deal about putting it there when it comes in.

Emergencies

What it is: Something you need to stop and deal with right away.

How to handle it: True emergencies probably don't involve email very much, so close your email program (after printing the message, if necessary) and go deal with the crisis in person.

What doesn't work: Trying to handle non-email issues over email – especially when tensions are high.

Physical-world parallel: When an email is about something that needs careful handling, we need to be there in person and see it through.

Now that you've seen each type of email and how it can be handled, you can work through your inbox much more quickly. Take a moment to solidify some of the choices you've made, and begin acting on these decisions next time you check your email.

Earlier in this packet, I estimated that I get about ____ emails per day, and I'd like to handle

them in about ____ minutes per day. This means I can spend about ____ (minutes or seconds) per email. I can accomplish this by saving and re-using my typical responses to the following types of emails:

The to-do list tool I use is _____,[1] and I can convert emails into tasks by ____
.

In order to use this approach reliably, I'll need to develop a habit of _____

_____.

When people send me data, I need to _____

_____.

When I receive emails I need to save for documentation purposes, I will keep them in

_____.[2]

The only kinds of emails I want to answer from my phone are

_____.

I can type my replies more quickly by saving shortcuts such as _____

_____.

I know I'll be more successful if I challenge myself and a colleague, so I will share what I'm

doing with _____to help us both become more efficient with email.

_____

1. If you don't have a preferred tool, I recommend ToDoist.com. You can also use the built-in Tasks feature in Microsoft Outlook.
2. If you don't have a preferred tool, I recommend Evernote.com

ABOUT

JUSTIN BAEDER

I BELIEVE IN HIGH-PERFORMANCE INSTRUCTIONAL LEADERSHIP.

As Director of The Principal Center, it's my professional mission to help school administrators transform their productivity and maximize their impact on student learning with strategies, tools, and habits for high-performance instructional leadership. You can find my latest articles, Principal Center Radio interviews, online courses, and more resources like this guide at PrincipalCenter.com.