

## Why to get to Inbox-Zero

1. Inboxes do not work as task lists
  - The actual 'to do' is usually buried
  - No efficient filtering between 'to-dos', 'information', 'junk'
  - No time/date reminders
  - No context reminders (e.g. where do I need to get this done - home, work, a phone call....etc)
  - No idea of 'next actions' that actually need to be performed to get work done
  - Lost tasks
  - Missed deadlines
2. Very wasteful of time and energy
  - Constant scrolling
  - Constant searching (hopeless in Outlook)
    - Need to keep reopening emails
  - Opening an email more than once is a waste of time
3. Very stressful
  - Seeing hundreds (thousands) of emails piled up with unknown tasks buried in them
4. A regularly processed inbox means that you can focus your attention on stuff that needs doing now

## How to get to Inbox-Zero

**Allow several hours to get done the first time if you have thousands of emails, then will take about 10 mins twice a day**

### **REDUCE INPUT:**

1. Only put 'return receipt' when really necessary
2. Only use 'reply to all' when really necessary (this reduces everyone else's inbox in the hope they will return favor)
3. Make folders for archiving
  - a. In left panel, right click on inbox and select "new folder", give it a name
  - b. Suggested folders depend on how you like to file (lumper or splitter).e.g.
    - i. Lumper - Old files, Reference, Temporary, Read later, Home
    - ii. Splitter - Old files, Temporary, Read later, Home, Work, Education (then I have a bunch under each of those last 3 like Trips, Coupons, Tumor boards, ABR, Students, Receipts, Kids to make searching faster see pix)
4. Archive any emails older than 3 months by selecting all and dragging into the 'Old files' folder.
  - a. If you don't have too many you can quickly scan them and check there are no urgent tasks
  - b. Keep these for later if you need to go back to them
5. Stop spam - note, Outlook's spam filters are not great, so consider trying all methods until spam nearly disappears
  - a. Sort inbox by sender
  - b. Click on one email from each junk sender in turn
  - c. Use the unsubscribe button usually at the bottom
  - d. Then right click on message and select "Junk email...add to blocked senders list"
  - e. This should get rid of all similar in your inbox, if it doesn't then select all by same sender (as sorted by sender) and delete
  - f. Repeat for all grouped junk emails
  - g. If this doesn't do it, and they come back, use 'rules' below
6. Autofile using Rules (see below) into folders regular messages that you rarely look at but might want to check or are better looked at when you have time. Examples are:

- a. Social networks e.g. Facebook - send all to a Facebook folder and review when you want to, to save distractions
  - b. Tumor board notifications that you either don't or rarely go to or don't need the patient lists for
  - c. Meeting notifications that you never attend but can't get off list
  - d. ACR education updates...
  - e. Center view on-line
7. To make a rule (NOTE - must be done in Outlook (or citrix), not web (owa) Outlook, right click on the message ...make rule)
- a. Select any combination of criteria (e.g. sender, subject contains - limit to general terms e.g. 'breast tumor board' not 'breast tumor board 10/19')
  - b. Select the action you want done - delete, or move to folder (select folder), or forward to someone
  - c. If you are adventurous, click advanced and play around a little
  - d. Click Ok and ask it to run on all messages in your InBox (which will check that it worked)
8. If your friends send you group emails that you don't want - ask them politely not to

### **Other input reduction methods!**

To get taken off (or reduce) direct mail paper junk mail and catalogue lists, go to:

[www.dmachoice.org](http://www.dmachoice.org)

To get off all credit and credit card offers call:

18885OPTOUT

To get off unrequested phone call lists go to:

[www.donotcall.gov](http://www.donotcall.gov)

### **TRIAGING YOUR INBOX**

Try to do the following at least a couple of times a day as a block (tho I delete whenever I see one I can delete!)

1. Any new spam - apply rules above (unsubscribe, mark as spam)
2. Delete immediately anything that can go

Ask yourself - "what is the next action if any that needs to be performed based on this email - now or later?"

1. If it can be replied to in < 2 mins, do it, save as reference if necessary
2. Download any attachments that you need and save somewhere logical
3. If it is just for reference at some point, dump into 'reference' folder or subfolder e.g. a receipt for an on line purchase goes into 'receipts' , or correspondence with an organization into that organizations folder
4. Drag messages that you need or might need to refer to but only for the next week or so into the 'temporary' folder (e.g. tumor board lists, meeting agendas). You can reference them when needed
5. Long informational non urgent emails put into Read later folder for when you have time
6. Schedule an appt or activity then delete email (NB, you can drag the email over to the correct day on the calendar on the right in outlook and it will fill in most of the blanks for you)

7. Delegate immediately to the person who needs to do the work (forward email, archive as reference if necessary)
8. If it is a task that will need doing at some point but not today, including emails that need long extensive replies, add it to your task list (drag it to the task button on the bottom left if you use Outlook tasks and complete details). File for reference if needed.
9. If you plan to do it in next 24 hrs , leave it in your inbox

### **NOTES FOR GMAIL**

The same concepts apply but are easier in Gmail as you use 'labels' rather than folders, and you can archive everything as there is a huge capacity and infinitely better search facilities.

1. Archive all older than 3 months
2. Sort by sender as above
3. **For junk mail**
  - Select one from each sender
  - Click 'Report Spam'..it will also try and unsubscribe you (if you still get them then use unsubscribe links as above)
  - Select and delete all others with same name
4. **Make labels** for how you might want to search for stuff - eg. residents, students, computer, receipts, trips.
  - Click labels...manage labels
  - Use these labels like folders as above to label emails before archiving...but the searching is pretty good without them
5. Instead of making rules, **set up filters** (same theory..you can auto label, delete, send to folders, forward etc)
  - Select an email that you would want filtered in future
  - Click MORE...filter messages like this...
  - Follow instructions to set up your filter as you wish
  - Click 'test search'...select 'apply to messages below'...ok

## OUTLOOK SCREENSHOTS

