CPA Practice **Advisor**

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Okay. I admit it. I'm not the most organized person on the planet. I'm learning. But it's a fact that organized is much better than disorganized. That applies to e-mail also. It helped to think about e-mail like I think about regular snail mail. I took a minute to analyze what I do with the daily batch of snail mail. This contains items like bills, which need to be taken care of, but not necessarily immediately; magazines and newspapers; statements that need to be filed perhaps; and, of course, just like you, we get our share of unsolicited 'junk' mail.

When I returned from the walk to the mailbox, I found myself doing a quick categorization of these various items. First, I extracted all the junk mail and tossed it. Then, I looked for items I could deal with in 30 seconds or less — say filing a statement or putting my new insurance card in my wallet. Then, I took all the reading material like magazines and newspapers and placed them in a location in which the family knows to look for this type of material. Finally, the dreaded bills get filed in a 'bills to pay' file, which we routinely attack once a month. I'll bet your routine with snail mail is somewhat similar.

One thing I don't do is take a quick look at the items the postman left and then stuff them back into the mailbox. Yet, more often than not in my consulting work, I see e-mail inboxes filled with hundreds or even thousands of items that have been read and perhaps even dealt with.

My inbox was no different, so I decided to employ a similar strategy that I used with snail mail to my electronic mail. I first created four sub-folders to my inbox and titled them Requires Action, Possible Action, Completed Tasks, and Read and Review. I also added these four folders to my 'Favorites

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store all the books and magazines we get in snail mail.

So now for my regular routine. First, my goal is to keep the inbox empty, just like the mailbox. Who would ever think about stuffing hundreds or thousands of pieces of mail back into the box to which they were delivered, if that was even possible? I suspect your friendly postman would become not so friendly. We have a pretty good spam filter, but it's not perfect and occasionally a piece of unsolicited e-mail gets by the filter and into my inbox.

Since I can either delete or (for pesky senders) add them to the filter relatively quickly, I deal with these items immediately. I wish this small amount of unproductive

time (which adds up) didn't have to happen, but unfortunately spam is a fact of digital life.

Next, I look for e-mails that I can deal with in 15 seconds or less (like a quick reply) and just take care of those. Urgent items come next — requests that might take longer than 15 seconds, but which are important and urgent. These are tasks for which I am willing to be interrupted. Next comes important tasks that are not urgent — generally, e-mail by definition falls into this category. But as clients and others have come to find out, I'm most always able to get to their e-mail and so the expectations have changed.

Whoops, excuse me for a few seconds while I deal with an e-mail that just arrived.

That was one of those 15-second e-mails. Anyway, I'm back. Ah, yes, important tasks that are not urgent. I've found a great way to deal with these e-mails. I open my Outlook calendar in a separate window on a second monitor, and then with the task bar enabled I simply drag the e-mail to a date on the

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superseded. Occasionally, I go through my Requires Action box and move all the items that have been completed to the Completed Items box for reference. You may be asking, "Why not just delete them?" I have found that if I just delete them, they also disappear from my calendar, and I wanted to preserve the timing so I knew when I completed an e-mail-turned-task.

Lastly, I take all of those e-mail newsletters and messages with attachments that I need to read, and I place those in my Read and Review folder. Sometimes, after reading this material, it becomes a Requires Action item, but sometimes it just gets deleted.

With the advent of full indexed searching of my entire electronic mailbox, I worry less about finding e-mails that may have been inadvertently deleted. Results are fast and rarely am I unable to get back to a message for which I'm looking. I just search on a word or words from my memory of the message.

Regardless of how you deal with the flood of e-mail that flows to you daily, I hope my methods have given you some ideas to consider. If you already have an organized method of dealing with your e-mail, good for you. But if you just glanced at your inbox and saw the total number of messages in the hundreds or even thousands, get busy and get organized.

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