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## BUSINESS MANAGEMENT

# Five Tips for Improving Email Management

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In columns last month (July 2010), Executive Editor Darren Root, CPA.CITP, and I wrote about Apple's new iPad (Darren's July column is available at [www.cpata.com/go/2841](http://www.cpata.com/go/2841); my July column is at [www.cpata.com/go/2843](http://www.cpata.com/go/2843)).

Darren has long been a proponent of Apple technologies as reliable, quality products, while I've long been an Apple critic, pointing out cost issues and the desire for common computing platforms. So I was surprised when I found myself just as impressed with the iPad as he was. Although we both looked at it from different perspectives, we both agree that the iPad, and future netbook-style devices, will likely play a significant role both professionally and in personal recreational computing.

So it is that yet another type of technology has entered the lives of the modern professional, promising to make our lives more connected and, therefore, enabling us to be more responsive to incoming communication channels such as email, text, IM and RSS news feeds, and to be more productive with that information. In other words, we're adopting new technologies with the expectation that they will help us better manage other technologies.

This happens on a continual basis, of course. As we have access to increasingly growing amounts of information, we develop new technologies that enable us to

access even more information. But simply having more messaging, data and communication directed at us doesn't mean we are becoming better at managing it. Knowledge can be power, but only if it can be retained.

Unfortunately, there is a saying that "technology always seems to outpace our ability to use it wisely." In the case of business communications, this has been proven year after year by technology analyst firm, the Gartner Group. In a recurring annual study, most recently in late 2009, Gartner identifies the technologies that decrease productivity in professional offices. Not just tax and accounting firms, of course, but all modern information professionals.

And a recent *Wall Street Journal* article (<http://tinyurl.com/oytkcz>) quantified this information, noting that professionals are exposed to about 1.6 GB of information per day. How much is that? According to small business expert and regular columnist Doug Sleeter, the average small business using QuickBooks has a company data file that's about 50 to 75 MB, which includes all of their transactions, their client data, their inventory items, bank data, employee information ... everything. Well, 1.5 GB is about the equivalent of 200 to 300 of those average-sized QuickBooks company files being hurled at us every day. It's no wonder that we can't efficiently manage this fire hose of information that's coming at us, but there are tools and techniques for getting a better handle on it all.

In short, these and other studies show that the very technologies we rely on to perform our jobs are also preventing us from doing them efficiently. These mission-critical communication channels are, unfortunately, congesting our information processing capabilities ... not because of the technology itself, but because of our inefficiency at using them more productively. The key, then, is finding ways to better manage these technology communication channels.

In the Gartner Group's 2009 study, and for the past 10 years, the number one productivity-wasting technology in the modern professional office was email. Yes, even after 15 years in mainstream business use, we seem to have managed to avoid finding productive management techniques. Well, that's not entirely true, of course; it's just that the volume of messaging coming through email increases faster than we can learn to better manage it.

When asked what aspects of email are tripping them up, most professionals identify the following factors: spam, too much non-spam, poor organization, too invasive and time-wasting. Fortunately, there are some simple management techniques we can all use to better manage this inflow.

## 5 Simple Email Productivity Tips

**1. Schedule your inbound email usage.**

**2. Use spam filters; they work.**

**3. Utilize foldering techniques.**

**4. Delete or move items.**

**5. Be concise.**

To read the rest of this column, including more advice on the 5 tips, please go to [www.CPATechAdvisor.com/go/2894](http://www.CPATechAdvisor.com/go/2894).

Since almost the beginning of business adoption of the Internet and email, productivity experts have been preaching the mantra of time management and prioritization. After all, just because the technology is new doesn't mean that the underlying issue of effective personal time usage is new. Even Stephen Covey, PhD., the author of *The Seven Habits of Highly Effective People*, has included email management as part of the third "habit" when speaking of modern professionals. Here are some tips to better email management.

## 5 Simple Email Productivity Tips

**1. Schedule your inbound email usage.** As Dr. Covey noted, if we are simply responsive to messaging, that doesn't mean we are managing it. So turn off the alerts that tell you that you've got mail. Most emails aren't emergencies, and a great deal of them are actually spam. And even a lot of the "good" email isn't something that needs immediate action. People contacting you have alternate methods of reaching you if it is an emergency (IM, text, phone, other office staff, etc.). I try to check my email twice in the morning, twice in the afternoon and occasionally in the evening.

**2. Use spam filters; they work.** And there are additional inexpensive tools available at technology stores. If you still suffer from egregious junk mail, consider having a local tech consultant enhance your filters. If it saves you five minutes per day, would it be worth a few hundred dollars?

**3. Utilize foldering techniques.** While most professionals use folders to some extent, users can also set up rules that can automatically route email from certain people/clients into specific folders. So email from your contact at client ABC Trucking can automatically go into that client folder. Likewise, emails from your

boss, other staff, or even friends and relatives can automatically be routed to separate folders. This can help prioritize more important messaging over less important. For instance, you often know that emails from particular people are not likely to contain urgent matters.

**4. Delete or move items.** It was true with paper, and it's true in the digital paperless age: Professional accountants hate to throw things away. But in the case of email, much of what clutters our inboxes is email threads that include several replies. Deleting all but the most recent will still let you keep all of the message thread. If you still don't want to delete things, consider additional subfolders. For example, in the folder for client ABC Trucking, you could have additional subfolders for different contacts at the client, for specific engagements or for fiscal periods. When tasks/issues are accomplished, simply move the messages into the appropriate subfolders. This can help with management and finding messages in the future. Many professional practice management and document management systems also offer automated email functions.

**5. Be concise.** The amount of time we put into communication should depend on the level of formality required by law or practice requirement (engagement letters, etc.) and the level of formality expected by the client. But email is also used for many interoffice communications that require little, if any formality at all. Sometimes quick is best, so if you can say something in six words, don't spend a dozen.

It comes down to managing communication instead of letting it dictate when and how we respond. This starts by prioritizing the messaging, channeling it into more filterable streams, and then digging into it in manageable ways.

In the coming months, I'll look at some productivity tips for handling the other communication technologies upon which we rely, including IM and text, social media management, automation of search functions, RSS news readers and customization of search engines to create more manageable user dashboards. n

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