

BOULDER COUNTY BUSINESS REPORT

Use action items to complete important e-mails tasks

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E-mail is now the primary source of where action items enter your work world.

There needs to be a system to manage the action items you receive daily. Adopt the same process as the inbox on your desk - a place that information should come into, make a decision on the next action and move out quickly. Regardless of how carefully you manage e-mail, occasionally you won't be able to respond immediately to an e-mail action item, or action is not required until a future date. In such cases - or when you need to take a later follow-up action - use these techniques so that those action-related e-mails don't fall off your radar.

Keep in inbox

The most effective way to manage e-mail action items is to keep them in your e-mail inbox until they are completed.

The goal is to create an empty inbox and move all e-mails that require no action out of the inbox. Only e-mail that you haven't yet read or still must take action on should remain in your inbox. All other e-mail should ideally be deleted or moved to an e-mail file folder so that you can view easily those e-mails that need action or response. This approach keeps your inbox current and highlights the items you must take action on next.

Change the date column to be in descending order so that the older e-mails are at the top of the page and the newest at the bottom. This will keep the older e-mail items in your current view on the monitor so that you don't forget they are there.

Use your flags

Another alternative if you have problems deleting or moving e-mails into folders is to use the flagging function. In Outlook merely right click on an e-mail, and choose "Follow-up," and there are options to flag an e-mail.

Outlook 2003 will give you flag color options, and Outlook 2007 will give you flag date options.

Using the flag feature in Outlook you can also add a date and time to be reminded. Once an e-mail is flagged, click on the "Follow-up" folder (under the Favorites Folders), and all e-mails you have flagged will be located in one location. In this view you will be able to see the 'due date,' which will help you prioritize and know which e-mails to take action on first. In Outlook 2007 you will also see the flagged e-mail items along the "To-Do Bar." Most other e-mail programs - such as Lotus Notes - also have follow-up flag functions.

Copy e-mails

For action-related e-mails that need to be done at a future date, consider moving them into the "Calendar" or "Task" folder within Outlook. Merely left click and drag an e-mail into the file folder that says Calendar or Tasks, and Outlook will automatically create a new window with the body of the e-mail in the text section.

This is a copy function and does not remove the e-mail from the inbox. You can then either delete the e-mail or move it to an e-mail file folder. For more options converting e-mails into Calendar or Tasks, right click on the e-mail and drag to the folder, and there will be multiple options including moving the e-mail and or creating it as an attachment.

Create action-type folders

You can also create action-type e-mail file folders as suggested in David Allen's book, "Getting it Done." Folders can be created for action-type e-mails that are "Action," "Follow-up," "To Read," "Priority," etc. If you choose this option you will have to be extremely diligent to review this folder daily. Otherwise the action items will be forgotten. This is only recommended if you find it easier to manage action items in a separate file folder.

For most individuals, when you move e-mails out of view from the inbox, you are less likely to take action.

E-mail needs to be one of your priorities, with its management scheduled along with other tasks you need to complete each day. Set aside an appropriate amount of time to read, respond and manage your incoming e-mail, and determine a system to manage those e-mail actions that will be dealt with at a later time and date.

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