

*Improve your Outlook —
and manage every aspect of your business!*

Managing Your Business with Outlook® 2003

FOR
DUMMIES®

***A Reference
for the
Rest of Us!***

FREE eTips at dummies.com®

Marcelo Thalenberg

*Microsoft® Outlook
consultant and trainer*

*Develop sales strategies,
marketing plans,
and telemarketing
techniques*



Managing Your Business with Outlook® 2003 For Dummies®

Chapter 8: Surfing Over the E-mail High Tide

by Marcelo Thalenberg

ISBN: 978-0-470-04674-6



Copyright of Wiley Publishing, Inc.
Indianapolis, Indiana

Posted with Permission

Chapter 8

Surfing Over the E-mail High Tide

In this Chapter

- ▶ Responding to e-mails
 - ▶ Cutting down on e-mails
 - ▶ Creating folders and rules
 - ▶ Mastering the Zen of e-mail management
-

Suddenly, like a nightmare, you are drowning in an endless e-mail tide in a sea of senseless messages. People at your side are sending good evening messages by e-mail rather than talking. Personal marketing messages arrive at an alarming rate. You have 25 separate “requests for answer.” It is enough to make you lose track of everything. How do you get rid of it all and wake up from this nightmare?

Understanding Why People Send Messages (And How to Respond to Them)

Consider two important skills for any competitive surfer: observation and practice. The surfing champion spends a month on the beach observing the ocean, getting a good sense of its tidal cycles. Each day, two high tides occur, arriving about an hour later than they did the previous day. Observing your Inbox content over time helps you understand the tides in your sea of e-mail and even take actions to keep tsunamis from coming into your Inbox bay, transforming your Inbox into a dreamer’s paradise.

Separating the wheat from the chaff

Written communication has been around since the Stone Age, with cave drawings from human ancestors trying to tell their stories. One or two

members of the community had the drawing skills. Today, millions of people are writing and reading quickly with the assistance of computers. What makes people read and write e-mail messages? What is important or unimportant for each individual?

Distinguishing the wanted from the unwanted, the valuable from the relatively valueless, is what our ancestors did in their ancient agricultural practices or what a surfer does today when choosing which wave to ride. Looking at your Inbox with thousands of e-mails parked in it is a waste of time and distracts you from your priorities. You can split the Inbox content among desired and undesired messages, personalities, feelings, and needs.

The lack of communication rules can generate nonsense messages. In the professional environment, we use e-mail to send and receive information, proposals, invitations, Tasks lists, and so on. Besides unwanted spamming messages, we receive unsolicited jokes; spiritual, religious, and personal marketing; and even answers sliced into 20 different messages. If you understand what is important to you as well as people's behaviors and Outlook rules, you're able to detect and avoid unwanted messages even before they're written to you.



Unsolicited messages are different than unwanted messages. You can detect and remove unsolicited messages by using anti-spam filters, but unwanted messages from your own pool of contacts can be eliminated before anyone even writes them (see the next section).

You can also adopt several parameters to scan e-mails and classify them according to their content. You can then automate Outlook by using rules and automatically organize your wanted messages or eliminate the unwanted ones.

Dealing with unwanted e-mails

Unwanted e-mails come in two forms: unsolicited junk messages and inconvenient social behaviors from friends, workmates, and acquaintances. You can greatly reduce junk mails by turning on Outlook filters (for details, see Chapter 9), but changing a social behavior requires that you adjust your environment and use a little psychology.



Identifying behaviors and requesting behavioral changes when appropriate is a major step in surfing over the e-mail high tide. When you point out a behavior, people think twice about repeating it.

Following are some behaviors you may encounter:



✔ **Copy maniac:** Messages where your name appears on the cc or bcc line aren't for your direct action, right? So why do they keep arriving at your Inbox, interrupting your actions? You can use Outlook rules to route these e-mails to a new folder called cc, removing them from your sight. You can then go through the folder at your convenience. A simple analysis of a week's worth of these stored cc messages (organized by sender or by title) can reveal excessive unwanted messages coming from the same source. You can then identify behavior patterns in your colleagues and eliminate these behaviors before more messages make their way to your Inbox. (See the sidebar "Working with a cc folder" for more tips.)

A boss or any person sending a meeting invitation should do so by using the Calendar invitation features rather than a simple cc e-mail. Meeting invitations create commitment upon accepting them. (Read Chapter 10 for more details.)

✔ **Personal marketer:** Mark Eteer needs to send daily messages advising you of how good he is and how fine a job he's doing. People moan about the number of e-mails generated, but don't know how to solve the problem. You can use rules to move any Mark Eteer messages out of the Inbox and into a special folder. Showing Mark his folder with 25 messages in four days may make him conscious of his behavior and cause him to think twice before he sends any new marketing messages.

✔ **Procrastinator:** Noko Mitment is a procrastinator, always explaining why his work isn't ready. Instead of reading ten excuses or schedule adjustments, detect the behavior by using Outlook rules. The rules, used to separate Noko's messages from the rest, let you show Noko his own behavior and help you work as a team to avoid future procrastination.

✔ **Reliever:** Cherie Hart is a very sensitive person and sends many advice messages, tips for a better life and a better world, sunsets, angels, and so on. Outlook rules help you detect the behavior and perhaps make it easier to request that she keep it down to one "save the planet" message a month.

✔ **Joker:** A smile to break up the day is welcome but ten jokes a day? Call Batman to fight your Joker enemy or eliminate his messages by using Outlook rules.

✔ **Demander:** I want this information now! Why haven't you answered me? Did you accomplish my request? When will the job be ready? All these questions reflect poor timing and prioritizing compatibility between two people. Understanding a person's anxiety and the way he or she works helps shrink the demand to its real size.

- ✔ **Soap star:** Mary Slicer is an anxious human being, and she sends messages at every step of the job. You can isolate her behavior by using Outlook rules, show her the results, and ask her to keep her messages down to information about key milestones in her project with no step-by-step messages.
- ✔ **Hypervisor:** Howis Disnow is an anxious manager demanding status reports and sending messages every minute, interrupting your work. If you share your Outlook Tasks list with him, he becomes aware of your working priorities and progress without the need for repeated status reports, increasing your productivity with no stress. To share your Tasks list with someone, you should use the sharing folder properties if connected to an Exchange server, or you can publish your Tasks list on a server. (Read more about your Tasks list in Chapter 10.).

Working with a cc folder

If you create a folder for all the e-mails you're copied on, you can sort it by sender to help you identify different behaviors among your coworkers. Analyze each sender's mail, and you notice his or her behavior, which makes it possible for you to show them new skills for improving their communication by using fewer messages.

Here are a few solutions based on the content you find in your cc folder:

E-mail problem with an individual: Create a folder with the name of the person and apply a rule like, "E-mails arriving from John@Smith.com move to Smith folder." Later, show the person the unnecessary energy spent with his or her messages. Use this same technique for other behavior patterns.

Company culture promotes an excess of e-mails: Make a presentation to your team showing it the meaningless e-mails. By unmasking the issue, you create the power to eliminate it. Create a campaign, "Less e-mail means more productivity," using cartoons of the common behaviors identified.

News and other information: Create a News folder and create a rule to send all newsletters to the News folder. Read items in this folder when you have extra time.

Reports: Create a Reports folder with a rule that sends all arriving reports to the special folder. You can create a rule that looks for certain senders or certain words in the subject (like the word report).

Reflections and jokes: Why do people keep sending this stuff? Probably because nobody tracked the problem, measured it, and asked them to stop. People who send regular jokes and advice think they're sending a smile or a feeling from the heart. Sometimes this is true, but in general, ten jokes a day is more a cause for crying than for smiling. Fifteen pieces of advice a day makes anyone angry. Telling people about it can solve the problem. Otherwise, you can keep using the special folder with the person's name on it along with the Outlook rule to reroute their messages into the folder. If you're still receiving ten jokes a day, separate them and block them by using rules.

You probably also receive other unwanted messages and junk messages. You can isolate any message constantly sent by using Outlook rules. Avoiding it is usually a simple matter of revealing the behavior pattern to the person sending you the messages. You can also use Outlook's junk e-mail filter to eliminate unsolicited messages. (For details, see chapter 9.)



Using Outlook rules and creating new folders can enable you to detect, analyze, and eliminate messages before they're written, thus changing unwanted behaviors. When a behavior is caught and exposed, the sender knows the behavior isn't welcome any longer and the environment itself helps eliminate those e-mails. In the upcoming section "Using Rules to Eliminate E-mails," you discover how to create new folders and use Outlook rules to drive messages straight into them.

Classifying wanted messages

You can classify desired messages according to the action needed:

- ✓ **No answer required:** Newsletters, informative e-mails, newsgroup e-mails, and so on are messages that don't demand an answer. You can have Outlook rules file them for you in a folder called something like News, Info, Suppliers Info, and so on. Open and read these e-mails at your convenience.
- ✓ **Action required now:** Answer now before you receive a "Where is my answer?" message. Send a response even if you don't have the complete answer. A response stating "I'll get back to you with an answer within 48 hours" can help eliminate follow-up messages from the sender.
- ✓ **Actions required later:** Although every e-mail message has a follow-up flag with a pop-up alarm reminding you to complete the action, I prefer to transform any pending-action e-mails into Tasks by dragging and dropping them into the Tasks list. The Tasks list is the best checkpoint for to-do items. To read more about using Tasks and e-mail, see "The Zen of Inbox Management," later in this chapter.

Introducing Outlook Rules

Can you imagine what traffic would be like today with no rules and no driver's licenses? At the beginning of the 20th century, automobiles were a new technology for a happy few. There were no traffic jams and few rules. No driver's licenses were needed, and few accidents happened. After a few years, cars became popular and soon obstructed the available roads until modern highways were built.

The same is happening with electronic messages; your Inbox today looks like a Disney parking lot avalanche during summer holidays. To manage e-mail traffic, you have to use the same techniques used for cars: Create rules and develop your driving and navigating skills.

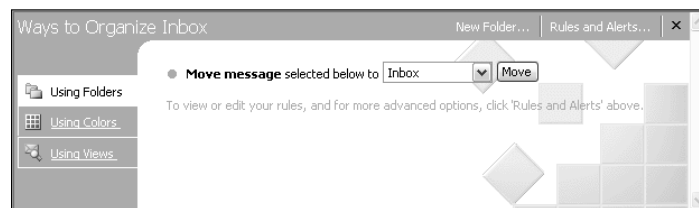
Thankfully, the Outlook Rules Wizard is a powerful tool for eliminating problem e-mails. Using rules, you can apply your own criteria to move or block e-mails and set up alarms that help you surf the e-mail high tide.

Beginning to organize your e-mails

When you first start to organize e-mails, I always suggest keeping on top of the Inbox by using the Ways To Organize Inbox dialog box. This shortcut lets you start a rule or open a new folder in one click instead of repeatedly choosing the Tools command and following a menu sequence over and over. The Ways To Organize Inbox dialog box provides helpful shortcuts for selecting e-mails and taking actions on them one by one. It also contains a button for creating new folders.

To open the Ways To Organize Inbox dialog box, simply choose Tools⇨ Organize. The Ways To Organize Inbox dialog box appears at the top of your current mailbox, as shown in Figure 8-1.

Figure 8-1:
The Ways To Organize Inbox dialog box appears in your Inbox, letting you start a rule or open a new folder in just one click.



Alternatively, you can use the Rules Wizard to manage groups of messages by using characteristics like sender, keywords in the Subject line, and so on.

Using rules to eliminate e-mails

Some e-mails, such as the ones you're copied on, don't require action and aren't urgent. Because you don't need to read them as they arrive, you can remove them from your Inbox and send them directly to a folder that you name. You can then access these e-mails at your convenience.

There are two steps to this procedure: First, you create a folder, and then you create a rule for filing these messages into the new folder the moment they arrive.

Creating a folder

To create a folder:

1. **Click the New Folder tab at top right of the Ways To Organize Inbox dialog box.**

If you don't see the Ways To Organize Inbox dialog box, refer to the section "Beginning to organize your e-mails," earlier in this chapter.

The Create New Folder dialog box appears, as shown in Figure 8-2.

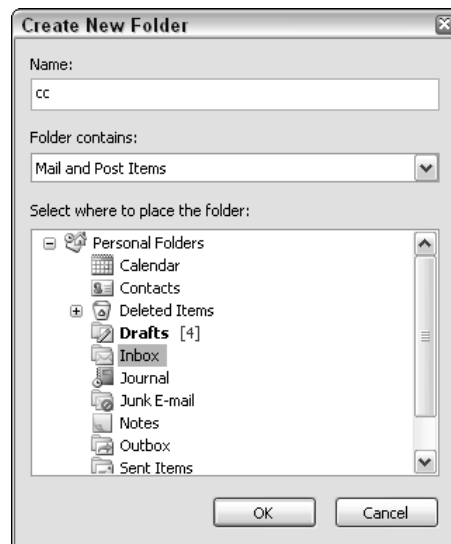


Figure 8-2:
You can name your new folder anything you want.

2. **In the Name text box, type the name of your folder.**

For example, I typed cc for a folder that contains all the e-mail messages I've been copied on.

3. Make sure that Inbox is highlighted in the Select Where To Place The Folder list.

4. Click OK.

Your new folder is ready.

Creating an e-mail rule

After you have a folder ready (see preceding section), you can create a rule that screens every arriving message and files your message in the appropriate folder.

For example, say that you wanted to automatically archive messages copied to you. This rule gives Outlook an order: Check arriving e-mails, and when your address is not on the To list, file the message in a cc folder. (For more on managing a cc folder, see the sidebar “Working with a cc folder.”)

To create a rule:

1. Click the Rules And Alerts tab on top right of the Ways To Organize Inbox dialog box.

If you don't see the Ways To Organize Inbox dialog box, refer to the section “Beginning to organize your e-mails,” earlier in this chapter.

The Rules And Alerts dialog box, shown in Figure 8-3, appears.

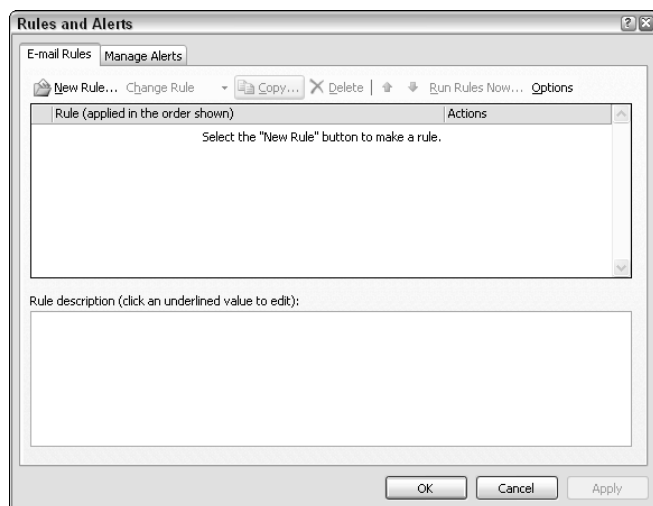


Figure 8-3:
The Rules And Alerts dialog box lets you lay down the law.

2. Click the New Rule button.

The Rules Wizard appears, as shown in Figure 8-4.

3. Select Start Creating A Rule From A Template.**4. Select Move Message From Someone To A Folder in Step 1.****5. Click Move To The Specified Folder in Step 2.**

The Choose A Folder dialog box opens.

6. Choose the folder you want to move the message to and click OK.**7. Click Next.**

The next dialog box, shown in Figure 8-5, allows you to choose a condition.

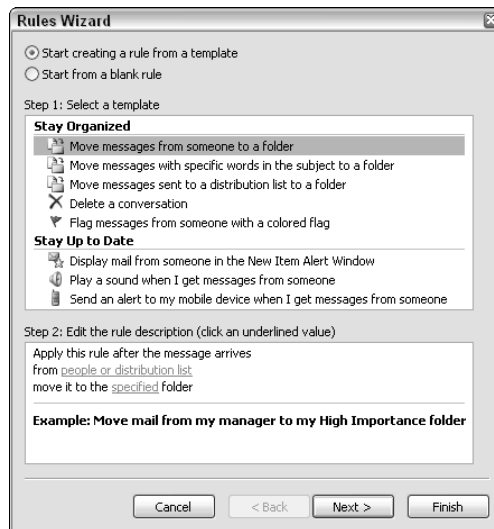


Figure 8-4:
The Rules Wizard guides you through creating a rule.

8. Select the condition you want and click Next.

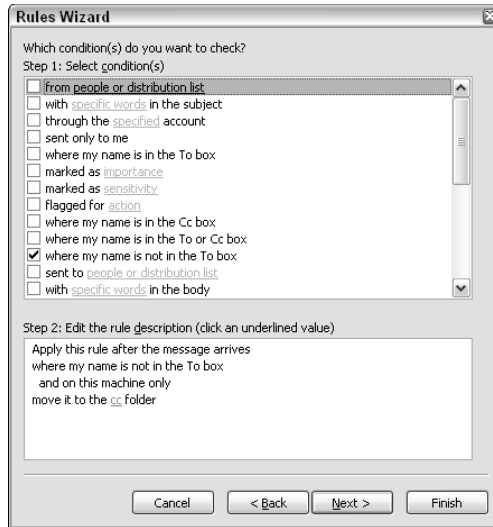
For example, if you want to move all e-mails that you're cc'd on to a folder, select Where My Name Is Not In The To Box.

9. In the next dialog box, select the action that you want and click the Next button.

For example, if you want to move the e-mail to a certain folder, select Move It To The Specified Folder.

When you click the Next button, the Are There Any Exceptions? dialog box appears.

Figure 8-5:
You can
select the
conditions
you want to
use in the
Wizard.



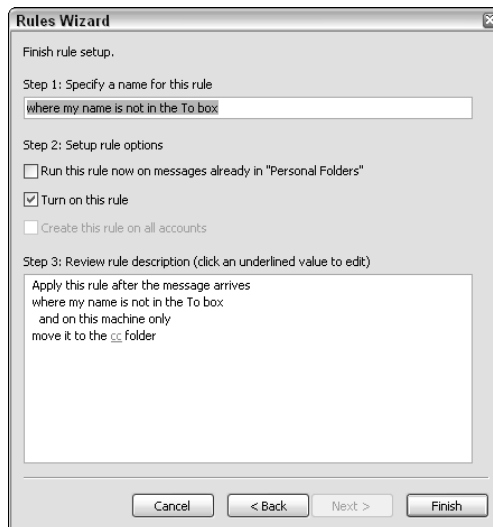
10. Click Next if you don't have any exceptions.

The Finish Rule Setup dialog box appears, as shown in Figure 8-6. Outlook automatically inserts a name for you in the Step 1: Specify A Name box.

11. Accept the name Outlook suggests or type a new one.

12. Choose Run This Rule Now On Messages Already In "Inbox" if you already have a lot of cc messages in your Inbox; if you don't, skip to Step 13.

Figure 8-6:
Type a name
in the Finish
Rule Setup
dialog box
to remind
you of the
rule.



This option applies the new rule to all existing messages in your Inbox.

13. **Make sure that the Turn On This Rule option is checked and click Finish.**

Figure 8-7 shows a sample rule setup.

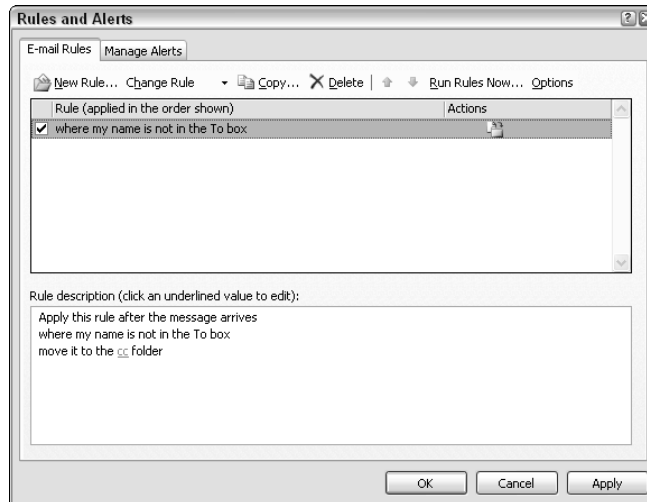


Figure 8-7:
The Rules
And Alerts
list shows
the new
rule.

Attaching previous messages

An industrial site manager complained to me about how much time he was wasting reading messages that go back and forth many times. He has to read from the last to the first message to understand the whole picture and solve the problem.

To avoid confusing back-and-forth messages, configure your e-mail system to reply with the prior message attached instead of being at the end of the message text. To be more effective, this practice should be taught to the whole team as a company rule.

To configure Outlook to automatically attach previous messages when you reply to them is easy. Here's how:

1. **Choose Tools→Options.**

The Options dialog box appears.

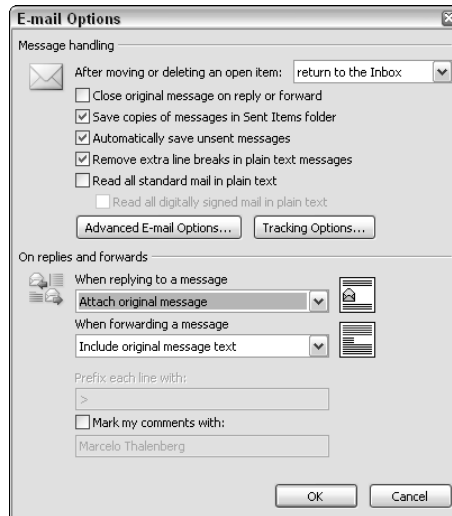
2. **Click the E-Mail Options button.**

3. **Select Attach Original Message from the When Replying To A Message drop-down list, as shown in Figure 8-8.**

4. Click OK.

The dialog box closes.

Figure 8-8:
The E-mail Options dialog box enables you to attach the prior message instead of including it in the answer text.



The Zen of Inbox Management

The Zen of Inbox management is a set of rules that lets you finish the day with no e-mails parked in your Inbox. To achieve this goal, follow the path to Inbox bliss:

- ✓ Think of your Inbox as a tollgate and not a parking lot. Every message that arrives should be read and an action taken to reply, move, or delete it.
- ✓ Remember the John Wayne rule: If the sender is unknown, delete first and ask no questions. Don't be distracted by what's on the Subject line.
- ✓ Read the e-mail now, answer it, and then move it to the appropriate folder or delete it.
- ✓ Reply immediately to all messages that require short answers and then delete the original message and file your reply if desired.
- ✓ For requests that you can't answer immediately, reply by informing the sender that you'll get back to them when you have a full answer. Drag and drop the requested message to become a new Task.
- ✓ Don't keep any message overnight in the Inbox. The Inbox is a tollgate, and long-term parking is prohibited. Four exit lanes are available for your message: delete, answer now, move to file, or drag and drop to become a Task.



For messages that require more than the current day to answer, drag and drop them to your Tasks list. Set up the Reminder to schedule your time to work on each Task. Having all your pending actions in one list helps you establish priorities. You can see an e-mail dragged and dropped into the Tasks list in Figure 8-9. (Read more on this topic in Chapter 10.)

Task Details

Due in 8 days.

Subject: customer request #121

Due date: Thu 4/21/2005 Status: Not Started

Start date: Thu 4/14/2005 Priority: Normal % Complete: 0%

Reminder: Thu 4/21/2005 8:00 AM Owner: Marcelo Thalenber

Dear Marcelo,

Please quote the logistic and schedule to ship the Heavy weight generator from Taiwan.

Diagram and details on the attachment document.

Contacts... Categories... Key Customer Private

Figure 8-9:
You can
drag and
drop an
e-mail as a
Task.

The Art of Sending Messages

Sending messages means paying attention to the other individual. It means thinking about his ability to receive and understand your message and writing in a way that satisfies the reader while communicating your message. Who is your recipient? How should you write to get and keep your recipient's attention?

- ✓ Explain the objective of your message in the subject line.
- ✓ Summarize the objective of the message at the beginning. If it's long, explain it step by step.
- ✓ Inform the recipient of any due dates.
- ✓ Before copying anyone, ask yourself why this person needs a copy.
- ✓ Attach the sender's message when replying to it. Avoid long, drawn-out e-mail conversations.
- ✓ Use the telephone to clarify doubts instead of starting an inglorious e-mail battle.
- ✓ Revise the message again before pressing the Send button. Keep the following question in mind: Will the reader understand the meaning of this e-mail?

- ✔ Use Tasks rather than e-mails to request actions from people in your company. The Tasks requests increase commitment when coworkers receive and accept the Tasks. Read more on using Tasks in Chapter 10.
- ✔ Use the Invite attendees feature in the Calendar to schedule a meeting instead of writing and sending e-mail invitations. (Read more on this feature in Chapter 10.)
- ✔ Request a read receipt for a message instead of calling the person to confirm that the message arrived (or worse, sending an e-mail to confirm the arrival of the other e-mail). In the e-mail form, click the Options button, and in the Options dialog box, select Request A Read Receipt For This Message.

Working in sales or any business associated with emergencies, you must be online full time and check your e-mail constantly. But for most other professions, you can probably open your Inbox every couple of hours or once in the morning and once in the afternoon. Think about working offline and reading the e-mails according to your business cycle with fewer interruptions.