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Tips for Managing Your Email

Technology has greatly increased the amount of information we receive and the speed at which it arrives. In 2015, business professionals sent and received an average of 122 emails per day[1] and, in 2012, the average worker spent 28% of their day managing email and another 19% searching for information[2].

It is easy to get overwhelmed when the volume of potentially useful and relevant information exceeds your processing capacity, causing all of this information to become a hindrance rather than a help.

Five Benefits of Well Managed Email

1. Increased productivity when you and your co-workers have access to the records you need to do your jobs. Email is classified and filed in the official recordkeeping system, not left inaccessible and unmanaged in an individual's email folders.
2. Email and all related records are linked together. A complete file of a specific activity, case, or topic is maintained, which is not possible if records are scattered across various email accounts. This decreases duplication of information resources and discrepancies due to version control issues.
3. Email is disposed of in accordance with approved retention schedules.
4. Security risks are reduced when records are stored in office recordkeeping systems instead of email systems that are more easily compromised.
5. Records required to comply with FOIP or litigation requests can be quickly located.

Email Best Practices

- Use your University email account for all work-related email correspondence
- Pay attention to the emails you send and who you cc
  - Think about how your recipient(s) would respond to your message if they are using the RAFT system (see Tips for Managing Information Overload)
- Don't assume privacy. Emails may constitute University records and be subject to disclosure during litigation or for a *Freedom of Information* request.
- Use meaningful and specific subject lines
- Write clearly and try to stick to one theme in emails
- Read your message before you send it to ensure clarity and avoid typos
- Try to avoid generic "thanks" or "great" replies
- Consider sharing attachments through cloud services or by sending a link to a shared drive folder instead of attaching documents to email. This will help to avoid version control issues.
- Use BCC or a mailing list when sending large group emails
- Add the approved confidentiality notice to your email signature and use it on any email containing sensitive, personal, or confidential information.
- Retain the original message(s) when replying to an email to keep the entire record together.

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[1] The Radicati Group. (2015). Email statistics report, 2015-2019. Retrieved from http://www.radicati.com/wp/wp-content/uploads/2015/02/Email-Statistics-Report-2015-2019-Executive-Summary.pdf.

[2] McKinsey Global Institute. (2012). The social economy: Unlocking value and productivity through social technologies. Retrieved from http://www.mckinsey.com/industries/high-tech/our-insights/the-social-economy.

Inbox Zero

Inbox zero[3] is not about having nothing in your inbox, although some people are able to do this. In practice, it is about getting (and keeping) control over your email. For every email you receive, ask yourself:

- What does this email mean to me and why do I care?
- What action, if any, does this email require of me?
- What is the best way to deal with this email and the action it requires?

Based on these questions, you may find it handy to move all incoming emails into one of the following folders if you can't immediately delete them:

- **Action Required** – emails that require you to complete a task or follow up
    - Be sure to add this to your to do list and/or schedule time for the task in your calendar
    - Use flags, categories, and/or subfolders to further categorize these emails (e.g. must read and nice to read)
- **Awaiting Response** – emails that you are waiting for someone else to respond to
    - Periodically review the emails in this folder and follow up on any that are overdue
- **Delegated** – emails you've delegated to someone else
    - Periodically review the emails in this folder and follow up as necessary
- **Archived** – emails that don't require an action, but need to be filed
    - Set aside time to regularly file these emails in your office recordkeeping system

There are several variations[4] on this approach to managing your email. You might, for example, use your inbox for the "action required" emails and move everything else out to another folder. Experiment to find something that works for you.

Additional Resources

- Checklist for Email Clean-up
- Email: Your Recordkeeping Responsibilities
- University and Transitory Records Decision Diagram
- Quick Reference Guide to Transitory Records
- Naming Conventions
- Tips for Managing Information Overload
- University of Lethbridge Classification System
- Guidelines for E-mail and Notebook Confidentiality Notices
- Data Storage Standard

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[3] This term was coined by Merlin Mann. See http://www.43folders.com/izero.

[4] See http://www.hubspot.com/sales/inbox-zero. This site also has instructions for setting up inbox zero in Gmail and Outlook.