Randy Dean's Mastering Microsoft Outlook/365 Video Series

Copyright Randall F. Dean 2004 - 2026

Video #1: Taming the E-mail Beast: The Problem & The Process

Multi-day "Segment" Plan for Course Attendees: *Use this plan to break the video content into more manageable 25-40 minute segments – it is recommended that you also have the video playing on a second screen and that you have your Outlook open so that you are ready to pause the video and practice the new technical tips in real time as they happen.*

You can use the key points summaries below plus the attached raw time-stamped transcript from the full-length video to jump to specific content areas that are of most interest/need. Also remember that many of Randy's individual technical tips for Outlook and other 365 and Google programs are on his YouTube Video List PDF:

https://randalldean.com/youtube_guide_timelyman_c23/ (Note: this is a permalink, so you might want to bookmark and periodically check to see if new videos have been added.)

Day 1: First Video Segment:

Key Points Summary (up to 00:29:47 in Video Program)

1. The Scope of the E-mail Problem

- Many professionals spend 2–4 hours or more daily on e-mail, with some receiving over 100–200 messages each day.
- Frequent inbox checking (sometimes every few minutes) is common, leading to stress, distraction, and reduced productivity.
- Most people have never received formal training in e-mail or information management, nor in the software they use daily (like Microsoft Outlook).
- As a result, professionals often look at the same e-mail three to seven times before taking action, wasting significant time and effort.

2. The Cost of Inefficiency

- This repetitive checking and lack of decisive action leads to lost hours each week, which adds up to days per month and weeks per year.
- E-mail is described as a "necessary nuisance"—essential for work but a major source of distraction from more important tasks.

3. The Opportunity for Improvement

- Even a modest improvement (10–20%) in e-mail efficiency can yield significant productivity gains for individuals and teams.
- Training in e-mail management is positioned as a high-ROI investment, potentially rivaling the gains promised by AI.

4. The Core Problem: Lack of Decision-Making

- The main issue is not making a decision about what to do with an e-mail the first time it is read.
- Marking e-mails as unread or flagging them for later guarantees repeated handling, which is highly inefficient.
- The recommended approach is to read each new e-mail far enough to decide what action is needed, and if it can be handled quickly (in a couple of minutes or less), do it immediately ("Only Handle It Once" or OHIO).

5. Handling E-mails That Require More Time

- If an e-mail requires more than a couple of minutes, add the action item to a task list or calendar—do not use the inbox as a to-do list.
- Once an e-mail is processed (either handled or added to a task/calendar), it should be filed or deleted to keep the inbox clear.

6. The Decision Tree and Crisis Exception

- The video introduces the “Taming E-mail Decision Tree” for processing e-mails efficiently.
- In true crisis situations, normal processing rules are suspended—focus entirely on resolving the crisis, then return to the decision tree for regular inputs.

7. The Broader Application

- The same decision-making process can be applied to all workplace inputs, not just e-mail (e.g., voicemail, documents, texts, etc.).

© Randall F. Dean

Day 2: Second Video Segment: Key Points Summary (up to 01:06:07)

Key Points Summary (00:29:48 – 01:06:07)

1. The E-mail Decision Tree: Handling E-mail Efficiently

- The video introduces a practical decision tree for processing e-mail:
    - When a new e-mail arrives, read it far enough to determine what action is needed.
    - If the action takes only a couple of minutes or less, do it immediately—this is the *"Only Handle It Once"* (OHIO) principle.
    - If it will take longer, add it to your task list or calendar. Do not use your inbox as a to-do list.

2. Why Marking E-mails Unread or Flagging Is Inefficient

- Marking e-mails as unread or flagging them for later guarantees you'll revisit them multiple times, which wastes time and mental energy.
- The only way to break the cycle of repeatedly handling the same e-mail is to make a decision and act the first time you read it.

3. The "Quick Action" Rule and Crisis Exception

- If you're too busy to even decide what to do with an e-mail, you shouldn't be checking your inbox—focus on your urgent work instead.
- In true crisis situations, normal e-mail processing rules are suspended: focus on resolving the crisis, then return to the decision tree for regular processing.

4. Task Lists and Calendars: Where Work Belongs

- For e-mails requiring more than a couple of minutes, transfer the action item to a task list or calendar—this can be digital (Outlook Tasks, To Do, OneNote, Google Keep) or analog (paper, sticky notes).
- The inbox should not serve as your task list; once an action is identified, move the e-mail out of the inbox.

© Randall F. Dean

5. Filing and Deleting: Keeping the Inbox Clean

- Once an e-mail is processed (handled, added to a task list, or calendar), file it in an appropriate subfolder or delete it.
- If you need to keep it but don't have a folder, create one. Some people print important e-mails to PDF and store them with related documents in OneDrive or SharePoint, but subfolders are usually more efficient.

6. The Logic of the System: Advanced Common Sense

- The process is about making a decision for each new input, handling quick items immediately, and moving longer tasks to a system where they can be prioritized.
- This approach reduces wasted time and helps you focus on what matters most, using your inbox only for processing, not for storage or reminders.

7. Applying the System to All Inputs

- The same decision-making process can be applied to all workplace inputs: e-mail, voicemail, documents, texts, etc.
- The goal is to efficiently process all types of input, freeing up time for high-value work.

8. Technical Tips for Outlook Users

- The video provides practical demonstrations for both Classic Outlook and New/Web Outlook:
    - How to identify which version you're using.
    - How to customize the sidebar and pin frequently used apps (Word, Excel, OneNote, Tasks).
    - How to use the "My Day" button in New/Web Outlook for quick access to calendar and tasks.
    - How to use "peeks" in Classic Outlook to quickly view calendar, tasks, or contacts without leaving the inbox.

Significance:

These first two sections of the video are foundational for building efficient e-mail habits. It emphasizes the importance of decisive action, the pitfalls of using the inbox as a to-do list, and the value of leveraging Outlook's features to streamline workflow. Hopefully, you find

© Randall F. Dean

these tips practical and actionable, with an aim to reduce your stress, reclaim time, and improve overall productivity.

Day 3: Third Video Segment: Key Points Summary (up to 01:37:00)

Key Points Summary (01:06:07 – 01:37:00)

1. Overcoming Hesitation to File E-mails

- Many people hesitate to file e-mails because messages often cover multiple topics, making it hard to choose the right folder. This leads to inboxes growing out of control, especially when combined with marking messages unread or flagging them for later.

2. Efficient Folder Structures

- Outlook allows for flexible folder structures: folders within folders, and favorites for quick access.
- You can use special characters (like exclamation points or stars) at the beginning of folder names to move frequently used folders to the top of the list, making navigation easier.
- This naming strategy works for both top-level folders and subfolders, and can also be applied in OneDrive.

3. Using Categories (Labels) for E-mails

- Outlook's "Categories" feature lets you assign multiple labels to a single e-mail, overcoming the limitation of only being able to file an e-mail in one folder.
- Categories make it easier to find messages later, even if you're unsure which folder you used.
- You can search by category, sender, subject, or other keywords to quickly locate messages.
- Categories are personal — labels you create for your job may not make sense for others, and they don't transfer when you forward e-mails.

4. Practical Category Management

- You can create, rename, and manage categories easily in both Classic and New/Web Outlook.

© Randall F. Dean

- The video demonstrates how to use categories to organize messages by project, client, vendor, coworker, or any other relevant label.
- Searching by category is more precise in Classic Outlook; in New/Web Outlook, searching by category name may also return messages with that word in the body or subject, so unique or slightly misspelled category names can help.

5. Competing Folder Strategies

- *Three main strategies for e-mail folder management are discussed:*
    - **Many Folders:** Create a folder for every project, client, or topic. This can lead to hundreds of folders and complexity.
    - **One "Done for Now" Folder:** After processing, move everything to a single subfolder and rely on search and categories to find messages later.
    - **Hybrid Approach:** Use a few main folders for key projects/clients and a "done for now" or "sweep" folder for everything else, labeling messages before filing them.

6. The Importance of Putting E-mails Away

- Leaving processed e-mails in the inbox leads to repeated checking and wasted time—even if marked as read, most people will look at them again to confirm they've handled them.
- Science shows that moving e-mails out of the inbox once processed reduces distraction and increases confidence in your system.

7. Building Confidence in Your System

- The presenter encourages users to find a folder and label system that works for their personal workflow, using search and categories to ensure they can always find what they need when they need it – quickly, easily, and efficiently.
- The goal is to process each e-mail, move it out of the inbox, and trust your system to retrieve it when needed.

Significance:

This section focuses on overcoming the psychological and practical barriers to filing e-mails, leveraging Outlook's folder and category features, and choosing a management strategy that fits your work style. The advice is designed to help users maintain a clean inbox, reduce stress, and improve productivity by making e-mail organization intuitive and reliable.

© Randall F. Dean

Day 4: Fourth Video Segment: Key Points Summary (up to 01:59:54)

Key Points Summary (01:37:01 – 01:59:54)

1. Three Competing Strategies for E-mail Folder Management

- **Many Folders:** The traditional approach is to create a folder for every project, client, or topic. This can lead to hundreds of folders and subfolders, which becomes unwieldy and increases the risk of misfiling or losing messages. Outlook allows you to move messages by drag-and-drop or right-click, and you can use shortcuts like Ctrl+Z to undo accidental moves.
- **One "Done for Now" Folder:** An alternative is to use a single subfolder (e.g., "Done for Now" or "Sweep") for all processed e-mails. After you've handled an e-mail (either completed the action or added it to your task list/calendar), move it to this folder. Rely on search and categories to find messages later. This approach is especially effective if you use labels (categories) for context.
- **Hybrid Approach:** Use a few main folders for key projects/clients and a "done for now" folder for everything else. Label messages before filing them so you can use search to find them later. This balances specificity with simplicity and is more manageable than hundreds of folders.

2. The Importance of Moving E-mails Out of the Inbox

- Leaving processed e-mails in the inbox leads to repeated checking and wasted time—even if marked as read, most people will look at them again to confirm they've handled them.
- Science shows that moving e-mails out of the inbox once processed reduces distraction and increases confidence in your system.

3. Building Confidence in Your System

- The transcript encourages users to find a folder and label system that works for their personal workflow, using search and categories to ensure they can always find what they need.
- The goal is to process each e-mail, move it out of the inbox, and trust your system to retrieve it when needed.

© Randall F. Dean

4. Handling High E-mail Volume and Job Design

(This is the content starting in Video Addendum #1)

- For those receiving an overwhelming number of e-mails (e.g., 200–300 per day), the problem may be job design rather than e-mail management. If processing all inputs takes most of the workday, it's important to track the volume and discuss it with supervisors to seek solutions such as redistribution, automation, or reallocation of work.
- Senior managers are encouraged to delegate input management tasks to others so they can focus on higher-level work.

5. Real-Life Example: Customizing the System

- The transcript shares a story of a professional who successfully manages a massive inbox (over 248,000 e-mails) by consistently processing each message upon first read, handling quick actions immediately, and using search to find messages later. This person never creates folders and relies on discipline and search functionality, but acknowledges that IT may eventually require archiving for performance and data file management reasons.

Significance:

This section focuses on practical strategies for e-mail organization, the psychological and productivity benefits of moving messages out of the inbox, and the importance of customizing systems to fit individual work styles and job realities. It also highlights the need to address systemic issues when e-mail volume becomes unsustainable and encourages open communication with management.

<u>Optional Day 5: Addendum #2:</u> Bonus Video on Strategies for *Cleaning Up a Messy Inbox* Quickly and Efficiently Using "Search, Sort, and Groups"

Key Points Summary (01:59:55 – End)

1. Cleaning Up a Cluttered Inbox: Step-by-Step Process

- **Assess the Size of the Mess:** If you have *a couple hundred emails or less*, you can clean up your inbox in a few focused rounds:

© Randall F. Dean

- **Step 1**: Go through and file or delete whatever you can. Typically, about half of the emails can be handled this way.
- **Step 2:** For the remaining emails, handle every message that takes a couple of minutes or less. This clears out most quick tasks and responses.
- **Step 3:** For emails that require more time, add the action item to your task list or calendar, then file or delete the email. This ensures your inbox only contains items that truly need attention.

2. Handling an Inbox with a Large Number of E-mails to Clean Up/File

- If you have far more than 200 emails, use *age-based sorting*:
    - **Delete or Archive Old Emails:** If company policy allows, delete emails over a certain age (e.g., two years). Otherwise, move them to a folder called "Really Old Emails."
    - **Move Recent Emails:** Create a folder for "Really New Emails" and move the last couple weeks' worth of messages there for focused review.
    - **Sort and Group:** For emails between three weeks and six months old, sort by subject, sender, or other logical groups, and file them in batches. This avoids one-by-one processing of thousands of messages.

3. Maintaining a Clean Inbox Going Forward

- Once your inbox is clean, follow a smart regimen:
    - Open new emails and decide what to do the first time you read them.
    - Handle quick actions immediately.
    - For longer tasks, add them to your task list or calendar, then file or delete the email.
    - If you need to keep an email but have no folder, create one for it.
    - This process helps prevent the inbox from becoming messy again.

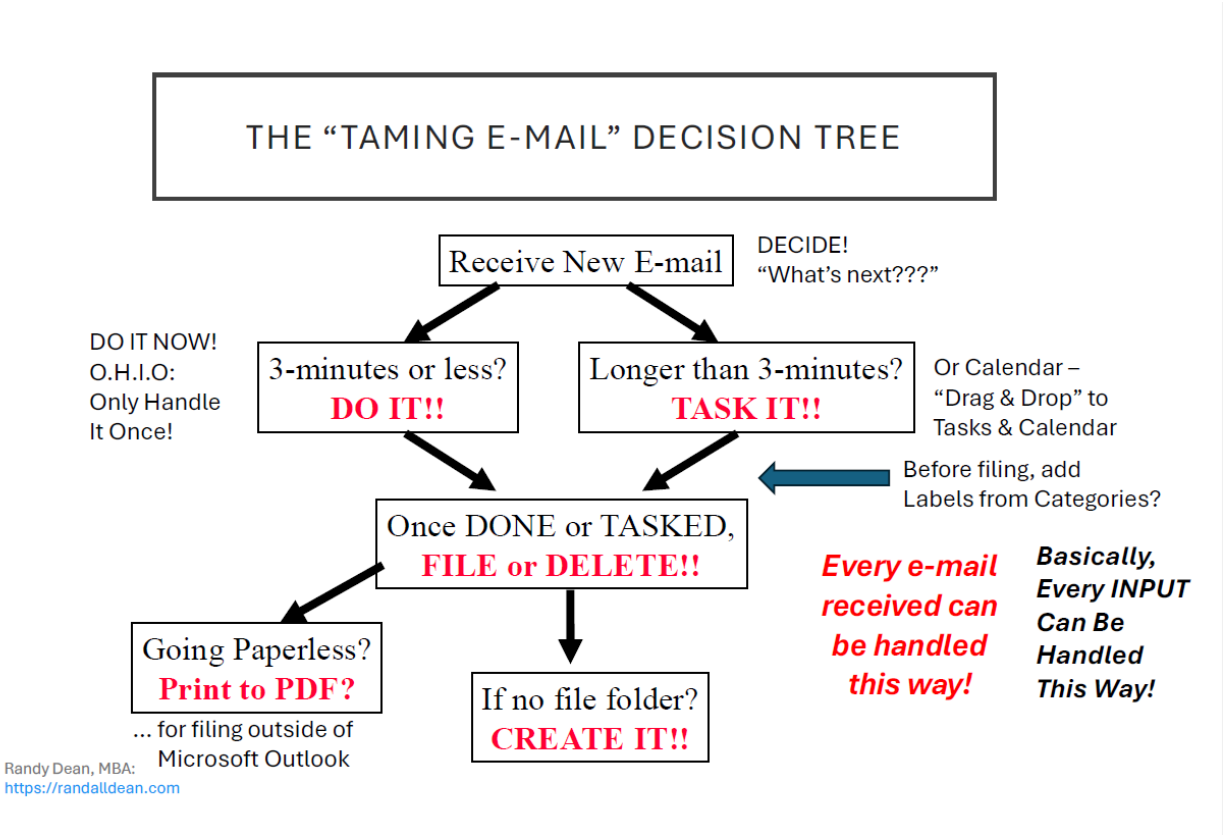
4. Additional Resources and Support

- The presenter, Randy Dean, offers further resources, including productivity tip sheets and training programs. Viewers are encouraged to visit Randy Dean's website or email for more information and ongoing support.

© Randall F. Dean

Significance:

This final section provides a practical, actionable roadmap for cleaning up a messy inbox, whether the problem is moderate or severe. It emphasizes batch processing, strategic sorting, and ongoing habits to maintain control. The advice is designed to help users reclaim their inbox, reduce stress, and sustain productivity improvements over time.



See the full raw transcript with time stamps on the next page – please note this transcript has not been edited for grammatical accuracy.

© Randall F. Dean

Audio file Raw Transcript with Time Stamps:

Taming the E-mail Beast for Outlook Users Video 1: The Problem and The Process

00:00:09

So how much time do you spend daily? Just.

00:00:12

Working on your e-mail.

00:00:17

Hi if you don't know me already, my name is Randy Dean. People call me the e-mail sanity expert. I've been helping literally 10s of thousands of working professionals all over the world get their e-mail under control for the last 20 plus years and I'm hoping I'm about to make a big improvement.

00:00:34

In your work and your life starting right now.

00:00:43

So I started this business in the early 2000s after spending more than a decade studying time and productivity management strategies from some of the leading experts and thought leaders in the field. At the time, I became known in my previous jobs as the on-site time and tech guy, and in the late 90s.

00:01:01

I started developing immediately usable strategies for my coworkers on how to better use one of the earliest versions of Microsoft Outlook.

00:01:10

And my coworkers in three different organizations encouraged me to seriously consider starting a company teaching these strategies.

00:01:20

Let's flash forward in 2005, about a year into that business I was teaching at time management for Outlook users workshop and noticed something when I got into the little segment on better e-mail management and outlook.

00:01:34

© Randall F. Dean

People perked up, but not in a good way. You could see the stress, aggravation and even a bit of anger in their faces. e-mail, e-mail. I sensed an opportunity. People were clamoring for ways to get their e-mail under control and get back to being productive.

00:01:53

E-mail was their nemesis.

00:01:56

I created a standalone course on this topic for Microsoft Outlook users called taming the e-mail beast, which quickly became my most popular program, which then became a book that went on to become an Amazon bestseller in six categories. This focus on better e-mail management and efficiency has allowed me to not have to get a real job now.

00:02:17

For more than 20 years.

00:02:20

I've been going all over the world teaching people to get their e-mail under control and be less distracted by it all of this time, and I've noticed a few different things.

00:02:35

Here's the problem.

00:02:36

Professional workers in a traditional office or hybrid environment often spend 2 to 4 hours or more daily just dealing with their emails. Some receive 51102 hundred more e-mail messages daily.

00:02:50

And many are checking their e-mail inbox multiple times per hour, some every few minutes.

00:03:01

But here was the one big kicker almost no one had training.

00:03:14

No one had training either on traditional information and input management techniques and strategies, or specifically on the software they used for hours every day on their e-mail

© Randall F. Dean

and calendar. Many working professionals were and are spending 25 to 50% or more of their work day.

00:03:33

Just dealing with e-mail, often checking their inboxes 15 to 40 times daily.

00:03:38

Being regularly overwhelmed, stressed and highly distracted with almost none of them having training on how to actually use their software intelligently and strategically, and because they are self-taught and they don't have the time to learn a better way, they are typically looking at each and every e-mail three to seven times.

00:03:59

Before taking a smart and appropriate action with that e-mail, they are literally looking at their messages over and over again, often doing nothing with them, wasting time and effort every time they do.

00:04:14

They are losing hours of time and productivity per week, which means days per month, which means weeks per year. And it really doesn't have to be this way.

00:04:24

However, if you are watching this video for yourself right now, I'm happy for you because I'm certain you will find numerous tips and techniques to save time, be more organized and productive and be significantly less distracted with all things e-mail. I consider e-mail a necessary nuisance. You can't get rid of it.

00:04:44

You need it for your job.

00:04:46

But it often distracts and gets in the way of true productivity and leaves you little to no time for your most important work. Thus, every minute you can save on this necessary, but often distracting communications tool that is a minute you can use for a more important project.

00:05:05

Task or action. It could literally be the difference between being a mediocre performer and a rock star.

© Randall F. Dean

00:05:14

But if you are a manager or a leader, you should be even more happy that you are watching this video, because if your firm hasn't yet trained your team on how to better manage this necessary nuisance e-mail you have right now stumbled upon one of the easiest ways to greatly increase your team's productivity while reducing their stress.

00:05:35

Overwhelmed and distract.

00:05:37

Action the ROI on getting your employees even just 10 to 20% more efficient and effective with their e-mail and skills is ridiculous. There is a lot of hype over the potential productivity gains from AI right now, but I have to tell you I think there are similar gains to be had and simply getting your people far more skilled.

00:05:59

Using an essential software and critical communication.

00:06:02

Tool they often use for hours every day, so let's get you working better with your e-mail, which should help you also get more time to be more focused, more creative and create more time for your most important work projects and tasks.

00:06:32

All right. Hi everyone. Just going to say something right here real quick. When you see the headset on, that means that the program content is about to change in this video series and I am about to get both tactical and technical. So as you're watching this video and if you're going to be watching the other.

00:06:53

Videos in the series just realize that when you see this, it means I'm about to dive into some of the things that.

00:07:02

I think are going to make you significantly more effective and efficient when it comes to utilizing your Microsoft tools. Now I had mentioned previously that you know I have been teaching a course called taming the e-mail beast for basically 20 years now and one of the interesting things about this I made the little joke.

© Randall F. Dean

00:07:22

That I haven't had to get a real job in that time. I call this right here. My taming e-mail decision tree. And when when you say that I, I mean, it's sort of built on the.

00:07:33

Back of, you know, some other thought leaders in the field that really helped me refine my thinking about what you do with an e-mail. I'm specifically going to call out David Allen. But I think also people like Malcolm Gladwell's work and Stephen Covey's work really made me focus in and think about, you know, what is it that you're doing?

00:07:55

When an e-mail comes in and you're expected to basically handle it and.

00:08:02

One of the interesting things is, you know, I mentioned in the program that because so many people are self-taught that they're looking at their emails three to seven times before they actually take a smart and appropriate action. That's the low hanging fruit that I really want to dive into here.

00:08:21

As we begin, the more technical part of this program.

00:08:24

Graham. But before we do time out, I actually got to go into outlook for a second and show you a couple essential and necessary screen setup tips so that when we get into some of the more important tips.

00:08:45

That are coming very short.

00:08:47

You'll be ready for them. OK, so let's dive out right now. Out of my little slide right here. By the way, this is how I got away with not having a real job for 20 years. Come up with a slide like that and start showing it to people. But let's go back into first. We'll go into classic Outlook, and now this is important right here because a lot of you, when I do my sessions at.

00:09:08

© Randall F. Dean

Conferences.

00:09:09

I'm finding out that a whole lot of people don't even know which version they're actually using. People are confused. Am I still using the classic? The older version? Am I using new and web? How do I know we're going to answer that right now? Classic outlook as long as you haven't done any changes to the, you know, basic screen.

00:09:29

Layout you know in your settings is going to have sort of a look and feel like this and and notice that you have your functional icons up over here in the upper left corner going down this sidebar.

00:09:46

And what's interesting about this notice that they're sort of very angular sharp corners. You know, basically sort of black and white until you get down here to to do. Let's open up, let's open up new and web outlook now real quick.

00:10:03

So by the way, I say new and web together because you'll see why in a quick.

00:10:08

2nd, I'm going to close this, bring this back down here. OK. And as you can see, did you see how it had that like little which call it graphic of an envelope and an opening and now notice that the icons have color and they're a little bit more rounded, a little more friendly. This tells you you're in either new or web.

00:10:28

Outlook and so this is the key easy way to figure out which version you're in. There's a slightly different look and top bar and header. There is clearly a different look and feel to these. This should look pretty familiar if you've been using.

00:10:45

Look for more than a couple of years because this is the one we've been using sort of with upgrades for 20 plus years now. So how many of you remember Outlook? What was it like 2003? So, but here's here's the thing. What I wanted to share with you is 1 essential thing that we're going to need to talk about to get ready for one of the big.

00:11:10

© Randall F. Dean

Tips in this program and that is the location of this right here.

00:11:16

It's called your.

00:11:16

Full and notice that when I hover over it says more apps. Now if you haven't gone down here yet, you're probably not seeing a whole bunch of these. And let me just show you something here real quick like OneNote. I'm going to unpin word. I'm going to Unpin excel. I'm going to unpin PowerPoint.

00:11:36

I'm going to unpin and now when you first started using it, you probably had a sidebar up here that looks sort of like this, and it might even have been missing a couple of the other ones here.

00:11:50

Like the old task view and now I'm going to unpin this one and let me show you what I discovered in order for one of these first tips to work to do the icon for Todo. It's not going to work, they haven't activated it yet for some reason. I wish they would, but if you come down here into the more.

00:12:12

Apps folder. You might find your tasks as well as these other items that I just unpinned inside.

00:12:20

Here and one of the key initial points I would say is if you're using classic outlook, but you find yourself frequently jumping from outlook into word or Outlook into Excel or Outlook into OneNote.

00:12:34

Then go over to the ones that you're using a lot. Right click on them inside the waffle and pin them, see. Then they jump over to the side screen and you can access them. And now I just. I'm now think about what this means right here, right now. When you're in outlook, you can immediately jump and open word without having to come down here to your.

00:12:55

© Randall F. Dean

Basically programs and start menu to go find word.

00:12:59

It saves you a click. I mean, that doesn't sound like a lot, but every time you save a click, you're saving a second or two and that's what adds up to minutes, which adds up to hours over a long period of time. So, you know, make sure you customize this bar and get over here. The ones that you're likely to open frequently.

00:13:19

When you're inside your outlook and the one that I really want to make sure though that is available there, let's go into the.

00:13:29

More apps, again, is this tasks view now notice it looks like a clipboard with a little check mark on it. This is the old icon for tasks and what you're going to want to do is go over this one, right click and pin it.

00:13:45

And the reason that I want you to pin it is because you're going to need it for one of the big tips coming up. And then what? I'd also recommend you do is come over here, right click and see how you have options to move it U. Let's just move this thing up several times.

00:14:01

But let's move it up to about here. See, I like to have it right below my calendar, so here's inbox. Here's calendar. Here's tasks. Here's the old version of Notes, which is different than OneNote. We'll probably talk about that a little bit later, and here's contacts. People. OK, so this is.

00:14:21

Initial basic setup in class.

00:14:25

In Newin web outlook, what I want you to see is that I can do sort of the same thing over here. I can right click, unpin and notice that when I unpinned, the waffle wasn't showing. Now it is because now there's something hidden in there and let's let's do the same. Let's unpin excel.

00:14:45

It's the same capability. Notice that you can come into your into new and web outlook, open up this waffle down here, find other apps, and if.

00:14:55

You use these.

00:14:56

Apps regularly. Right click and pin them so they appear on your side.

00:15:01

Are, but that isn't what I want you to look at in new.

00:15:05

And web outlook.

00:15:06

It's a different tool. It's right up here. It's called the my day button and if you click on this look what this gives you. This gives you basically a little peek into either your calendar or your task list.

00:15:21

Now what it's doing right now, which is fascinating, is it's pulling up my old outlook task list to see if I have any updates. I clicked off of that. We're gonna come back into.

00:15:30

That in a minute. But what I wanted you to see is that you can come over here using this little button to drop a panel that allows you to get a quick view of either your calendar or your task list while you're in your inbox. What's interesting, though, is that's not the key reason I want you to know that that is there.

00:15:51

Because it's also going to be helpful in that very first killer strategic technical tip that we're going to be covering shortly.

00:15:59

All right, so this is basic stuff, by the way. Before I jump back into discussing the decision tree, I want to go back to class. I can show you one more thing. See your little peaks here for

© Randall F. Dean

a calendar and to do take a look at this. If you come back into classic outlook, they have activated something with your sidebar menus, you can come down here.

00:16:19

And.

00:16:20

Hover and when you hover you can actually hover to see little mini views. They call them peaks so you can hover and get peaks now notice when I hover over calendar I get a peek at my calendar and I can see what's going on tomorrow and into the future. If I'd like, I can get in and take a peek at.

00:16:38

My task list we'll be covering this a little bit.

00:16:40

Later I can hover over people and search my contacts without having to go and open contacts to search. Nice if you're basically going to look for a contact and all you really want to do is find their e-mail because you're here in the e-mail.

00:16:59

Yay. So it's little little things like that. And one of the other things that I'll show you, which is sort of cool about the peak, not only can you hover and see the peak, you can even do a right click and dock the peak. Now look what this does this brings in to the side of my inbox.

00:17:20

My calendar. Nice. Alright, so. And by the way, yes, you can even go into calendar.

00:17:31

And so here I am in calendar and I'm going to right click and dock the peak here to bring in a little view of my task list. It's a little bit in reverse order, but you know we'll be playing around with this a little bit later in the program to show you a little bit more on the setup of all of this.

00:17:52

But I wanted you to see these capabilities in terms of sidebar menus as well as the Myday view.

00:18:03

© Randall F. Dean

As well as the waffles and how to pin and unpin items from the waffles, as well as how to use your peaks and even get rid of your peaks. Look, all you have to do if you want to go back to full, unadulterated inbox with no calendar in there. Click on that little button.

00:18:23

And you're back to the full panel view. If you don't have your reading panel open, we'll talk about reading panels a little bit later too, but this is our little starter and now we can go back to the taming e-mail decision tree.

00:18:40

So now that we've had that little, how would you say it? Interlude with a couple essential technical tips for those both in classic Outlook and new and web outlook. I want to come back to the strategy and starting right at the top of this flow chart where you see it says receive new e-mail.

00:19:02

I'm going to tell you that I'm seeing a problem right here, right at the start.

00:19:09

And I think I've even figured out why so many people are looking at their emails three to seven times each before taking a smart and appropriate action.

00:19:23

Let's go see if I'm right and see if you agree. Let's get out of here.

00:19:29

Let's go into my outlook.

00:19:32

And now that I'm here, I want to show you what I see. So many users do not just in outlook, but in Gmail and all other e-mail programs.

00:19:47

I got this new e-mail from this Randy Dean guy. I should open up and see what's going on in here. Let's open it up.

00:19:54

© Randall F. Dean

So I open it up and I can see the message, but I'm in the middle of doing a live video taping recording.

00:20:06

And I.

00:20:08

I don't really have time to.

00:20:09

Deal with this e-mail right now.

00:20:12

So you know what I'm going to do?

00:20:13

Because I don't have time, even though I've opened it and looked at it, I'm going to pop up here and mark it unread.

00:20:20

And close it.

00:20:25

No, even better. You know what I'm going to do? I'm also going to come over here to the side and turn on one of these little flags.

00:20:33

Hey we got new and web outlook people. Let's close that my day button. We've talked about notice that when I came over here now that one's marked on red. See that I click the check box.

00:20:46

I can switch it to unread again right here under the read unread button, or if I'd like, I can pop over here and flag the message.

00:20:59

And let's think about what you just did.

00:21:04

© Randall F. Dean

You by taking that e-mail that you opened and read.

00:21:10

When you marked it unread or flagged it, or both.

00:21:16

You just guaranteed you got.

00:21:17

To look at it again.

00:21:19

And again.

00:21:21

And again, and when I'm speaking at my live conferences, I'm asking people how many of you, when you have an e-mail that you cannot deal with right now, you either mark it unread or.

00:21:31

You flag it.

00:21:33

It's like 90% plus almost everyone does this, but I want you to think about something here.

00:21:41

If you're taking an e-mail that you've opened and read, and you're marking it unread or flagging it.

00:21:48

You're pretty much guaranteeing you're going to have to look at it again later.

00:21:53

And if you're getting hundreds of emails daily, how much time are you losing? Just looking at emails again and again and again, marking them unread or flagging them again and again and again.

00:22:06

© Randall F. Dean

It's it's a very dangerous cycle, even, and there's only one way you can fix it. One simple way.

00:22:17

Right here, new e-mail comes in, you open it and that first time you open it, you can't read it just far enough to go, oh, I don't have time for this right now. You have to keep reading until you know what it is you need to do next with that item.

00:22:34

You need to make a decision and that decision is what do I need to do next.

00:22:40

Because if you can't get to that.

00:22:43

You're going to have to read it again and again and again until you do get to that.

00:22:49

I hope this makes sense. The only way you can possibly change the three to seven insanity is by reading that message the first time and figuring out what you need to do with that message the first time.

00:23:10

It's the only way you can fix it and marking them unread or flagging them does not fix that it it encourages that.

00:23:20

But now time out I mentioned David Allen earlier. He wrote the book, Getting Things done and this whole concept of looking at a new input once and then deciding what you need to do with it the first time you look at it. That was a concept I learned from him all the way back in the early 90s. And I remember specifically.

00:23:40

He did something I thought was genius. Not only did he take this whole concept, which used to be called the One Touch rule. You know, if you get a new dock.

00:23:48

© Randall F. Dean

Minute touch it one time before you set it down. Decide what you need to do with it. Well, this was just moving this forward into sort of the world of electronic inputs and e-mail. And I remember what he said all those years ago, though he goes critical thing you need to do though, is if that e-mail.

00:24:08

Has something inside of it that takes a couple minutes or less.

00:24:13

Just do it. Don't you dare keep it for later. You know? Why are you keeping something for later? That's going to take a couple of minutes or less. If you do it right now. And when you think about it, there is a ton of inherent logic here. First, if you're getting a pretty heavy flow of stuff.

00:24:33

Coming in and you're not keeping the quick little things moving, might they not just stack up and bury you?

00:24:40

Plus, let's think about another piece of logic here. Quick little e-mail only takes you 30 seconds to write a reply or a minute to look up a piece of information and forward it on, or a minute to click on the web link in that e-mail, fill out the.

00:24:54

Web form hit submit.

00:24:57

Or you try to reply to that voicemail.

00:25:00

At a time when you hope the other party cannot answer their phone, so you catch their voicemail too. Good tip.

00:25:08

Any and all the things I just described. What do they take?

00:25:13

Couple minutes Max minute or two.

© Randall F. Dean

00:25:16

Well, think about this. By the time you've looked at it three times without doing it.

00:25:22

You just double how long it takes.

00:25:24

When you're keeping stuff for later, marking them unread, flagging them.

00:25:31

You're doubling or tripling your effort on the quick little things.

00:25:37

Get the quick little things done and gone. Now let's do a quick little time out right here. I'm going to do. Do what I call a sidebar.

00:25:49

All right, so here's the sidebar.

00:25:53

Randy.

00:25:55

So what you're saying is if an e-mail comes in?

00:26:00

I'm supposed to decide what I need to do the first time and if it's quick, do it now. What if I don't have time to handle something?

00:26:11

Quick right now.

00:26:14

And my answer is why are you even looking at your e-mail then?

00:26:19

© Randall F. Dean

If you're so busy, so crazy, so on fire, that you cannot even open an e-mail, read it far enough to decide what you need to do next, and handle it. If it takes a couple minutes or less.

00:26:34

Why are you even looking?

00:26:36

Just stop. Keep your focus on what it is that's obviously so important and urgent, and deal with that thing.

00:26:45

You know, it's like, you know, if you're dealing with a crisis, why the heck are you checking your inbox?

00:26:52

But I have to admit there have been some people that have said to me, Randy.

00:26:56

What if I'm checking my e-mail?

00:26:58

To see if it tells me how to.

00:26:59

Put out the fire.

00:27:02

There's some credence to that, so here's what I'm going to say.

00:27:08

If you're dealing with an actual crisis, you know my little decision tree that I'm going to be walking us through.

00:27:15

Completely disregard that when you're dealing with an actual crisis. If something's on fire, something's flooding. Stop the fire. Put.

00:27:26

© Randall F. Dean

Out the flood.

00:27:28

Did I say that backwards?

00:27:31

And and here's the thing, you should put full focus full effort into dealing with the crisis. So can you check your e-mail? Can you check your voicemail? Can you check your texts and IMS? Absolutely. But when you do this?

00:27:48

Don't.

00:27:49

Figure out what you need to do next. Deal.

00:27:52

With it if it's.

00:27:52

Quick etc. No scan your subject line scan your new user name, scan your phone numbers.

00:28:02

Find the thing related to the thing that's on fire or flooding right now and put out that fire. Stop the flood.

00:28:10

Full focus on crisis.

00:28:14

Until crisis is settled for now, now think about this. How many of you have crises dejour multiple little fires and floods daily? Well.

00:28:27

Then the decision tree is what you do in between those times, so you know the fire pops up full focus, put out the fire, then work on your decision tree process. During normal periods of time where nothing's burning.

00:28:47

© Randall F. Dean

Nothing's flooding, but then when?

00:28:49

The next flood pops up full of focus.

00:28:52

Stop the flood.

00:28:54

That's the way you're going to sort of surf back and forth depending on crises and urgency versus normal efficient processing of new inputs.

00:29:07

Hope that makes sense.

00:29:10

Let's get back to normal task.

00:29:13

All right and.

00:29:13

I hope that that little sidebar makes total sense you.

00:29:17

If you're dealing with crises, deal with the crises, don't get distracted by anything else, you're going to get burned. All right, keep your focus when it's time to keep your focus, don't get pulled in to other distractions when you need to keep your focus. Sort of like the same tip.

00:29:37

You know, don't be looking at your phone when you're driving. You're going to kill yourself or somebody else.

00:29:42

Right, right. OK. So.

00:29:47

© Randall F. Dean

I want to come back to this because there's another thing that I do need to point out right at this time.

00:29:55

I've had a few people in my programs say this, Randy.

00:29:59

I heard what you just said.

00:30:01

New e-mail comes in normal processing time. Read it far enough to figure out what you need to do next. If the thing that you need to do next takes a couple of minutes to handle those now.

00:30:12

If I did what you just said.

00:30:14

That's all I would do all day, every day.

00:30:18

I am getting so many emails and other inputs coming in I could. I wouldn't even be able to get.

00:30:25

To my work.

00:30:28

And I think.

00:30:28

There's a few people that that's actually legitimate.

00:30:33

You know, if you're getting 250 emails every day, each one takes you 3 to 5 minutes, you can do the math on that. I believe it works out something like.

00:30:42

© Randall F. Dean

10 1/2 eleven hours of work.

00:30:45

If you're getting 10 1/2 eleven hours of inputs.

00:30:48

And that you have to process every day.

00:30:52

That's not a sustainable.

00:30:55

Situation, unless that's the only thing you have to.

00:30:58

Do.

00:31:33

All right, enough talk about that.

00:31:36

I'm going to assume most of you.

00:31:38

We'll be able to survive.

00:31:41

If you get much better at looking at something, once deciding what you need to do and handling it if it's quick, here's a good way to remember.

00:31:52

That.

00:31:53

Let's go to Ohio. Ohio only handle it once. That's the way I want you to think about quick.

00:31:59

Little things handle.

© Randall F. Dean

00:32:01

Them once.

00:32:03

S.

00:32:05

Now, coming back to the flow chart here, notice the next box over basically gives you the description of what you do next.

00:32:13

If it takes more than a couple of minutes, that should go on your task list and your task list should not be unread items in your inbox.

00:32:22

No. What what I want you to do.

00:32:25

Is I want you if you can, to take whatever that thing is you need to do. That's in that e-mail and get it onto a task list. Whatever task list you prefer. Does it have to be outlook tasks or to do not necessarily? I mean, I don't even got your little sheet of paper task list or a sticky note task list.

00:32:45

I mean, if you work better from that then use it. I do think that there is something to be said.

00:32:52

For a couple.

00:32:53

Of the cool features we're about to get into related to the Outlook task manager tool.

00:32:59

Both the older task view and classic outlook and new to do views that are available in both classic and new web.

00:33:09

© Randall F. Dean

But I could even see you. You know, having like your, you know, tablet and having one node or Google Keep and building a little task list every day right there, you know, so you can decide which one works best for you.

00:33:27

I don't care what task list you use.

00:33:30

All I care is that you use a task list and the task list should not be your inbox with things.

00:33:35

Marked, unread and flagged.

00:33:38

There is one other place that the item can go, and no, not your trash. Remember, if it was trash, it should have already been done right here. People like to make that joke. Where else could it go? Trash. Yeah. No.

00:33:53

Your calendar.

00:33:55

Because if you don't want to put it on your task list, you could then instead put that item on your calendar.

00:34:03

Blocking time for you to get that thing done later, whatever that thing is.

00:34:10

And that could even it doesn't have to be a.

00:34:12

Meaning it could just be.

00:34:13

You blocking time to get a task done that really needs to be done all right, so let's let's run this real quick here. New e-mail comes in. Decide what you need to do next. If it's quick, handle it now.

© Randall F. Dean

00:34:28

Remember, Ohio only handle it once.

00:34:31

If it's not so quick, then that's when it should go on to your task list. Or maybe your calendar.

00:34:38

And another timeout right here.

00:34:41

Would you agree that once we've reached this level with that new e-mail item?

00:34:50

We have reached what I like to.

00:34:52

Call.

00:34:53

Done for.

00:34:53

Now.

00:34:54

You're done for now with that item.

00:34:57

Which means in my strong opinion.

00:35:01

It no longer needs to be in your inbox. You have two choices as an outlook user choice #1 file it into an appropriate subfolder.

00:35:12

Item number 2 delete it.

00:35:15

© Randall F. Dean

That's your two options.

00:35:18

And if you don't have a good place to file it, but you feel you might need to keep it for later reference.

00:35:24

Make a folder, put it there.

00:35:27

This is not rocket science you'll even see. I got a little side box here. You know what a lot of people are doing now instead of putting emails into folders, some people are printing the emails they want to keep to PDF files and then taking the PDF files and putting them into the OneDrive.

00:35:48

Or SharePoint or CRM.

00:35:51

Client, customer, project, activity, event folders. So that way your emails are just another document inside of the folder with your word and Excel and PowerPoint and other PDF files.

00:36:06

There's something to be said for that. Feels like a lot of printing to PDF potentially though, and so I would probably say if I can get away with it, I'd just prefer to have it go into the subfolders. All right? Now this is that point where I could show you the really big tip.

00:36:27

But I wanted to show you the full logic of this. Let's walk through this one more time so that you understand the logic of the system.

00:36:34

New e-mail comes in. Read it so you know what you need to do next. Make that decision. If the item is quick. Allah. David Allen, do it now. Don't keep it for later. Only handle it once.

00:36:47

© Randall F. Dean

More than a couple of minutes. That's where it should go on to your task list or your calendar, and once you've either got it done or added it to your task list or calendar, you file it or you delete it.

00:37:00

And if there's no good place to file it, but you need to keep it, make a folder, put it there.

00:37:08

This is not rocket science. As a matter of fact, I would argue this is advanced common sense. Basically what I'm doing right here is I'm taking a raw material input, new e-mail. I'm running it through the value added process and then ending up at an appropriate finish point.

00:37:28

And I'm trying to do this each and every time.

00:37:33

Because by doing that I can gain efficiency. See I want to get to where I'm not wasting time looking at stuff again and again and again that I don't need to look at again and again and again. I want to be decisive. I want to clearly identify what it is that needs to be done.

00:37:55

I want to handle quick little things now.

00:37:59

Because that means I will spend less overall time on this.

00:38:07

And I want you to think about one other thing.

00:38:11

Other than the quick stuff.

00:38:13

Doesn't that mean that I'm basically saying?

00:38:16

Your work.

© Randall F. Dean

00:38:18

Should move out of your inbox at this point and now instead be in your task list. Whatever task list that is or your calendar.

00:38:29

Doesn't that sound inherently logical? I hope it does.

00:38:33

Yes.

00:38:34

You know, clear your inbox, use it for processing.

00:38:38

Once things are processed, shift your focus to your task list and your calendar to make the right choice about the most important thing to do next.

00:38:48

With your time and your effort.

00:38:53

And I promise you this.

00:38:56

The way that they've designed, especially the task tools in outlook, the either the old classic tool or the new todo tool, it is far easier to figure out what the most important next thing is or most urgent next thing is in a well constructed task list.

00:39:16

Than it is in a messy, cluttered inbox streaming several pages with a whole bunch of different things marked unread or flagged.

00:39:26

You're just going to be able to identify the most important or urgent item much better and more quickly once you get these items processed.

00:39:37

That's the strategy.

© Randall F. Dean

00:39:37

Yes.

00:39:39

And now I want you to take this one step up before I show you.

00:39:41

That killer technical tip.

00:39:45

If you've printed out the handouts for this program and you're looking at the slide right now.

00:39:52

Go up to the top and cross out the 2 words taming e-mail.

00:39:57

Seriously, do it.

00:39:58

And replace it with the following 3 words.

00:40:02

All workplace inputs.

00:40:06

All workplace inputs because does it have to be just e-mail that you manage this way or could you manage your voicemail, snail mail documents, E documents, faxes, text messages, IMS, even your stacks, piles and clutter.

00:40:19

I'm going to argue.

00:40:21

That you can basically efficiently process all of those input types.

00:40:28

Using the same basic decision tree, so regardless of format, if you give your attention to some new input of any type, first time you decide what you need to do with it, and if it's

© Randall F. Dean

quick, you deal with it. Now. If it's not quick, it becomes part of your task list or calendar. Maybe if it's a document you scan it to PDF so you can put it into your electronic task list or calendar.

00:40:49

And then you either put it away, throw it away, shred, recycle trash.

00:40:56

Because not only do we want you to get really efficient with your e-mail, we want you to get really efficient with all of these input streams.

00:41:08

The more efficient you get at managing your input streams of all types, including e-mail.

00:41:16

The more time you then have to get to the work that matters most.

00:41:24

So that's the strategy.

00:41:27

And now I got to show you the tip, because you need to understand.

00:41:32

Even though they have made it really easy for you to mark things unread or flag them.

00:41:37

They've also built in the option I'm talking about here, and they've made that quick too. Let me show you what I mean. Let's go back out to my outlook.

00:41:47

And I'll start with classic, but then I'll flip into new and web. So here's that little.

00:41:53

E-mail that I already marked.

00:41:56

© Randall F. Dean

Unread. But what I'm going to do this time. What I really need to do is make sure that the updated handout file.

00:42:08

PDF for this program I am recording right now is in good form to add to the program for the program attendees you.

00:42:24

That's what I need to do. Notice the subject line doesn't at all mention those things.

00:42:33

Does the subject line ever mention what it is that you need to do? A quick little tip that's just going to help everybody around you and your team and your clients and your vendors.

00:42:43

Trying to make the subject line at least somewhat related to the content inside the e-mail. You know something related to the project, person, client, activity, event, etcetera.

00:42:55

If you can do that, people are going to much more appreciate your emails versus an e-mail that just says you won't believe this.

00:43:06

Thank you for that. That's totally vague and now I have no idea whether I need to open it right now or I can wait till tomorrow. All right. So but that's a little e-mail etiquette aside, let's do this. Let me show you. I need to create the handout PDF for.

00:43:25

Video program attendees.

00:43:27

That's what I need to do. Subject Line doesn't say it, so watch what I'm going to do. I am left clicking on this e-mail on my mouse and now I am going to pick it up and drag.

00:43:38

It to the old.

00:43:40

© Randall F. Dean

Task icon. So I wanted to.

00:43:41

Show you that earlier.

00:43:43

It doesn't work yet with the todo.

00:43:45

Icon I keep watching to see if they're.

00:43:47

Going to activate it.

00:43:48

As of the time that I'm doing this video recording, it's not working there yet. You got to go to this one and what you do is then you drop it.

00:44:00

And when you drop an e-mail.

00:44:04

On to a task. The old task view and outlook.

00:44:08

Once it brings up the new task window, you have to come up to the subject line.

00:44:14

And change it to.

00:44:16

Create hand out. I can type.

00:44:21

I really can't type hand out PDF.

00:44:24

For video program.

© Randall F. Dean

00:44:31

Due date probably should get that one done today. You'll see when I'm recording this priority.

00:44:38

Hi.

00:44:40

How long did that take?

00:44:42

I'm going to say about 10 seconds.

00:44:45

Which is a few seconds longer.

00:44:48

Than just marked it unread or flagging it.

00:44:50

But do you see why it's already critically better? It's right here. Create handout PDF for video program. I have specifically called out what it is I need to do because of this e-mail.

00:45:03

And if I do that well enough, calling out exactly what it is I need to do with a clear enough description.

00:45:11

8 times out of 10 I don't even need to reference the e-mail again, I can just get the task done.

00:45:18

But notice something. Look down here.

00:45:23

Look what's in the bottom of the task I just created in outlook. Yeah, that's the text of the original e-mail.

© Randall F. Dean

00:45:31

So think about this left click hold the click and drag it up to that task icon drop. It pops up new task window.

00:45:40

Change the subject line to whatever it is that you actually need to do next. Set appropriate due date and priority text of the message right there inside of it, if you.

00:45:51

Need to reference it.

00:45:54

10 seconds or so once you.

00:45:55

Get good at it.

00:45:57

There's a few of you probably thinking I like this, Randy. I like it a lot.

00:46:02

But I have one major problem with what you just showed me.

00:46:06

I don't regularly use that outlook Pascual.

00:46:09

So if I do what you?

00:46:10

Just showed me I might never see that task or that e-mail again valid concern. Watch close.

00:46:18

Reminder.

00:46:19

Save and close.

00:46:22

© Randall F. Dean

Boom. There it is.

00:46:26

I haven't watered the plants yet. I will snooze that for another hour.

00:46:33

But there's the one I just created and what I want you to see is that it when you're as you're new to using this new strategy for dealing with these incoming emails, moving them into and creating tasks. If you don't trust yourself that you're, you feel you're going to forget to look at your task list, turn on the reminders.

00:46:53

And then they will pop up on your screen when you need to see them again later, and then you can do it pretty much everyone does when they pop.

00:47:00

And snooze, see that one again in 5 minutes. But wait, there's more. Maybe I should block time on my calendar to create the appropriate handout PDF for this program. Watch this classic outlook. Users left click hold the click, this time, drag it to the calendar icon, not the task calendar.

00:47:23

Drop it and you'll get.

00:47:27

A calendar item pop up.

00:47:31

And then of course you do the same thing. Create handout.

00:47:35

PDF.

00:47:37

For video.

00:47:40

Time. Uh, this one. I'll do tomorrow at let's move it all the way up to 1:00 PM.

© Randall F. Dean

00:47:47

How long did that take?

00:47:49

10 more seconds so see, you can create both task items in classic outlook as well as calendar items in classic outlook using this drag and drop technique. Left click hold click drag it to either icon drop it, it will pop up the window. Change the subject line to what it is and either.

00:48:10

Set a due.

00:48:10

Date. If you're in tasks or set a date and time if you're in calendar.

00:48:15

You know what's nice about the calendar option? I could even take this notice. It also brings in the text of the e-mail. I could turn this into a meeting. All I need to do is come up here and hit invite and all of a sudden now this thing where I'm creating the handout.

00:48:30

Has become a meeting request and I can start adding in people's names and emails right here to invite them to the meeting tomorrow at 1:00 PM.

00:48:42

And notice down here at the bottom is the text of the e-mail that prompted me to call the meeting.

00:48:50

Which means I could put the cover. No. Hey, everybody. Look at this e-mail we just received from one of our key clients. We need to have a meeting about this.

00:49:00

First thing tomorrow.

00:49:03

That's in like 20 seconds. But wait, you go even one step further. Not only could you have that little cover note in the original message that prompted you to call the meeting.

© Randall F. Dean

00:49:14

You can pop up here to the top to the scheduling.

00:49:18

And if you've got shared calendars, which I'm betting you do, you can start typing in their names and emails and see if they're even available tomorrow at 1:00 PM.

00:49:27

30 seconds.

00:49:33

I got one more for you. Then we're going to go into new and web outlook show you the comparable.

00:49:38

But here's the last thing I wanted to show you. While I'm showing you this little trick, do I want to save changes? No, it's already in my task list. I don't need it on my calendar, but I would like to get this Randy Dean guy into my contact database. That way I'll never forget who I am. Left click, hold click this time, drag it to not calendar, not test this time to people. Drop it.

00:50:00

And that pops up a new contact item in Outlook and notice this it auto populates both name and e-mail.

00:50:09

And not only does it auto populate name and e-mail, it brings in the text of the message over here into the notes field, where if you're lucky, you page down, you get to a signature and then what I can do? Watch this close. I'm going to highlight e-mail sanity expert, that job title release the click.

00:50:29

Pick it up, move it to job title. I can do the same thing for this business office phone number and I can do the same thing for this mobile number.

00:50:40

Release click.

© Randall F. Dean

00:50:42

Drag.

00:50:45

And drop that quick and easy. I call that a highlight drag and move, and once you get really good at it, you can start just grabbing things and moving them from the place that you don't need them to. The place that you do. And here's something you need to know, that little trick.

00:51:04

Highlight drag and move. That doesn't just work in Microsoft Outlook, it works in the entire Microsoft Office suite, Word, Excel, PowerPoint, OneNote, etcetera.

00:51:13

It actually also works in Gmail and Google Docs, and it even works in a lot of web forms. You know how sometimes web forms auto fill, but then they put stuff in the wrong fields? A lot of the time you can go to the field that filled in and the wrong info highlight it.

00:51:27

Pick it up, move it to the correct field. You'll have to try it.

00:51:30

But think about this. I mean right there, that one little mini tip. I'll show it to you one more time.

00:51:36

Get your mouse to the right place, highlight release, click that allows you to pick it up. Drag it, move it. That little tip right there.

00:51:44

Once you get good.

00:51:45

At it save you a second or two over traditional.

00:51:48

Cut and paste operation.

© Randall F. Dean

00:51:52

But I'm betting I gave at least somebody watching this video right now.

00:51:56

With that little.

00:51:57

Tip working in all those different programs and places.

00:52:01

Three extra days this year I just gave you.

00:52:02

Three days. You're welcome now.

00:52:05

Let's see what happens when I hit.

00:52:06

Save and close.

00:52:08

Remember this classic outlook, so I just created this new contact based off of that e-mail and the signature in the e-mail. Let's see what happens when I.

00:52:14

Hit save and.

00:52:14

Close it checks the database, so I'm not creating unnecessary duplicates and this is a good time.

00:52:22

To talk about the fact that if you're playing around with the onboard camera on your PC to see how it works to add in a photo into a contact, you might want to be better prepared that your picture is going to be taken.

00:52:43

© Randall F. Dean

But I'll give you a little side tip. I share my programs. Are you not good with names and faces? Here's a good little tip for you when you're at a conference event workshop. If you meet somebody you'd like to stay in touch with, a good professional contact.

00:53:00

Get their business card because I've noticed something weird about the way the human mind thinks you might forget their name. You'll have a conversation with but 10 minutes later you forgot their name.

00:53:10

But the weird thing about the human mind, you'll probably remember the company they're working at.

00:53:15

Isn't that odd? You don't remember the name, but you do remember the company.

00:53:21

Well, if you get their business card when you get back to the office, if you're not good at connecting the names and the faces, what you can then do is go see if they have their headshot out on LinkedIn or Facebook or another social network snippet with the snipping tool that's in Windows, and then install that little picture.

00:53:42

Into their contact. And if you've got the company name in there, you can search by company.

00:53:47

And.

00:53:49

Attach the face and the name.

00:53:51

There you go, your little networking tip of the day.

00:53:55

Great. All right, let's see. Let's cancel out of here. I don't need to add this one in since it's already in there. Now it's time to pop out into new and web outlook and show you the

comparable there. So I'm going to not save the changes. I'm already in there. Oh, there's my little snooze this time. I'll dismiss it. And then what I'm going to do.

00:54:16

Is pop into new web outlook.

00:54:20

And I'm going to move myself down over here. I think because do you remember the my day button up here?

00:54:29

Let me show you something.

00:54:31

Cool. Click on my day.

00:54:33

You can get to calendar. Let's go see if it brings in the full To Do List this time. Yep, there it is. There's my To Do List. Notice what I can do now.

00:54:42

Click on the e-mail, hold the click instead of dragging it to the left like in classic, you drag it to the right and when you drag it to the right, depending on which tab you're in, you can create an event or a task from the item. Let's drop it.

00:54:58

It just created this task at the very top where I can then come in create.

00:55:06

Oops, sometimes it does that jump. If it does that, just quickly click back. I don't know why it does that. I've seen it happen a few times. Create if I can create hand out PDF for video program.

00:55:23

And notice. Did you see what's right below it?

00:55:26

© Randall F. Dean

That's the one I just created in classic outlook, so this is showing you that this is the same data file.

00:55:32

It's in the Microsoft Cloud and it's actively syncing between these two different user interfaces.

00:55:40

Classic Outlook, new web outlook. So when I'm making changes in one, if I go into the other I'm going to see the updated version but notice I just made the exact same task basically except for one little thing. And when I first started using this in new web outlook I was a little bit upset because I'm like wait.

00:55:58

I I can't.

00:56:02

Make a doody.

00:56:04

I try to right click right there.

00:56:05

That's why this popped up. That isn't what I want.

00:56:08

I was like, so are you telling me I gotta come out to to do launch to do find the task and give it a due date? That's clunky. Didn't like it.

00:56:16

Then I figured out the shortcut. If you just created this one. Come down here, click on a different one, then come back up and now right click.

00:56:25

So you click off, click back on, but it's a right click when.

00:56:27

You come back.

© Randall F. Dean

00:56:29

And now you can edit the title. You can block the time on your calendar. You can set a reminder. You can set the due date. All the things that I was showing you in classic slightly different layout on.

00:56:41

How to do?

00:56:42

It, but you just do that here. And like I said, all you have to do is once you've added the text of what it is you need to do, click off.

00:56:49

Then re click right.

00:56:51

And you can do all those functions and features.

00:56:55

That's how you create a task.

00:56:58

Let's now do a drag drop.

00:57:01

And add is an event.

00:57:03

And.

00:57:05

Boom.

00:57:07

Just like in classic, outlook pops up the calendar window this time in new or web outlook and then what you do is you pop in here and you create handout PDF video.

00:57:22

© Randall F. Dean

Time.

00:57:23

Date first to Morrow time.

00:57:28

1:00 PM just like I did in the previous one. And look what's down here in the bottom. Let me get.

00:57:33

Myself out of the way a little bit.

00:57:36

There's that e-mail. It's down there. You can use it. You can put your cover note right here, and all you have to do if.

00:57:42

You want to invite people to this meeting.

00:57:45

Just click right here and the names will pop up.

00:57:49

I would click there but it will show you a bunch of names. I don't want you to see their names. Just click here. Trust me.

00:57:55

It works all right.

00:57:57

So you can create a new calendar item. One more for you to look at. Let's close this.

00:58:05

I don't need to keep that. It's already in my task list. Oh, there's my little snooze again. So I'm going to dismiss this this time and what I want to show you is this. How do you add somebody into your contact database? And this is actually, you don't need my day open for this one. Just open the e-mail. Because when you open the e-mail.

00:58:26

© Randall F. Dean

If the person is already in your database and you hover over their name.

00:58:31

It will give you the option to update.

00:58:36

But if they're not in your database, you come over here to the ellipses. The three little dots, by the way, wherever you see ellipses in your software, go click on it and see what's hiding in there. There's usually goodies inside of here right now. It says export data, but actually what you want to do if it's a new person, it will also see.

00:58:56

Add to contacts and it will even give you the option to add to favorites. Let me see if I can do that with a different e-mail in here.

00:59:05

And now let's try this.

00:59:08

Let's open the e-mail. Remember, you got to do it from an.

00:59:11

Open e-mail hover.

00:59:13

And now look, it changed it. I could call, I could send an e-mail. I can go find this guy on LinkedIn. And if I come over here.

00:59:22

Edit contact remove from favorites and if I wasn't in there it would say add to contacts. So what's interesting is what this is seeing right now. It's actually thinking that my Gmail address is a different entity than my outlook address, even though they're both.

00:59:41

And obviously you could fix that, but I wanted you to see where to look to add someone to contacts.

00:59:49

© Randall F. Dean

All right.

00:59:51

Oh wait, there's more. We're almost to the end of this strategy session here and you know, looking at time, I want to make sure I I honor your time so that we can craft this in the appropriate way. But I really wanted to make sure you understand the fundamentals of this and as such.

01:00:12

I want to go back and show you one more thing.

01:00:15

Randy.

01:00:17

What if that e-mail has an attachment? If you do a left click, hold drag and drop.

01:00:26

There's no attachment.

01:00:28

Uh oh.

01:00:31

Watch close.

01:00:33

I'm going to close this and instead of doing a left click, hold drag and drop.

01:00:38

First, by the way.

01:00:39

You've been watching me for a while. Let's have a little fun. Let's open the e-mail.

01:00:44

And here comes your dad joke of the session. What do you call a squirrel with only half a tail? I'll let you ponder that while I open the attachment.

© Randall F. Dean

01:00:57

No jokes.

01:00:59

I actually chased this little guy down when I was down in Nashville TN because when it ran by me, that's not a chipmunk. When it ran by me, that's a full size squirrel. That's like small cat sized. When it ran by me and went, Oh my gosh, that's a living.

01:01:13

Dad joke I have.

01:01:14

To go take a picture of that squirrel.

01:01:17

Because what do you call a squirrel with only?

01:01:19

Half a tail.

01:01:21

Lucky it got away.

01:01:25

All right, so let's go back and show you the trick. Here's the.

01:01:28

Trick close the e-mail.

01:01:30

Go out here to the e-mail and this time, instead of doing a left click, hold drag and drop. Try a right click, hold, drag and drop.

01:01:40

And look what this does. It gives you some different options. I don't recommend you use move here as task with attachment because then the e-mail leaves the inbox becomes the task. So if you need that e-mail for later reference and filing or to create other tasks and.

© Randall F. Dean

01:01:56

Items you don't want to use that option. Instead use this one copy here as task with attachment. Because look what this does.

01:02:05

It brings in the item like a task, but then it brings in this little icon of an envelope and if you double click on this it opens the original e-mail which is inside there. Now with the attachment. So it's all there.

01:02:20

OK, so instead if it's got an attachment that you want to have as part of the task or the calendar item, well, wait a minute. Would you just say let's close this one and not going to save changes? Let's take that same e-mail, right click, hold, drag and drop to calendar and look.

01:02:39

Copy here as appointment with attach.

01:02:42

Then.

01:02:43

Few other options too. I mean you could go in and play around with these and see what each different option does. Just be aware that if you use the move here, I'm pretty sure it leaves the inbox and becomes the calendar item or the task. So be careful with that one. And so with that.

01:03:01

You can basically also add attachments to your task and calendar items if you need to reference them when you're completing the task or the attending the calendar item.

01:03:14

Let's go back to new and web outlook because in new and web outlook, let's close that e-mail. I opened up here.

01:03:20

© Randall F. Dean

And close that. Let's go back to the inbox. Let's go back to the my data button. Let's go back to the To Do List and I'm going to show you it doesn't matter. And let me show you why. Because if you create a task from an e-mail in to do actually I'll grab the squirrel.

01:03:40

Pick it up, drag it, drop it as a task.

01:03:44

There it is and notice.

01:03:47

It says e-mail well if you click on this it opens the e-mail with the attachment.

01:03:53

The emails like it's a link.

01:03:56

It's not inside the task per se, but the link to the e-mail is.

01:04:02

All right.

01:04:04

So.

01:04:06

I'm going to close that.

01:04:08

It's a new web.

01:04:09

Little advantage right here to bring over your attachments and the links to the e-mail, and then you don't have to do that little piece of extra work. You know, I will say I still think I like classic a little bit better, but there are some features in new web that are.

01:04:25

Not bad.

© Randall F. Dean

01:04:27

All right.

01:04:28

Now you understand why.

01:04:31

I want you to.

01:04:34

Follow this new tree.

01:04:36

Because they made it easy.

01:04:38

They've made it easy.

01:04:40

First part decide what you need.

01:04:42

To do next quick.

01:04:43

Do it only handle it once.

01:04:45

Longer than a couple minutes, add it to your task list or calendar, which in both classic outlook and new web outlook is a simple drag and drop operation in both one you're going to the left to the icon list, the other you're going to the.

01:05:02

Date.

01:05:03

To the my day dropdown panel.

01:05:06

© Randall F. Dean

Work about the same slightly different user interface, by the way. This is one of those good times. Since this is a video program for me to remind you you could be playing this video program on screen too. If you have a dual monitor setup with your outlook open on screen one and you could rewind to the beginning of this little segment.

01:05:27

When I talk about how to convert emails into task calendar and contact items and you can practice depending on whether you're using classic outlook or new in web outlook.

01:05:40

Yay.

01:05:43

All right, we got one more thing we need to cover, but the plan is to then talk a little bit about what to do with the e-mail once you've reached the done for now level.

01:05:55

Because I said should go into either a subfolder or you delete it.

01:06:01

This brings up the question about putting things into your subfolders. Let's talk.

01:06:06

About that now.

01:06:14

All right, so I want to come back to the decision tree and we've talked about this sort of top part of the sort of process and flow chart, you know, couple minutes or less. Do it now longer than a couple minutes task or calendar and then you know I said that this is the done for now, which is the time.

01:06:34

When it should leave the inbox, you know either file it or you delete it.

01:06:40

I found a surprising amount of.

01:06:45

© Randall F. Dean

Hesitation and uncertainty these last 20 years by people basically being afraid.

01:06:55

To put their emails away, and let's sort of talk about the mentality here because it actually makes a little bit of sense. See, here's the problem. A lot of times emails cross over multiple different topics. You know, you could have one e-mail that's talking about.

01:07:12

You know your main project with your main client vendors involved. Your coworker bills involved, and you know there's a sub project that also is very important that sort of fits in too. So you got like 5 different things.

01:07:30

And then you got to make a choice. Which folder does it go in? And because of that, a.

01:07:37

Lot of people go.

01:07:39

I don't know, and I'm afraid if I put it in any of those folders, maybe I won't be able to find it when I need it. So guess I'll just leave it in my inbox.

01:07:49

And that's where you get the creeping crawling in box that goes pages and pages long over time, especially if you're also marking your emails unread and flagging them. You see. So the two are sort of like conspiring with each other to cause you distraction, stress and overwhelm.

01:08:09

UM.

01:08:10

And.

01:08:11

I think there's a lot of people missing out on the fact that one, there's ways to be more efficient with managing your folder structures.

01:08:21

© Randall F. Dean

And two, there is a feature inside of Outlook, both classic Outlook new web outlook that will give you significantly greater confidence in finding what you need when you need to find it. So let's go take a look at a couple of these things.

01:08:43

Before we wrap this one up.

01:08:46

All right, so I want to pop out.

01:08:49

Into my outlook, I'll start once again like I have been in classic.

01:08:54

And the first thing I want to talk about when it comes to folder structure is you know how many of you have something like this going on in your primary inbox. And I do want to show you I have three different inboxes that I'm actively managing inside of here. One thing that I'm doing though is regardless of where things come in, I'm still doing that drag and drop to task or calendar.

01:09:15

And because I'm doing that here and the main account is my 365 connected Outlook account.

01:09:24

The task items and calendar items are actually going into 365. This one comes from an outside web hosting firm that also hosts my website, and so you know it would not be good if my tasks were still residing over there. I want them to be part of my 365.

01:09:45

System.

01:09:46

So.

01:09:47

You know, I've got that going on.

01:09:51

© Randall F. Dean

I'm betting a number of you have something like this going on inside of your primary mailbox where you've got a drop down.

01:09:59

And inside the drop down you'll have folders and in some places you'll have folders inside of folders, and in some places you'll even have folders inside of folders inside of folders.

01:10:13

And if you've been using your outlook for long enough.

01:10:17

And you've stayed at the same company, you're in the same job long enough.

01:10:22

And you're making folders.

01:10:24

Every time you think you need a new one.

01:10:27

This is sort of inevitable. You're going to end up with something like this.

01:10:33

Wow, that's a lot of folders and a lot of drop downs.

01:10:33

Oh.

01:10:38

And I will say this, you know, just from a purely functional perspective.

01:10:45

Every time you add another layer into your folder structure.

01:10:50

It's possible you're not just increasing the complexity sequentially. You might be increasing it exponentially and that will give you once again less confidence to put your stuff away.

01:11:06

© Randall F. Dean

A couple little basics here. Of course. I want you to see if you want to add some new folder inside of a folder, go to that folder that you want to drop the folder in, right click and then you can hit new fold.

01:11:17

This is also where you can move folders. Let's say you say have a folder that's in one place, and then something changes and now you realize it's got to go up inside a different master folder. You can do that. Here's a good way. When your boss walks by to make it look like you're getting your work done, you can mark all as read.

01:11:37

And down here is add to favorites. Now this is a good one to to know. I want you to take a look up here. So this is my favorites list and I can even take this favorites list right here if I want. And.

01:11:54

You know, I can actually collapse it by hitting this little carrot look for wherever you see these carrots, because these carrots can help you hide things.

01:12:04

And show them again. And if you hide something and then you show it again and then you see the push pin, you can click on the push pin and that makes it a semi permanent view. In this case you'll see I've got folders up here in my favorites. These are all ones that I did that right click on the folder down here and then marked it as a favorite so it would move up here.

01:12:25

And one of the nice things is, like I said, I got 3 inboxes. Notice that I can see Inbox One, Inbox 2 and Inbox 3. All right here, sort of crunched together.

01:12:34

Plus my sent folder and my drafts folder. The drafts folder will be important in the next video lesson, but I can also collapse this if I want to, and if I collapse it now, I can actually see my primary work e-mail inbox and all of the subfolders.

01:12:53

To them.

01:12:54

© Randall F. Dean

And then I can get down.

01:12:55

To the other inboxes too.

01:12:58

OK.

01:12:58

OK, now one of the interesting things.

01:13:01

About this though.

01:13:03

I want to show you a couple of things here. I already showed you how you can add a folder inside of a folder by simply doing the right click and new folder. What I wanted to show you though is notice the naming formula that I'm using here.

01:13:19

Starts out with blurbs, boss clients, mastering Microsoft prospects Randall dean.com, e-mail backup speaking Bureau streaming programs, timely tips, vendors. Wait. What accounting? Finance.

01:13:33

Aye. Wait, wait. Alphabetical to here, then the alphabet starts over again.

01:13:41

Do you see the difference?

01:13:44

Look real close.

01:13:45

When I named these folders, which I use far more frequently than the folders below this.

01:13:55

© Randall F. Dean

I put a special character at the front of the name and to change the name. All you have to do is click on the folder.

01:14:03

And click on it again.

01:14:05

And again, and then it'll do this. And when it does this, you'll see how I did it. It basically was 3 clicks. I clicked on it once to select the folder I clicked on it again to highlight the folder and then I clicked on it the third time, which gave me the ability to come in and rename.

01:14:25

The folder and you'll notice that right at the front.

01:14:29

I added in the special character just put in any special character. I use exclamation points because they're right over on the far left. But if I wanted, I could put in stars or dollar signs or whatever. And honestly, you could even make a couple different levels using different.

01:14:50

Starting characters that will depend move things up or down depending on how you want them. You know, so I could see making two or three different levels of this depending on the special characters you're using. You can even number. You can even put numbers at the front and if you did like one through 9.

01:15:10

We'll have them in that order. So you could really get very specific as to how you want these to show and utilize the way you do your names by putting the special character before the actual name. And then when you get down to your normal folders.

01:15:27

Then you can just have it be normal alphabetical. Pretty easy and this same strategy doesn't just work in your top level folders, it'll work in your subfolders too. So if you go into subfolders and you have a pretty significant list inside any one of these folders inside of folders, you can rename to get those to the top of that.

01:15:47

© Randall F. Dean

Inside directory also and listen to this. That same strategy also works in naming your folders in OneDrive.

01:15:58

So if you open it up in Windows Explorer you can see you can name your folders in a way using special characters to make your most used most important folders move to the very top of your structure. So this is just sort of basic housekeeping type stuff, but will make you, you know potentially able to.

01:16:19

You know, get your structures in place the way you want them to be, and I'm going to reopen the favorites. I like to just sort of have that open so I can sort of see what's going on in those other two inboxes. See if there's anything I need to go take a look at. Now. One of the things, though, that I want to show you.

01:16:33

Here is that there is another feature and this feature I think is deeply underused for people that want to get control of their inboxes. It's called categories and I want you to notice something here real quick. I'm going to move myself a little bit out of the way down here. Did you?

01:16:52

See all these?

01:16:53

Little like it almost looks like a flag.

01:16:55

You know the different colors of the flag, but really what these are are little labels. You'll see the high column top here is called categories. And by the way, part of the reason I can see all these columns is because I have the reading panel turned off.

01:17:13

In my inbox and most of my subfolders I have the reading panel turned on, but in my inbox I like to see these column headings because you can actually come in here and sort. Hold on let's do this click on the subject line, click subject and it'll sort it into subject line order or come over here.

01:17:33

© Randall F. Dean

Click on this click on the received it'll switch it into date received and then if I flip it, it'll put oldest at the top, newest at the bottom, vice versa. So you know I like having these column headers for this. This column is categories and what's interesting about that is watch this. I can come up here and click.

01:17:54

I did a quick double click it.

01:17:56

Opened the e-mail.

01:17:59

And here is the categories button.

01:18:02

All right, so I'm going to go into the categories and taking a look at this, this e-mail from Joe Schmo, obviously a test e-mail for something I was showing in my AI program. This e-mail from Joe Schmo, I would actually let me see, I want to go into all categories.

01:18:23

I'm not sure I have a category for AI.

01:18:27

I don't see 1 yet. Isn't that interesting? So let me show you what I can do here. I could either rename one of my existing folders to AI by clicking on this, but.

01:18:41

I think what I'll do, I could also just click on over here and click again a second time, see how it changed the highlighting from being highlighted to. Now you can actually get in and do edits, but I think what I'll do this time instead of doing an edit to zingers, I'm going to come over here and actually hit new.

01:19:01

And notice something when you hit new.

01:19:04

It's going to assign a color automatically for you. You don't really have to think, but you can change it if you don't like it. OK and I am going to put in a new category AI info and hit OK

© Randall F. Dean

Now moved it to the bottom, but when I come in next time I'm pretty sure it's going to move back up into alphabetical order as we talked about.

01:19:26

And I'm going to hit. OK. And now it's added the label AI info to this e-mail. Now let's see what happens when I close the e-mail.

01:19:37

Yep, there it is. AI info.

01:19:41

I want you to think about the word categories.

01:19:46

Because I think a lot of people are like, what does that really mean? Categories.

01:19:52

Let me give you a different word to use labels. That's easy and notice that this one has four different labels. Marketing, PR agencies and bureaus, clients and prospects, etcetera. This one also has four different labels. You can see by the four colors, marketing, PR, business, client prospect zingers.

01:20:13

And this one just has one label AI info.

01:20:17

And So what I'm doing here is remember that e-mail that had five different things, you know, the project, sub project key, client key, vendor key, coworker well folder. Do I put it in? Don't know. Guess I'll leave it in my inbox.

01:20:32

Because in Microsoft.

01:20:34

In outlook.

01:20:36

When you put an e-mail into a folder.

© Randall F. Dean

01:20:40

You can only put it in one folder.

01:20:43

You're not allowed to put it in multiple folders at the same time, and somebody's like that even possible. Actually it is. You can do that at Gmail, but in in Microsoft you have to pick one. It's linear.

01:20:58

Uhm.

01:20:59

But you can add a bunch of labels.

01:21:03

So what if you had labels?

01:21:07

For.

01:21:09

Key project subproject, client, vendor, coworker.

01:21:14

You would make everyone of those a label.

01:21:17

You could add.

01:21:19

All of those labels to that e-mail.

01:21:23

And then you put it in the folder. That makes most sense now.

01:21:30

But then let's say you come back later and it's not where you.

01:21:33

© Randall F. Dean

Thought you put it.

01:21:35

Pani.

01:21:37

Don't panic. Just come up here and search box.

01:21:40

Because if you click the search box, you'll see it will give you a quick little drop down sometimes and I want to show you something over here. Notice there is a second little caret. Like I said, whenever you see caret click on it, see what it does. This opened up something that looks much more like a more sophisticated search and filtering mechanism.

01:22:01

Now notice I have options I can select.

01:22:03

Different options for the mailbox. Do I want to just search the folder I'm in? Do I want to search subfolders within the folder I'm in? Do I want to search the current mailbox? Do I want to search all mailboxes do?

01:22:17

I want to search everything.

01:22:20

And the reason that I'm sharing this with you is if you're not sure what folder you put it in, but you're pretty sure it's in this mailbox, you could just select current mailbox.

01:22:30

And then.

01:22:33

Also come down here to your categories. Look, there's categories.

01:22:38

And you could pick the category. Let's pick the category AI info and let's hit search.

© Randall F. Dean

01:22:48

There it is. What's funny is this is the one that was in my.

01:22:52

Inbox and I'm still in my inbox.

01:22:54

One more little.

01:22:55

Thing I would say though, remember this too.

01:22:58

If you can give it more than just this.

01:23:02

You can. The search will be more specific. Let's say you know who it was from or who it was sent to then.

01:23:14

Or, you know, at least one word in the subject line.

01:23:19

You could get more specific. The search will then be tighter.

01:23:24

OK. And so, you know, keep that in mind when you are doing your searches, but understand and know that you can set up labels that are unique to you.

01:23:42

And your job. And here's something else you should know, and I think it makes a ton of sense. I'm going to clear the search. So now I'm going to be back into my inbox like I was before. I could send this e-mail, right?

01:23:54

Here.

01:23:55

© Randall F. Dean

To other people.

01:23:57

When they receive it, those categories are not there on their version of the e-mail.

01:24:03

And.

01:24:04

I think that makes a ton of sense, and let me explain why every company is different. Every job is different. Your labels should be for you and your job, and your labels won't make sense for many other people. So make your labels. How do you make labels? That's actually pretty easy. Let's go in and.

01:24:25

I like to get into an open e-mail to do this.

01:24:29

And then I like to come up to the top to categories.

01:24:33

And I can come to all categories. That's one pathway. Let me show you another pathway that works really well. You can just right click on a message in your inbox and get to categories this way too. And then you can come over and select categories or deselect. Look, I can take marketing, PR and I just got rid of a category right there by clicking on that.

01:24:53

But I can also right click categories and come down to.

01:24:58

All categories if I click all categories it brings up in classic outlook the category Wizard. Now I'm going to show you a new web, the comparables that's coming OK, slightly different setup but same categories. OK.

01:25:18

And notice this.

01:25:21

© Randall F. Dean

If you want to make a new one, you just come up here, hit new if you want to change the name, you hit rename. And I'm not kidding you. When you come in here the very first time you use it, it will have like 5 or 6 of these and it will literally have the words yellow, category, purple category, green category, blue category, red category. It'll literally have those.

01:25:41

Words well, on those initial ones, just click on it like I showed you a couple of times or come over here and hit rename and you can change it to whatever name for whatever label you could find useful.

01:25:56

And I have a whole slew of labels. Look at how many labels I've got. Let's just page down through this. This is all categories and I'm going to come in here. Let's page down.

01:26:08

I got a lot.

01:26:09

Of categories. Some are projects, some are related to clients, some are related to vendors, some are related to coworkers, some are related to sub projects within main projects, activities, events.

01:26:25

Whatever labels you need processes.

01:26:29

Make a label, because then you can go search by label and find your stuff no matter where you put it.

01:26:36

It's like the ultimate.

01:26:39

What do they call?

01:26:40

That air tag.

01:26:42

© Randall F. Dean

You can air tag all your emails and then you can go find them wherever the heck you left them last time, like your car keys.

01:26:51

I really need to get some air tags but so this is how you can set them up and use them. Now let's show the comparables here real quick. I'm going to close this. Let's go in now into new.

01:27:03

And web outlook.

01:27:04

OK, now notice a couple of things. Let me just show you this and now I've got it back to the form that I want it to be.

01:27:12

With my special characters superseding.

01:27:17

The normal folders, just like I showed you before. So the special character setup will work here. The subfolders will also work just like we showed you before and notice once again you can right click on any of these and add to favorites to move them up to your favorites.

01:27:37

Category up here.

01:27:39

So you know, a lot of similarities in terms of the folder structure, folder design. Notice that I can see some of my labels here and what's interesting a little bit different, let's close my my day button a little bit different because it's actually put the labels.

01:27:59

Right inside the subject line here. Now I want to try something. I am going to do a right click U here.

01:28:08

And let's see.

01:28:10

© Randall F. Dean

This is cozy. Let's go to compact and see what that does. Actually, I like that view a little bit better. I'm not as happy with the with the one thing I wanted to see if it gave me some other options in terms of you can change the size of the columns right here.

01:28:27

You can click the check box by any one of these emails to select it.

01:28:35

And then notice this.

01:28:37

Categorize. But look at look at what they've done.

01:28:41

That's the image of a label that's an icon for a label, so even Microsoft says, yeah, these are labels.

01:28:48

You use your labels to categorize now. Notice it's a little bit of a different look.

01:28:53

You don't see the whole list. If you want to see the whole list, you got to hit all categories. Now I can see everything if I want to add a new category, I can click here. If I need to manage my categories though, then I have to click on this and this is a very different look from the category Wizard I just showed you in.

01:29:13

In classic.

01:29:15

Outlook, but take a look, it's got some of the same features you can mark which categories are your favorite. You can edit the name, you can delete the category if you no longer like it, you can create new and so you can get in and set up your categories and new and web outlook.

01:29:34

Edit change, modify, create more.

01:29:39

© Randall F. Dean

The same way that you did.

01:29:41

Yes.

01:29:43

In classic outlook.

01:29:46

And then notice this. Let's close this. Let's go up to contact test. Now that I've got it selected with the checkbox, let's go U to categorize and I want to add zingers.

01:30:04

So I've added zingers as the category in here.

01:30:08

It's a little bit different in here. I keep checking to see if they change this. You come up to search.

01:30:16

So you click search.

01:30:18

And then what you can do all mail files people here you can specify you want to search current mailbox just the inbox. You know different locations etcetera. But notice that you can also slide over here to the side.

01:30:38

With this thing that looks like a filter, and that's exactly what it is. It's a filtering tool. If I click on the filtering tool because I left it as current mailbox, I can search by name. I can search by subject. Now the one thing that's missing is categories.

01:30:55

But it's not. Let me show you.

01:30:57

What?

01:30:58

© Randall F. Dean

I mean, you've got this field called keywords. OK, let's type in zingers.

01:31:07

And then hit search.

01:31:10

Boom, boom, boom, boom. And somewhere in this e-mail.

01:31:16

It's got to have the word zinger. That's why it came up too. So it will pull up not only emails that are in that category. You just got to know the names of your categories. It might pull up some.

01:31:31

Emails that have the words inside. So it's a little bit different. 1 little thing that I was almost thinking that might help you if you're using new and web outlook.

01:31:47

Is.

01:31:48

Maybe purposefully, slightly misspell some of your category names, because if you do that then you're going to get a legitimate category search.

01:32:01

And it won't bring in all these other emails that might have that as a word in it.

01:32:06

Right.

01:32:09

If you do that, then I wouldn't have this e-mail here if I just slightly misspelled zingers. Maybe I'd take out the ID and just make it ZNGERS and I know that because it's I've named it. I made it, I use it, I would.

01:32:23

Just put that.

01:32:24

© Randall F. Dean

In ZINGERS and I'm pretty sure it would only bring up the stuff that has the actual label.

01:32:30

Versus this extra stuff and that will be important like I have one of my folders is called clients, prospects, clients is a very regularly used word and e-mail.

01:32:42

Else and so like when I did a search on you know clients I was finding I was getting you know 20 emails for every one that was a category. And so just little inside tips here to make this work better. You don't have to worry about any of that in the classic outlook because when you do the category search.

01:33:03

By category, it's doing it by category, not by keyword. Little bit different. I keep watching this though.

01:33:11

As of the time I'm filming this, I keep hoping they're going to add in an actual search by category in here, I bet it will show up, I just don't think they've quite got to it yet and they're 50 million line long troubleshooting list of things to make new outlook better so.

01:33:31

Send that in to their help thing and it'll show up sometime in the next 6 to 24 years. OK, so but now, now that you understand that you can build these labels and now you understand how to set up your folders.

01:33:45

And get your folders in an order with favorites and also special characters that you like.

01:33:54

Let's talk about.

01:33:57

The three different competing strategies in e-mail management, science, sexual thing.

01:34:05

On how you should set up your folders.

01:34:08

© Randall F. Dean

Now the old science, I'm going to go back to classic outlook on this. The old science is real simple.

01:34:16

When you need a folder, make a folder.

01:34:19

If you use it a lot, give it a.

01:34:21

Special character move it to the top.

01:34:23

If it belongs inside a folder, make it a subfolder inside of a top folder.

01:34:30

And then if you need to go with even.

01:34:33

Deeper level you can even put folders inside of folders inside of folders.

01:34:37

Cool.

01:34:39

Like it?

01:34:40

But problem.

01:34:43

You use it long enough.

01:34:45

You're going to get a lot of.

01:34:45

Folders because look at this, every single one of these with a carrot means I have subfolders within and so I've got probably about maybe close to 15.

© Randall F. Dean

01:34:59

15 folders with subfolders and in some of those subfolders. I know I've got like in my client and prospect folder.

01:35:09

100.

01:35:10

And then in some of.

01:35:11

Those I got even more folders.

01:35:14

I one time and this was a few years ago, I haven't done this in a while. I one time counted every single folder and subfolder in my directory and I had like more than 400 folders.

01:35:26

And I want you to just take a timeout on that.

01:35:29

That's a lot to remember.

01:35:31

And it would be pretty easy to misfile things or lose things using that. By the way, little important.

01:35:37

Tip I think I covered it previously. Control Z the keystroke combo. Have you ever been getting ready to move an e-mail into a folder? You're coming down here. You're sort of trying to get to the folder that you want to.

01:35:49

The jumps and you didn't know it was going to jump and then it drops it and you don't.

01:35:53

Know what folder it just dropped.

© Randall F. Dean

01:35:54

It in control Z Windows keyboard. It will come back into your inbox.

01:36:02

And then you can do it again, by the way, since I mentioned that, let me show you this. If you're afraid of that because you got the folders, you can always right click on an e-mail and come down to move. It'll show you a list of folders that you've been in recently, but then you can come even down here to other folder and you can get your entire directory.

01:36:21

Folders and put it right where you want it to, so there's two ways you can move. You can pick them up and drop them, or you can right click and use the move capability inside to move them.

01:36:35

OK.

01:36:38

Building your giant, complicated file cabinet? That's option one.

01:36:44

There is a second theory out here right now.

01:36:49

That says.

01:36:51

Maybe you only need one subfolder?

01:36:55

And you know what I would call that subfolder.

01:36:59

Done for now.

01:37:01

There's my done for now folder. I haven't really put anything in here because I'm still sort of using my upper directory on this, but I want you to hear this.

© Randall F. Dean

01:37:10

You could also call it a sweep folder.

01:37:12

If that makes sense too.

01:37:15

In essence, let's go back to our taming e-mail decision tree.

01:37:24

In essence, when you get to right here.

01:37:30

You either got it done because it was quick. You put it on your task list or calendar, so you'll work on it later at the appropriate time and urgency.

01:37:40

You're done for now.

01:37:44

Well, you could just take everything once you hit done for now and put the mall in the done for now folder and that's basically like having the mall in your inbox one level down.

01:37:56

So be like if you left everything in your inbox but you're not leaving it in your inbox, you're one level down. It's a sweep you're done for now.

01:38:08

There is some sense to that, because then what you would do.

01:38:14

Is you search.

01:38:15

To find what you need when you need to find it.

01:38:21

Using only one subfolder.

© Randall F. Dean

01:38:24

And I think that idea makes even more sense.

01:38:29

If you've set up those labels in categories, so I would add a little sub.

01:38:36

Task here to this decision tree. New e-mail comes in. What do you need to do next? 3 minutes or less? Do it now only handle it once, longer than 3 minutes task list or calendar and then.

01:38:53

Label.

01:38:55

E-mail.

01:38:59

With all labels you need.

01:39:02

Before file.

01:39:05

By the way.

01:39:07

You don't need to label your emails if you're going to delete them because you're deleting them. Although you know what I found out, some people are actually they found out that their work is not automatically emptying the deleted items folder.

01:39:26

UM.

01:39:27

After like 60 days or 90 days, a lot of organizations have like an automatic, you know, empty the deleted folders on everybody's after 60 or 9 days. But some organizations haven't done that.

© Randall F. Dean

01:39:39

I found some people that were using their deleted folder.

01:39:43

As their sweep folder or done for now folder in some of my programs as long as you know they're not deleting them, that would work. And then actually it would make some sense to put labels on something you're about to delete so you know, maybe there is a circumstance where that makes some sense. But in essence I just want you to sort of think about this.

01:40:05

You've got one extreme where you've got more than 400 folders, another extreme where you got 1 subfolder. That's it.

01:40:15

Both of them, though, give you the option to.

01:40:21

Get that stuff out of your inbox that you need to keep for later.

01:40:26

But I would actually argue that the idea of the one folder.

01:40:32

Might make a lot more sense.

01:40:35

Now that you know you can create and add multiple labels to any single item in your e-mail folders.

01:40:44

Including items in your inbox or your sent folder.

01:40:51

Later on, you're going to find out that categories also are very usable in calendar, tasks, contacts in Outlook, and we're going to talk about that in later programs.

01:41:04

But.

© Randall F. Dean

01:41:07

I had mentioned there was 3 strategies.

01:41:10

I'm a pragmatist.

01:41:13

I'm not dogmatic.

01:41:15

About most of this stuff, I want you to find the strategies that makes sense but work for you and the way your mind operates and thinks and everybody's a little bit different when it comes to that.

01:41:32

I was sort of thinking about these two extremes of, you know, so many folders, almost no folders. What about a hybrid option somewhere in the middle where what you have is maybe?

01:41:46

You know, almost all of us have a few main projects or a couple main clients or you know, couple of key vendors, a couple of key coworkers. We're interacting with all the time.

01:41:56

We'll make those folders.

01:41:59

But then have the done for now or the sweep for everything else. So now instead of having 400, maybe you got 10.

01:42:11

That's way more manageable.

01:42:14

You can be more specific with the things that you're working on most and drop a lot of the things related to those into those specific folders, but everything that's sort of beyond the major stuff.

© Randall F. Dean

01:42:27

Throw it into that done for now sweep folder.

01:42:31

But label it first, label it first before you put it in any of these so you can use search to find it later.

01:42:40

And if you.

01:42:40

Know you can use search to find it later.

01:42:43

Both by keyword and by category, and maybe by, you know subject line or location who it was sent from, who it was sent to.

01:42:56

You can find your stuff.

01:42:59

Which means you put your stuff away.

01:43:02

Don't leave it in your inbox. Why do I? Why do I not want you to leave it in your inbox?

01:43:09

Because when you leave it in your inbox.

01:43:12

Science has shown that even if you dealt with it.

01:43:16

You're probably going well. Why do you have 4?

01:43:20

Because I'm showing examples on a lot of these.

01:43:24

© Randall F. Dean

These are all example emails that I have to do when I'm doing my e-mail program. If I wasn't teaching this course, this would be empty right here. This would be 0 emails I would be to a zero inbox.

01:43:38

But it doesn't mean I have 0 emails, it just means there's none in the inbox. They're all in the subfolders and if you know I did what we were just talking about, it could just be the one subfolder done for now.

01:43:54

I want you to find the system of folder design and folder manage.

01:44:01

Label design and management and your ability to use search to build the systems and structures that give you confidence to put your stuff away when it's done for now.

01:44:22

And why do I want you to put it away?

01:44:26

Because the science has shown that if you take that thing that's done for now and you just leave it in your inbox, even if it's marked red.

01:44:34

Not the color Rea D.

01:44:37

Even if it's marked red.

01:44:41

About 80% of people.

01:44:44

We'll look at it again.

01:44:47

To make sure that they've already previously handled it or not.

01:44:50

© Randall F. Dean

At.

01:44:53

You're looking at something you already dealt with because you can't remember if you dealt with.

01:44:57

It or not?

01:44:59

Do you know the clinical definition of insanity? Actually, I found out there really isn't a clinical definition of insanity. It's a good joke though.

01:45:08

Yeah.

01:45:12

Don't leave them in your inbox.

01:45:15

And with that, this is sort of the end of the program, but I want to give you something to chew on here.

01:45:20

Funny little story. True story.

01:45:23

Several years ago, probably a decade ago now, I'm doing this program.

01:45:28

In Las Vegas.

01:45:30

And I'm doing it for a big room like 550 people, so it's a big audience.

01:45:36

And I get done with the session I'm standing out in the hallway and this Conference Center at one of the big casino properties.

© Randall F. Dean

01:45:45

And one of the people in the.

01:45:46

Program walks up to me.

01:45:48

This is one of the best conversations I've had since I started this business. She walks up and she goes. I was just in your session. I go. Yeah, she goes.

01:45:56

What's the biggest number of emails you've?

01:45:58

Ever seen in an inbox?

01:46:01

And and I get that. I get that question every now and then and it's always funny. And I looked at her and at the time I go 164,000 she goes.

01:46:12

I got that.

01:46:13

And I go.

01:46:15

OK, she goes. But I was just in your session.

01:46:18

I go. Yeah, she goes.

01:46:20

I don't think I need to change a thing.

01:46:22

And I go.

01:46:24

© Randall F. Dean

You do have my attention.

01:46:26

Please go on, she goes. Well, you know how you said if you open an e-mail first time you you decide what you need to do with it. First time. Every time I go. Yeah.

01:46:34

She goes. I do that.

01:46:36

That's good.

01:46:37

She goes and you know how.

01:46:38

You said if it's.

01:46:39

Quick, you just try to deal with it right then and right now and I go. Yeah, she goes. That's what I do. I'm running most of my business right here on my iPhone. If I can answer it, reply to it forward it, you know, do what I need to do, you know, send a note, ask for meeting stuff like that. I do it right here right now.

01:46:55

She was doing everything in Apple Mail. She wasn't even using Outlook or Gmail. Apple Mail she was doing.

01:47:00

I go. Yeah. That's good. Yeah. If you can handle it quick, do it. She goes, and then you know how you said if it's not quick, either put it on your calendar or you put it into your preferred task. Cause I go. Yeah, she goes. Yeah, I'll go right in and make the appointment. I'll sometimes copy and paste something out of the e-mail. Put it right into my calendar, or I have at the notes.

01:47:20

© Randall F. Dean

App that's built right into the iPhone and I actually make a daily task list in there every day, and if I need to, I'll add something onto that task list and I go well, that's good. And then she goes and I just leave them there.

01:47:35

I go OK.

01:47:37

How do you find your stuff? Search.

01:47:39

I go OK.

01:47:41

But are you reading them again? She goes. No, because.

01:47:46

Once I have opened it and read it.

01:47:50

I know I've dealt with it.

01:47:54

Idol.

01:47:56

OK. But do you promise? You promise? You never, ever, ever go into one of those read emails that you've left in your inbox to open it and see if you needed to deal with it. She goes never if it's marked red. I know. I've done what I needed to do.

01:48:18

The only time I go back to an e-mail is if I need it for reference on something later.

01:48:24

And they go.

01:48:27

You're good.

© Randall F. Dean

01:48:30

I'm OK. You have my blessing.

01:48:34

Of course, then I said, I'm not sure your IT department.

01:48:38

It's going to have your blessing.

01:48:40

Because maybe because she'd been like, 20 years doing it this way or something like that, 10 years, I can't remember probably that that would be before iPhone. So I think it was probably more like 10 years, but she just never had filed the thing.

01:48:53

Never had made a folder.

01:48:54

And but she was doing almost exactly what I was talking about, except for putting stuff away. But very few people I've run into aren't that good and that discipline.

01:49:11

I think it's just easier for most people out of sight, out of mind.

01:49:14

She was doing the process the right way.

01:49:17

And she just basically didn't even create a done for now her sweep folder. She just used the inbox for all that, but she relied on herself for knowing she had done proper triage of those messages.

01:49:31

Her system was consistent and good like I did say to her, though I said I'm going to predict that your IT group at some point is going to come up to you and say your file size is just ridiculous. Can we at least archive some of the older ones into a secondary location just to make your file size smaller?

© Randall F. Dean

01:49:53

Your software is going to run better if we do that. I mean, that's the problem with getting these monster file sizes with all those emails and especially all those attachments, it can actually make programs like Outlook and Gmail a bit unstable. It's just too much.

01:50:06

Data you know, so definitely something to consider but.

01:50:13

I wanted to share that story because I think it sort of gets.

01:50:16

You to seeing.

01:50:18

A real life example of a way somebody sort of customized exactly what I was talking about to make it.

01:50:24

Fit.

01:50:25

Who they are and what their situation is.

01:50:29

But I hope that what you see from what we've covered so far in this program, this first program on taming the e-mail beast, there's another program coming after this.

01:50:40

That is a.

01:50:40

Continuation, I wanted to break these into one and two, but I hope that you see that this one was really focused on this.

01:50:49

© Randall F. Dean

Process idea how to take in that new input, run it through the decision tree to get to an appropriate endpoint each and every time. That will reduce you from looking at each and every e-mail three to seven times down to once, maybe twice.

01:51:08

But also gives you the confidence to put your stuff away because you know you have the tools you need to find it when you need it, and it keeps your quick stuff moving.

01:51:23

With your longer form work.

01:51:26

In tools that are better built for you to prioritize, including your calendar and your priority based task lists, which will be coming in one of the later programs in the series, we're going to talk about how you can set up and use that task list for better decision making in real time.

01:51:45

You know, I wanted to really deep dive this process so that it becomes sort of like.

01:51:53

The anchor you lean on for processing, not just.

01:51:57

E-mail but all new inputs.

01:52:00

What we're going to do in the next video.

01:52:03

Is we are going to actually get in and talk about some really killer cool automation tool.

01:52:12

I'm going to show a couple of tips even on AI for e-mail decision users. Although I know a lot of organizations aren't really using AI, but I'm going to give you a very non AI time saver. I'm also going to get in and talk a bit about.

01:52:31

© Randall F. Dean

Rules and notification.

01:52:33

Because one of the other big issues is people are looking at their inbox too many times per day and part of the reason that they're doing it is because sometimes urgent critical things are coming in.

01:52:45

So they're looking at everything coming in to see if it's an urgent critical thing. And I think there's some ways that you can set up with your rules and notifications, both classic and new web, that might greatly reduce the distraction you're receiving.

01:53:02

From your emails overall and maybe even from these things.

01:53:08

All right. So we'll see you at that next.

01:53:12

Video 1. Little reminder, take advantage of this format if there's something that you want to go back and practice.

01:53:20

Rewind.

01:53:22

Play hand ready to hit pause.

01:53:26

I'm on screen 2.

01:53:28

Viewer outlooks open on screen one.

01:53:31

Practice in real time.

01:53:33

© Randall F. Dean

That's how you build the skill.

01:53:36

Thanks. We'll see you.

01:53:37

In the next video, bye now.

01:53:49

I've had a few people in my programs say this, Randy.

01:53:53

I heard what?

01:53:54

You just said.

01:53:55

New e-mail comes in normal processing time. Read it far enough to figure out what you need to do next. If the thing that you need to do next takes a couple of minutes to handle those now.

01:54:06

If I did what you just said.

01:54:08

That's all I would do all day, every day.

01:54:12

I am getting so many emails and other inputs coming in I could. I wouldn't even be able to get to my work.

01:54:22

And I think there's a few people that that's actually legitimate.

01:54:27

You know, if you're getting 250 emails every day, each one takes you 3 to 5 minutes, you can do the math on that. I believe it works out something like 10.

© Randall F. Dean

01:54:36

And a half, 11 hours of work.

01:54:39

If you're getting 10 1/2 eleven hours of inputs.

01:54:42

And that you have to process every day.

01:54:46

That's not a sustainable.

01:54:49

Situation, unless that's the only thing you.

01:54:52

Have to do.

01:54:55

I mean, there's probably some people that work in customer service and their whole job is responding to customer inquiries. Hopefully it's not 11 hours a day, but if you're like in a professional position management position and I just described your reality pretty well.

01:55:15

You're not going to.

01:55:16

Like what I'm about to say.

01:55:18

Email's not even your problem.

01:55:21

There sounds like e-mail is the problem, Randy.

01:55:24

2 words.

01:55:25

© Randall F. Dean

Job design. You've got a job design problem. You were hired to do certain things. You have such a heavy e-mail and other input flow coming in.

01:55:37

That either you can't keep up with your inputs, or you can't keep up with your work. One of the two.

01:55:45

Or you do both poorly.

01:55:47

And.

01:55:49

Basically, keep everyone dissatisfied with your performance.

01:55:53

Or work 1,000,000 hours a week.

01:55:58

I don't think any of those are good options. Let me tell you what I think the appropriate option is. I think you got to elevate the discussion. And when I say elevate the discussion, here's what I mean.

01:56:09

If you're legit getting 200 to 300 emails a day and you've figured out that each one takes you 3 to 5 minutes to process.

01:56:18

And handle on average you need to share that with your supervisor and share the literal statistics. Track it for a week or two, walk in and show them what you've got on your plate in terms of inputs.

01:56:33

And then.

01:56:35

© Randall F. Dean

Basically, let them make the decision, you know, just sort of say, hey, listen, this is my reality, this is what I'm facing.

01:56:43

And as you can see, that's not sustainable.

01:56:48

And we need to either a figure out a way to reallocate some of this work, automate some of this work, redistribute some of this work.

01:57:00

Or.

01:57:04

I have to not get any of the work you hired me to do. Done.

01:57:08

It's one of the two.

01:57:13

And I know that some of you are going to make that approach. Make sure you have the data to support it.

01:57:19

And you're going to get the well, you're going to have to make it.

01:57:22

Work. We don't have the budget.

01:57:28

That is a bad spot to be. Now the bigger question I would ask at this point is.

01:57:35

Is this a short term thing that you can potentially fix overtime and you just got to sort of get through it or is this something that's never going to change and then you got to make some hard life decisions at that?

01:57:48

© Randall F. Dean

But.

01:57:50

I'm assuming most of you.

01:57:53

Are not in that situation, or if you are in that situation and you brought the actual evidence in front of your supervisors, they would give you an open ear and try to come up with something that's going to help you. So you have time to get some work done.

01:58:11

Let's hope. Let's hope that that's your situation, OK?

01:58:15

One of the analogies I like to make is.

01:58:19

Even if you have.

01:58:22

The best little boat.

01:58:25

If you're directly under Niagara Falls, you're still going to drown.

01:58:30

Now I would also like to take a timeout for those of you that are in more senior management positions.

01:58:40

If I just described your reality and you are higher up in the organization.

01:58:47

I'm going to challenge you directly.

01:58:49

You need to find someone.

01:58:54

© Randall F. Dean

That can help you get through the input barrage.

01:59:01

Stop trying to do it all by yourself. That's just not even a good use of your companies resources.

01:59:09

Because you at your level of pay loading benefits.

01:59:15

Are doing a whole bunch of lower level work.

01:59:21

And that's just not a great use of your time. You have to figure out a way.

01:59:26

To reallocate, redistribute some of that input management work.

01:59:32

And hopefully train someone that can help make the higher level stuff.

01:59:39

Get to you appropriately so that you can handle those items as needed.

02:00:05

All right. Hello, everyone. Welcome to the first video in today's two-part video series on how to get that inbox a little bit better and under control. This video is going to focus on a quick way to clean up your messy e-mail inbox and once again.

02:00:22

I am Randy Dean, commonly known as the e-mail sanity expert, and I lead anywhere from 75 to 100 sessions on time and tech and e-mail management all around the United States, Canada, and occasionally.

02:00:35

Every year and I want to get into this topic because one of the most popular things that I get asked about is OK, Randy. So you've given me a system on how to better manage your e-mail moving forward, but what do I do with everything that's in there? This video is going to

© Randall F. Dean

be basically about how to clean up an inbox that's already a mess so that you can keep it clean moving forward.

02:00:55

So let's dive in now. I was when I do this in my programs, I was asked this first question. How big is your mass?

02:01:01

Because depending on how many emails you're actually having to deal with, I think that sort of creates two different ways to go about this. Now I always tell people if you've got a couple 100 emails or less. Honestly, I think the best way to just deal with this is you're going to just go through them and a couple different rounds here and do a few things that will help clean this up.

02:01:21

Quickly, first step I want you.

02:01:23

To do is this.

02:01:25

Go through and file or delete whatever you can just file or delete. My bet is if you've got a couple 100 emails and you just went through those couple 100 emails and you filed the ones that you want to keep, but you don't need to take any more actions on or deleted the ones you no longer need. My bet is about half of those emails are going to.

02:01:43

Go away right there.

02:01:44

Now more or less a little bit here or there, but let's say you start out with 200, you're going to be down to about 100 and it's going to take you, I don't know, maybe half an.

02:01:51

Hour to an hour.

02:01:52

To go through.

© Randall F. Dean

02:01:52

Them all and get rid of the ones that you just need to file or delete.

02:01:58

Then Step 2. Now what I want you to do is take what's left, so you're already down by half, take what's left and just deal with every e-mail that's in there. That'll take you a couple minutes or less. Now this is going to be the majority of your time that.

02:02:13

Might take you the next.

02:02:14

Hour or two to go through these emails open.

02:02:17

The ones that have.

02:02:18

Something quick you need to do a quick response, a quick reply, a quick forward look up a piece of information, forward it on, take a quick little action.

02:02:29

I want you to get all of those gone, deal with the quick little things and get them done. Get them moving. Now, here's the thing. That's funny.

02:02:37

You've got you've got.

02:02:38

People out there that have been waiting for you to get this stuff done, they're going to be really happy with you a little bit later today because they're going to go, finally, he answered my question. So just get the quick ones.

02:02:49

Done. I want you to clear as many of those out of there as you can now. Like I said, we started now with 100. Now you're probably down to about.

02:02:56

© Randall F. Dean

And then here's step #3 whatever's left. Add it to your task list, or add it to your calendar. That could be your paper task list. That could be your outlook or Google task list. That could be the task list on your phone or tablet, or your calendar. Add it to one of those two places, and then once you've identified the task or the calendar item that's inside that.

02:03:16

You know file that e-mail or delete that.

02:03:18

E-mail.

02:03:19

And so in this three-step process, my bet is anywhere from a couple hours to up to 1/2 a day. You're taking a couple 100 emails and they're gone. You're going to get this thing down to almost 0, if not all the way to 0. OK, so that that's what you do. If you got a couple 100 or less. Now if you've got something way more than 200.

02:03:42

I'm going to recommend a slightly different process. First question I want to.

02:03:46

Ask you just.

02:03:47

Can you delete all emails that are over a certain age? I run into some people and they've got emails that are 510 years old in their inbox.

02:03:54

Boxes and my question is, do you have any relevance for that? Do you even have a company policy that might say once emails reach a certain age they should be summarily deleted if you've got an electronic retention policy in your firm that says once they reach a certain age you can just.

02:04:09

Get rid of them. You should follow.

02:04:11

© Randall F. Dean

That policy, it makes it pretty easy, and one of the things that you can do in most inboxes is just simply.

02:04:17

Sort it by age.

02:04:18

And then you can go down to the e-mail that is the youngest e-mail meeting the rules. So let's say your company wants you to delete everything that's two years old or old.

02:04:27

Go down to the e-mail that is exactly 2 years old. Click on it and if you're using outlook, if you hold down the shift key after you click on that e-mail and go all the way to the bottom of that mailbox and then click on the very bottom e-mail, that makes one big group. Let me show you what I mean when I talk about this. Let's pop into Microsoft Outlook and in order for me to do this, I'm going to go into one of my archive files. I'll go into my archive.

02:04:47

Sent folder and I just want you to see something here. So I'm going to sort it by received. So it's going to put it in some sort of an order here. And now what I want to do is I'm going to page down.

02:04:58

And let's see. Let's go all the way back to oh, that that's good. December 12th. And now what I'm going to do is hold the shift key and I'm going to page way down here to.

02:05:13

Now notice just a couple of months.

02:05:16

I'm going to go to here.

02:05:17

Good and click.

02:05:18

© Randall F. Dean

And I just made a group and now I can either delete those or now that I've made a group, I could pick them up and move them too. See, I could actually move them into a different folder. I'm not going to do that, but that's how you make a group based on.

02:05:30

Age. You can also, by the way, since we're talking about this watch this. You could also sort it by person or by subject. Let's say I want to see all the emails they have 2018 in the subject line. Look what I just did and now I could make these all a group. See what I just did right there and now what I could do is that's another way that I can quickly sort and move stuff. We're going to talk about that little tip.

02:05:52

More in a minute, but the first question coming back to what we were talking about is, can you delete them by age? If you can do it now, if you cannot, if you're uncomfortable taking that action and deleting.

02:06:06

Emails over an age.

02:06:07

Could you make a folder called really old emails and then instead of deleting those emails, just move them into that folder and I always tell people maybe six months or older just move them all, move everything six months or older into a folder called really old emails. Now let's say you do have a rule 2 years and older. You just got to get rid of. Those company says they want you to do that.

02:06:27

Do that, then take everything between six months old and two years old and put them in that folder called really old e-mail.

02:06:35

And I hope you see what I'm doing. I just.

02:06:36

Cut off the.

02:06:36

Feet of your.

© Randall F. Dean

02:06:37

Beast, I cut the the legs right off. I've taken out a huge chunk of your messages right there and you.

02:06:43

Did that if you.

02:06:44

Did it properly in a couple minutes probably.

02:06:47

Now what I want you to do is a little bit counterintuitive. I want you to make a folder called really new emails. I actually showed this in my programs, so take a look at this. I'm going to go into my folder structure here and inside of here let me see if I can find it in my inbox. Really new emails with an exclamation point. See what I just did right there and what's sort of nice.

02:07:08

About that, let me let me.

02:07:09

Explain to you this is a little counter in.

02:07:10

Intuitive I want you to take all of the emails from the last couple weeks and I want you to put those into that folder.

02:07:19

And let me explain to you what I'm doing here. So I've already taken out the oldest emails. You've either deleted them or filed the oldest emails. I don't want you spending much time looking through those emails because they're really old. You probably don't need to spend time being very particular. And finally, in each and every one of those, I just don't know if that's a good use of your time for productivity.

02:07:40

The newest emails you have are actually the ones that you need to look at fairly closely, and so that's why I want you to move them out of your inbox for right now so that you can keep them to go through them.

© Randall F. Dean

02:07:53

With a little.

02:07:53

More specificity now one thing. If you're using Gmail, what you might need to do is mark them and move them.

02:08:01

Into a label and I would create a label called newest emails because with Gmail when you do your sorting and putting stuff away automatically, some of these might get pulled out by the slightly different way that Gmail processes and moves stuff.

02:08:14

OK, so I would mark the mall in a new label called newest emails because then what you can do is go into that folder after you do the steps we're talking about here and go through those emails. What you're going to end up doing is going through all these emails 1 by 1 because these are the emails that still have active items. But I want you to get them out of your inbox right now because now think about what's in your inbox.

02:08:36

What you've got in your inbox now are.

02:08:39

Emails say between two or three weeks old and six months old.

02:08:43

So these are the emails that you've worked on fairly recently, but they're old enough that you probably don't still have a lot of active items in there.

02:08:52

And now this is what I want you to use those sorting capabilities that I just showed you. And remember once again let's pop back out here. I'm going to go back into here. I can sort by subject line.

02:09:04

I can sort by size of attachment.

02:09:09

© Randall F. Dean

I can sort by date obviously to get it in from oldest to newest or.

02:09:13

Newest to oldest.

02:09:14

And I can also sort by whoever's in the in the from field or the to field.

02:09:21

And So what this means is that I can create groups so.

02:09:23

Let's say I want to find all the.

02:09:26

Emails that have video in the subject line, so I just click on that one that says video and now I can make a group and move the mall into a video folder. See what I can do there and the reason I wanted to show you that is what I want you to do with the emails that are say between 3 weeks and six months old is I want you to create natural logical groups.

02:09:48

That you can easily deter.

02:09:51

That are related to your key projects, clients, activities, events vendors and start sorting groups of emails, not one at a time. Groups of emails into your folders, so you're not going one by one through hundreds or even thousands of messages. And then once you do that, you're going to have a smattering leftovers.

02:10:10

So sort it by subject, sort it by sender, maybe sort it by.

02:10:13

Date file as many emails as you can out of.

02:10:16

That three-week to six month old.

02:10:19

© Randall F. Dean

Process into the folders you're going to have a smattering the leftovers, and now what you're going to do is take all the emails that are new, move them back into your inbox with the smattering of leftovers that you have right here. And then what's the time for? It's time to do three-step process. Again. You take all of those items now delete or file whatever you can delete or file.

02:10:39

Handle everything takes a couple minutes or less, and then whatever's left goes on to your task. List your.

02:10:44

Calendar. Then you file or delete.

02:10:47

Let me tell you this, this process that we just described, by the way, if I did that too fast rewind and play this again.

02:10:54

And maybe even stop at each step. You know what's?

02:10:57

Funny I do.

02:10:58

YouTube videos all the time on home repairs, entire repairs and I'll play it for about 6 seconds. Hit pause and then do what they told me to do, then hit play again. You could do that right here and you're in my.

02:11:12

Do this with your inbox and then what's going to happen is I actually had this happen once. I was working for one of my university clients. I was doing this session. I described this process woman who was in the class on a Tuesday, had 3500 emails in her inbox. She emailed me on Friday.

02:11:31

And said this is my last e-mail and I promise you she didn't just do select all delete. She followed this process and was able to finally get control of this and then once you get that inbox clean once you get that inbox.

© Randall F. Dean

02:11:44

I want you to follow a smart e-mail regimen so you don't lose control again, and I cover this extensively in my classes, sort of what I want to do. You get a new e-mail, you're going to open it and decide what you need to do with it. The very first time you open it. Then if it's quick, you're going to get it done. If it's not quick, it goes on to your task list or maybe your.

02:12:00

Calendar once it's done or task you file a delete and if there's no place to file it.

02:12:05

You make a folder and you put it there, and if you put all this together it could really change the way you manage this stuff and help you get your mess under control and then keep it from getting messy.

02:12:17

Yeah. Now once again, my name is Randy Dean. Thank you for your time. If you'd like to find out about more about me and my programs, please go check out my website randalldean.com. You can actually see a little demo video of when I'm up speaking on stage on the front page of that site. And there's a link through to, you know, descriptions of the different programs I do at conferences and events also.

02:12:23

In.

02:12:24

Program.

02:12:39

If you enjoyed this video and the other videos that I'm creating, I do strongly recommend you subscribe to the channel and if you'd like to get a whole series of little two to four page PDF productivity, tip sheets and electronic e-mail format.

02:12:54

Just send me an e-mail randy@randalldean.com put YouTube PDF in the subject line and by automated e-mail. Imagine that I will send you out a whole series of little bonus tip sheets on time management e-mail management, outlook usage, Google Usage, smartphone, tablet usage, how to be more productive, less distracted and with that.

© Randall F. Dean

02:13:13

I'm going to say thank you for your time. Hope that you learned something here today that might help you get your mess under control and good luck with your productivity. Thanks.

© Randall F. Dean