



10 tips to better manage your inbox

Our article *The day-to-day stresses and challenges of being a lawyer*, found on page 5, discusses how technology contributes to today's frantic pace of practice. And if there is one technology that adds to the stress of a harried lawyer's day, it's their email inbox. Clearing out emails often feels like Hercules cleaning out the Augean stables.

If you want 45 days from next Wednesday, type "Wednesday+45d." This also works for weeks and months (+45w or +2m).

Here are 10 tips to help you both better manage and reduce the number of messages in your inbox. Some tips apply to specific programs, and some are universal.

1. Sort your inbox by column

Many email programs including Microsoft Outlook® and Lotus Notes® allow left-clicking on any column heading to sort the messages in your inbox by the contents of that column. Most people already have their inbox sorted chronologically but you can also order your emails by sender, subject, or file size. Clicking a second time on the same column will sort the messages again in reverse order to the initial sort.

If you want to further sort by a second or third column in Outlook (e.g. alphabetically by sender, and then by received date from each sender) just hold the shift key down before clicking the second or third column.

2. An easier way to add a date to a task item

The practice of law often revolves around deadlines, but it can be a hassle to figure out the exact date of "60 days from tomorrow." Outlook can save you from having to count days on your calendar by allowing you to simply type the number of days until the deadline.

For instance, typing "tomorrow" or "Wednesday" in the Due Date field of the task item will enter the actual date. It will populate once you click on another field.

3. Distinguish between the to: and cc: fields to cut down on replies

If you put multiple names in the to: field, then chances are that many of those people will feel obliged to respond. If you only needed a response from one, and the others were only included as an "FYI", then put their names in the cc: field.

4. Drag and drop items of one type to create another

Sometimes you will get an email from a client triggering the need to have an in-person meeting. This requires the creation of an entry in your calendar. In Outlook, you can save time and avoid re-entering all the information in the email by dragging the

email message to the taskbar Calendar icon and dropping it there. All the information from the original email will automatically be transferred to the new calendar entry – no need to retype it. Make any necessary edits and save the meeting entry.

5. Banish the new email pop-up

If your computer has a “new message” pop-up, “ding,” flashing light, etc. every time an email message arrives, turn it off. It’s hard to be productive when you’re being side-tracked checking new messages. You’re going to check your inbox reasonably regularly anyway, so perhaps you don’t need to know the instant when something arrives.

6. Delayed delivery

Outlook allows you to schedule the sending of an email at a later date. There could be any number of reasons you’d wish to do this: you might be travelling or in court on the day you wish to send the email to a client, or you’re composing on a Sunday but don’t need to send it until later in the work week. Delayed delivery saves you from having to create a task to remind yourself.

Click Options in your New Message and under Delivery Options you’ll see the ‘Do not deliver before...’ field. The email will remain in your Outbox until that date when it will be delivered automatically.

In the meantime, if circumstances change and the email needs to be edited, or is no longer required, don’t forget that it’s sitting in your Outbox!

7. Redirect your email replies

If you are sending an email on a matter in which you want someone else to manage the responses, set up your message to redirect replies to that person (or people).

In Outlook, click on the Options tab of the New Message window, click the Direct Replies To button. In the Dialogue box that opens, look under Delivery Options and click the Select Names button. That will open your Address Book and you can select the appropriate person or people to receive the replies.

8. Second (and Third) Email Accounts

Keep your office email account as “clean” as possible by keeping non-client matter related emails out of your work inbox. The easiest way to do this is to open an alternate account which you use to sign up and direct all email that is important, but not directly related to client matters (this would be a separate account from your personal account). Examples of these types of emails could be notices from legal newsletters, professional associations, etc. (but not LAWPRO notifications!)

You could set up yet another email account just for sites that fill your inbox full of travel deals, store sales, two-for-one coupons, etc.

Among the free email programs, Gmail appears to do the best job of filtering spam so that may be the best option.

9. Create “canned” emails for frequent responses

If you find yourself typing the same email on a regular basis, you can save yourself a lot of time by creating a template with the body of the message already written. You just need to populate the “To:” field and hit send. Note that this is different from a draft email, which disappears when it is sent.

These templates go by different names in different programs, but the common first step is creating a new message and typing in the text you wish to save.

- Outlook: Depending on which version you have, the process will vary. Recent versions allow you to compose an email

and Save As a template, while versions prior to 2010 have a somewhat different process. A quick search online should direct you to some easy-to-follow instructions for your particular version of Outlook.

- Gmail: To turn on this function, first click the “cog” button (the wheel shaped icon), select Settings, then the Labs tab. Look for Canned Responses and click “enable”, then save your changes. When you compose an email, you’ll now be able to click on the arrow on the bottom right and save it as a Canned Response.

10. Open a new window

Sometimes it can be frustrating in Outlook to have to switch back and forth between Inbox and Calendar, or between two mail folders. A solution to this is to open your calendar or other mail folder in a new window. This is ideal for those with two monitors, but it works with one monitor as well by resizing your two open windows.

Right click on Calendar Group or Mail Group and select “Open in New Window.”

The Golden Rule of Inbox Management

A final tip: if you want to receive less email, send less email. Sometimes a call or face-to-face chat can be faster, more informative, and less prone to the misunderstandings that can come with email.

For additional reading on email, the practicePRO Lending Library has *The Lawyer’s Guide to Microsoft Outlook 2010* and *The Lawyer’s Guide to Microsoft Outlook 2013*, by Ben Schorr. The books contain a wealth of information and tips on all aspects of using Outlook in a law office. For more information on the books and how to borrow them, visit practicepro.ca/lendinglibrary ■

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