A place for every email
and every email in its place

Improving your inbox organization

In a modern law firm, it is not uncommon for the bulk of a file to be located in the lawyer's inbox. This includes records of client instructions, agreements between counsel, strategy discussions, and scheduling confirmations. This can also include attachments and documents circulated between lawyers and clients that are sometimes never stored in a file management system or separate drive and are only accessible by digging through ancient conversations.
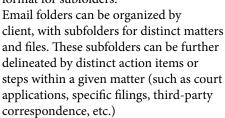
While your email application's search algorithm can help navigate a cluttered inbox, it can quickly become frustrating when an old message requires either an accurate recollection of the precise language used in the relevant communication or a laborious review of triaged yet still-voluminous lists of old conversations.

Equally important: If a file must be shared or transferred to an associate or new counsel, making sense of a lengthy file-history can be frustrating if communications are only organized chronologically. You never know when a colleague may need to make sense of the way you have stored key information on the file.

Here are a few simple and straight-forward ways to keep your inbox organized, save time, and ensure your files are easily comprehensible.

Subfolders and subject headings

A good way to keep track of email communications is to start with a standardized format for subfolders. Email folders can be organized by client, with subfolders for distinct matters and files. These subfolders can be further delineated by distinct action items or steps within a given matter (such as court applications, specific filings, third-party correspondence, etc.)

The format you use for organizing subfolders can then be extended to your email subject lines. A standardized subject format such as "*Client – Matter – Topic*" will allow you to easily locate what you need using the application's search function (e.g. *Parking Co. – Hamilton Lot Purchase – Easement*).

The subject line of received emails can be easily altered to conform to your personal format in Outlook and many other email applications by opening the email, double clicking on the subject line, changing the text, and then saving the email with the new header.

Using Rules

To save even more time, you can create a "Rule" that will automatically sort incoming emails from specified senders into the correct folder and subfolder. Custom Rules can be created that will automatically sort your messages based on your naming format, such that many of your incoming messages will be properly and permanently organized without any additional effort on your part.

The Rules window is accessible in Outlook from the Rules button on the ribbon, and most if not all email applications provide similar functionality through the options or settings menu. In Gmail, for example, this is referred to as a Filter and can be created in *Settings > Filters and Blocked Addresses > Create New Filter*, then check both the "Apply the label" and "Skip the Inbox" boxes when selecting the destination folder.

If you subscribe to newsletters or otherwise receive regular emails from a particular source that are not of an urgent nature, creating a Rule to automatically sort such messages from that sender into a designated folder will help keep your inbox uncluttered and ensure important messages are not missed or forgotten under a pile of content that can be more appropriately reviewed at a later time.

Automatically filing replies in the same folder as the original message

In addition to storing and sorting incoming emails, it's a good idea to keep track of your outgoing messages. Another way to automate your inbox is to have outgoing messages automatically filed in the appropriate folder, rather than manually moving them from the default Sent folder.

In Outlook, this can be done in settings, through *File > Options > Mail > Save Messages*. You need to check the box labeled "Save copies of messages in the Sent Items folder," and the box labeled "When replying to a message that is not in the Inbox, save the reply in the same folder." In Gmail, this can be accomplished by putting your own email address in the "From" box when creating a new Filter.

This will keep your outgoing messages saved in the folder you have designated for your incoming messages on the same matter. If the message you are replying to was not already sorted into a subfolder by a Rule, remember that you will need to first move the message into its appropriate subfolder before replying to it.

Save time and stay on top of your tasks

Nobody wants to lose track of important action items or documents, and forgetting to respond to a client can be a serious problem. Developing a habitual way of automatically sorting emails will not only save time during your work day, it may save the headaches that arise from a forgotten inquiry or task. ■