

Quick Reference Card (QRC)

Best Practices for E-mail Productivity

- Minimize the distraction of a pop-up box by shutting it off or setting it to check every hour.
- Designate blocks of time in your schedule to check email; start with 3–4 times a day and gradually reduce it to 2–3 times.
- Sort incoming messages by stock, sector or author to process related email together
- Unsubscribe or remove your email address from unwanted or unread mailings.
 - Stay on top of it by removing the first instance of spam (waiting won't save you time)
 - When returning from vacation, sort all email by sender or subject line to quickly find the worst spammers (who's filling your inbox over the course of a week?)
- Focus on easy emails with quick replies first.
- Try to read emails only once -- take action before moving on:
 - Delete it; or
 - File it; or
 - Reply/act
- Minimize the use of "Reply to All" because unless it's critical that all recipients receive your email
- Turn emails into calendar appointments or tasks; avoid using your Inbox as a "to-do" list.
- Write less text; keep messages short and to the point.
- Use rules to automatically send certain messages into designated folders.
- Complete the "TO" and the "SUBJECT" lines last. When appropriate, the subject line should have a call to action to catch attention and for ease of filing.
- Use templates for repetitive messages.
- Use "Out of office" auto-responder to avoid being distracted from email when conducting off-site research

Elements adopted from Lisa J. Downs, Managing Email, American Society for Training and Development (ASTD).