Rise above your inbox
Gain hours back in your week through better email management

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Time is arguably our most valuable—and our most scarce—resource.
By identifying and eliminating wasteful activities, you free up more time for meaningful, value-adding tasks for yourself and your customers. One major time-sink is your inbox.

Email overload is costing you significant time:

* Your email largely consists of either spam (18%) or irrelevant emails (72%), with useful emails making up just 10% of your inbox.[1]

* The average accounting professional handles 100–200 emails per day.[2]

* Given a daily average of 200 emails, 24 hours is spent emailing each week.[1]
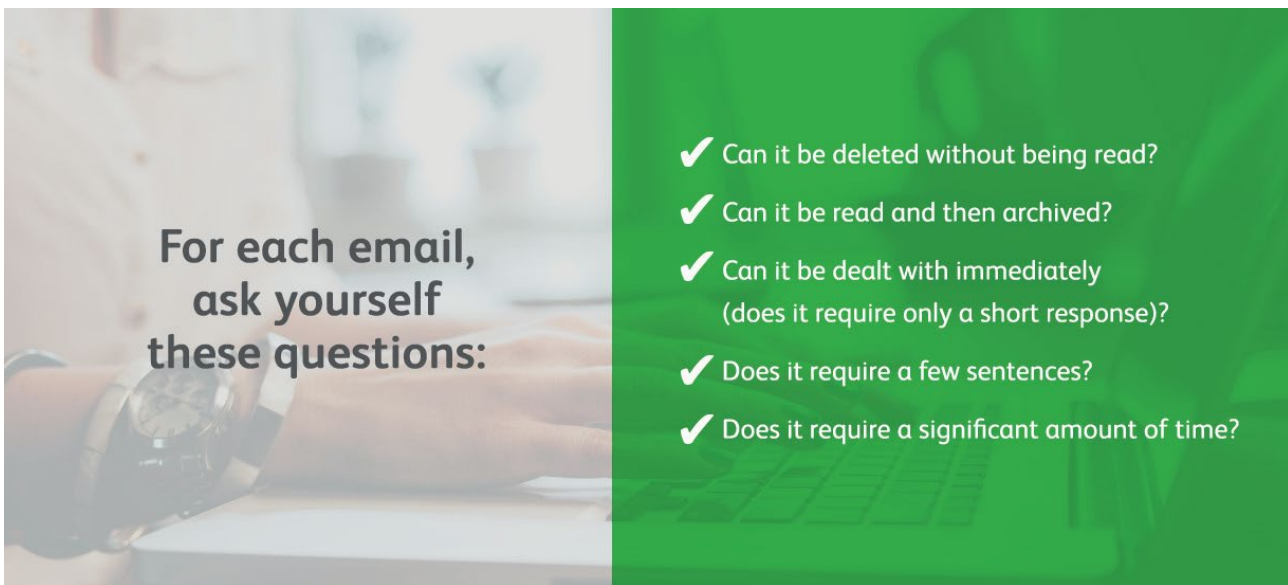
Learn how progressive accountants slash email time:

* Progressive accounting professionals handle ~50 emails per day.[2]

* Given this daily average of 50 emails, 6 hours is spent emailing each week.

By being more efficient with their email, progressive accountants are saving up to 18 hours per week (or 2.25 working days per week) compared with their peers. The vast majority of us, however, spend entirely too much time in our inbox—time that would be better spent on other tasks, like getting billable work done.

Step 1: Be efficient from the start

Begin by triaging your inbox to prioritize what you should address now, and what can wait till later.

For each email, ask yourself these questions:

✔ Can it be deleted without being read?

✔ Can it be read and then archived?

✔ Can it be dealt with immediately (does it require only a short response)?

✔ Does it require a few sentences?

✔ Does it require a significant amount of time?

The goal is to touch an email only once by either acting on it now or assigning it to be addressed later. You want to avoid reading an email and saying, "I'll get to this later." The truth is that you may not return to it, and even if you do, you'll have spent twice as much time reading and rereading it.

There are two different ways to accomplish this:

- By going through each email one by one, either purging, reading and archiving, responding quickly, or assigning it to be addressed later. In each case, the email is addressed and moved out of your inbox.

- By skimming over subject lines and previewing text, purging all things that can be deleted or archived, and then diving into the email.

Whatever method you use, you need to evaluate, take action and move on.

"I deal with the email by deleting the stuff I don't want, immediately archiving those that are info only, and then dealing with those that need action: scheduling a task or appointment, replying, etc. If I need to push it off to a later date, or am waiting for a reply on something, I use Boomerang for Gmail to bounce it back as needed."

(CA Subal Jalan, Partner at SARC Associates)

Time-saving tricks

- **Newsletters:** If you often find yourself leaving a newsletter unread or just deleting it straight away, don't be afraid to click "unsubscribe" at the bottom of the email. If it's something you only look at on occasion, use filters to automatically forward it to a folder that you can check at your leisure.

- **Email groups:** The time it takes to fill in the "to:" box seems relatively insignificant, but added up over the course of a year, it can become hours. Having a group you can select to instantly fill in all relevant parties saves time.

- **Filters:** Research shows that people spend about an hour each day searching for lost emails.[1] Using filters will save you time trying to find that one email that you *knew* you had *somewhere.*

- **Folders:** Separating email into smaller, subject-specific folders of unread messages can help make your inbox seem less insurmountable and help you process them faster.

- **Templates:** Many types of emails require a similar, even identical, response. Create template emails for these common responses that are ready to be sent whenever needed.

Step 2: Change your habits

You likely have a morning routine that includes checking your email. Rather than making email something you do concurrently with other tasks, like having breakfast, make checking your inbox an activity of its own with its own time slot in your day—perhaps 15 to 30 minutes.

You should check your inbox frequently, but not incessantly. Set aside a few specific times a day to do so, making sure you've allocated enough time to process all the new messages. This is key. Checking your inbox is disruptive. It breaks you away from whatever else you were doing, requiring you to re-establish context for that work when you get back to it. Going back and forth throughout the day wastes time.

"I have a 'to-do' list each day, and as I finish a task or appointment, I stop and check email. I try to deal with everything in my inbox in one pass—either deleting, replying, taking action or scheduling."

(CA Khanjan Chhaya, Partner at KCJM Associates)

An important habit to develop is to delete first. This means going down the list of new messages and, from their subjects alone, checking off all of those emails that you know can be deleted straightaway.

"I reverse-engineer the process each day by selecting all unread emails, and then unchecking the ones I want to keep while deleting the rest. This eliminates 90 % of it, which is junk I don't need or don't care about."

(Seth David, Owner of Nerd Enterprises, Inc.)

How you write your emails is important as well. Start with a good subject line. This can often give the recipient all of the information they need about the substance of the email. It also gives you context if the recipient sends a response. Then, keep your message concise. Say exactly what needs to be said and avoid anything superfluous.

Once you have written your email, ask yourself if anyone actually needs to be cc'd in on the conversation. This is an important question. For every 100 people needlessly cc'd on an email, 8 work hours are lost. This is where "bcc:" is a gift. By bcc'ing someone, you are keeping them in the loop, but not including them in the thread of emails that may result.

Finally, label your emails and folders logically so that specific emails are easy to find at any given time.

Habits can be contagious. By setting a good example of how to write and address emails, you may end up receiving more concise emails yourself, and fewer emails you have no need for.

Step 3: Reduce the flow

A great way to get ahead of your inbox is to reduce the overall flow of email coming in. To that end, one of the most important things you can do is to create multiple dedicated email addresses. At a minimum, you should have three:

✉ One for work

✉ One for your personal life

✉ One for spam

The first two are obvious, but the third may not be. The spam inbox is for any website or service that you're unsure of but that requires an email address to sign up. This way, all of those newsletters and promotional emails will go there and not clutter up your other two inboxes.

Another way to reduce the flow is to get an online calendar app (like Calendly). A lot of email can be generated when you try to set up an appointment or meeting. A scheduling app will allow you to share your calendar with your contacts, so they can view when you're free and pick a time that works for them, without all the back-and-forth.

Finally, maximize efficiency by keeping "water cooler" talk out of your email correspondence. This includes any kind of personal communication that might better be done via a different medium, be it in person, over the phone, or via Skype or instant message. Remember that every email you send out will likely generate a return email. Send fewer emails and you will receive fewer emails.

Step 4: Get work done elsewhere

Lastly, you will want to leverage the various communications and productivity apps out there. The goal of using these programs is to avoid trying to do these tasks via email. While email is extremely useful, it's important to know its limitations. You want to use the right tool for the job.

Try some of these:

- **For internal discussions and "water cooler" talk:** Slack or Yammer, both of which keep group conversations organized while keeping a record of what has been said.

- **For instant messaging:** Google Hangouts, Skype or Zoom, all of which also have video modes.

"My tip is to utilize a messaging app. We implemented Slack in early 2015 and, in the last year, we've reduced our email by over 60%. Email is no longer used for inter-company communication—only to send info or get info from clients."

(CA Subal Jalan, Partner at SARC Associates)

Tasks and to-do's:
Asana, Evernote and Google Keep

Client management:
Google Drive and Groups

Work management and coordination:
Podio, Basecamp, Wrike and Confluence

"Like many of my peers, I used to view email as a necessary evil in my daily work life, a time quagmire I was forced into every day just to keep our business running. Attempts to organize and stay ahead of the constant barrage of emails, more often than not, did little to help with finding and extracting critical information from the disparate correspondence chains. With Karbon, all that has changed. While the volume of emails has remained constant, the tools and structure Karbon has implemented into their system makes finding, organizing and responding to the varied chains easy and intuitive. For the first time I feel in control of my communication and not enslaved to it."

(Heather Gunther, Owner of KeyRing Business Solutions)

Rising above your inbox may seem like an impossible task, but by altering your routine, using your inbox more efficiently, reducing the overall flow of messages coming in, and leveraging productivity software, it is very possible. It's not a complicated task to get that inbox to 0, but it does take discipline and consistent effort. By getting ahead of your inbox, you will literally free up days' worth of billable hours, giving you time to focus on what matters: growing your business.

1 Various sources including The Radicati Group, TechCrunch, OnlineITDegree.net, and others.
2 Karbon research: Top 15 barriers of progressive firms (n > 250; U.S. only; December 2015)

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