

How to Master Your Emails

Coaching for Healthcare Leaders

Caroline Gay, Certified Life Coach

Email is a key mode of communication, a staple of our personal and professional lives. But it is a beast that must be tamed. The lines quickly blur between “emailing” and “working”, to the point you could spend most of your day reading and responding to emails, and not actually complete any real, substantive work.

Do you feel controlled by your email inbox? Ever felt shame because you see someone in person and realize you did not respond to their email message?

Now picture a clean, organized inbox with all your messages read and a plan to deal with anything that needs to be followed up on. Imagine the amount of calm, confidence, and mental clarity you will gain from mastering your emails.

This guide is designed to give you a simple, easy structure to follow to completely reframe the way you approach managing your inbox and eliminate the stress caused by the constant flow of email. You will learn to be successful following my proven method on the following topics:

- #1 Organizing**
- #2 Batching**
- #3 Responding**
- #4 Etiquette**
- #5 Advanced Tips**

***Get ready to take back control and learn
How to Master Your Emails!***

#1: ORGANIZING

Handle instead of read.

Changing your language will help your brain switch from a passive state to action. “Reading emails” puts you in the passenger seat, where you are just consuming information. “Handling emails” places you in the driver’s seat – read, file, respond, take action, and ultimately leave the session with the peace of mind that you are in control.

Minimize touches.

Strive to only touch emails once. This will save you a ton of time in the long run. Refine your skill to be incredibly decisive and move this communication to the next step in its journey.

Simplicity is key.

There are many different ways to organize your inbox -

by topic,
by person,
by project,
by date,
etc.

Spending your time and brainpower for filing your emails can be a huge time suck. Reduce the number of folders you have will reduce decision fatigue and allow you to use your limited bandwidth on the highest value functions of your position!

On the next page, you will find a simple folder structure that works perfectly to keep your inbox clean and organized.

The 6 Email Folders You Need



INBOX

This is where your new messages come in. Messages arrive here, you read them, and then determine where it goes next. If the email can get handled in 2 minutes or less, respond or read them and never touch it again. The goal is to finish your batching session with all your inbox emails read & dealt with, leaving your inbox empty. This will signal to your brain you are done and your emails are handled.



ACTION

File emails that you need to spend more time with here. Those emails you want to give that snippy, quick response? File it here and sit on it while you fume. Longer emails with attachments you need to read? Put them here until you make time. I like to keep this folder trimmed down to under 50, or fitting on my computer screen with no scrolling. There is a psychological aspect to narrowing it down to fit on one screen, telling your brain this is manageable and eliminating overwhelm.

***Important:** Your action folder is not your to-do list. Email does not set your priorities!*



ARCHIVE

I believe it works best to file almost everything into **ONE** folder. And when I say everything, I mean anything beyond obvious trash or emails you know with certainty you'll never need again. I never waste brainpower on where to file an email, or keep versus delete. Just put in in the archive folder and consider it handled.

So, if it's all in one folder, how do you find it later? The magic of the search function. You can always remember a word from an email and the sender. Key word + sender name in the search bar will pull up all relevant emails. There are fancier search options, but this one works for me 99% of the time.



VITAL INFO

Figure out what those emails are you keep referring back to and put them here. For example – there is a certain color scheme we use at our company for official documents and charts. I had our Marketing Manager email me the color specs, and I keep it here for quick reference.



QUICK READS

This is an advanced option. I create email rules to route my daily news, statistics, and alerts here. You can google how to set rules for your email server. I route emails here that I know will come daily, but the world won't end if I don't read them. The mental savings here is that I can quickly breeze through these in a moment of downtime, and I know they won't yield additional work.



DELETED ITEMS

I prefer not to see the number of unread messages in this folder, so I will occasionally right click and mark all emails as "read". If that doesn't bother you, then you never have to worry about this!

#2: BATCHING

Turn off all email notifications.

(Sounds, pop-ups, everything!)

We are all addicted to email. Every time we open up our inbox and have new messages, we get a hit of dopamine. Ever found yourself refreshing your inbox to check for new messages? Checking email during a meeting? Going back to your office and checking your inbox first thing? Face it- we are addicts.

Establish in your mind that there are not “urgent” emails. If something is truly urgent, the sender will call or text you. Otherwise, it is to be read and dealt with on your terms.

Schedule times on your calendar to handle your inbox.

(Keep your inbox closed at all other times!)

This will be an adjustment – but check and handle your emails in batches, a few times a day. You may have to start with every hour of the workday, because remember – you’re an addict. But ideally a morning, after lunch, and end of day schedule for handling emails will make you way more effective. Figure out your ideal schedule – for me it is three, 30-minute sessions a day.

Once you decide how much time you need to clear your inbox, plus deal with 10 items in your action folder, and schedule that time on your calendar. You will find that you are actually MORE efficient and save a ton of time by dealing with your inbox in manageable blocks of intake. Deal with your inbox, then go on about tackling your action items to get the results you want!

Enjoy the perks of batching.

(You are in control!)

The best part about batching is that sometimes situations will just resolve on their own. People will figure out what they needed on their own, someone else will respond, the situation is handled and doesn’t require you to do anything!

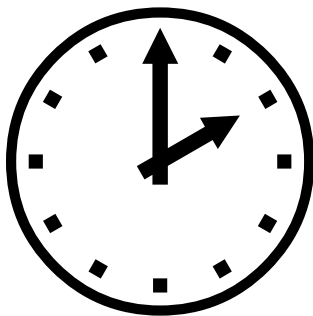
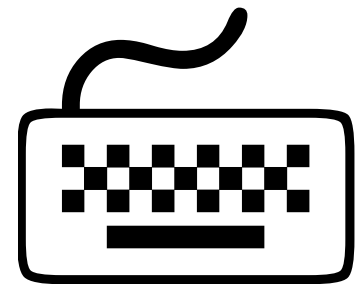
It may take some practice to get adjusted to the batching approach. However, dealing with every email as it pops up makes you constantly distracted and unfocused. This does not allow you to be the best version of yourself. Make your daily goal to deal with email on your schedule, not on the sender’s timeline, and enjoy the confidence that comes from taking back control of your inbox!

#3: RESPONDING



Stop the perpetual email string. This takes discipline! It's so easy to jump in with your quick response and get 10 exchanges into it with a co-worker. The truly dangerous part is, this feels productive. My personal rule is 3 exchanges max, then I need to handle through an actual conversation.

Assume that everyone reads their email. I laugh out loud when I am on an email sent to a group of ten people, and three of those people reply "Thanks!". If acknowledgment is necessary, indicate that in your email by asking for a reply. Otherwise, we all can trust that if you send an email, people will receive it and read it.



Implement the "Next Day Rule". If you find yourself getting angry because of something you read in an email, do not respond immediately. Sit on the emotion, calm down, and rise above the drama. Then respond as an effective leader, with calm and intention. Perhaps even consider if the email requires a response at all.

Don't respond. This is always an option. Never underestimate the power of just leaving things alone! Of course, your brain just came up with a bunch of excuses like, "but I can't ignore emails from my boss!". Obviously, use your judgment. But the most effective leaders use email as a tool, and are too focused on getting results to type responses to every message.



#4: ETIQUETTE

Here are a few things we should all agree on to make our lives easier:

- Flagging emails with the “**High Importance**” indicator should not be allowed. Seriously, what is “highly important” enough that you send it via email versus a meeting or a phone call? There is no universal threshold. The sender doesn’t get to determine for you what priority of importance something is. Early in my career, I had a supervisor who sent me at least one “high importance” email a week, which scarred me for life. Now, when I see them in my inbox, I have to fight the urge to just delete. **Let the mode of communication dictate the level of importance.** Emails can be important, but don’t assume I will read it and drop everything to address.
- Sending emails with **large attachments**. I cringe when someone sends me an email with an attachment that contains an 80-slide presentation and says “thought you might find this interesting.” **Delete**. I do not have the time to read through 80 slides on the chance that I *might* find something interesting.

A better approach is to send someone the file attached as a reference, but include an excerpt for them in the email to point to the interesting part.

Kari,

I attended a conference last week and the speaker did a great job outlining value-based payment strategies. The presentation is attached for your reference. Check out slide 4 for some interesting ideas she shared.

-Caroline

- **Long emails.** If an email is 10 paragraphs long and you have to scroll to read it all, the reality is your reader will get lost and bored. Keep it short and concise, no more than 3 short paragraphs.

Other options when your message is long:

- Put the content in a word document and send it as an attachment. Include a brief message in the email: “*Please review the attachment and respond with your approval.*”
- Schedule a 10-minute meeting or phone call to discuss.

#5: ADVANCED TIPS

- ✓ **Set up your signature** to save time on typing your name at the end of every message. I have two: one with my full title and one with just my first name.

Formal: **Caroline Gay**
 Certified Life Coach
 CarolineLGay@gmail.com

Default: -Caroline

- ✓ **Unsubscribe ruthlessly.** Pick a few news or industry emails you find valuable, then remove yourself from the rest by unsubscribing.
- ✓ **Schedule meetings with yourself.** I block time on my calendar every day for batching. Also, for emails I need to give a lot of attention, I will create a meeting with myself devoted to just that topic.
- ✓ **Experiment with your email settings.** Figure out what works best for you to streamline your email experience and minimizes distractions. A few that I prefer:
 - Single line display
 - Disable the email reading pane
 - Show email grouped by conversation
 - Sort by date with newest on the top
- ✓ **Only check emails on a computer or laptop.** This one is an advanced player move, and your brain may immediately tell you it's impossible. But I challenge you to really question if you need email on your phone. If you go all in on this this system, you will be a master of your inbox and receiving emails on your phone will no longer be necessary.
- ✓ **Practice.** Commit to changing your approach to email for a month. View this challenge as building a muscle, and 30 days from now you will be in total control of your inbox!

You have the power to take your leadership skills to the next level, and coaching will help you get there faster and more effectively.

Schedule your FREE 30-minute session by [clicking here](#).

Learn more about coaching, bring all your questions, and get ready to change your life!