

Train Your Email, with Rolando Brown

Preface

This document was created to serve as a toolkit. Please feel free to comment throughout the document with any questions you have or any needs for elaboration. [Here's a video for how to comment.](#)

Assumptions

Here are some assumptions I am making going into the production of this toolkit.

- GSuite: You're using Gmail / Google Apps as your main email tool. If using another tool, tell me.
- Communication: You can use other channels (i.e. phone, text, chat, skype)
- Clear Mission: You're operating with an set of Objectives, Priorities & Key Results
- Coachable: You have a willingness to learn and practice.

Intended Results

There are the results we are looking to create today

- You are introduced to good email practice (habits)
- You consider "right action" in all email exchanges
- You consider optimizing your "tools"
- You are introduced to Jocelyn K. Gleij, Merlin Mann, and David Allen

Videos

Here are some brief videos you could watch before delving into your email training!

- TechnoFear & TechnoJoy: http://youtu.be/C9I_xhaDyxs (1:16mins)
- Discipline - <http://youtu.be/zG7Va8sHCmY> (1:38mins)

Approaches

1. Aspire towards "Right Action" | [link](#)
2. If nothing else, know these things | [link](#)
3. Primer on Processing vs. Handling | [link](#)
4. Fatal Flaws | [link](#)
5. Other thoughts | [link](#)

Resources

1. Lessons & Resources | [link](#)
2. Email Tools & Browser Addons | [link](#)
3. Open Questions & Answers | [link](#)

If nothing else, know these:

1. [The 7-Step Guide To Achieving Inbox Zero—And Staying There—In 2018](#)
2. Review Inbox Zero: Delete, Delegate, RESPOND, Defer, Do | [image](#)
3. [The Threefold Nature of Work – by David Allen - Getting Things Done](#)
4. Purchase [Unsubscribe: How to Kill Email Anxiety, Avoid Distractions, and Get Real Work Done](#)
5. Email Etiquette for the Super Busy | [link](#)
6. 10 Tips for Clearing Your Inbox | [link](#)
7. 21 Day Email Management Course: Revive Your Inbox by Baydin | [link](#)

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Approaches

Below are a set of approaches that can inform how you go about becoming better managing your email.

Email Tips:

- Stop checking your email first thing in the morning.
- Spend the first part of morning taking care, doing meaningful work (60 - 90mins).
- Consider reviewing and planning for the day, the night before
- Consider starting the day with meaningful work.
- Don't avoid doing heavy lifting: notice if you're checking email to avoid undesirable tasks, etc.
- Use Google 2-Step Verification, Lastpass, and Authy as needed
- Process email in three phases (this can be in one setting, or more):
 1. Topline
 2. Inline
 3. Deep handling emails that take over 2 minutes

We're working to prioritize the Right Action:

- Should enhance and supplement more dynamic communication (not substitute)
- Is opportunity to practice communication, prioritization and collaboration
- Intentional processing and being proactive in both action and inaction
- Complex work can move to collaborative documentation or in person meetings

Inbox Processing & Handling:

- Process Topline
 - Use Sender, Subject Line & Snippet to Read, then Archive/Delete
 - Subject Line Defer (Most likely requires action that's over 2 mins)
- Process Inline
 - Look for actionable items, critical questions and the back into context
 - Archive or Delete (got all you needed by reading)
 - Delegate or Respond (Not yours, or easy to respond to)
 - Defer Actions that are > 2mins (Label, Star, Calendar or Task)
 - Take Deeper Action*
 - Renegotiate what gets our time & attention by being proactive in both action and inaction
 - Most deeper actions will be better managed via another work tool (i.e. Google Calendar, Slack, Google Docs, or a desktop application like Keynote, or other collaboration tool)
 - Schedule blocks of "work" time so that you don't spend all your time processing
 - Remember that exponential, creative and strategic thinking require "out of email time"
 - Develop a sense of what "Done" actually looks like in your team

Fatal Flaws:

- Don't Cherry Pick emails (leaving unread emails in your inbox)
- Don't spend all day checking email
- Don't delay Actionable items that take under 2 mins
- Don't use email as primary Project Management Tool. Use a Project Management Tool
- Avoid doing more than 3 things per email (best case 1 thing)
- Avoid unclear Subject Lines (Yes, change a bad subject line mid thread)
- Don't send angry or contentious emails.

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- Need a documentation trail? Summarize prior in person communication.

Other Thoughts

- Awareness.
 - Improving our ability to be both self aware and context aware
 - Expanding your line of sight (so that you have visibility into important things, but don't have to make a lot of decisions about them)
 - Identify growth opportunities in how you communicate, collaborate and get things done.
 - See email as transient (a medium to move through quickly)
 - Consider only checking your email 3-5 times per day
- Keystone Habits:
 - Develop a deep knowledge of your primary tools & personalize them
 - Search based organizer vs. place based (i.e. gmail search > gmail labels)
 - Uses Keyboard Shortcuts for both your Operating System & Email Clients
 - Looking for Automation (i.e. Email Addons, Filters, Rules, Zapier, etc.)
- Extras:
 - Learn to type Faster (i.e. <http://10fastfingers.com/typing-test/english>)
 - Ensure tools play nice together (Zapier, Calendar, Doc & Task integration)

Lessons & Resources

Email Tools & Add-ons

- Add-ons: [Mixmax](#), [Loom](#), [Gmass](#), [Zoom.ai](#)
- Desktop: [Chrome Browser](#), [Astro Mac app](#)
- Recommend Enabling [Gmail Priority Inbox](#), [Gmail Lab Features](#)
- Mobile Apps for iPhone: [Gmail App for iPhone](#), [Astro](#)

Additional Reading

By NY Times:

- [Stop Checking Email So Often](#)

By Jocelyn K. Gleib

- [Working in the Age of Distraction \(Video\)](#)
- Recommend purchasing this audiobook or book: [Unsubscribe. Book](#) (it includes great email scripts)
 - Crafting an Email Signature
 - Composing an Out-of-Office Message
 - Curbing Unproductive Brainstorming
 - Getting Off Annoying Email Threads
 - Following Up After a Productive Meeting
 - Asking Your Boss for Things
 - Setting Up a Meeting with Someone You Admire
 - Reconnecting with Old Contacts
 - Writing a Thank You Email

By 99U:

- [Email Etiquette for the Super Busy*](#)

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By Alex Moore

- [10 Tips for Clearing Your Inbox*](#)
- [How to Mute an Email](#)
- 21 Day Email Management Course: Revive Your Inbox by Baydin: www.reviveyourinbox.com

By Merlin Mann

- The internet-famous [Inbox Zero video](#)
- [Merlin Mann on Time and Attention](#)

By David Allen

- [Email by David Allen](#) (Getting Things Done - GTD)
- [Work by David Allen](#) (Getting Things Done - GTD)
- [Book by David Allen](#) (Getting Things Done - GTD)

By Bijan Sabet

- [Thinking about simple inbox hacks](#)
- [Little things to make email better](#)
- [Email vs SMS](#)

By Fred Wilson

- [Some Thoughts On Email After Dealing With 500 Emails](#)
- [Social Networking vs Email](#)

Open Questions & Answers

List any open questions you have here!

1. Subject Lines
2. Explore "Search" vs "Place"
3. Statusing, & Universal Visibility
4. Affordable Options
5. Documentation & Project Management
6. Task Lists (external priorities vs internal priorities)
7. Dealing with Unplanned work
8. Reconciling Project Management Systems
9. Managing email via Computer vs Phone
10. Establishing Healthy Boundaries