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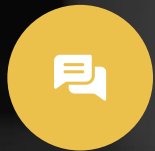


Improve Your Personal Productivity

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About Me



Three decades in leadership spanning R&D, Sales, and Product Management



Passion for accelerating leadership growth



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VP of Coaching Services for Doctums



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Goals of **This Session**



Improve your
personal
productivity



Increase your
responsiveness and
personal accountability



Reduce your stress by
organizing your
workload





Why This Matters

- Out of control email is one of the most common signs of **overwhelm**
- Personal accountability is a hallmark of high performers
- Reliability and dependability are highly valued at all levels of the organization
- No one likes having to follow-up on something





Why This Works

- Productivity is a personal passion for me
- Proven techniques are drawn from *Getting Things Done* by David Allen
- Consistent results





Today's Focus

Core Elements for High Productivity

- Ritualistic Planning
- Aggressive Calendar Management
- Email Mastery
- Systematic Note-Taking
- A Single Centralized Tasklist
- Distraction Elimination



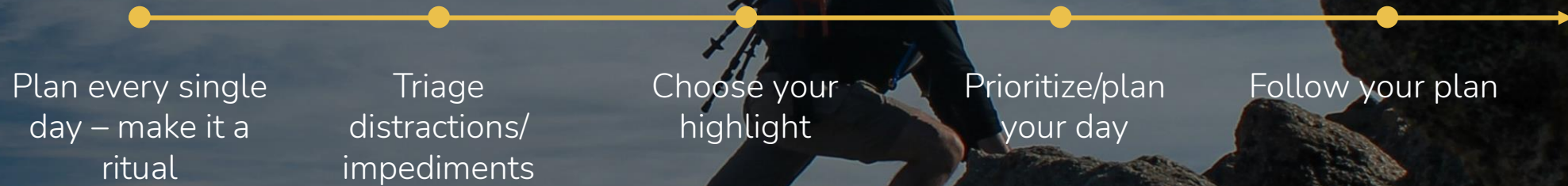


Planning Challenges





Use a Daily Planning Ritual to **Organize and Prioritize**





A Suggested Daily Planning Ritual

- Remove all distractions
- Consolidate tasks from all sources
- Review waiting email folder
- Review calendar for the day, identify prep tasks
- Sweep through email inbox
- Revise/prioritize task list
- Set goals for the day/Choose your highlight
- Deal with the critical emails
- Proceed with the day





Establishing Your Planning Ritual

What time of day
would work best
for you?

How much time
do you need?

- First thing in the morning?
- At the end of the workday?
- In the evening before bed?

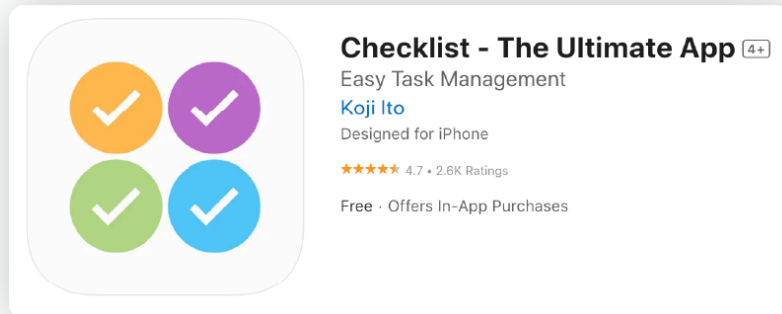
- I typically need 10-15 minutes
- When pressed for time I have a quick version that takes 5

What's your backup plan when that
doesn't work?



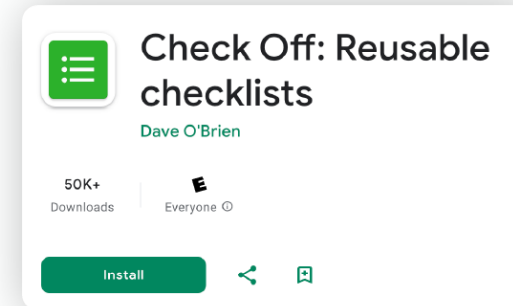
Pro Tip – Use a Checklist App

iPhone – Checklist – Perfect Checklist



[Download](#)

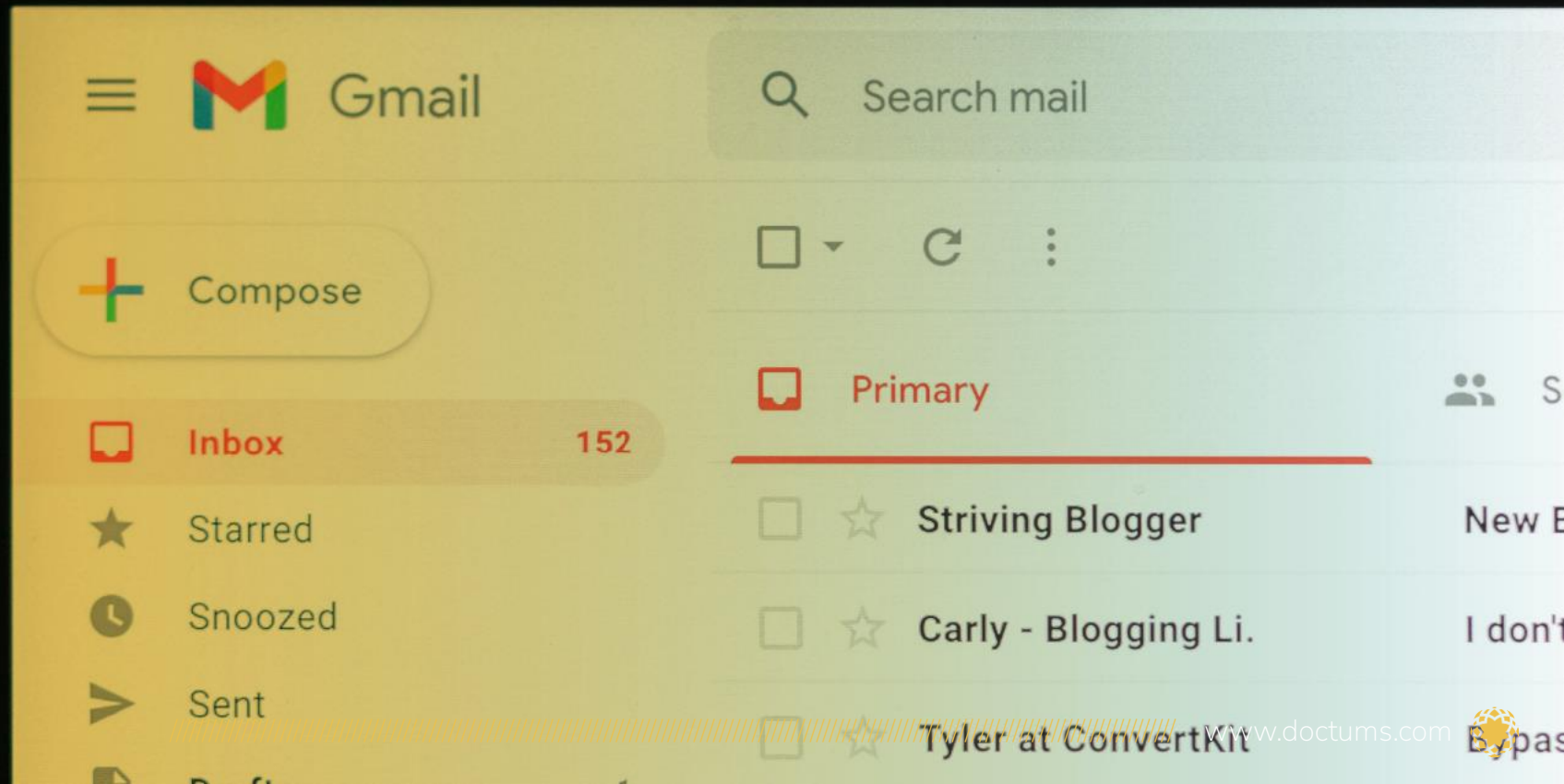
Android – Check Off



[Download](#)

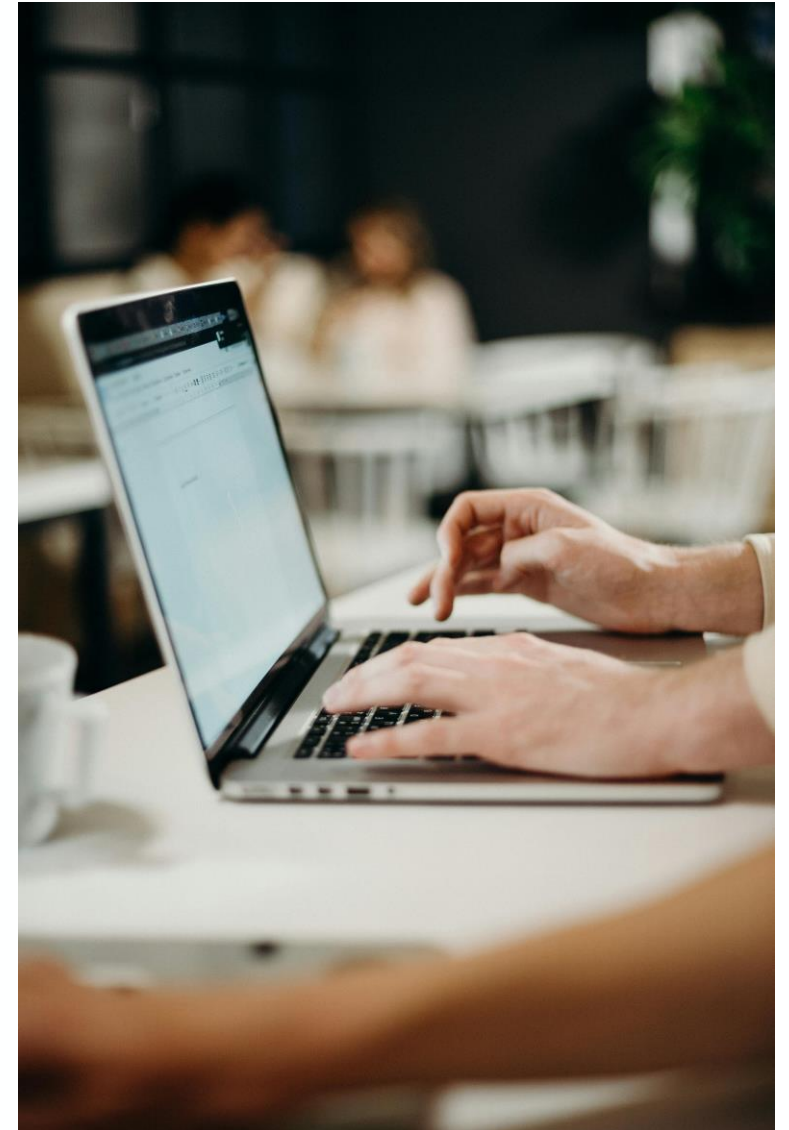


Email Challenges



Email Management Proven Practices

- Keep your inbox clean – “zero inbox”
- All emails are not equal – prioritize
 - Use folders to prioritize what needs action
 - File everything else
- Resist the urge to respond immediately
- Build the habit of cleaning your inbox every time you work email



Suggested Email Folders



Actionable

- 10 Now
- 15 Today
- 20 This Week
- 25 Someday
- 30 Waiting (Or Snoozed)
- 40 Stuff
- 50 Read
- 60 Alerts



Storage

- 60 File Cabinet
- 70 Customers
- 80 Vendors
- 90 People

Labels prefixed with numbers to sort them in the proper order



The Actionable Folders

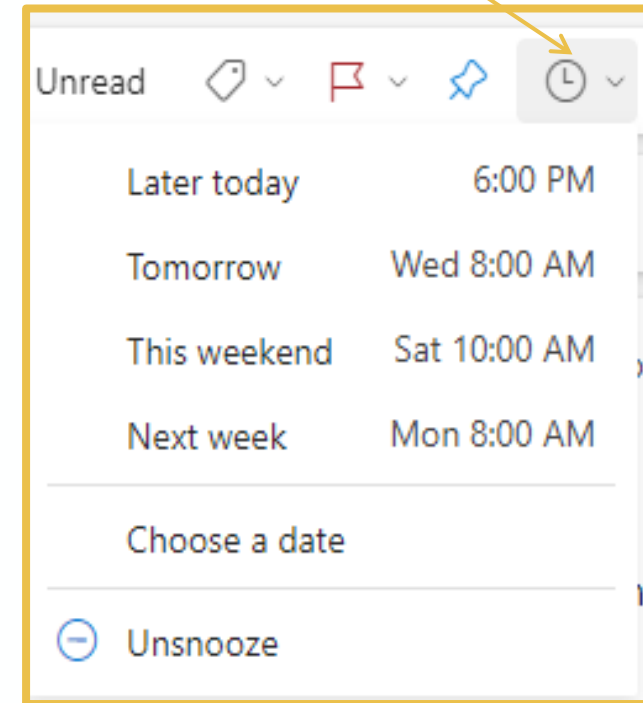


- **10 Now** – The fires
- **15 Today** – Should respond by end of day
- **20 This Week** – Should respond by end of week
- **25 Someday** – You'll never respond but you feel guilty
- **40 Stuff** – Stuff to keep at your fingertips
- **50 Read** – Things to read when you have time
- **60 Alerts** – Low priority alert emails. Skip the inbox and scan quickly when time permits



Snoozing Emails

- Are you confident you will get a response?
- If not, after sending the email, snooze it
- Snoozed emails reappear in your inbox when unsnoozed
- Move sent email to Inbox, then snooze it





The Archive Folder

- How much email are you willing to delete immediately?
- How much email do you save that you won't need in 3 months?
- Archive it
- Clean it out monthly – delete anything older than 3 months
- Some tips
 - Archived emails still show in search results
 - Backspace key moves an email to Archive



Storage Folders

Use whatever system works for you. Keep it simple.

10 File Cabinet

For everything other than customers, vendors and people

20 Customers

Child label for each customer

30 Vendors

Child label for each vendor

40 People

Child label for each person (typically colleagues, not customers, most relevant for people managers)



The Inbox Sweep

- Scan email briefly
- Respond or act if you can do so in 60 seconds or less
- Otherwise move to Now, Today, This Week, Someday
- Ignore all fires until the sweep is done



Getting Started – Clean Out Your Inbox

- Move everything from the past 48 hours to Now
- Move everything from the past week to Today
- Move everything from the past month to This Week
- Archive everything else
- If archiving makes you nervous, move everything else to Someday
- Maintain zero inbox
- Work down Now, then Today, then This Week backlogs



What Gets Measured Gets Done

- Track your progress daily until it's a habit
- Capture daily after your sweep
- Find a partner to hold you accountable
- Tracking tip
 - Change folders to show total items
 - Right-click each Inbox folder
 - Choose Properties
 - Select "Show Total Number of Items"

Date	Inbox	Now	Today	This	
				Week	Total
6/1/2021	5,227	0	0	0	5,227
6/2/2021	300	5	20	100	425
6/3/2021	200	4	17	105	326
6/4/2021					

[Email Tracking Template](#)



Working Your Email Backlog

Identify patterns

- Sort by “From”
- Sort by “Subject”
- Alerts, Email Lists

Create Rules

- Right-click email, choose “Create Rule”
- Move to folder
- Delete automatically
- Forward to someone else

Flag Junk Mail



Example Email Rules

- Move Box Sync Alerts to “Alerts” folder
- Move Confluence Alerts to “Alerts” folder
- Move release notifications to “Releases” folder
- Move Chronicle of Higher Education newsletter to “Read” folder



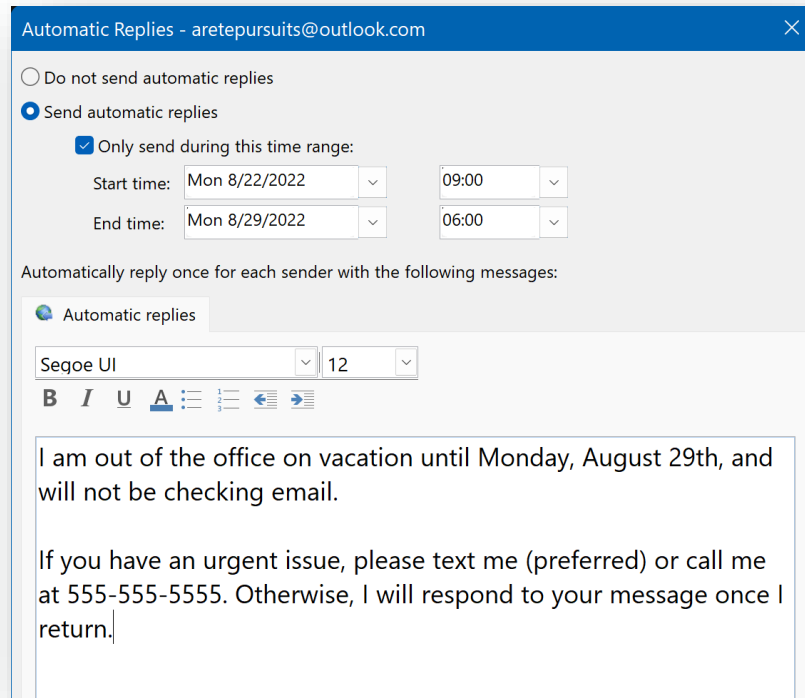
Additional Tips

- Think before you choose “Reply All”
- Move things to Slack
- Stop unwanted emails
- Use “All Documents” to search
- Know when you’re in a rut and change it up
- Leverage your mobile device
- A quick sweep brings peace of mind that there are no fires

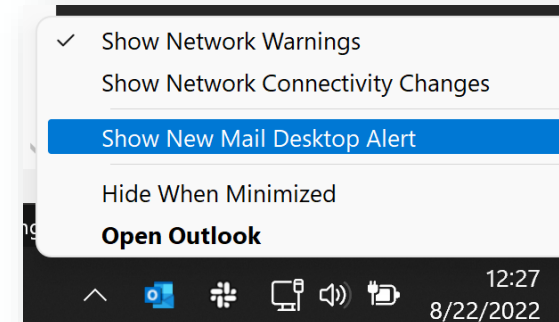


Additional Tips

Out of Office – set to turn off automatically



Disable desktop alerts



My Outlook

- ▼ Inbox
 - 10 NOW
 - 20 ACTIONS [6]
 - 35 READ [22]
 - 40 WAITING [22]
 - 50 STUFF [22]
 - 80 Travel
- > 02 Projects
- > 04 Active



Advanced Tips



Favorite Folders

Use Favorite Folders for the frequently accessed folders

How to do it

Archive

Sent Mail

Unread Mail (in Search Folders)

All Documents (in Search Folders)

Other frequently accessed

Right-click the folder

Choose “Add to Favorites”

Inbox Subfolders

- I keep the actionable folders as subfolders of the Inbox
- Easier to move to (especially on a mobile device)
- Quicker to access
- I do the same for popular folders or active customer/project folders
- Move them back to file cabinet when they are less active

Summary

Ritualistic Planning – Plan daily

Aggressive Calendar Management

Email Mastery – Establish a zero-inbox methodology

Systematic Note-Taking

A Single Centralized Tasklist

Distraction Elimination





Suggested Reading

Getting Things Done – David Allen

Make Time – Jake Knapp & John Zeratsky



Questions?

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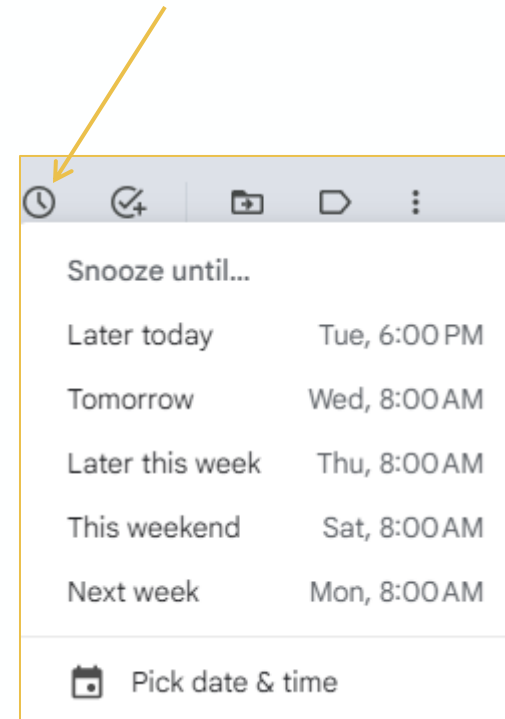
[Productivity](#)
[Blog Post](#)

Gmail Alternative slides



Snoozing Emails

- Are you confident you will get a response?
- If not, after sending the email, snooze it
- Snoozed emails reappear in your inbox when unsnoozed




Archiving

- Gmail search is so powerful, you don't need to label your emails
- If you don't want to delete it, archive it
- It will still be available in All Mail
- It will still be available in search

Label Visibility

- Set actionable labels to always show
- Set other labels to show if unread



Settings

General **Labels** Inbox Accounts and Import Filters and Blocked A

Labels [Create new label](#)

	Show in label list
10 Now 41 conversations	show hide show if unread
15 Today 0 conversations	show hide show if unread
20 This Week 0 conversations	show hide show if unread
25 Someday 0 conversations	show hide show if unread
30 Waiting 0 conversations	show hide show if unread
40 Stuff 0 conversations	show hide show if unread
50 Read 0 conversations	show hide show if unread
60 File Cabinet 0 conversations	show hide show if unread
70 Customers 0 conversations	show hide show if unread
80 Vendors 0 conversations	show hide show if unread
90 People 0 conversations	show hide show if unread

Other Gmail Tips

- I've had problems moving more than 50 emails at a time
- If you select everything and archive it or apply a label and it doesn't appear to work, just do one page of messages at a time

