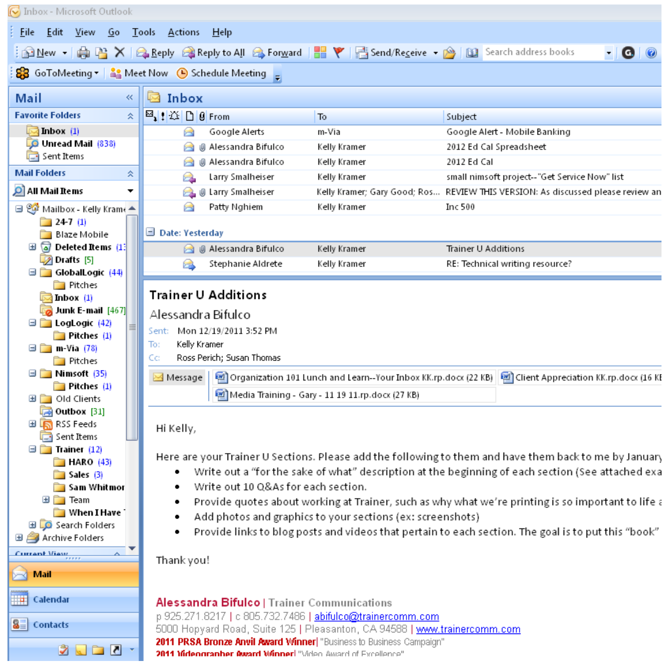
Organizing 101 - Staying Sane in Outlook

- Setting Up Outlook:
  - Set up a file for each client account you are on and for Trainer
  - Within each client account folder, create a sub folder for pitches. We re-use these often so it's useful to have them centralized.
  - Within the Trainer folder, set up a subfolder for Team and within the Team folder set up sub folders for each Trainer employee. Within the Trainer folder, also set up files for HARO, SMWS (Sam Whitmore Media Survey), and other resources.



  - The point is to file things the same way you associate them—so if you think Ross sent me the Crossing the Chasm, file it under Ross rather than under a client. But if you think, Jenna sent me this research for LogLogic, file it under LogLogic.
  - You do not need fancy auto-filters. Auto-filters often cause people to miss things.
- The Process of Using Outlook:
  - This is one of the ways you can manage Outlook. It typically works well for most people, but feel free to add what works for you. The goal of this process is to keep items in your inbox for as little time as possible. This means that you have 4 actions you can take when you receive an email—act on it, file it, delete it, and the thing you'll do least—leave it in your inbox.
  - So how do you run through this?
    - Start in the morning--you come in and check your email and go through this check list:
      - Does it require my action?
        - Yes and it's quick—Act upon immediately (i.e. sending someone a file, a quick answer, etc)—basically anything that doesn't take more than a moment or two. Then FILE it.
        - Yes and it's long—Leave it in your inbox (i.e. doing research, explaining a long answer to a client, scheduling a briefing time, etc)

            - No—it doesn't require action on my part:
                - Is it relevant to me?
                    - Yes and it's short (i.e. news on account, email trails, etc)—review in real-time and then FILE
                    - Yes and it's long (i.e. new whitepaper to review)—leave in your inbox to review later
                    - No--DELETE
- At the end of this process, you're left with an email that basically acts like your to-do list, which leads to one best practice for keeping a to-do list:
    - Keep a pad in front of you with actions that need to be completed immediately. If it MUST be done that day (i.e. an agenda or a deadline)—mark it in some way (highlight, star, underline, etc).
    - When you get an email with an immediate request (i.e. pitch Wall Street Journal), write it down on your list.
    - If it's a longer term request (i.e. research award opportunities), write it down if you may be able get to it that day. If you can't, then leave it in your inbox.
    - At the end of day, anything that didn't get completed on your written to-do list gets written on a to-do list for the next day. Also, go through your inbox to write down anything that's not on your written to-do list (i.e. Awards research).