



# Email management habits that guarantee less time in your inbox

[karbonhq.com](https://karbonhq.com)





# Meet your host



**Ian Vacin**

Karbon  
Chief Customer Officer

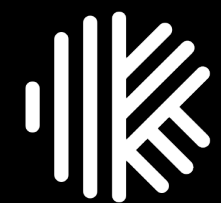




- 1. Close any open apps**
- 2. Ask and we'll answer**



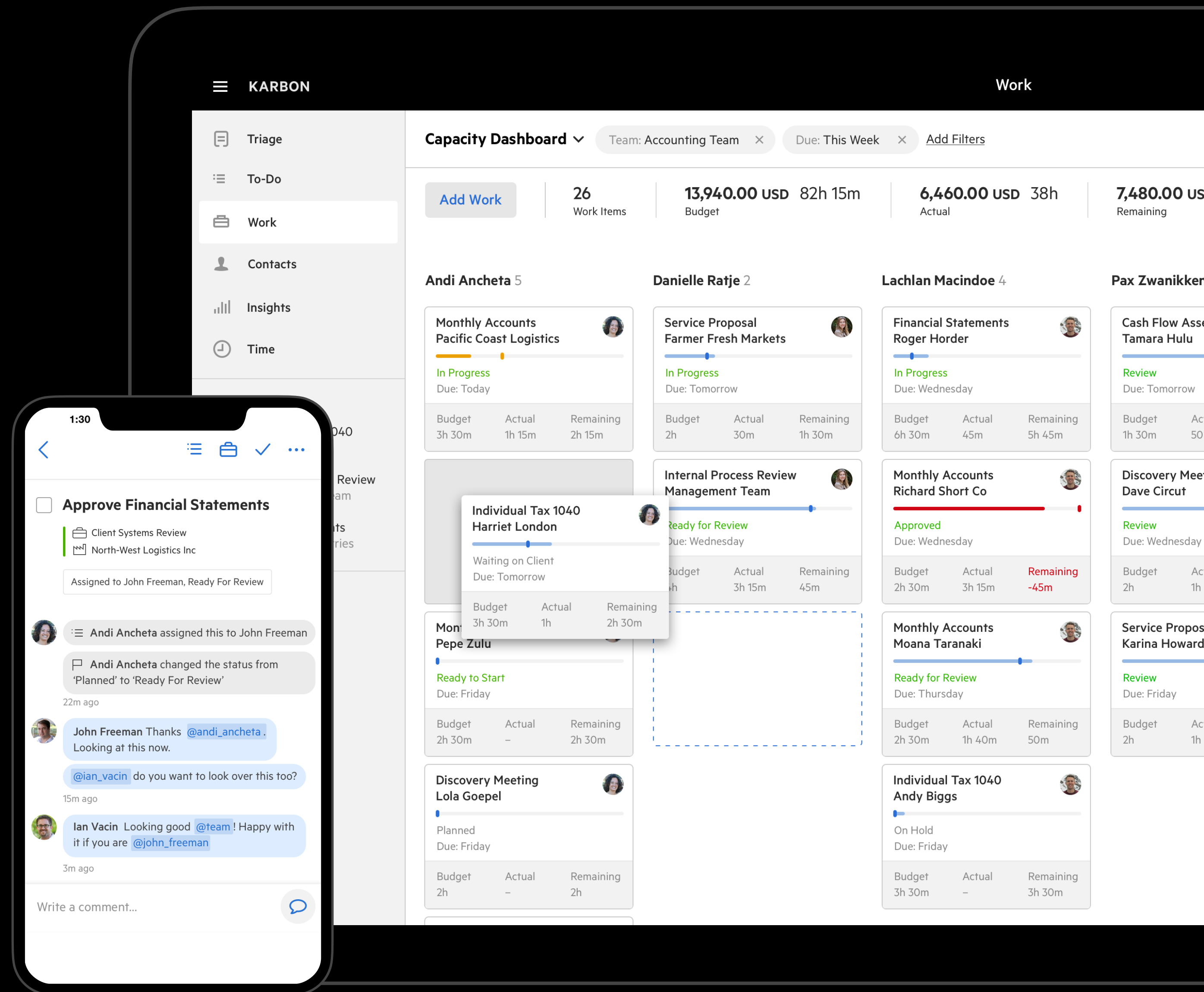




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED





Get above your email — as a team. Don't just read it, action it.

KARBON

Triage

Triage 2

Low Priority

Draft

Sent

Cleared

To-Do

Work

Contacts

Insights

Time

RECENTLY VIEWED

Individual Tax 1040

Tanya Franks

Internal Process Review

Management Team

Monthly Accounts

Xi Health Industries

Bronwyn Fredrickson

Help & Feedback

Settings

Logout

All - 7

1 - 7 of 7

<

>

Today

Clear Today

Jackie, Samuel, Rashid

Letter of Engagement for Tax Services

Email

Assigned to You

Corporate Tax 1120

Reach Foundation

3

6

1

1 new email

3 new comments & mention of you

Scott Gerdzunas

E-File Tax Return with Agencies

Task

Assigned to Scott Gerdzunas

Individual Tax 1040

Elliot Shehaan

1

Pax Zwanikken

@Bronwyn can you jump on a Zoom call and show @Scott how to lodge the amendment? Thanks.

Danielle Rathje

Capacity Plan

Note

Tax Season Planning

Internal

2

Danielle Rathje

@ian and @bronwyn the templates you set up for all this work are great! This automation will make a huge difference.

Richard, Chiang-Lee, ...

Confirming our Discovery Meeting

Email

Assigned to Richard Snell

Client Onboarding

North-West Logistics

4

4

1

3 new emails

This Week

Clear This Week

Ian Vacin

Share Project Plan with Senior Team

Task

Assigned to Lachlan Machindoe

Monthly Management Meeting

Internal

14

2

Lachlan Machindoe

I made the changes you requested @Ian. I think it has come together well and the rest of the team are good to start o...

Sara Goepel

Tax Due-Dates Delayed

Note

Tax Season Planning

Internal

2

Yohan Siemen

Let me know if I can help with this at all. I should have some time tomorrow if you need me.

Christina, Stuart, Maia

Monthly Account Files

Email

Assigned to You

Monthly Accounts

Reach Foundation

3

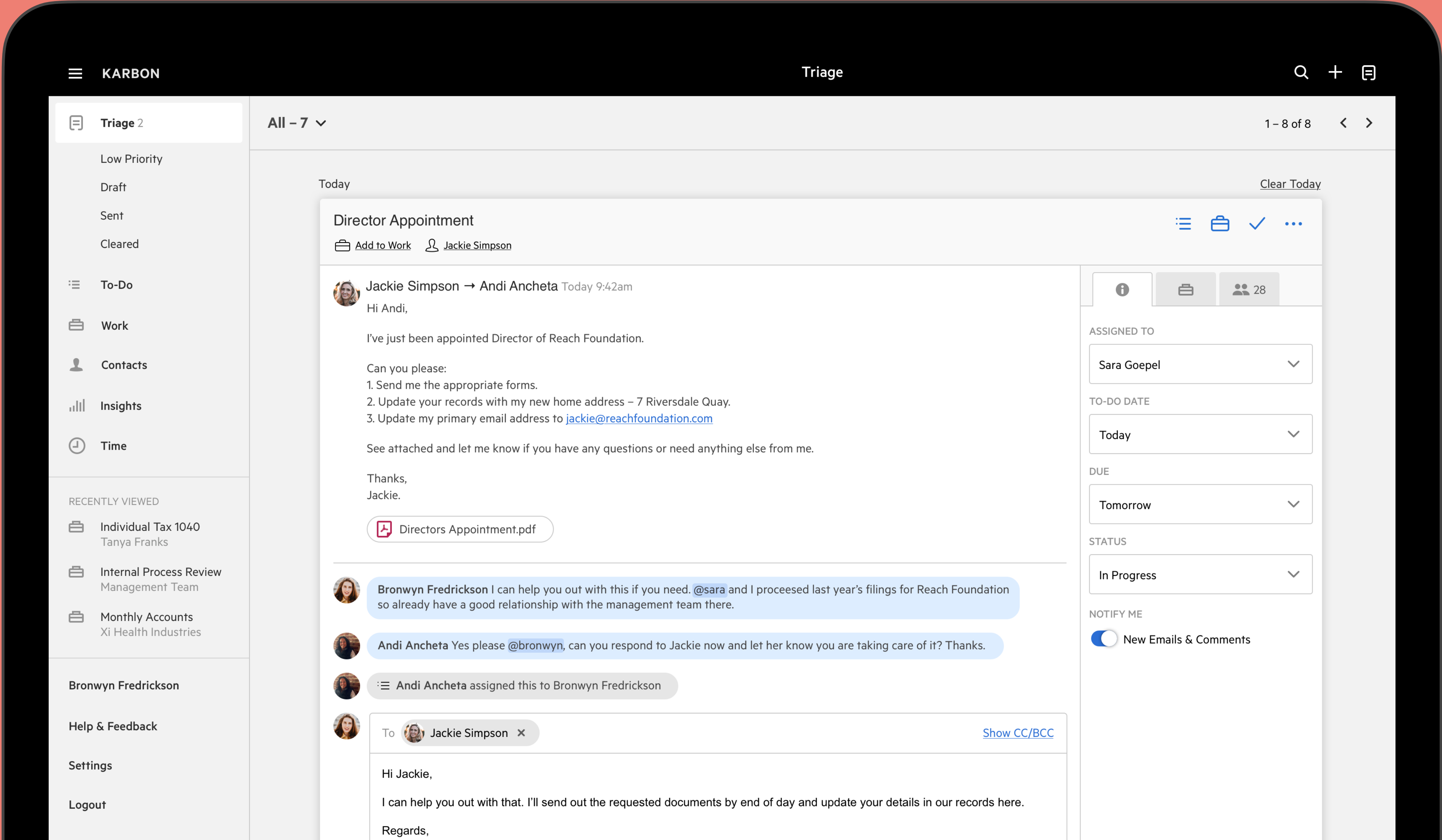
1

Hi Bronwyn,

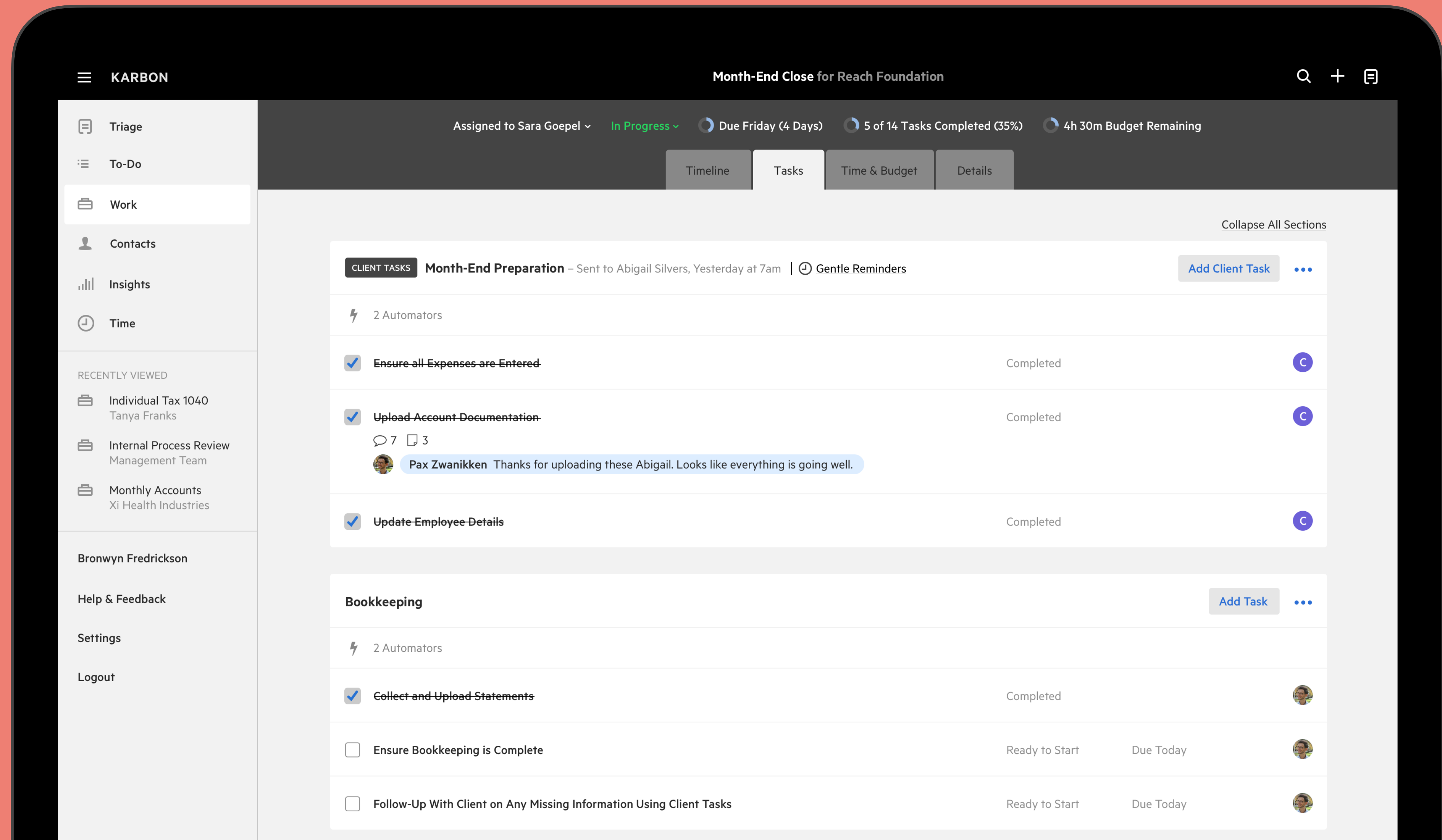
I've attached the last of the account statements and have completed the tasklist you sent me. Please let me know if you need anything else...



See the whole conversation no matter who said it to collaborate to complete.







- 1. Pros and cons of email**
- 2. Be efficient from the start**
- 3. Triage your inbox**
- 4. Change your habits**
- 5. Reduce the flow**
- 6. Tips and tricks**
- 7. What an ideal day looks like**



- 1. Pros and cons of email**
- 2. Be efficient from the start**
- 3. Triage your inbox**
- 4. Change your habits**
- 5. Reduce the flow**
- 6. Tips and tricks**
- 7. What an ideal day looks like**



# Email management: The pros and cons of email



# Global facts about email

- **Volume:** +280 billion emails per day sent
- **Growth:** ~20% increase by 2022
- **Participants:** Over 4.5 billion people on email
- **Importance:** 94% of workers recommend as best contact method
- **Categories:** 72% irrelevant, 18% spam, 10% useful
- **Impact:** \$650 billion loss per year





# A personal look at email

- **Volume:** ~125 emails handled each day
- **Type:** 60% are business related
- **Consumption:** 68% of emails read on a mobile device
- **Time:** 28% of your week in email (11+ hours)
- **Loss:** 1 hour per day lost searching for info



# The pros and cons of email

## Pros

- Everyone uses it
- Anyone can send or receive
- You can access it anywhere
- Frequency is rewarded
- It is the currency of business

## Cons

- No context, just threads
- Not actionable, not connected
- No ownership, no due dates
- All emails are treated equal
- No visibility, no transparency







# Email management: Why your email isn't actioned





**When you get a long email,**  
*what do you typically do?*



**How about a generic subject line...**  
*what do you typically do?*



**And an unknown sender...**  
*what do you typically do?*





# The keys to effective emails

- **Personalize:** Don't send from a generic email.
- **Be directive:** Use the subject line like a to-do to the sender.
- **Be concise:** Short & simple emails are read and actioned.
- **Assign an owner:** Place only one person on the To: line.
- **Be kind:** Email like you would like to be emailed.



1. Pros and cons of email
2. Be efficient from the start
3. Triage your inbox
4. Change your habits
5. Reduce the flow
6. Tips and tricks
7. What an ideal day looks like





# Email management:

## Be efficient from the start





# For each email, ask yourself:

- Can you delete it without reading it?
- Can you read it then archive it?
- Can you deal with it instantly (with just a short response)?
- Can someone else from your team action it?
- Does it require a significant amount of time?





# How to be efficient in your inbox

- **Purge:** Delete based on subject lines & senders
- **Action:** Touch an email only once!
- **Process:** Read, react... and go
- **Decide:** 1 second, 1 minute, 1 hour
- **Triage:** *The 4 Ds of email—Do it, Defer it, Delegate it, Drop it.*







# Email management:

## How to save time on each & every email





We spend 1.1 minutes on each email.

If we use simple tricks to trim 10 seconds off each,  
we'll save almost 60 hours over a given year.



# Email tips & tricks that save time

- Create & use email groups
- Leverage templated emails (Canned or Quickparts)
- Use automatic filters
- Label logically for faster search
- Emails are not to do's—create a to do



1. **Pros and cons of email**
2. **Be efficient from the start**
3. **Triage your inbox**
4. **Change your habits**
5. **Reduce the flow**
6. **Tips and tricks**
7. **What an ideal day looks like**





# Email management: Triage your inbox (the 4 Ds)



# Pre-requisites to consider

- **Purge:** Delete based on subject lines & senders
- **Action:** Touch an email only once!
- **Process:** Read, react... and go
- **Decide:** 1 second, 1 minute, 1 hour





# The 4 Ds to triage your inbox

- **DROP IT:** Archive the email.
- **DO IT:** Do the things that take <2 minutes.
- **DELEGATE IT:** Create a task & assign to someone else.
- **DEFER IT:** Create a task for yourself in your task manager.



1. **Pros and cons of email**
2. **Be efficient from the start**
3. **Triage your inbox**
4. **Change your habits**
5. **Reduce the flow**
6. **Tips and tricks**
7. **What an ideal day looks like**





# Email management: Change your habits





# Does this sound familiar?

- Do you look at your phone constantly?
- Are your notifications calling you?
- Do you check email hourly?
- When someone emails do you immediately respond back?
- Do you participate quite a bit on team apps like Slack or Teams?
- Does email feel overwhelming?
- Is your work/life balance unbalanced?





# Change your habits

1. **Turn off notifications**
2. **Check frequently not constantly**  
(for checking email / apps)
3. **Dedicated time to complete email**  
(30 minute blocks, 3 times / day)
4. **Be kind to others**  
(more you send, more you receive)
5. **Take a moment to breath**  
(switch off, go for a walk, meditate, practice yoga)
6. **Try time management methods**  
(e.g. Pomodoro technique, Edrolo OS, Moment app)





- 1. Pros and cons of email**
- 2. Be efficient from the start**
- 3. Triage your inbox**
- 4. Change your habits**
- 5. Reduce the flow**
- 6. Tips and tricks**
- 7. What an ideal day looks like**



# Email management: Reduce the flow





**388 emails sent per user per year**

**GROUPON**



# Reduce the flow

- **Purge:** Don't read. Delete first.
- **Siphon:** Use folders to move out and prioritize emails logically.
- **Eliminate:** Proactively unsubscribe. Try services like Unroll.me
- **Be smart:** Send less to receive less.
- **Tool up:** Get calendaring, workstream & team collaboration apps.
- **Old school:** Talk or meet... sometimes email is not the right medium.



- 1. Pros and cons of email**
- 2. Be efficient from the start**
- 3. Triage your inbox**
- 4. Change your habits**
- 5. Reduce the flow**
- 6. Tips and tricks**
- 7. What an ideal day looks like**





# Email management:

## Why you should have 3+ email accounts





**Ever emailed the wrong person by accident?**



**Had a personal email show up on your  
computer while presenting at work?**



**Tired of getting a million random sales or  
product solicitations in your work email?**





# Don't co-mingle your email

Does your accountant recommend you use personal credit card for your business?  
Get at least three emails to manage your work, life and otherwise.

## Email #1: Work

- This is your most sacred email.
- Give this email only to colleagues and business associates.
- Do not use this to sign-up to services unless they are critical to the business. Use spam email for app trials.
- Consider another work-like email that can be used for networking purposes.

## Email #2: Personal

- Use for friends and family only.
- If you don't work with them, and you know them, they are a contact here.
- Use in conjunction with personal finances and key life applications / services.
- Consider another personal email to split family/friends from associates.

## Email #3: Spam

- Give this out to whatever random service / person on the planet needs it.
- Don't replicate this password anywhere else.
- Ensure the email provider you choose has bulk actions for delete.
- Don't worry about this email getting out of control.





# Email management:

## Use email fields to your advantage








# The DACI (or RASCI) model

- **Driver**: person responsible and accountable for the work.
- **Approver**: person who will approve the work.
- **Consults**: experts that will be called upon to consult the Driver.
- **Informed**: people informed about the progress of the work.



# The structure of email

To	<a href="#">Add to work</a>
Cc	
Bcc	
Subject	
--	
Ilan Vacin	
	 





# The structure of email

- **To:** Target emails to ONE owner (e.g. Driver)
- **From:** Use a personalized email (e.g. Approver)
- **Cc:** Ensure consults know their role (e.g. Consults)
- **Bcc:** It is a gift and give it to others (e.g. Informed)
- **Subject line:** Create ones that are meaningful & directive.
- **Body:** Be concise.







# **Email management:** Unlock the power of subject lines





# Make emails more actionable

- 68% base their decision to open an email on the 'From' name.
- 33% of mobile email recipients read based solely on subject line.
- 22% increase in open rate when email subject line is personalized.
- 61-70 characters for subject lines receive the highest read rates.



# The power of subject lines

Website re-build contract: Review, sign & upload the proposal by Friday





# Subject lines are simple to-dos

verb + noun + object

- Contact Jane
- Phone Jane
- Phone Jane about tax return
- Phone Jane at 546-435-4562 to get tax docs
- Phone Jane at 546-435-4562 to get 2014 tax return
- Phone Jane at 546-435-4562 to get 2014 tax return (due date = Monday)



# The power of subject lines

Website re-build contract: Review, sign & upload the proposal by Friday

- To: = Owner
- Category = Website re-build contract
- Action = Review, sign & upload the proposal
- Due date = by Friday





- 1. Pros and cons of email**
- 2. Be efficient from the start**
- 3. Triage your inbox**
- 4. Change your habits**
- 5. Reduce the flow**
- 6. Tips and tricks**
- 7. What an ideal day looks like**





# Email management: What an ideal day looks like





# A typical day is full of distractions

- The average iPhone user unlocks device +80 times per day
- Email itself consumes almost 30% of each day
- The work place is full of high-volume communications (e.g. email and Slack), constant notifications, meetings, and interruptions.
- *Performing deep work is more challenging than ever*



***“A typical office worker gets only 11 minutes between each interruption, while it takes an average of 25 minutes to return to the original task after an interruption.”***

***— Gloria Mark, Professor at University of California, Irvine***





# The daily routine

- **Morning**

The wake-up ritual

In transit

The warm-up ritual

Focused work

The lull (part 1)

Focused work

- **Lunch**

- **Afternoon**

The post-lunch ritual

Focused work

The lull (part 2)

Focused work

The wrap-up ritual

In transit

- **Evening**

Dinner

Pre-bed ritual



# The daily routine

- **Morning**

The wake-up ritual

In transit

The warm-up ritual

Focused work

The lull (part 1)

Focused work

- **Lunch**

- **Afternoon**

The post-lunch ritual

Focused work

The lull (part 2)

Focused work

The wrap-up ritual

In transit

- **Evening**

Dinner

Pre-bed ritual







# Introducing Karbon

## Work Management Software *for* Accounting Firms

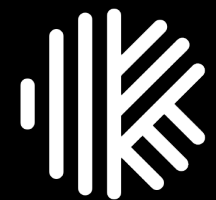
[karbonhq.com](https://karbonhq.com)

# Wrap up





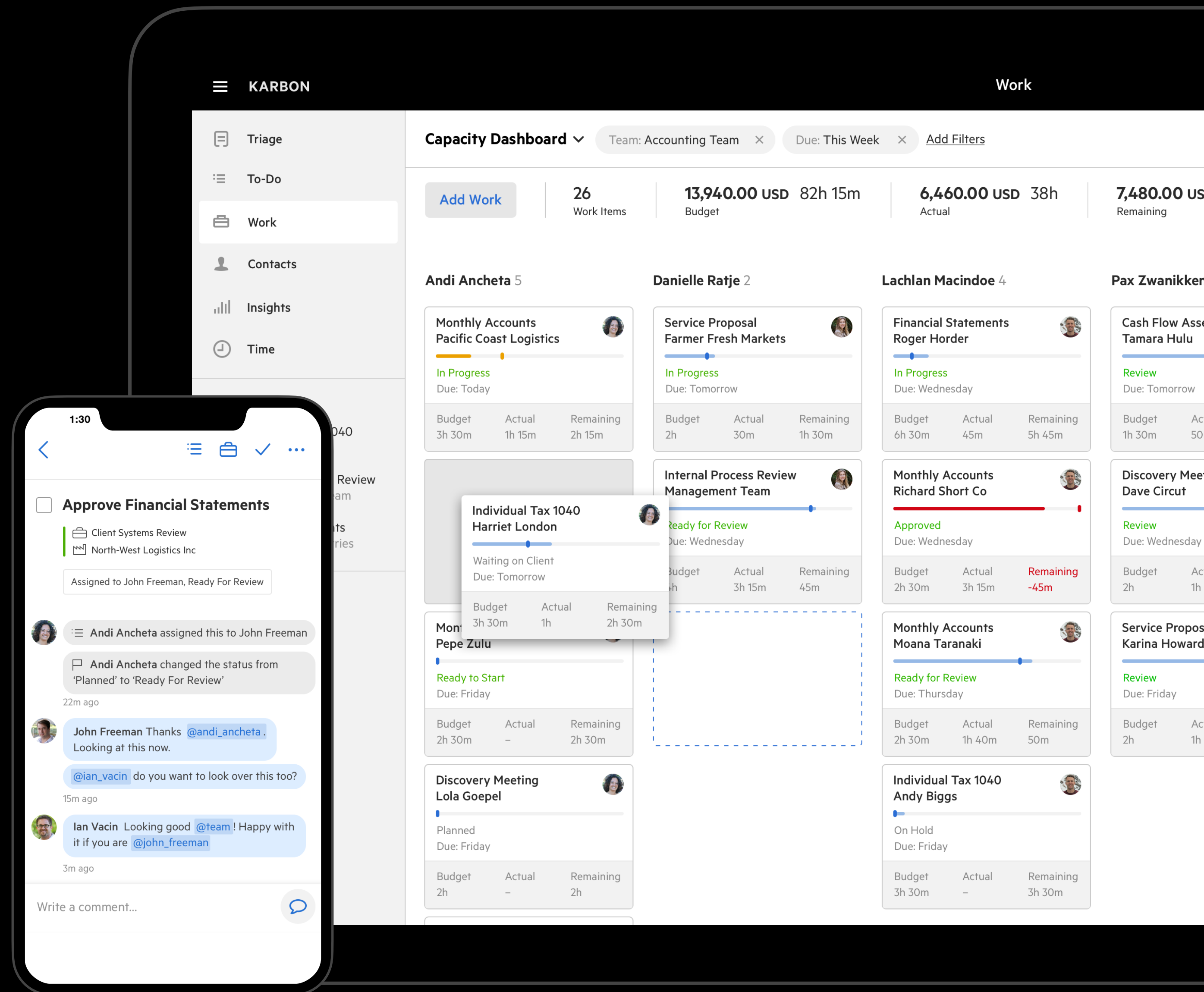
- 1. Pros and cons of email**
- 2. Be efficient from the start**
- 3. Triage your inbox**
- 4. Change your habits**
- 5. Reduce the flow**
- 6. Tips and tricks**
- 7. What an ideal day looks like**



# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED





# Questions



# Thank you

Get started at [karbonhq.com](https://karbonhq.com)

Follow us on twitter [@KarbonHQ](https://twitter.com/KarbonHQ)

[ian@karbonhq.com](mailto:ian@karbonhq.com)

