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Trial Reporter

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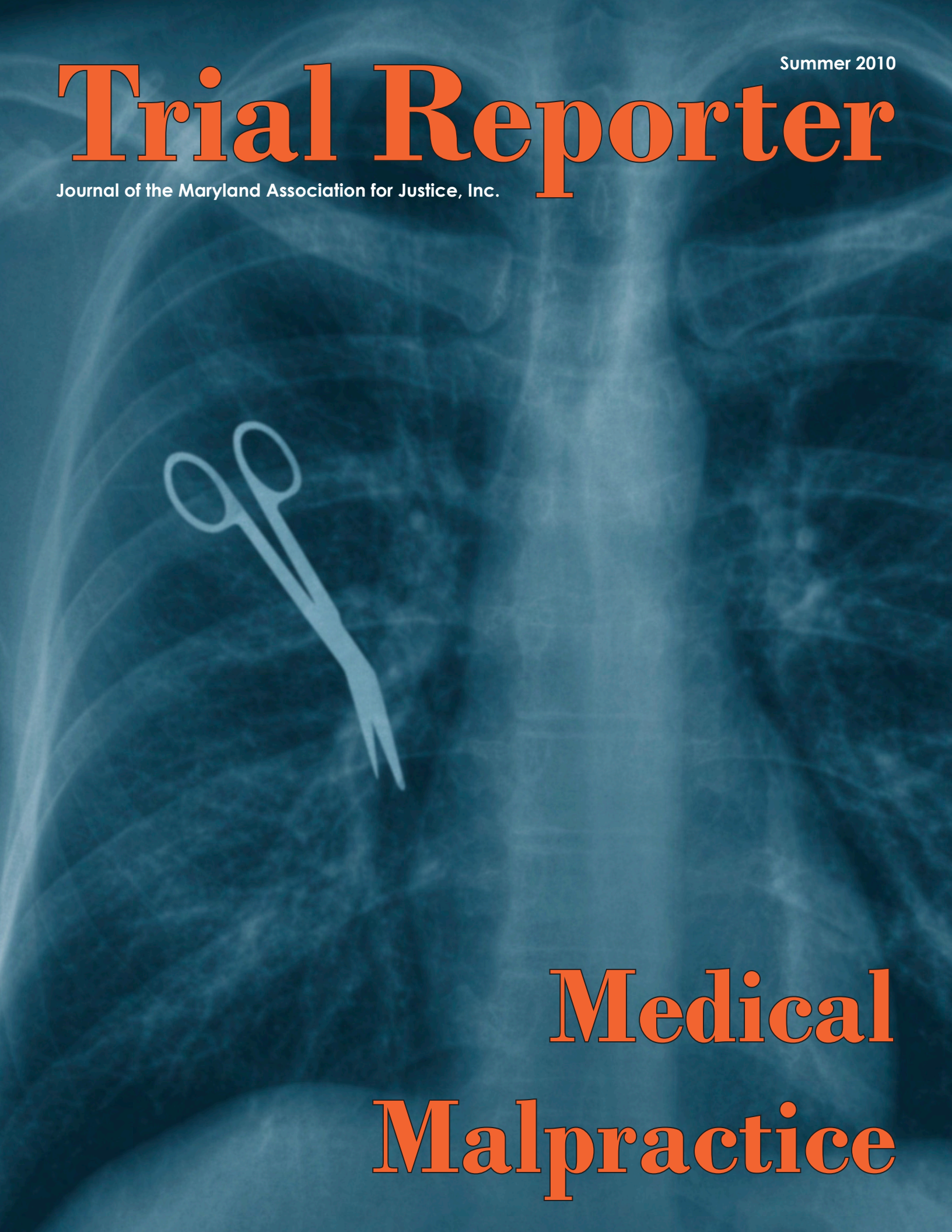

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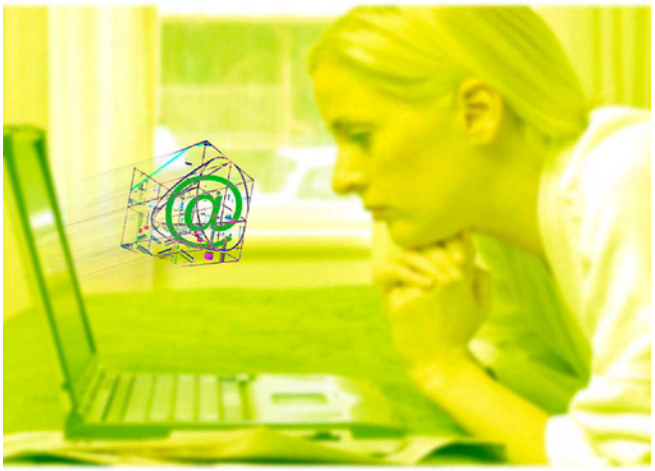
Ten Tips to Control Your E-mail Inbox



John J. Cord

In the Information Age, the goal is not so much to accumulate and assimilate information as it is to process it and separate the wheat from the chaff. Nowhere is this more important than in our e-mail inboxes. Listserve messages, spam, meaningless carbon copies, and even e-mails from ourselves to ourselves (the electronic version of the post-it note) all conspire to morph our inboxes into unwieldy and frightening harbingers of doom. Maybe that's hyperbole, but an inbox with hundreds (or thousands) of e-mails is an inbox that might be hiding a critical missive from a client, or something you overlooked with a fast-approaching deadline.

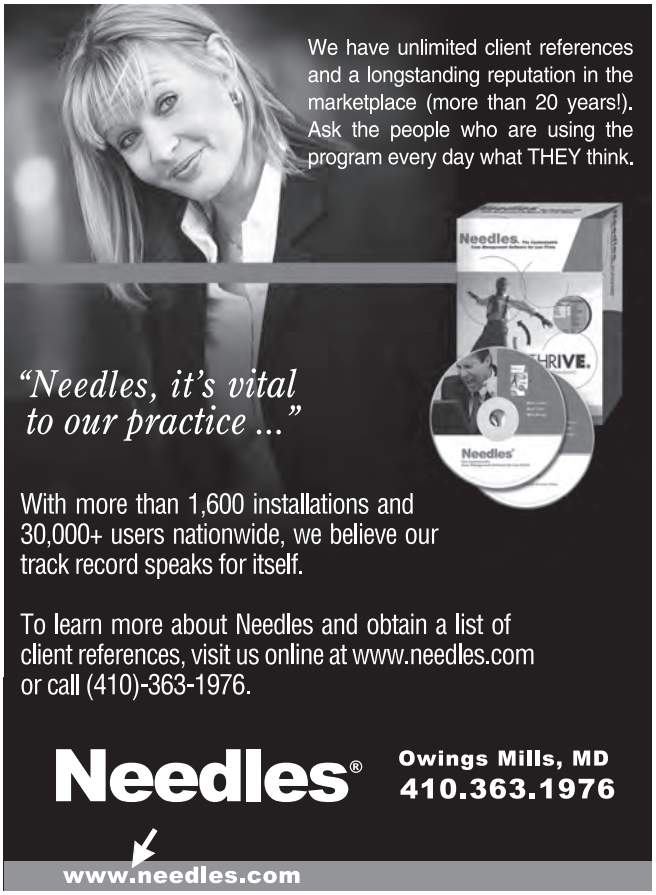
Using the tips and tools below, I transformed my inbox from 3,142 messages to 27 with just three days of work.

Tip No. 1: Use an E-mail Management System

You should have some way to move e-mails out from your inbox and link them to the cases they belong to. Our office uses Time Matters, a case management program that allows us to do two things with e-mail. First, we can link incoming e-mails (and their attachments) to the case file, automatically deleting the e-mail from our inbox. Second, we get a prompt every time we send out an e-mail, and the sent e-mail can also be automatically linked to a case. When the entire office properly links e-mails, all messages can be found in one location by anyone working on the case. This is particularly useful when cases are reassigned to other attorneys or staff. Whatever your case management program, you should have an easy way to save e-mails away from your inbox.

Tip No. 2: Use the Search Features

Every e-mail program has some ability to search messages. In Microsoft Outlook 2003 (my informal poll shows that most lawyers have not upgraded to 2007), click Tools>Find>Find (or Ctrl-F) to perform a word search. Even better, use Advanced Find (Ctrl-Shift-F) to give you more options for your search. Advanced Find allows you to search specific fields of e-mail messages (for example, the subject, the To or CC fields, items that are read/unread, items with/without attachments, and items that you have flagged. Use the search feature in conjunction with your e-mail management system by searching for key



words in e-mail messages (for example, a client's name, or defense attorney who only works on specific cases), then batch link those messages to the case. You can also sort quickly by sender, subject or even whether the e-mail has an attachment by clicking on the gray bar above the e-mails (From, Subject, Paperclip icon). The search feature is particularly important in the beginning, when you are culling through the hundreds (dare I say thousands?) of e-mails in you inbox.

Tip No. 3: Use Folders (But Sparingly!)

Many e-mail programs allow you to create folders or use labels to categorize your e-mails. This can be a useful tool for those e-mails that you want easy long-term reference to (not case specific e-mails, which should be linked to that case using your case management system). For example, I have folders for personal e-mails, a legal research folder, and an MAJ folder. In Outlook 2003, click File>New>Folder and type the name of the folder, and click where you would like it to reside (typically the inbox). You should not, however, just send all of your e-mails from the inbox to these folders—that only gives you the appearance of organization.

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Tip No. 4: Use Reminders

If you have no other automated method of following up on e-mails, most systems provide a method to flag and add reminders. The reminders will automatically pop-up at a specified date and time with the e-mail. For example, in Microsoft Outlook 2003, if you want to set a reminder to address a particular e-mail, click Actions>Follow-Up>Add Reminder, then click a flag color and enter a due date and time. The only difficulty with Reminders is that it is unwieldy to search non-flagged reminders. So, make sure to add a color-coded flag.

Tip No. 5: Get Digest Version of Listserve Messages

One of the biggest offenders of the well-manicured inbox is the listserve message. If you're like me, you subscribe to multiple listserves. On an average Wednesday, this contributed 148 messages to my inbox. The best way to manage these is to change your subscription to digest form, so you get one daily e-mail including all of the list messages as individual attachments. Otherwise, you can use rules to send all listserve messages to a specific folder. Which leads us to…

Tip No. 6: Use Rules

You can create rules for almost any contingency. For example, you can set up your e-mail system to automatically process e-mails from specific senders, with specific words in the subject line or body, or with a specific importance. Those messages can be deleted, moved to a specific folder, sent to your phone, or even printed. In Microsoft Office 2003, click Tools>Rules and Alerts>New Rule and follow the prompts to create your rule from scratch, or using a template. This is a good way to keep track of assignments sent from a supervisor or to an assistant by sending messages to specific folders.

Tip No. 7: Convert E-mails to PDF Documents

If you have PDF functionality enabled on your Microsoft Outlook 2003, you can select individual messages (or, use the Control button to select numerous non-sequential messages) and click Adobe PDF>Convert Selected Messages>Create New PDF. This will convert those documents to a PDF that can be saved on your system network, or easily forwarded to others as an attachment.

Tip No. 8: Eliminate Spam

This is really a variation on the Rules Tip, but has a more nuanced application—getting rid of spam. In an average day, I used to get about 50 spam messages. Many

of them are from the same e-mail address, but some are variations of the same e-mail address with identical domain names (for example, jujirx@zzpmzy.com and sduyux@zzpmzy.com). In Microsoft Outlook 2003, the way to do this is to click Tools>Options>Preferences Tab>Junk E-Mail>Blocked Senders Tab. Click Add to block specific e-mail addresses or domain names. Don't use this for every spam e-mail you get—only the ones you see on a regular basis that you want to eliminate. After this, those regular spammers will plague you no longer.

Tip No. 9: Color-coding senders

One way to easily sort through messages is to color-code messages from specific sources. For example, your assistant's e-mails can have a distinguishable color so they don't get lost in the mix. In Microsoft Outlook 2003, click Tools>Organize>Using Colors and specify the parameters in the fields.

Tip No. 10: Clean your inbox every day

...and make it your to-do list for the next day. The most important tip is make sure you clean out your inbox at the end of every day. Make sure all the spam is deleted, the important listserve messages are filed, and every other e-mail message from the day is either transformed into a To Do, or forwarded to the proper person in your office for handling. It's best to do this in the evening so that you can return to work the next day with a fresh inbox, and with a coherent list of things to do.

Using these tips can help turn your electronic inbox from disastrous to disciplined. It takes a little bit of work in the beginning, but if you can challenge yourself to keep your e-mail running slim and smooth, you will feel more organized, and may even avoid missing deadlines. ■

Biography

John J. Cord (*Miller & Zois, LLC*) graduated from the University of Colorado School of Law. He concentrates his practice on assisting victims of automobile negligence, medical malpractice, and defective products. He is licensed to practice in Maryland, the District of Columbia, Pennsylvania, Georgia and Minnesota. He is a member of the American Association for Justice and is a former chair of the MAJ Technology Committee. Read his blog at www.drugrecalllawyer.com, and follow him on Twitter at @johnjohncord.

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