GMAIL™ TIPS, TRICKS, and TOOLS

Streamline Your Inbox, Increase Your Email Productivity, and Save Hours a Week

Patrice-Anne Rutledge

FREE SAMPLE CHAPTER

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GMAIL™

TIPS, TRICKS, and TOOLS

Patrice-Anne Rutledge

GMAIL™ TIPS, TRICKS, AND TOOLS

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ABOUT THE AUTHOR

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DEDICATION

To my family, with thanks for their ongoing support and encouragement.

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WE WANT TO HEAR FROM YOU!

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IN THIS CHAPTER

- Exploring a Four-Step Process for Resolving Email Overwhelm
- Cleaning Up Your Inbox
- Processing Your Email
- Managing Multiple Email Accounts

1

INCREASING YOUR EMAIL PRODUCTIVITY

Before you implement the Gmail tips, tricks, and tools covered in this book, it's important to take some time to identify your current email challenges, clean up your inbox, and devise a new system for managing your email.

A FOUR-STEP PROCESS FOR RESOLVING EMAIL OVERWHELM

A four-step process can help you get out of email overwhelm. Following this process helps you get the most out of this book and create a personalized Gmail management system that takes advantage of all the latest technology available to you, yet is customized to the way you work and the email problems you need to resolve.

STEP 1: IDENTIFY YOUR EMAIL CHALLENGES

Before making any changes to how you use Gmail or implementing any new tools, take some time to think about what your current email challenges are. If you purchased this book, you obviously want to save time by becoming a more productive Gmail user, but there are obstacles in your way.

Which of these common problems do you identify with?

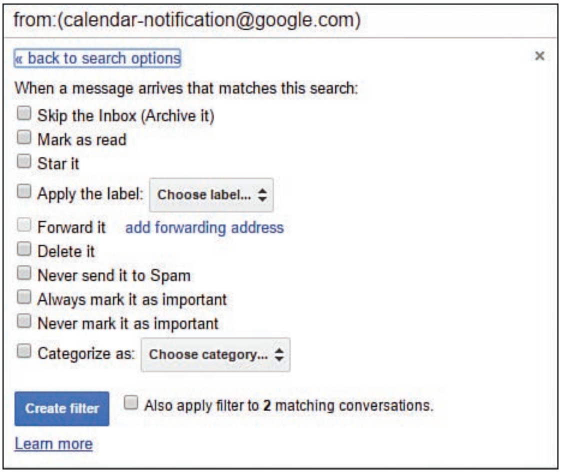
- I'm overwhelmed with the volume of email I receive.
- I check email too often looking for important messages.
- I'm using only basic Gmail features and haven't had time to learn and implement anything new.
- I forget to respond to important messages.
- I'm not able to find old or archived messages.
- I read the same messages multiple times before taking action.

If you're like most people, you could probably check off several of these items. Before I started using my current Gmail system, I was overwhelmed with messages (thousands of them in my inbox) and spent too much time checking for critical messages.

STEP 2: ANALYZE THE AVAILABLE SOLUTIONS

After you identify the email challenges you want to resolve, read through this book with an eye to related solutions. Solving your email challenges is often a combination of implementing the following:

- **Gmail features you're not currently using**—Many Gmail users don't go beyond the basics of sending, viewing, and responding to messages. Effectively maximizing the potential of Gmail features such as labels, filters, tabs, stars, and Gmail Labs tools can make a big difference in your email productivity. See Chapter 3, "Maximizing Gmail Efficiency," and Chapter 4, "Using Gmail Labs Features," to learn more. In addition, Chapter 5, "Using Inbox by Gmail," covers Google's time-saving email management app. Figure 1.1 shows an example of filters, a popular and powerful Gmail feature.
- **Gmail third-party tools**—Numerous third-party tools exist that extend Gmail's functionality and connect it with other popular applications. Chapter 6, "Extending Gmail with Third-Party Tools," and Chapter 7, "Extending Gmail with Browser Tools," introduce you to many of these tools. Figure 1.2 shows an example of a popular third-party tool, Boomerang for Gmail.



from:(calendar-notification@google.com)

« back to search options

When a message arrives that matches this search:

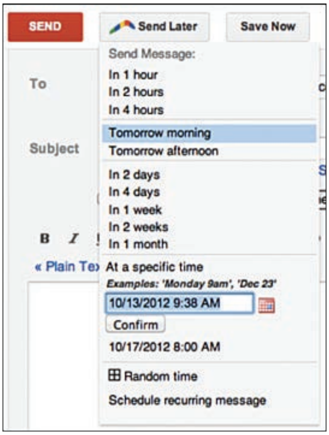
☐ Skip the Inbox (Archive it)
☐ Mark as read
☐ Star it
☐ Apply the label: Choose label...
☐ Forward it add forwarding address
☐ Delete it
☐ Never send it to Spam
☐ Always mark it as important
☐ Never mark it as important
☐ Categorize as: Choose category...

Create filter ☐ Also apply filter to **2** matching conversations.

Learn more

FIGURE 1.1

If you receive a lot of messages, using filters can save you hours a month.



Send Message:
In 1 hour
In 2 hours
In 4 hours
Tomorrow morning
Tomorrow afternoon
In 2 days
In 4 days
In 1 week
In 2 weeks
In 1 month
At a specific time
Examples: 'Monday 9am', 'Dec 23'
10/13/2012 9:38 AM
Confirm
10/17/2012 8:00 AM
Random time
Schedule recurring message

FIGURE 1.2

Schedule email to send later and track messages with a third-party tool such as Boomerang for Gmail.

- **Email productivity methodologies**—You can't control your Gmail inbox with tools alone, no matter how innovative or powerful they are. You must combine them with a solid email management process. See "Processing Your Email," later in this chapter, to learn how to create a system that works for you.

STEP 3: PERFORM A ONE-TIME INBOX CLEANUP

Next, delete any messages you obviously don’t need from your inbox and unsubscribe from any newsletters you don’t read. This one-time task will help purge your inbox of unnecessary items before you start organizing it and implementing the tools and techniques described in this book. See “Cleaning Up Your Inbox,” later in this chapter, for more information.

STEP 4: IMPLEMENT AND FINE-TUNE YOUR NEW EMAIL SYSTEM

After reading this book and getting a first-hand look at the available Gmail features and tools, select and implement the ones that best meet your needs.

CAUTION It’s important to remember that you don’t need to use every feature or tool—only those that truly help you save time and simplify time-consuming tasks. Start by implementing a few things, and continue from there. You’ll probably need to try out several features, tools, and processes before determining what works for you.

Remember that implementing too many new solutions and tools often can complicate things rather than streamline and save time. You don’t need to use every cool new tool or productivity concept—just the ones that actually work for you.

CLEANING UP YOUR INBOX

Cleaning up your inbox is rarely at the top of anyone’s to-do list, but taking on this one-time task can make organizing your remaining email much easier.

THREE STEPS TO A STREAMLINED INBOX

Here’s a three-step approach to handling this one-time task.

1. **Go through your inbox and delete any unwanted messages, both received and sent.** At this point, don’t worry about labeling, archiving, starring, and filtering messages or implementing any other Gmail features. Just focus on deleting what you don’t need to keep in your inbox or archive.

TIP If you're new to Gmail or need some advice on streamlining the deletion process, see the tip in the "Managing Messages" section in Chapter 2. Deleting multiple messages at one time is the easiest way to clean up a large email backlog.

2. **Review your trash bin for messages you shouldn't have deleted.** When you're eager to clean up a bloated inbox, it's easy to delete something by mistake. The Gmail trash bin gives you 30 days to review messages marked for deletion and restore anything you shouldn't have deleted.
3. **Unsubscribe from mailing lists that don't provide value.** If you're like most people, you subscribe to numerous mailing lists from the companies you do business with, such as stores, banks, investment firms, and online services. You also probably subscribe to newsletters related to your personal and professional interests. Most social media accounts also flood your inbox with messages unless you unsubscribe from their default settings. Unsubscribing from anything you don't read and don't use is one of the fastest ways to cut down on inbox overload.

TIP If you have numerous subscriptions (many active email users have more than 100!), you can streamline the unsubscribing process by using a tool such as Unroll.Me (https://unroll.me). This service also enables you to create a rollup of all your subscriptions that's delivered in one daily message.

TIP If you subscribe to email newsletters to receive new blog post notifications, an easy alternative is to use a reader such as Feedly (https://feedly.com), which is available in versions for web browsers, Android devices, and iOS devices. Feedly enables you to read all your favorite websites and blogs in one place, categorized by topic. In many cases, using a tool like this can eliminate the need for many newsletter subscriptions that overwhelm your inbox. Fewer subscriptions can help you focus on taking care of email messages that actually require your attention rather than driving you away from your inbox to read that intriguing new blog post.

REDUCING SOCIAL MEDIA EMAIL NOTIFICATIONS

By default, many social media accounts send you multiple messages a day notifying you about new followers, comments, likes, requests, and more. For example, several years ago when I first joined Pinterest, I forgot to modify my notifications and my inbox was soon flooded with hundreds of messages about every new follower, repin, and like.

If you're receiving social media notifications that you either delete immediately or leave unread in your inbox, take a few minutes to revise your email notification settings. Some people, for example, prefer to view everything on the site itself, whereas others want to receive selected notifications (such as invitations to connect or comments that need to be addressed).

Although you can often unsubscribe from social media notifications directly from the messages you receive (normally at the bottom of the message), it's often easier to review your notifications on each site as a one-time project.

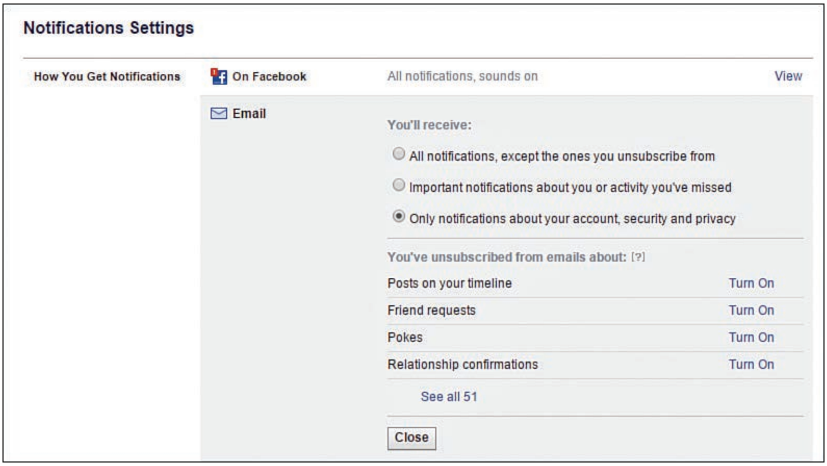
Here's how to manage your email notifications for many popular social sites.

MANAGING FACEBOOK EMAIL NOTIFICATIONS

To manage your Facebook email notifications, follow these steps:

1. Click the down arrow in the upper-right corner of the screen.
2. Select Settings from the menu.
3. Click the Notifications tab.
4. On the Notification Settings page, click the Edit link to the right of the Email section.
5. Specify your email preferences, such as all, important, or account-only notifications, as shown in Figure 1.3.
6. Click the Close button.

NOTE These instructions are for your personal Facebook profile. If you have a Facebook page, log in to that page, click the Settings button, click the Notifications tab, and specify your email preferences.



Notifications Settings

How You Get Notifications

On Facebook — All notifications, sounds on — View

Email

You'll receive:

○ All notifications, except the ones you unsubscribe from

○ Important notifications about you or activity you've missed

● Only notifications about your account, security and privacy

You've unsubscribed from emails about: [?]

Posts on your timeline	Turn On
Friend requests	Turn On
Pokes	Turn On
Relationship confirmations	Turn On

See all 51

Close

FIGURE 1.3

Control the type of email notifications Facebook sends you to reduce email frequency.

MANAGING TWITTER EMAIL NOTIFICATIONS

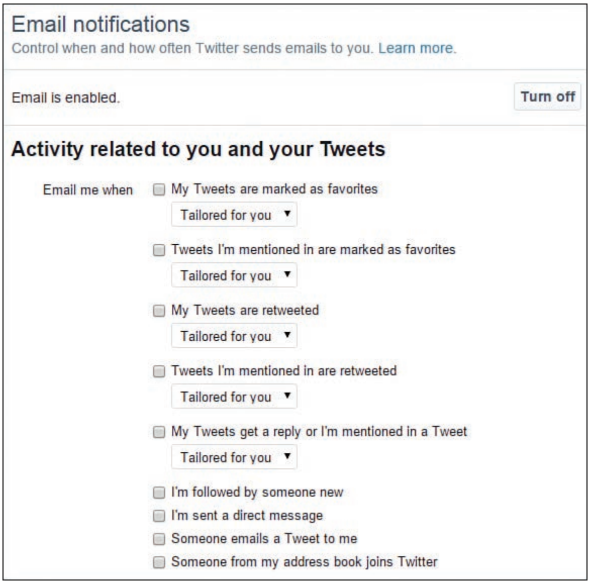
To manage your Twitter email notifications, follow these steps:

1. Click your photo in the upper-right corner of the screen.
2. Select Settings from the menu.
3. Select the Email Notifications tab.
4. Deselect the check box next to any emails you no longer want to receive (see Figure 1.4).
5. Click the Save Changes button.

MANAGING LINKEDIN EMAIL NOTIFICATIONS

To manage your LinkedIn email notifications, follow these steps:

1. Pause over your photo in the upper-right corner of the screen.
2. Click the Manage link in the Privacy & Settings section.
3. Click the Communications tab.
4. Click the Set Frequency of Emails link.
5. Click the Edit (pencil) icon to the right of the email notification type you want to manage. For example, you can manage your notifications from other members, groups, and LinkedIn itself.



Email notifications

Control when and how often Twitter sends emails to you. Learn more.

Email is enabled.

Activity related to you and your Tweets

Email me when

☐ My Tweets are marked as favorites
Tailored for you ▾

☐ Tweets I'm mentioned in are marked as favorites
Tailored for you ▾

☐ My Tweets are retweeted
Tailored for you ▾

☐ Tweets I'm mentioned in are retweeted
Tailored for you ▾

☐ My Tweets get a reply or I'm mentioned in a Tweet
Tailored for you ▾

☐ I'm followed by someone new
☐ I'm sent a direct message
☐ Someone emails a Tweet to me
☐ Someone from my address book joins Twitter

FIGURE 1.4

Twitter enables you to control email activity about your tweets, retweets, and network activity.

MANAGING PINTEREST EMAIL NOTIFICATIONS

To manage your Pinterest email notifications, follow these steps:

1. From your Pinterest page, select Account Settings from the drop-down list in the upper-right corner.
2. On the Notifications tab, specify your email preferences. If you do want to receive emails, you can choose to receive them once a day rather than as they happen, which reduces email volume.
3. Click the Save Settings button.

MANAGING GOOGLE+ EMAIL NOTIFICATIONS

To manage your Google+ email notifications, follow these steps:

1. Select Settings from the drop-down list on the left side of the screen.
2. Update the Manage Subscriptions and Receive Notifications sections with your preferences.
3. Google+ automatically updates your selections.

PROCESSING YOUR EMAIL

If one of your challenges is spending too much time checking, reading, and responding to your email, implementing a new email management system is essential to your success, no matter what new tools you start to use.

DECIDING HOW OFTEN TO CHECK YOUR INBOX

Checking your inbox too frequently is an unproductive, distracting timewaster. If you have this common tendency, you can save hours a week by creating a specific schedule for handling email. I don't believe there is one "best" schedule for managing email, however. There are too many variables based on the type of work you do, your company culture, and your own work style and preferences. Some people get by with checking email once a day; others require more frequent interaction with their inboxes. There are also big differences between the urgency of messages in your work inbox and your personal inbox (once a day is usually fine for that one).

For example, I used to work on a large global team for a major software company. The work environment was fast paced with frequent changes, late-notice meetings, and team members around the world. Checking email once a day simply wouldn't work in this environment. Instead, I created a system where I checked messages three times a day—when I first started working, right after lunch, and at the end of the day. This enabled me to respond within a few hours to urgent messages, yet flag less time-sensitive requests for processing once daily (for me, this was at the end of the day).

The key is to determine what timeframe works best for your own needs and stick to it.

TIP One way to avoid checking email too frequently is to have specific messages sent to your phone as text messages. For example, you could forward any email from your boss or an important client as a text message so that you receive it immediately, without having to check your inbox all the time to see whether these important people contacted you. In Gmail, you do this using filters. See "Working with Filters" in Chapter 3 for more details.

CREATING A SYSTEM FOR MANAGING YOUR EMAIL

The other big timewaster is reading messages multiple times before acting on them. When you're ready to review the messages in your inbox, you should take one of the following actions:

- **Respond**—Answer the message and then either delete or archive it with an appropriate label. Also consider applying a filter for future processing, if appropriate.
- **Delete**—Delete any unnecessary messages. If a message is spam, select it and click the Report as Spam button to alert Gmail. If a message is from a mailing list you no longer want, unsubscribe.
- **Archive**—Archive messages that you need to keep but don't need to act on. Applying a label to archived messages makes finding them in the future easier.
- **Delegate**—Send this message for someone else to act on. For example, you might delegate to one of your employees or forward a message to someone else if you aren't the right person to handle the specific request.
- **Defer**—If a message is something you need to act on but can't handle right now, you must defer it. One way to do this is to add this message to your task list by selecting its check box and then selecting Add to Tasks from the More drop-down list. Another way to handle this is to use stars to flag "to-do" items. You can leave messages that need action in your inbox or archive them with an appropriate label, such as To Do. This depends on how important it is to you to achieve Inbox Zero.

See Chapter 3 for more information about using labels, filters, stars, tasks, and more to streamline your email processing time.

NOTE When it comes to email productivity, you've probably heard of the term *Inbox Zero*, often credited to productivity expert Merlin Mann (www.merlinmann.com). To some people, Inbox Zero means literally no active messages in your inbox (archived messages don't count). To other people, Inbox Zero is more conceptual: Your inbox is so clean and well managed that you need to expend zero brainpower worrying about email management. Whichever definition you prefer, an emphasis on lightening the impact of your inbox can free you to focus on more important, productive tasks.

MANAGING MULTIPLE EMAIL ACCOUNTS

Another common email management problem is having too many email accounts. Although many people have two email accounts (work and personal), others have multiple accounts, such as additional accounts for newsletter subscriptions, shopping, side businesses, hobbies, and more. Just because it's easy to create free Gmail accounts, however, doesn't mean it's a good idea to have them. To streamline your email process, I recommend having no more than two accounts (work and personal) unless you have a solid reason for doing so, such as a side business account you must keep separate.

If you're using separate accounts for receiving newsletters and so forth, consolidate them with your personal account (if you decide you still need to subscribe after reading this chapter). With Gmail's tab system, messages from any newsletter subscriptions, online stores, or social media accounts are routed to your Promotions tab or Social tab, away from your most important messages.

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