

Email Inbox Management

What is the task?

Managing an email inbox to keep it tidy and organised.

Why does the task need to be completed?

A well-structured email management system saves time, increases productivity and efficiency, while also reducing cost and risk.

Who is in charge of completing the task?

Virtual assistant

When does it need to be done?

Daily, at regular intervals during the day.

How does the task need to be done?

Let us begin with the best practices in email management. Go through each of these best practices, understand, and apply them as you do the actual task.

A. Best practices in email management:

1. Set aside a time in a day to check your inbox. You cannot have it open all day unless under special circumstances when you have to watch out for a very important email. You may just minimise your inbox so you can focus on other tasks, or pin it on your browser or taskbar so that it is easier to switch from one task to another.
2. Your inbox is a to-do list. If an email comes in and you need to action straight away – do it! Do not delay. Taking actions immediately will help keep your email inbox under control.



3. Organise the inbox with labels/folders/categories. Use a relevant naming system. Come up with a structure that makes sense to you. Ideally, it should be based on the types of emails you are receiving regularly, but there is no standard protocol for this as every business varies. Doing this is going to help you focus and prioritise.

Ideally, the goal is to have less than one screen of emails in the inbox, or zero emails by end of day each day, but always communicate with your direct superior for goal setting and expectations.

4. Use filters to help you sort out emails automatically when it gets into your inbox.
5. Unsubscribe from unwanted promotional/marketing emails.
6. Use templates to common queries you get. Canned responses in Gmail really helps.
7. Some important emails may have gone straight to the spam folder so schedule a time to check this folder.

B. Best practices in email writing

1. A professional email should contain the following essential parts:
 - ✓ Subject line – Title your email in such a way that the recipient immediately knows what the message is about.
 - ✓ [Salutation or Greeting](#) – Use professional greetings.
 - ✓ Body – Keep it short and get to the point. Use editing tools like [Grammarly](#) to help with your text/grammar, etc.
 - ✓ Your name/signature – You never want someone to have to look up how to get in touch with you.
2. Your email is a reflection of you. So, be yourself when writing your emails. Always write in a manner that presents the way you want to be perceived by the person reading your emailing especially when establishing connection or relationship.
3. When writing an email on someone else’s behalf for the first time, introduce yourself to the person receiving the email.

You can say

“Joy here, admin at VA Platinum. I am helping Ed with his emails today so I am responding on his behalf.”



Got any questions? Contact me at brian@vaplatinum.com.au



4. Have your written email response checked by your direct superior if you are not confident with your work. Do not hesitate to ask advice and be open to feedback.
5. Proofread before sending.

To add the list above, you can read [this article about Email Etiquette](#) to learn more tips.

C. Email inbox set-up

Depending on what tool you are using, you can refer to the functionalities listed below for Gmail and Outlook. These are useful features that you can make use of to help with managing the email inbox.

In Gmail:

1. [Email signature](#)
2. [Labels](#)
3. [Search Filters](#)
4. [Rules](#)
5. [Templates](#)
6. [Important/Urgent Email](#)
7. [Grammarly Integration](#)
8. [Starring Emails](#)
9. [Automatic Replies](#)

In Outlook:

1. [Email Signature](#)
2. [Folders](#)
3. [Search Filters](#)
4. [Rules](#)
5. [Quick Parts](#)
6. [Important/Urgent Email](#)
7. [Grammarly Integration](#)
8. [Flagging Emails](#)
9. [Automatic Replies](#)

