Tips and Tricks to E-mail Management

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About me

Dean, Oregon State University Honors College and College of Education

Professor, School of Mechanical, Industrial, and Manufacturing Engineering

Process Engineer, Senior Member of Technical Staff, Project Manager, Hewlett Packard 1987-1999

PhD Industrial Engineering (Engineering Management), Oregon State University

M.S. Manufacturing Systems Engineering Stanford University

B.S. Material Science and Engineering, Cornell University

Grew up in eastern MT
I’ve lived in Oregon longer than any other place
First generation college student and only one in my extended family to earn a doctorate
I am a wife (30+ years)
I am a mother (Garrett 26, Taylor 24, Nicole 24 and daughter-in-law, Maddy 24)
I golf. I play soccer. I run or workout daily and read to relax
I enjoy music (country and classical)
I volunteer extensively and enjoy taking on leadership roles in professional organizations

B.S. Electrical Engineering, Cornell University
E-mail at OSU

• OSU provides an ONID account for all students. Undergraduates primarily use Gmail to manage e-mail, and undergraduate employees may also use Outlook Exchange.

• Communications from OSU (faculty, registrar, business affairs, financial aid, etc.) will come to you through your ONID account and into your OSU Gmail account.

• The number of e-mails in your OSU e-mail account might seem manageable initially, but as the term ramps up, some students find it difficult to “keep up” with their e-mail.

Image from: https://sophieuliano.com/deal-overwhelm/
Why Students Should Use E-mail at OSU

• Faculty and staff are accustomed to using e-mail for communication (as opposed to text or other social media platforms).
  ➢ Contact professor with clarifying questions that do not require additional discussion
  ➢ Contact an advisor with request for information
  ➢ Setting up an appointment with a professor, whose work you are interested in
  ➢ Inquiring about possible openings on a professor’s research team

• It is important to keep track of e-mail communications you send and follow-up. It never hurts to make sure someone has received your e-mail.
Why You Should Establish Effective E-mail Management Habits Now?

• On the quarter system, things get busy quickly. Designing an e-mail management process now allows you to establish good habits before you are too busy to figure it out.

• This is the first step towards managing your workload, particularly given you are in a new environment and you will have many “new” expectations to manage.

• At OSU (and beyond) people will expect that you read and respond in a timely fashion to requests and tasks sent to you by e-mail. Not “seeing an e-mail” will not be a valid reason for missing deadlines.

• E-mail management will be a skill that you will take to your career and/or to graduate school.
Four Strategies for Managing E-mail

• Set a schedule for “working” on e-mail
• Integrate e-mail with calendars and task lists
• Create a strategy for sorting and filing e-mails
• Manage the source of e-mails
Set an E-Mail Schedule

- Determine how frequently you will check e-mail*
Set an E-Mail Schedule

- Determine how frequently you will check e-mail
- Scan and sort your e-mail*
Set an E-Mail Schedule

- Determine how frequently you will check e-mail
- Scan and sort your e-mail
- Take action (4D’s)
Set an E-Mail Schedule

- Determine how frequently you will check e-mail
- Scan and sort your e-mail
- Take action (4D’s)
  - Delete it
  - Do it (if it takes 2 minutes or less)
  - Delegate it
  - Defer it*
Integrate E-Mail with Calendars and Task Lists

- Move e-mails that remind you where you are supposed to be to your calendar (electronic or physical)
- If you must defer taking action on an e-mail, move it from your inbox to a task list or “action folder” (this may be an electronic to-do list or a physical to-do list)
Create a Strategy for Sorting and Filing E-mails

- Determine how you will use your in-box
  - Strategy 1: As your “to-do list”
  - Strategy 2: As a staging area for your “to-do list”
Create a Strategy for Sorting and Filing E-mails

- **Strategy 1:** (As your to-do list)
  - Advantages

- Disadvantages:
Create a Strategy for Sorting and Filing E-mails

- **Strategy 2: (In-box as a staging area)**
  - Organize your in-box using labels, folders, and/or categories*
  - Develop a strategy and folder structure for archiving e-mails that you might need down the road*
  - Develop a schedule for reviewing and clearing out your in-box folders
  - Become familiar with the “search” function to be able to quickly locate archived e-mails
• Nest folders
• Use automatic filters (based on labels or other strategies)
• Split inbox
Simplify view
• split inbox
• Hide folders you do not use
Manage the Source of E-Mails

- Consider keeping personal e-mail accounts separate from ONID account, i.e. do not auto-forward all e-mails from one to the other*
- Do not subscribe to list serves/news feeds that are not related to your studies at OSU
Manage the Source of E-Mails

- Take the time to unsubscribe to lists that send you e-mails that you delete
- Use file sharing services, use BOX (OSU supported), for collaborative projects – good for revision control management and reducing e-mail storage space
Questions?