

# How to Get Your Email Inbox to Zero Every Day

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It is possible to get your email in-box to zero every day, even if you get 100 emails a day.

And it's not super complicated—though it does take effort and some discipline. But I don't think that lack of effort has been the main problem. I think the main problem has been not knowing *how* to manage email effectively.

A lot of people have simply never been taught some of the basic best practices for keeping email under control. For example, most of us fall into the trap of using our email in-box as a small to-do list from time to time (really bad), and sometimes we even end up using our in-box as a holding tank for major project items (far worse).

The result is that we go through the day with the sense of having a thousand “open loops” continually before us.

The goal of this article is to outline some very simple practices that will enable you to manage your email in a way that is effective, simple, and maintains a sense of relaxed control. You should be able to take this article and use it to get your in box from whatever point it is—even if it's at 15,000 emails—and get it down to zero.

And it shouldn't take too long (although if you have 15,000 emails, maybe you should just delete everything more than three weeks old and start over!).

And you'll be able to keep it there. Or, at least, if you don't keep it there, it won't be because you don't know how.

## Overview

In this article, we are going to cover five areas. By going through these five things, we will go through a process that will enable you to get your email inbox to zero and keep it there. The five areas we will cover are:

1. Setting up your email workspace
2. The rules of processing
3. How to handle the four different types of emails
4. Email filing (don't do it)
5. Staying at zero all day long: how often should you check email?

## Setting Up Your Email Workspace

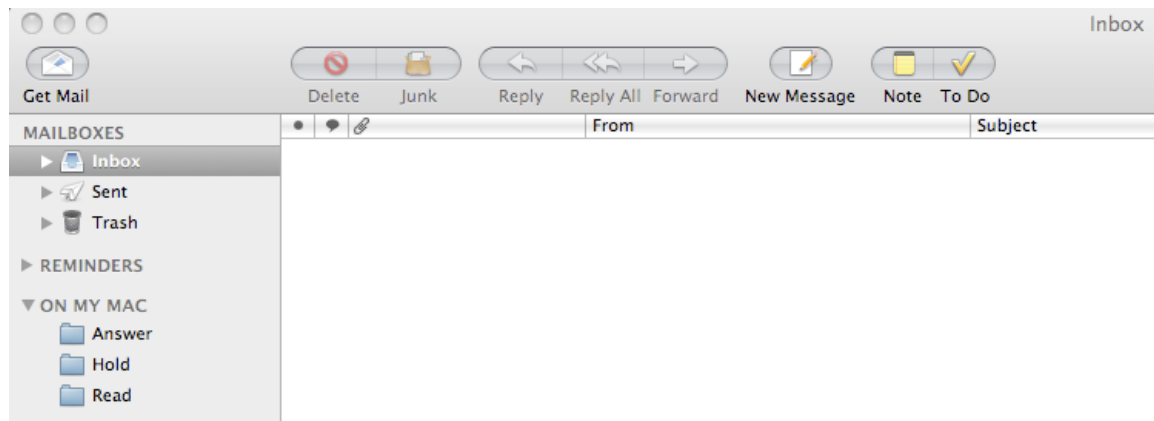
Before you start processing email you need to set up the right environment. This is simply a matter of having the right folders—and there aren't very many that you need.

First, your email program will have these folders by default: Inbox, drafts, sent, trash. Great. Keep those. (It's not like you could delete them, anyway.)

Second, you need to create a small set of “working” folders. These are to hold the emails that you can’t act on right away or are needed as *temporary* support material for a current issue or conversation. You’ll see how this works below. For now, you need to create these folders: Answer, Hold, Read.

If you use Microsoft Outlook, you should actually first create a folder called “Working,” and then make “Answer,” “Hold,” and “Read” as sub-folders. This keeps them all together. In Mac Mail, you create each of these as a new mailbox and they will show up underneath the “On My Mac” heading. In Gmail, I’d use labels.

Here’s an example from Mac Mail:



That’s it. Your email workspace is ready to go.

(You’ll notice I did not have you set up a special set of folders for permanently archiving emails after you are done with them. That’s significant. More on that later as well.)

## The Rules of Processing

Now that you have your email workspace set up, it’s time to review the rules of processing stuff. These govern the way you will go about processing your email to zero.

### The Three Rules of Processing Stuff

First, you need to understand a few basic rules for processing anything. Email is actually a sub-component of a much wider group of stuff that comes our way every day. There is voice mail, the regular mail (see my post “How to Get the Mail” [[www.whatsbestnext.com/2008/10/how-to-get-the-mail/](http://www.whatsbestnext.com/2008/10/how-to-get-the-mail/)]), ideas you might jot down, things people ask you today in conversation, action items from meetings, and so forth.

The way we manage our email needs to integrate with the wider approach we use for managing all the other input in our lives. Although the tool itself differs, there is no difference in the principles for *processing* an action item you get from email versus an action item that your boss tells you in the hall or your realtor leaves you on voicemail.

This is where I would highly recommend David Allen’s *Getting Things Done*, and adherents of his GTD system will recognize that my approach to handling email here is simply an application of the broader GTD system. (More on GTD—pros and cons—in upcoming posts.)

So the principles for processing email are the same as the principles for processing anything. They are:

1. Process the items in order
2. Process them one at a time
3. Never put anything back into your inbox

#### *Process In Order*

This is crucial: *don't jump around your in box*. That in itself simply *feels* disorganized and, on top of that, *creates* worse disorganization.

If you jump around in your in box to the emails that seems most fun or preferential to you, what you end up doing is looking at all the other emails as well several times before you get around to doing anything about them. This wastes your mental RAM and is incredibly inefficient.

In the olden days productivity folks would say “only handle a piece of paper once.” The essence of that advice is sound: You don't want to look at an email, say to yourself “not now,” and then move on to another one. That just wastes time.

The solution to this is: Go through your in box in order. Be sequential. Don't worry, you won't get bogged down by a super long action item in the midst of one of those emails if you follow the rest of the principles here.

#### *Process One Thing at a Time*

This is really a corollary to going in order. Finish processing the email you are working on before going to the next. Don't do it half way and then move on. Deal with it decisively, then move on.

#### *Nothing Goes Back Into “In”*

Your inbox is not for storing things. If there is an email that you will need to refer back to, your inbox is not the place for it. Likewise, if there is an email that seems “hard” to process, you can't skip it and leave it in your inbox for another time (see previous rule).

If you keep things like that in your inbox, you will have to mentally re-process your inbox every time you look at it. “OK, this email is new, so I need to look at that; that one is there to remind me of X, so I can ignore that for now...” That's complicated and annoying. It creates drag on your life.

We will talk below about what to do with emails you will need to refer to again soon, or when there are actions in there that you need to defer.

### **The Two Questions When Processing Anything**

So now you understand the basic rules of processing: Do the items in order, process one at a time, and never put anything back into in. So now, second, you need to know the two questions you ask of every item as you are processing it.

The two questions are:

1. What is this?

2. What's the next action?

Before you can know what to *do* with something, you need to know what it *is*. Hence, the first question: What is this? Once you know what it is, then you can determine how to handle it (define the next action).

The question "What is this?" is very powerful. I often find that when I am stumped about what to do about an item, simply backing up and asking "OK, what is this again?" really turns the lights on.

## How to Handle the Four Different Types of Emails

Now that you have your email workspace set up and understand the rules of processing, you are ready to get going. So whether your inbox is at 50 or 500 (or 3—if so, way to go), you should be able to follow along here and get it down to 0.

There are four types of emails that you need to know how to handle:

1. Emails requiring no action
2. Emails requiring actions that take less than two minutes
3. Emails requiring actions that take longer than two minutes
4. Emails containing information you need to keep

### When No Action is Required

Lots of emails fall into this category and require no action. For example, spam.

With these emails, delete and move on.

### Handling Quick Emails: The Two-Minute Rule

Lots of emails just require a very quick action. In these cases, apply David Allen's "two-minute rule": if you can do it in two minutes or less, do it right away. So a quick FYI email should get a quick look, and then be deleted. Or when a friend asks if you have the email address for so and so, you should respond to him right away and delete the email.

Note a recurring theme here: When you are done with an email, delete it. We'll talk more about that below. If you think you need to store the email or something in it for reference, that's a special case which we'll also talk about below under "handling emails with information you need to keep."

For now, create another working folder called "File," and put those emails in there.

### Handling Longer Than Two-Minute Emails, Part 1

Now we get into the thick of things. It is these longer than two-minute emails that ruin most people's day.

There are two types of emails in this category: emails where the *email itself* best serves as the action reminder and emails where *a project or action list in your planning system* (and not the email) best serves as the action reminder.

First, let's talk about emails where the email itself best serves as the action reminder. In general, you want to work from a list, not a stack of emails. But on issues where you are dealing with very quick turn around, it often works best to simply let the email itself serve as the action reminder.

This is why I had you create the “working” folders in your email program. You'll recall that I had you create these three folders: Answer, Hold, and Read. Here is what you do with that.

*The Answer Folder: Emails Requiring a Response that Will Take Over 2 Minutes*

If someone sends you an email that you are going to need to write a detailed response to, and you don't have time to do that right now, put it into the “Answer” folder. Do not do this for every email you have to answer—if the answer will take less than two minutes, you should answer it right away. This is for emails that will take a chunk of time to respond to. Hopefully, you won't have many of these.

*The Read Folder: Emails Requiring Reading that Will Take Over 2 Minutes*

If you get an email containing substantial reading material that will take you more than 2 minutes, such as a project plan or a lengthy article, put it in the “Read” folder. Again, if you can read it right away, please do so. You will thank yourself later.

This is only for lengthier reads so that your “processing” time with your email doesn't end up being 2 hours every day simply because people like to send you long things to read. (And once the longer reads are in a folder, you can then prioritize and ask if this is even necessary.)

*The Hold Folder: Emails Requiring You to Wait on Someone Else's Action*

Sometimes you get an email on which you need to wait for an answer from someone else before you can respond.

For example, if my co-worker asks me what the progress is on project X, I might need to email another co-worker to find out. In this case, I would email co-worker number 2 and put the original email into the “Hold” folder so that it is not cluttering up my email while I wait. Then, when co-worker 2 emails me back, I go into the “Hold” folder, respond to co-worker 1, and then delete the email.

Someone might say: “Why not just delete the original email right away, and then forward the email from co-worker 2 when you get it.” The reason is that you need to have a reminder of the fact that you need to get back to co-worker 1, and a response from co-worker 2 should not be depended on to be that reminder because he might not get back to you. Even with very responsible co-workers, you will have instances where the person, maybe an outside vendor, won't get back to you for a day or maybe at all. Your system needs to be able to anticipate that. Also, you don't want to have to keep this on your mind. If you just file the original email in the “Hold” category, you can forget that you are waiting for a response and keep your full focus for other things.

*Empty These Regularly*

There is a danger in having these “working” email files: you could put emails in them and then just leave them there, doing nothing.

That would be contrary to the whole point.

After you are done processing your email, or at another time in the day, you then need to go through the working folders and execute those emails. Read the “Read” emails, answer the “answer” emails, and see if you've received answers to the “Hold” emails.

You need to actually have a defined time each day when you clear out these folders. You can't leave it to your memory to remember "sometime this week" to go through them. You have to do it once a day, and get to the bottom of each of them.

#### *Do Not Have an Action Folder*

A very talented person that I work with has an "Action" file for email requiring longer than 2-minute actions. I've been meaning to tell him this for a while, but haven't gotten around to it yet, so I guess now is as good a time as any: Not a good idea.

The reason a generic "Action" folder is not a good idea is that it is not specific enough. Every time you go into it, you will essentially be re-processing everything in your mind. The point of the working files is that these emails have already been processed. You know what to do with them, you just haven't done it yet. That's why you need to get specific and create the three types we've discussed above: Answer, Read, and Hold.

If the action on an email is not specific enough to fall into one of those categories, then you should not allow the email to be its own action reminder. So this takes us to the next section: Handling longer than two-minute emails when the email itself should not be the main reminder of the action.

### **Handling Longer Than Two-Minute Emails, Part 2**

We said that there are two types of longer-than-two-minute emails: emails where the *email itself* best serves as the action reminder and emails where *a list* (and not the email) best serves as the action reminder. We've covered how to handle it when the email itself serves as the action reminder.

#### *You Need to Have Some Lists*

So what do you do when the email itself is not the best action reminder? This is where the way you handle email ties in to your larger productivity system. So this takes us into a big area, which there will be lots of posts on in the future.

I will keep it as simple as possible here, without going into the full details of how to set up your planning system.

In a nutshell, you need to have some lists. These lists can be kept in a Word document or in a task management program, such as OmniFocus (for Mac users) or the tasks section of Microsoft Outlook (for Windows users). Or you could write them manually. It doesn't matter how you do it, but you do need to have lists to keep track of your deferred actions.

Here are the two main lists you need to have:

1. A next action list
2. A project list

#### *Next Action Lists*

First, you need to have a next action list for single actions. Things that only have one step. For example, if an action from one of your emails is that you need to "Call Fred," and you don't want to do it right then (it will take more than two minutes), then write "Call Fred" on your next action list, and delete the email. (And include the phone number to save yourself a future step [unless you have an iPhone]).

### *Project Lists*

Second, you need to have a projects list for the larger outcomes you are responsible for and which require more than one step.

Lots of emails we receive are really requests for us to do multi-step things. Often, important assignments are delegated to us by email.

When this happens, you put the larger outcome or assignment on your project list, and delete the email.

Your project list then serves as the trigger to remind you that you have that project and that you need to be working on it. Email should not be used as this trigger. It is this failure to write actions and projects on lists, and then keep the emails themselves in our inbox as the reminder, that is responsible for more email misery than anything else.

### *Making Lists Work*

Let me state the obvious: Your lists will not work if you never look at them. Now that you've created these lists to keep track of the longer-than-two-minute actions that you need to do as soon as you can get to them, you need to review them regularly.

Review your lists regularly, and take action. That's the key.

## **Handling Emails with Information You Need to Keep**

Sometimes emails don't contain any actions but do contain information that we will need to keep on file or refer to later. Sometimes emails with actions contain this type of information as well. What do we do with these emails?

There are two types of storing we need to do when it comes to email. The first is when you need to keep the email itself, or its attachments. The second is when you just need to keep a few pieces of information from the email.

### *When You Need to Keep the Email Itself or an Attachment*

I do not believe in creating email files. We'll talk about this in more detail in the next section on email filing.

The gist is that it takes too long to file every email, or even most. Instead, only the most important emails should be filed. Further, they should be filed in with the rest of your computer files—in your “Documents” folder, not in your email program.

So when you need to keep an email for future reference, go up to the File > Save As command and save it into the relevant section of your “Documents” folder. Or drag it to your desktop, navigate to the relevant section of your “Documents” folder, and drag it in. Do this with any attachments as well.

The key principle here is that you should have only *one* filing system on your computer, not two (“Documents” only, not “Documents” and also email). This is much more simple, and keeps things integrated. For example, it is much easier when working on a project simply to have everything in

your project folder in the “Documents” section of your computer, rather than also having to go look at your email files.

Maybe it seems like more work to file an email in “Documents” rather than just a folder in your email program. But this gets to the other principle: You should only be filing very few emails. We just don’t have the time to file a ton. Keep it just to the most important. Then, it makes sense to keep the files all together over in “Documents.”

#### *When You Just Need to Keep Some Details from the Email*

Sometimes you don’t need to keep the whole email, but there may be a key principle that you need to keep on your radar when working on a project, for example. This gets to a sophisticated level, but in those instances you should have a project plan for the project the email pertains to. Then, you just paste into the project plan the important principles that you need to keep on your radar during the project.

A simpler example is when someone emails you with a meeting time, and instead of sending an invite they just send a regular email. In this case, create the calendar item and delete the email. Or if they send you details you need for an event or meeting, put those details in the note section of the calendar item right away.

#### *Now, Empty Your “File” Folder*

With the basics covered of how to handle emails with information in them that you need to keep, you can go through the “file” working folder I had you create for emails you felt you should keep and put those emails where they go.

### **Here’s Where We’re At**

If you’ve followed the process so far, your inbox will now be at zero. Emails without actions have been deleted. Emails with less than two-minute actions have been completed, and then deleted. Emails with longer than two-minute actions have been moved into one of the working folders or else the actions have been added to either your next action list or project list. And emails with information you need to keep have been filed.

## **Email Filing**

We’ve already covered the broad conception of how I think about email filing. But it would be worthwhile to go into a bit more detail, especially as it relates to the temptation to categorize and classify all of our old email after we are done with it.

### **Email Reference Files: Don’t Have Them**

A lot of people have an elaborate set of folders where they file their emails for permanent storage. So after dealing with an email, they put it in an email folder according to some characteristic such as what project it pertains to, who sent it, what departmental function it pertains to, what topic it deals with, or something else.

This is a waste of time.



Sorry to be so blunt. I am not against filing—I actually think it’s very important, and down the road I’m going to do a lengthy article on how to set up your files. But when it comes to email, 95% of it should simply be deleted, not filed.

As I mentioned above, the reason is that we receive such a large volume of email that it is incredibly inefficient to file our emails after we are done with them. Further, most of the emails that you file you will never look back at. In the event that you *do* end up needing an email that you deleted, I have a very good solution that will come to your rescue, while still saving you time and allowing you to remain fully organized.

Instead of filing your emails after you’re done with them, here is what I suggest instead:

1. Delete all emails after you are done with them
2. Do not empty your deleted folder, so that it can function (uncategorized) as your email archive
3. File select emails that are of top importance in Documents, *not* in email folders
4. Copy important project information into your project plans

### **Delete Each Email After You Are Done with It**

Don’t create a bunch of reference folders where you file every email when you are done with it. There is not enough time for that. Just hit delete. Your deleted bin can then serve as your email archive.

### **Don’t Empty Your Deleted Items**

In order to use your deleted items bin as your email archive, you need to change your email settings to never automatically empty your deleted folder.

Make that change, and you will now have a permanent record of all your email, without having to file anything. Of course, it will not be categorized. But that’s part of my point: There isn’t time for that.

Further, this is where the search feature serves its purpose. Sometimes, it saves time to organize your files well. With email, there isn’t time for that, and you don’t go into your old email enough anyway. But when you do end up needing an old email, just do a search in your deleted bin.

This might mean that it takes longer to find the email than if you had filed it in a hierarchy of folders. However, the rare number of times that you will have to do this mean that if you factor in the time you save by not creating and maintaining that hierarchy, you are saving far more time overall.

In my Gmail account, I noticed that the deleted bin says “why delete when you have over 2,000 MB of space?” Great point, bad application. I agree: Don’t delete permanently. But this message sounds like they are encouraging you to just keep your old emails in your inbox. That’s a bad idea, as we’ve covered, not because of the need to save space (which doesn’t exist with Gmail) but because it’s confusing and thus wastes time. That’s not what an inbox is for. An inbox is for unprocessed stuff.

By the way, I know that some IT people may say that you should permanently delete your deleted items folder because “delete” means “delete,” and is not for storage. The reason I advocate for using your deleted items folder this way is because it’s quicker: All you have to do is hit “delete” on an email to get it into your permanent storage spot. If you didn’t use the deleted bin for this, you’d need to drag every email to your storage folder (or, I suppose, figure out how to assign a speed key to do this).

If you do have storage issues, I would suggest archiving your deleted bin every 6 months or so (you could put this task in your calendar to make sure you remember, or set up auto archive). In this way, emails older than an age you determine can be moved out of your deleted bin and into a separate archive file, keeping your email program from ending up with 30,000 items in the deleted bin.

### **File Really Important Emails in Documents**

I do recognize that you need quick access to some reference emails and that these need to be kept together with other relevant files on a project. These emails should be saved into your “Documents” folder, not in a hierarchy of folders in your email program.

As discussed above, the principle here is to minimize the number of filing systems on your computer. Have only one, and integrate everything into it.

### **Copy Important Project Information into Project Plans**

As also discussed above, if an email has a small piece of information that you need to keep before you as you work on a project, copy that into your project plan. Then delete the email.

### **Nothing Actionable Should Be In Your Files**

If an email had an action tied to it, you should have taken that action out when processing and added it to one of your lists (or done the action right away, or put the email in your “working files” for attention later that day).

When you’ve deleted an email, it means the actions have been processed into your system and any essential information has been put in a project plan or filed into a Documents folder. You should never have to go into your email archive to figure out what you have to do. If something is in the archive, it means “don’t need to think about this again except as possible reference material.”

## **Staying at Zero All Day Long: How Often Should You Check Email?**

Once you’ve gotten your email inbox to zero, a new challenge arises: keeping it there. This is actually not super hard. Or I should say, it’s not complicated. It is hard in that it takes discipline and time. But, the good thing at least is that it’s not complicated.

The basics of keeping your inbox at zero come down to how often you check it and what you do when you check it. There are four principles here:

1. Do not check email continually
2. Check your email once an hour throughout the day
3. Each time that you check your email, process all of it
4. Clear out the working folders once a day, preferably first thing in the morning
5. Review your next action and project list once a day and take action on them

### **Do Not Check Email Continually**

This is the first principle. If you handle your email in real-time, right as it comes in, you will not be able to focus your time and thought on other tasks. Multi-tasking is generally not effective.

If you continually check your email, you are setting yourself up for 80 interruptions a day.

### **Check Your Email Once an Hour**

Instead of keeping your email going continually, I suggest having set times throughout the day when you check it. You can make these as frequent or spread out as you need.

I would suggest every hour as a good balance. This is frequent enough to enable quick responses, will spread out enough to enable you to give a good chunk of time to your other projects and responsibilities between email.

To do this, you could set your email program to only check for new messages once an hour. Or, you could simply shut it down when you are done, and open it when it's time to check again. Or, on a Mac, you could just minimize it and it will probably be easy enough to ignore it in between times.

If you use Outlook, I would suggest shutting off that bell or whatever that goes off every time a new email comes in. (In Outlook 2007, go into Tools > Options. Then, in the "preferences" tab, click the "email options" button. Next, hit the "advanced email options" button. You will then see a heading that says "When new items arrive in my inbox." Uncheck the "play a sound" box.)

The one problem here is that this doesn't accommodate very well email conversations that happen quickly and in real-time. In an ideal world, these would all take place through instant messaging, which is much more suited for these things. In the real world, you just need to know when to break the rules, and don't make it a habit.

### **Each Time that You Check Email, Process All of It**

This is really crucial. Regardless of how often you determine to check email, you need to resolve that, no matter what your plan is, you will process your email to the bottom every time that you do check it.

There is nothing more frustrating than checking your email, only processing half of the messages, and then feeling like you have a bunch of unfinished business hanging over you the rest of the day. Process all the new items that come.

Further, if you only process some of the emails (such as just the ones that interest you), you'll simply be back into the original problem of having an in box with 200 messages in it. The key to keeping your in box at zero is to follow the rules of processing every time you check your email.

The reason this won't bog you down is because *processing is not doing*. There is a lot of doing involved, but it's of the basic sort, like the two-minute rule. When longer actions are required, you have the working files to move an email to and your action lists.

So processing your email fully every time that you check it does not mean that you are committing to a 45 minute session.

### **Clear Out the Working Folders Once a Day**

When you put email in the "working folders," the aim is not to just let them sit there until you think about getting to them. For this system to work well, you need to be deliberate about clearing those out regularly.

As alluded to above, I suggest clearing them out once a day. Choose whatever time works for you. Maybe afternoon is best for you because you want to have them at zero before you leave. I do this right away in the morning because that just works well with my morning routine. Either way, execute those folders once a day.

### **Review Your Next Action and Project List Once a Day and Take Action on Them**

Same principle here as with the working folders: Don't put actions on your lists only to let them sit there. Review those lists and get those things done.

You don't need to clear these lists every day the way that you do the working email folders, but do keep up with them.

### **When to Break the Rules**

As with most things, there are some times when you need to go against these general practices. To do this right, you need to know when to break the rules. We'll talk about that in a future post.

Here are some other things that we'll also talk about in future posts:

1. How to write better emails
2. How to get people to send you less emails
3. Unconventional tips

### **In Conclusion, Send Me Your Questions**

We've covered a lot of ground here, but I'm sure that you still have questions. And that's what I'm most looking forward to. So I'm going to do a post answering the most interesting and helpful questions that I receive about email.

So email me your questions ([matt.perman@gmail.com](mailto:matt.perman@gmail.com)), or put them in the comments, on whatever you want to know about email — anything that has been a consistent snag in the way you handle your email, or any unanswered questions that arise as you read the posts.

I'll review all of the questions before writing the post and pick the most interesting and important to respond to in the post. If I get enough questions, I'll just keep doing more posts responding to them as long as it seems helpful. So even if you read this article well after it's initial posting, send me your questions anyway and they might make for continued interesting posts.