Email Audit

worksheet

Instructions:

1) Pick your time period for your audit. A week is ideal.

2) Choose categories for your incoming emails, based on your suspicions about what's causing your email overload. See pages 5-6 for examples.

3) Decide on your definition of urgent/non-urgent.

4) Remember to log every email before you delete or file it.
> ~ You'll need to be especially careful when checking email on your phone.
> ~ If you have your inbox set up with different tabs (so that your emails are sorted for you), remember you'll need to count those too.

5) If you find you need new categories during the audit, just add them.

6) If you suspect some senders are emailing more frequently than you'd like, keep track of them, too.

7) At the end of your audit, see page 4 for your action plan.

Email Audit Template

Dates:

	M	T	W	Th	F	Sa	Su

Frequent Senders

Dates:

Sender	M	T	W	Th	F	Sa	Su

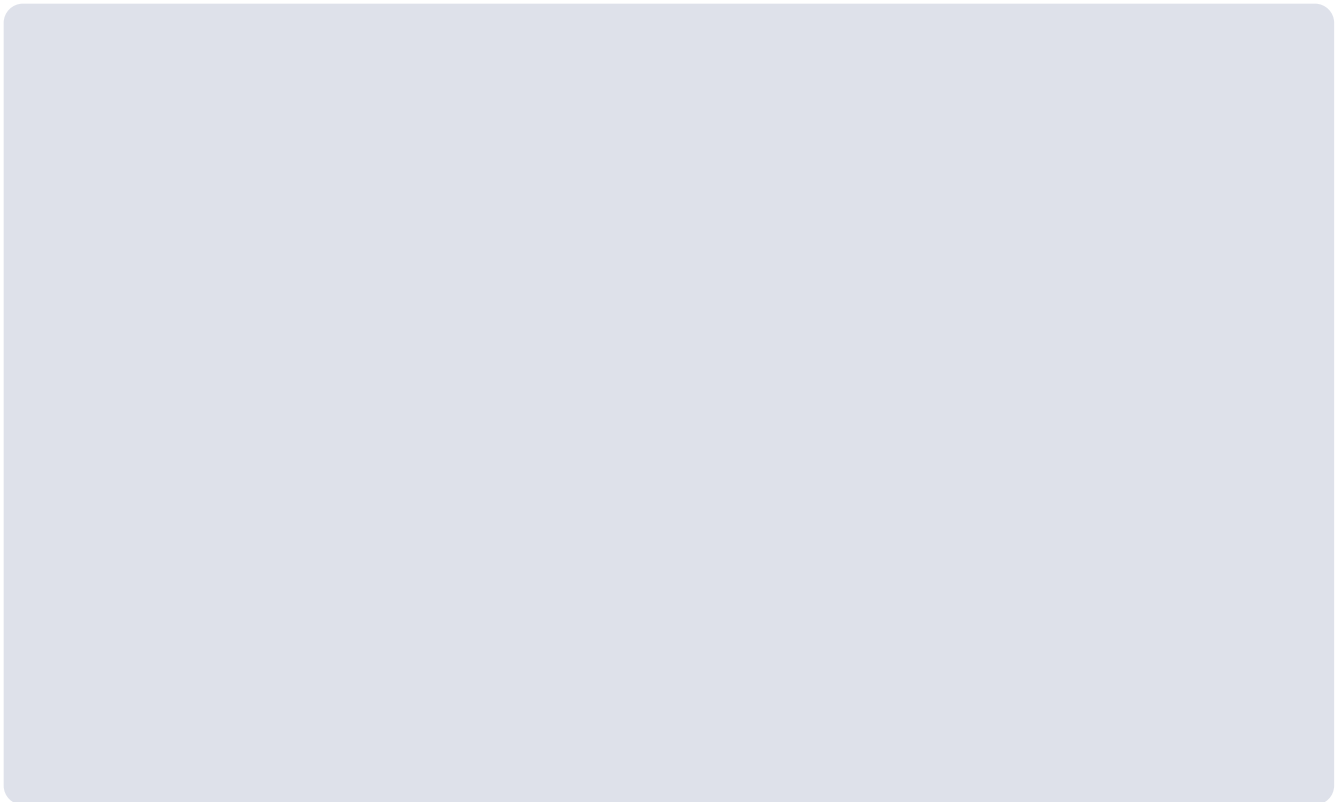1) Use this table to keep track of any senders you suspect are emailing too frequently.

2) Decide on your tolerance: will you accept a daily newsletter? Weekly? Less often? Unsubscribe if the frequency is unacceptable.

Reflections and Action Plan

Now consider:

1) Where can you simply unsubscribe?

2) Which emails take you the most time to process? Do 20% of your messages take 80% of your time?

3) Can you help yourself by reducing the number of updates you sign up for?

4) Do you receive a lot of similar questions, for which you should create template responses?

5) How urgent (truly) are the emails you get? If you dealt with emails just 3 times a day, what would the consequences be?

6) Is "inbox zero" important to you? If so, what has to change, to get there?

7) What new habits, rules or behaviors do you need to work on?

Example 1

Dates:

	Urgent	Non-urgent	Total
Deleted without reading			
Deleted or dealt with, 1 min or less			
Filed immediately (future reference)			
Newsletters / read any time			
Unsubscribed			
Personal: 5 mins or less			
Personal: 5-15 mins			
Personal: > 15 mins			
Professional: 5 mins or less			
Professional: 5-15 mins			
Professional: > 15 mins			

Example 2

Dates:

	M	T	W	Th	F	Sa	Su
Deleted without reading							
Deleted or dealt with, 1 min or less							
Filed immediately (future ref.)							
Newsletters / read any time							
Unsubscribed							
Personal: 5 mins or less							
Personal: 5-15 mins							
Personal: > 15 mins							
Professional: 5 mins or less							
Professional: 5-15 mins							
Professional: > 15 mins							