Workbook for

**EMAIL CLEANUP WORKSHOP**

Use this space to create a list of personal pain point for a cluttered email inbox.

Use this space to create a list of how cleaning up your inbox would help you.

**References**

**What resources do I need to save?**

Create a list of categories.

Which application will you use to store your references? (OneNote, Teams, SharePoint, etc.?

Use this space to create a list of resources that I will need to store. Include tip sheets, articles, documents.

**DEFINE YOUR ACTION LIST**

|  |  |  |
| --- | --- | --- |
| Action | Types of Items | Rule |
| Trash |  |  |
| Archive |  |  |
| Respond |  |  |
| Schedule |  |  |
| Plan |  |  |
| File |  |  |

Agreements – any rules above require agreement? For example, how often to check email.

**COLLECTION PLAN**

Use this space to declutter your mind – what else should you manage here?

* Projects started but not completed
* Projects to be started
* Commitments or promises to other
* Communications to make or get
* Meetings that need to be set up
* Planning or organizing activities
* Administrative activities
* Professional development

What other items to you want to collect - How will you manage them?

Examples:

- Voicemails

- Meeting Action Items

- Written lists

- Paper forms

**INBOX CLEANUP PLAN**

Number of inbox items

Weeks to clean up your inbox.

How many inbox items do you have?

Write your plan to clean up old inbox items:

How many items to you plan to clean up per week?

How many hours per week will you clean up the inbox?

Create your burndown chart:

**Call to Action**

Create your CALL TO ACTION!

Define your PURPOSE for changing!

What are your pain points with current inbox: What is the benefit to you for cleaning up your inbox?

**Plan to Motivate**

What are your rewards? What are your consequences?

Use this space to describe how you will use rewards for desired behaviors.

Use this space to describe how you will use consequences for old habits.

How will you stay accountable for this process change?

**Create Your Vision – Measure Your Success**

What metrics will you use to measure your success?

What is your target?

How will you collect this data? How often?

How will you show it?

Use this space to describe how you will feel when you have no items in your inbox.

**Make it Easy**

Use this space to draw a picture of how you will make this easy.

Use this space to make a list of how you will make this easy

What are y

**ACTION PLANNING**

|  |  |  |
| --- | --- | --- |
| WHAT | WHO | WHEN |
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