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mesmo
CONSULTANCY

managing email smartly
maximises opportunities



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Organizing Email Chaos

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Organization Strategies

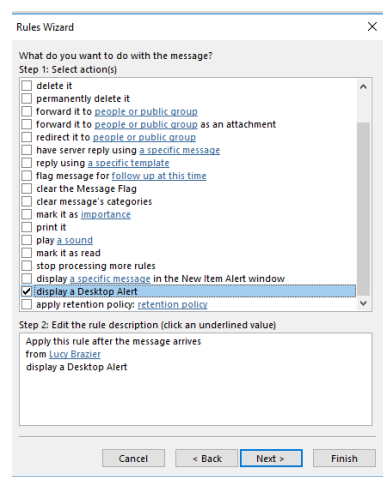
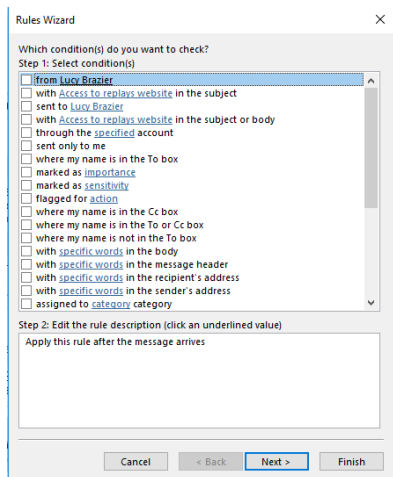
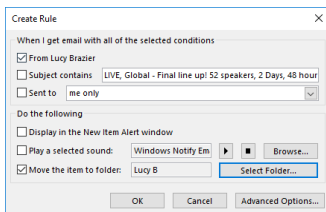
- ▲ Managing views
- ▲ Folders
- ▲ Categories

Rules (Outlook) and Filters (Gmail)

- ▲ Basic rule in Outlook
- ▲ What can you do with Advanced rules
- ▲ Filtering rules in Gmail
- ▲ Labels vs. Stars

See Emails from Important People Quickly

1. Right click on the person's name. From the drop-down menu select Create Rule.
2. From the Rules wizard, click on Advanced Options.
3. From the Step 1 box, click on the box with the person's name.
4. Click Next
5. In the next box click on the relevant action eg Display a Desktop Alert. Click next/Next/Finish.



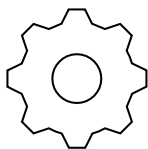
What rules will you create?

Gmail: Stars vs. Labels

- ▲ Stars are a visual marker with metadata.
- ▲ Stars work on individual messages in a conversation
- ▲ Labels apply to conversations
- ▲ Labels act like folders
- ▲ Filters can apply to either BUT one kind of star only

Gmail: Stars: How to

- ▲ Click the star
- ▲ Use a filter to star
- ▲ Setting up custom stars, then click, click, click, click











Settings





[General](#) [Labels](#) [Inbox](#) [Accounts and Import](#) [Filters and Blocked Addresses](#)

[Forwarding and POP/IMAP](#) [Add-ons](#) [Chat and Meet](#) [Advanced](#) [Offline](#) [Themes](#)

Stars: **Drag the stars between the lists.** The stars will rotate in the order shown below when you click a star. To learn the name of a star for search, hover your mouse over the image.

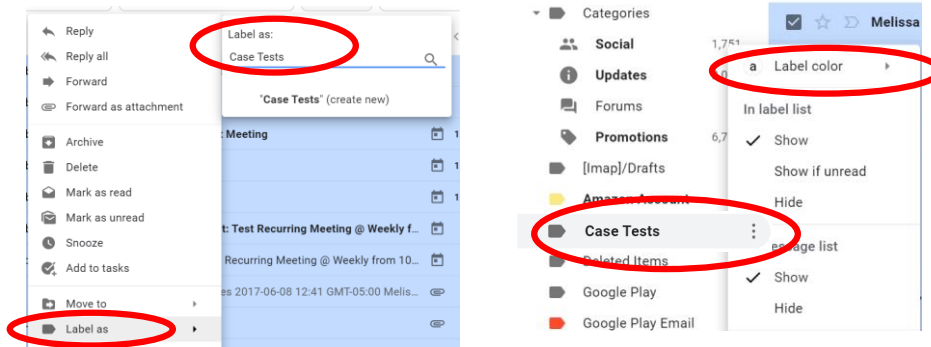
Presets: [1 star](#) [4 stars](#) [all stars](#)

In use:        

Not in use:    

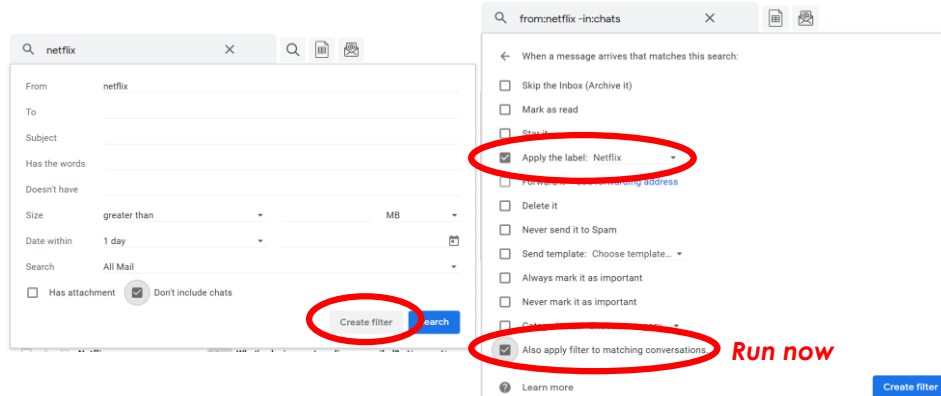
Labels: How to

- ▲ Labels = Folders
- ▲ Labels area also categories, with multiples possible
- ▲ Label as...
- ▲ Setting up a Filter



Filters: How to

- ▲ Search for messages
- ▲ Create filter
- ▲ Assign action
- ▲ Also apply filter to matching conversations = Run now



Quick Steps vs. Templates

Quick Steps

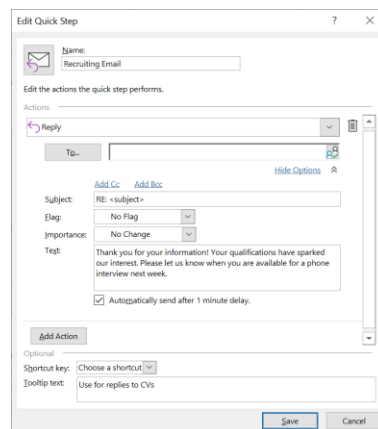
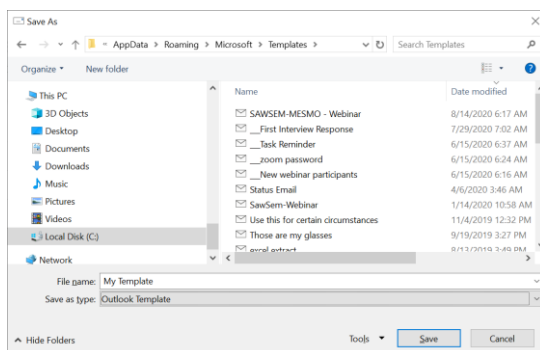
- No rich text
- No attachments
- One click operation

Templates

- Anything you can put in an email message
- A few more clicks to use

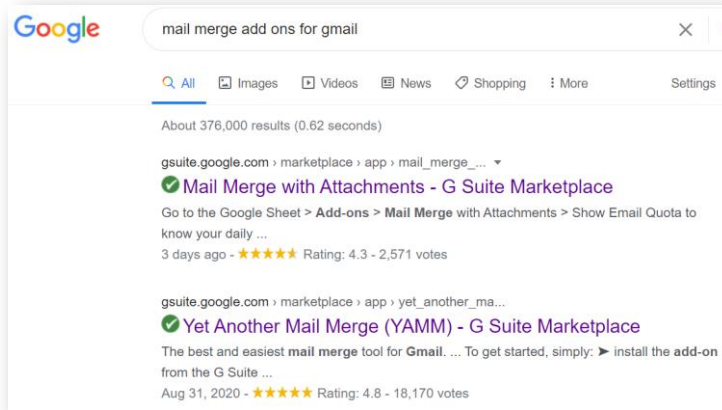
Email Templates & Quick Steps

Doing the hard work once

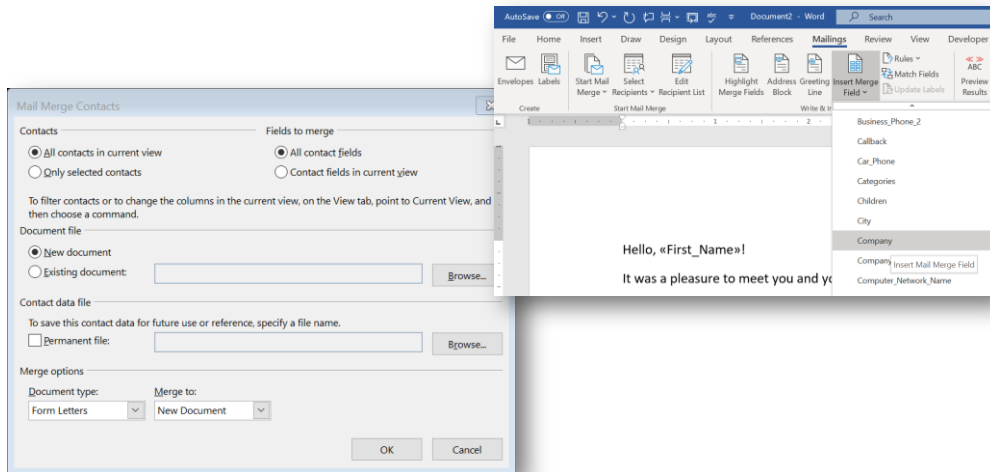


Mail Merge

- ▲ Sending the same message to multiple people in Outlook
- ▲ What about Gmail?

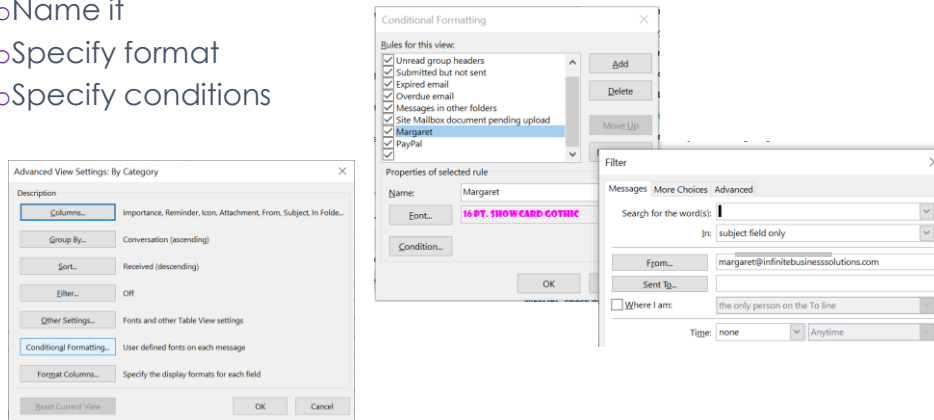


Mail Merge in Outlook

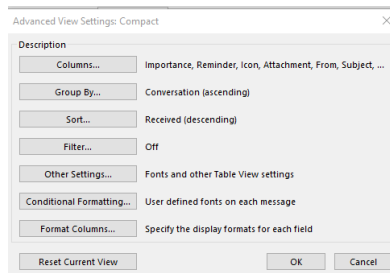
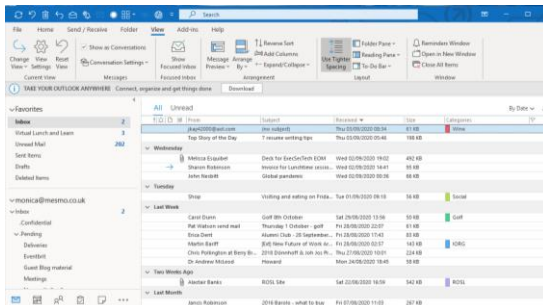
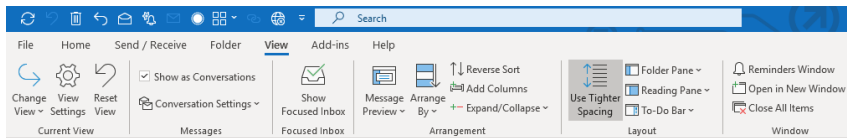


Conditional Formatting Steps

- ▲ View tab, Current View group, View Settings button
- ▲ Conditional Formatting button
- ▲ Add
 - Name it
 - Specify format
 - Specify conditions



Inbox Views

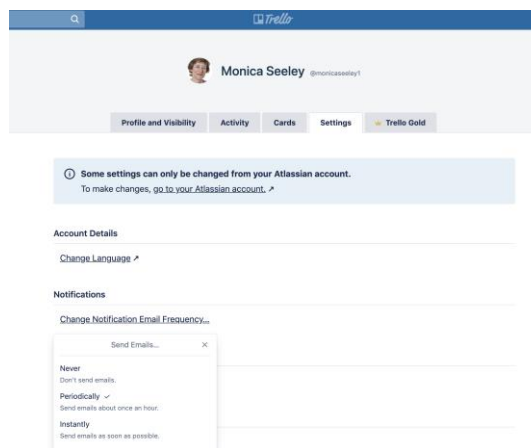


Don't use email

- ▲ Not everything should be an email
- ▲ Instead of email...?



Turning off Notifications in Trello



What you say when you say Nothing

- ▲ Priorities
- ▲ What do you want?
- ▲ Emotional messages
- ▲ Ending the conversation

Resources

▲ Watch & Learn

- <https://melissaesquibel.com/watch-learn>

▲ ExecSecTech

- <https://www.execsectech.com/>

▲ MESMO website

- <https://www.mesmo.co.uk/>

▲ 100 Tips to Supercharge your Productivity

▲ More from the two of us

- <https://sawbuckseminars.com/special-series-mesmo-consultancy/>

▲ Coming up on Sawbuck Seminars

- <https://sawbuckseminars.com/services/>





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