



How to Control Your Email Inbox Without Losing Your Mind

Implementation Plan

	Tasks	Task Owner	Date Due
1	Grant access to your assistant to your email account		
2	Create "Read Later" email file or label		
3	Create "Archive" email file		
4	Create generic responses or drafts for typical emails		
5	Create a Standard Operating Procedure (SOP) for how to write a draft		
6	Grant ability to forward emails to Project management system		
7	Find email address for forwarding tasks to email response task list		
8	Grant access to your Project management system		
9	Grant ability to create tasks in Project management system		
10	Add a task list in project management system (i.e. Teamwork.com) for email response tasks assigned to business owner (or define where tasks will be kept if not using a project management system)		
11	Determine and communicate email processing schedule with assistant		
12	Review email processing flow with assistant		
13	Watch email processing by assistant and check for understanding		
14	Check in with assistant 1 week after initial implementation to review and answer questions		
15	Create a Standard Operating Procedure (SOP) for how and when to ask for direction		
16	Create a confidentiality policy		