



## Gmail Inbox management



Tips & Tricks to remove the  
inbox stress



## Gmail - Tips & Tricks to remove the inbox stress

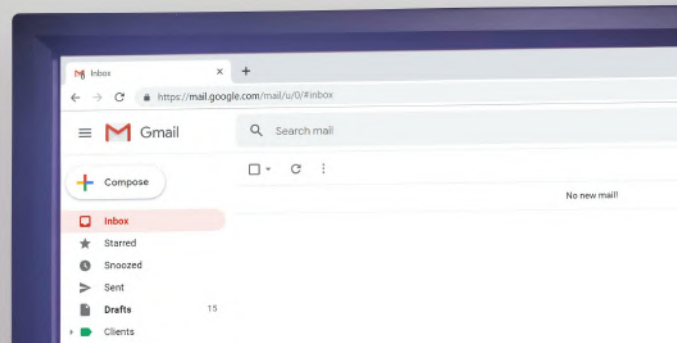


- Using an inbox view that works for you / your boss / your client
- Labels
- Stars
- Tips to encourage delegation
- Utilising Gmail options to achieve confidence with Inbox management

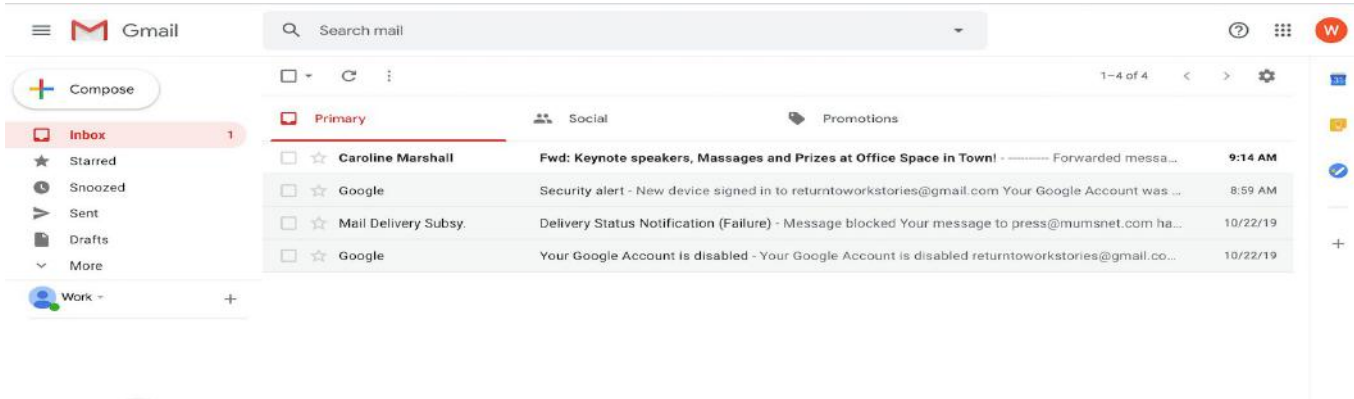
## Gmail - Tips & Tricks to remove the inbox stress

Inbox management is very personal but causes a lot of stress for most people

- Trust
- A style that works
- Consistency



## Gmail - An inbox view that works for you



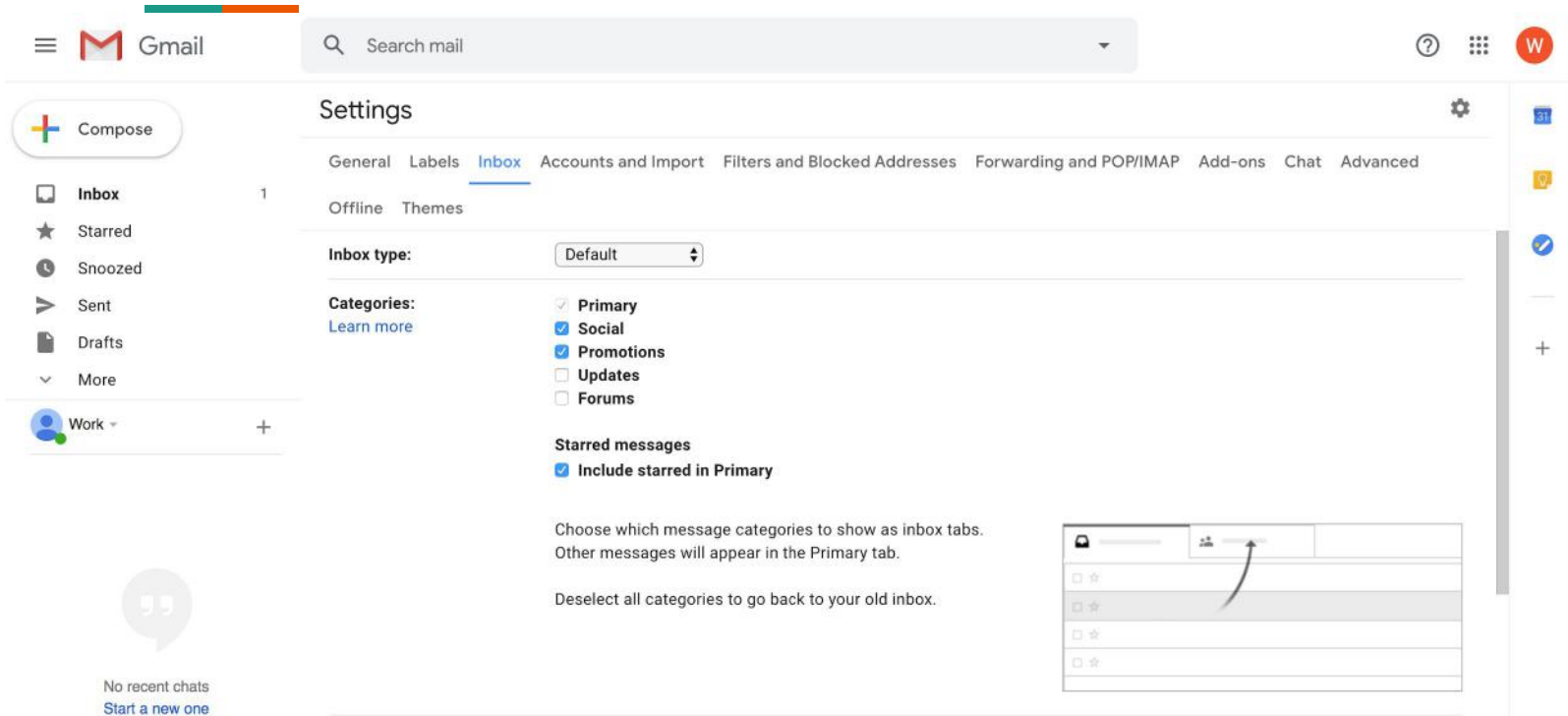
### Pros:

- On initial view each day you don't get overwhelmed by the spam

### Cons:

- It splits your inbox in a way that limits your choice
- Any 'updates' may be part of your day to day working

# Gmail - An inbox view that works for you



The screenshot shows the Gmail interface with the 'Settings' page open. The 'Inbox' tab is selected, and the 'Inbox type' is set to 'Default'. Under 'Categories', 'Primary', 'Social', and 'Promotions' are checked. Under 'Starred messages', 'Include starred in Primary' is checked. A green arrow points to the right sidebar of the interface.

**Settings**

General Labels **Inbox** Accounts and Import Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat Advanced

Offline Themes

**Inbox type:** Default

**Categories:**  
[Learn more](#)

- Primary
- Social
- Promotions
- Updates
- Forums

**Starred messages**

- Include starred in Primary

Choose which message categories to show as inbox tabs.  
Other messages will appear in the Primary tab.

Deselect all categories to go back to your old inbox.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



No recent chats  
[Start a new one](#)

## Gmail - An inbox view that works for you



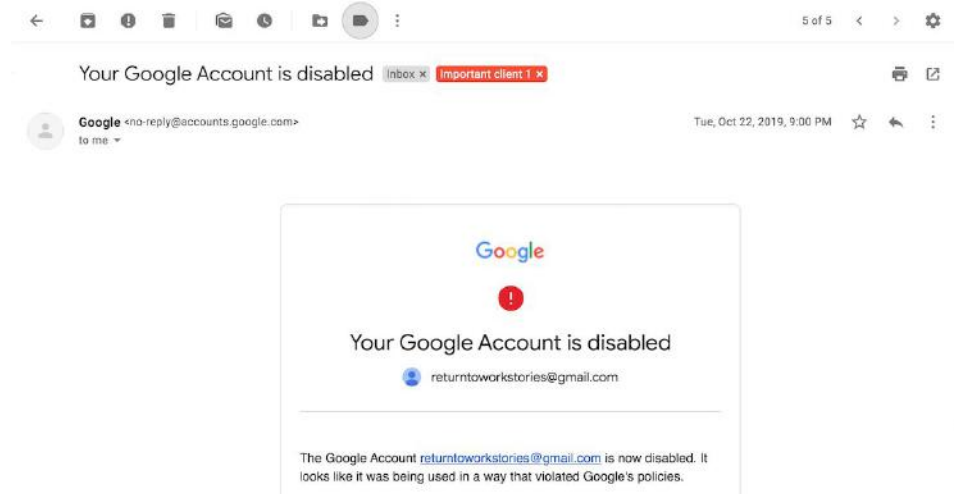
Action	Result
Remove social and promotions (Save changes)	All emails will be in one place
Enable reading pane	Gives you the view you may be used to in Outlook
Show markers	Gmail analyzes your new incoming messages to predict what's important, considering things like how you've treated similar messages in the past, how directly the message is addressed to you, and many other factors
Inbox Type	Your inbox can display emails in an order you prefer for example: <ul data-bbox="832 762 1147 896" style="list-style-type: none"><li>● Starred</li><li>● Important markers</li><li>● Drafts</li><li>● Labels</li></ul>
How you view emails - Conversation view on / off	<ul data-bbox="832 945 1688 975" style="list-style-type: none"><li>● Sets whether emails of the same topic are grouped together</li></ul>

## Gmail - Using labels to organise your inbox



### Pros

- Can set the labels BEFORE you move from the inbox. For example if you have some core client emails and like to keep the most recent in your inbox - once complete you can remove the inbox label



## Gmail - Using labels to organise your inbox



### Pros

- Can be used to encourage your client / boss to delegate

For Example a label 'Caroline working on' you can start labelling these emails you can sort and encourage your boss to see what you can do for them clearing their headspace

- Can colour code - so this gives a more 'visual' person an easier view of their inbox
- You can use this for example if you are covering an inbox while they are on holiday, to easily alert them of emails which are a priority
- Use labels like 'to read' for all those newsletters and alerts you receive but need time on your commute or over lunch to spend time looking out



## Gmail - Using Stars to organise your inbox



- Similar to labels you can use stars to organise emails and create a 'system' with your client
- Once done rather than creating files you can archive the emails - archived emails are still searchable if you wish to come back to them - for the client who isn't a fan of email folders!

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### Stars:

**Drag the stars between the lists.** The stars will rotate in the order shown below when you click successively. 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:             

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- Again! Less is more, try to not fall down the hole of a star for every eventuality

## Gmail - Tips to encourage delegation

- Delegate access

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**Grant access to your account:** [Add another account](#)

(Allow others to read and send mail on your behalf)

[Learn more](#)

**Mark as read**

- Mark conversation as read when opened by others
- Leave conversation unread when opened by others

**Sender information**

- Show this address and the person who sent it ("sent by ...")
- Show this address only (returntoworkstories@gmail.com)

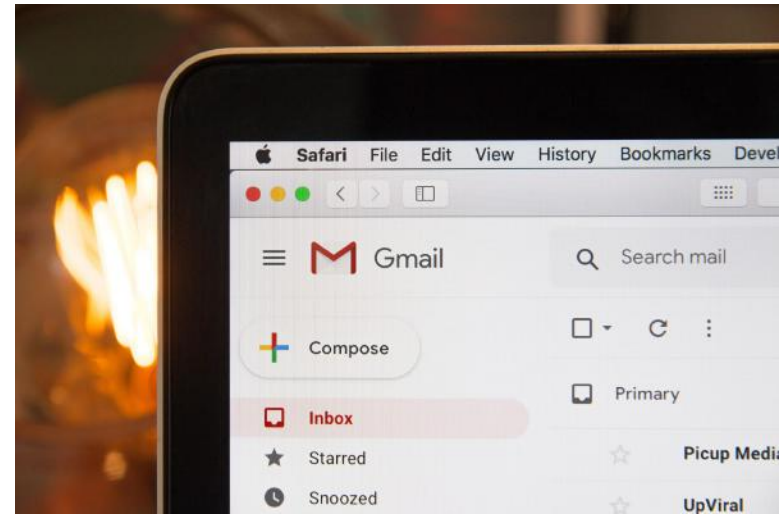
**Trust - Can be a blocker to managing your clients / bosses inbox**

## Gmail - Tips to encourage delegation



- Create a simple star system or label system and SHOW them what you can do
- Create your own label / file in their inbox
- If they want you to respond as them - leave them in drafts before you send to confirm they are happy with the tone etc
- Consistency is key

Example: set time in the diary that is to focus on the inbox.  
15-30 minutes



## Gmail - Utilising Gmail options to achieve confidence with Inbox management



- Sign in to Multiple Gmail inboxes at once:

*Click on your icon (right hand corner of inbox) and 'add account' - for when your client has granted delegate access!*

- If you have clients with multiple inboxes / google accounts use multiple chrome browsers to switch between the accounts easily
- Use extensions to support your gmail account - there are many!

My personal favourites:



## Gmail - Utilising Gmail options to achieve confidence with Inbox management

- Schedule emails in advance

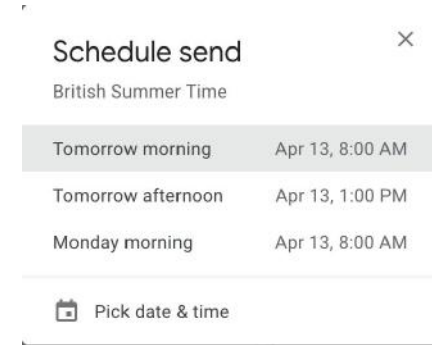
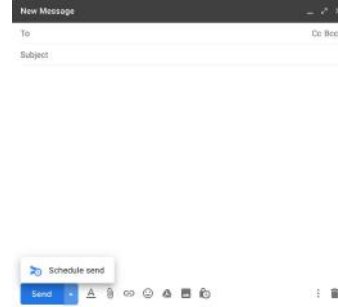
Set boundaries with your working hours for clients, bosses whilst getting work done when works for you

- Increase the time you can undo sending an email

Don't get caught out again from clicking the send button too quickly! (Settings>General)

- See more messages in your Gmail inbox

(Settings>General)



Undo Send: Send cancellation period  5 seconds

Default reply behavior:  Reply  Reply all

[Learn more](#)

Maximum page size: Show  conversations per page



Thank you!

Do email if I can help with any Gmail  
related questions you may have:

[pooleycaroline@gmail.com](mailto:pooleycaroline@gmail.com)

