

Cracking the Productivity Code:

Habits to Increase Email Productivity



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Agency Management Systems

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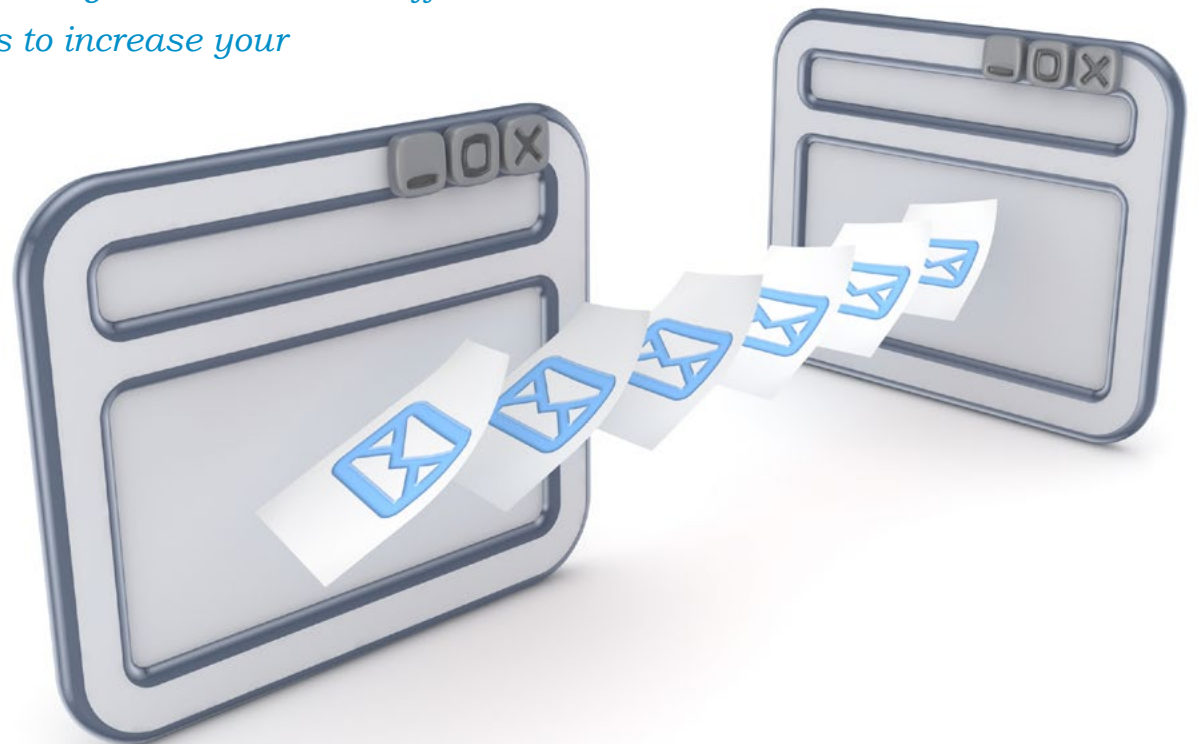
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Intro

When email became standard in the workforce in the early 1990s, inboxes received a modest amount of traffic. That is rarely the case anymore. With literally hundreds of emails coming in each day, **email is now wasting our time and draining productivity.**

But, all is not lost! Just by integrating some simple habits, you can keep your inbox clean and your staff on task.

In this eGuide we'll look at how you can bring email back to its efficient and effective roots. We'll explore daily habits to increase your productivity, how to protect your inbox from unwanted messages and how you can use Outlook to speed up your agency's processes, to bring your independent insurance agency to a new level of getting it done.



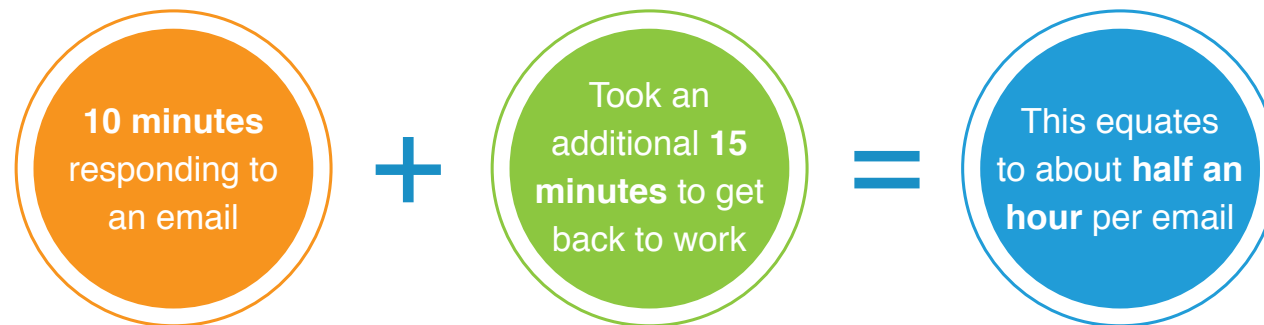
Practices to Get Time Back:

The Facts and How to Beat Them

According to a recent [McKinsey Global Institute](#) study, the average person spends **13 hours per week** on emails. That equates to:



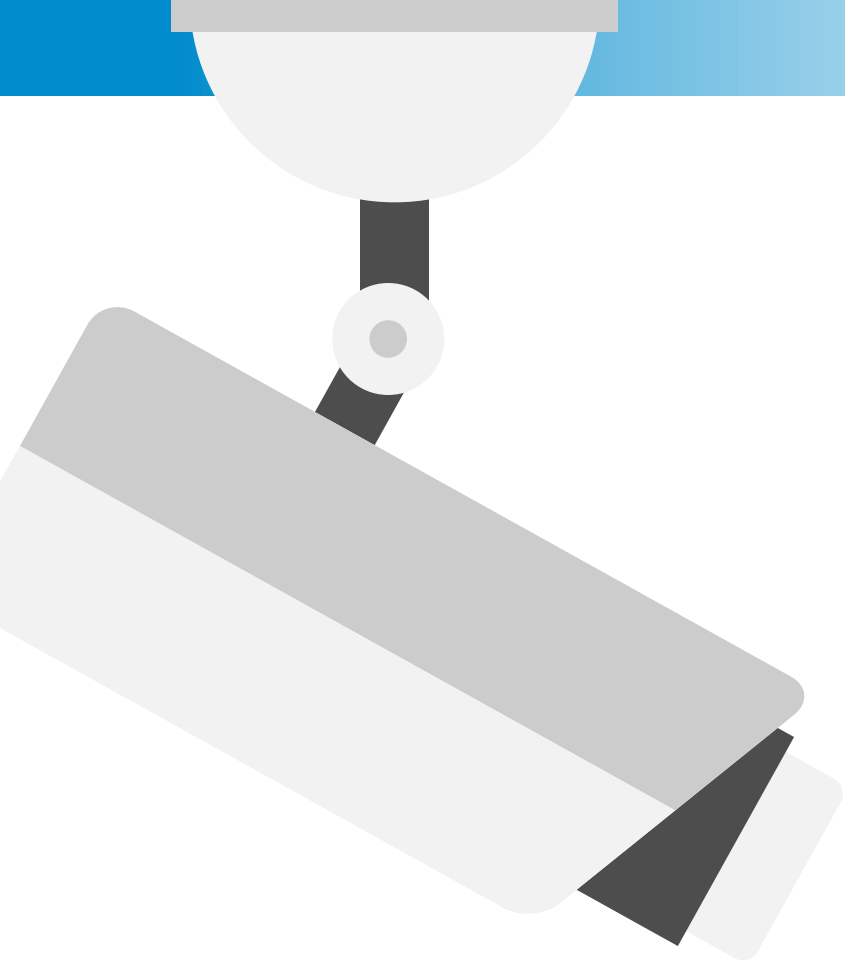
A [2007 survey](#), showed Microsoft employees spent:



No wonder we are wasting so much time in our inboxes! You can get these hours back. Small changes can make a difference in your productivity.

- **Check your email only twice a day**—According to a recent [Forbes article](#) doing this alone can save you 2.24 hours.
- **Categorize your email**—Sift through your messages and mark them as “spam”, “to delete,” “for action now” or “for action later.” This will help shorten your response time, and make it faster for you to transition back to other tasks.
- **Use Outlook Integration**—Your agency management system is a great tool for increased email productivity. Partner XE users with the Outlook integration module say it has helped increase their agency’s productivity and centralizes client info. This makes for a big win in the efficiency department!





Ways to Keep Your Inbox **Safe**

There isn't much you can do to keep out your great aunt's chain emails, but you can keep your inbox safe from spam, and, the newly coined "BACN" (enews or other emails you subscribed to, but rarely read). Integrate these small changes for a cleaner inbox, keeping you safe from harmful viruses and, more importantly, keeping you on task.



Keeping Out Spam

Keeping Out Spam

- **Use your email systems' spam filter**

Every email platform has its own spam filtering system, and you should get familiar with yours. Look into how your email provider blocks spam, and continually mark bad messages as spam to update its settings.

- **Get a spam filter add-on**

You can beef up your spam protection with add-ons that are tailored to your email platform. As most independent insurance agencies use Outlook, one great add-on to check out is [Cloudmark Desktop](#). Check out other Outlook add-on options [here](#).

- **Invest in anti-spam apps**

There are many great [anti-spam apps](#) you can use that attach to any and all email systems, and go wherever you go. Using these apps will give you that extra layer of protection, and many will give you the added bonus of sending secure e-mail.



Cutting Out the BACN

Cutting Out the BACN



■ Unsubscribe

The best way to cut back on the [BACN](#) is to unsubscribe from the newsletters you don't read. Rather than just deleting yet another daily digest newsletter, scroll down to hit "unsubscribe" first.

■ Consolidate your updates

If there are a number of newsletters you read regularly, think about consolidating them in to one daily email with [Unroll.me](#). Similarly, consolidate your social media updates so you receive one email per day or, even better, per week with the info you need.

■ Filter your BACN

Make sure your [BACN](#) goes to a folder just like spam. This way, you can take time and read it as needed rather than being interrupted with each new message. Better yet, get a personalized email system, like [Sendio](#), for your independent insurance agency that can help you filter these items and provide other great resources.

Habits to Increase Email Productivity

Email is the preferred mode of communication for most of your clients, partners, and colleagues, meaning you simply cannot cut email out of your life. This leaves you with one option: use email, but use it better. Here are a few great tips to help you keep connected and allow you to stay focused and productive.

1 Turn Off Notifications

Just seeing an email notification pop up can interrupt your thoughts and your workflow. Turn off notifications and check your email at set times throughout the day. This will help you respond to messages in a timely manner without interrupting your workflow.

2 Keep Your Things Short

Whether you're writing a new email or responding to an incoming message, keep your messages short and to the point. By doing so, you'll set a precedent for more concise, easy to read messages. Shoot to keep emails between 3 and 7 sentences.

3 If You Don't Read It, Unsubscribe

This is also true for anything that doesn't benefit your work. As for professional mailing lists, think about whether or not you read the content provided, and if it has benefitted you. If not, unsubscribe! This will save you time and space in your inbox.

4 Create a Filing System

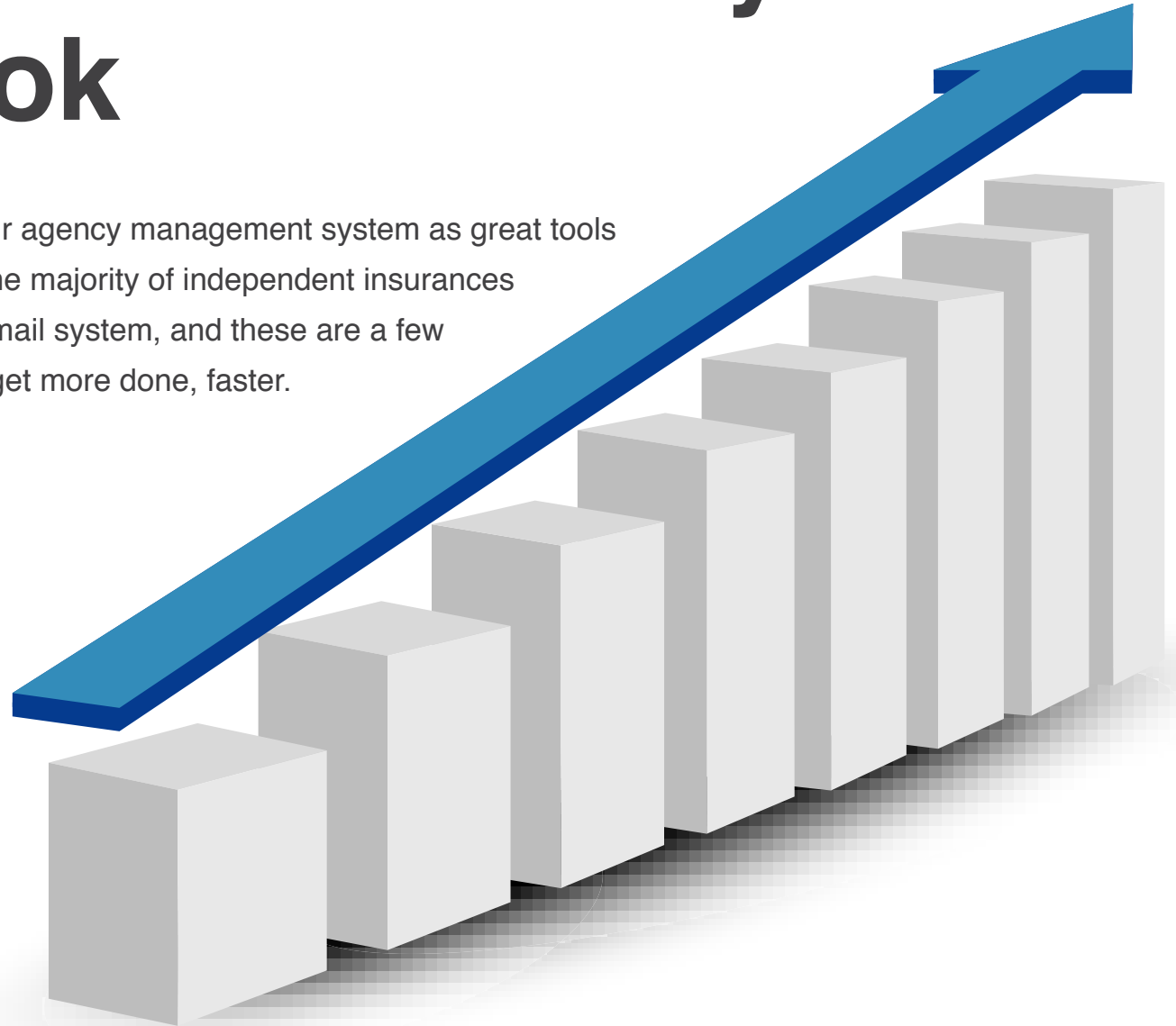
At the end of the day, you should be looking at a clean inbox, which can be achieved through categorizing your emails. Create folders and move read emails there rather than letting them sit on your home screen. If you have messages that need follow up, mark them as such instead of letting them sitting in a mess of other messages.

5 Keep One-Subject Messages Together

Create fewer emails by responding to previous messages that are related to the same topic rather than writing a new email. This helps you keep all emails related to a certain project or issue together, so you don't have to spend time searching for multiple messages and can easily see the progression of the correspondence.

Means for Increased Productivity in Outlook

Now, we turn to Outlook and your agency management system as great tools to increase email productivity. The majority of independent insurance agencies use Outlook as their email system, and these are a few ways you can utilize Outlook to get more done, faster.





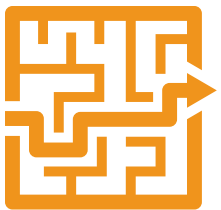
Use Quicksteps

Quicksteps is a feature found in Outlook 2010 and 2013, located on the top ribbon. You can click the arrow to open up the Quicksteps screen and check out some of the features already set-up. You'll be amazed to see how many ways you could save time just by using some of these built-in shortcuts.



Use folders

Utilizing Outlook's folder system can help you categorize your inbox and keep it clean. This also helps you keep information on one topic or project in one place, making it easier to find when needed. In addition, you can create rules to automatically move emails, such as newsletters or emails sent from a specific co-worker, client or provider.



Use shortcuts

Just like with Quicksteps, you'd be surprised to see how many keystroke shortcuts already exist in Outlook. [LifeHacker](#) went through a list in a recent post, including the familiar "Ctrl+R" to reply to an email, but also "Alt+R" reply to all to an email. Other keystrokes included "Alt+W" to forward an email and "Ctrl+G" to jump to any date in the calendar. See the full list [here](#).



Use templates

You may find yourself writing the same email, such as a meeting reminder or a request for client info, repeatedly. Once you've written out your format, you can save yourself time by creating a template of your commonly sent emails simply by going to "File>Save As>Outlook template".



Use custom task priorities

Start using Outlook to track your tasks. This helps you easily see which tasks are most important or those that need to be completed before other tasks in a project series. This simple visual prioritization will help you tackle things in proper order and keep up on deadlines.



Use Outlook Integration

[Outlook Integration](#), which allows you to sync Outlook with your agency management system, ensures all your independent insurance agency's data and communications are in one place. Combining Outlook integration with the above tips on increasing Outlook's productivity will put you on the path to a more relaxed, successful work day.

As you can see, there are hosts of ways for you and your agency to take back the benefits of email to increase productivity. By integrating some of these habits, you'll get more done in less time, leaving you space to expand your agency's business and invest in personal attention for your clients.

We at SIS know it is important for you to streamline your agency's efforts so you can spend more time focusing on clients. We listen to you to find out what you need to do just that, like adding Outlook Integration as of Partner XE's many [capabilities](#).

Clients like [Mark Mraz of Insurance Consultants Group](#) are thankful for our efforts with comments like: "(Outlook Integration) has made us extremely more efficient in documentation and E&O prevention". It's feedback like this that lets us know we're giving our clients what they need. To let us know your opinion on Partner XE, or to find out more, contact us today at 800-747-9273 or sales@sisware.com.

About SIS

Headquartered in Columbus, Ohio, Strategic Insurance Software (SIS) is the team behind Partner XE—an innovative web-based insurance agency management system that helps independent agencies streamline workflow and grow their business. Built on a foundation of strong technology and exceptional service, we're moving forward with a constant eye on innovation that will make independent agents' lives easier.

About Partner XE

Supporting downloads from nearly 300 carriers, real time interaction, integrated agency accounting, and much more, Partner XE is a full-featured agency management system at an affordable cost for the independent insurance agency. For more information, please visit www.sisware.com

Partner ^{XE}



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