



# A Little About the Author

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Judy Owen established Terrace Consulting in 2002 to provide an advisory service to businesses and government agencies. Her aim was to improve their business systems and processes to access information so they could increase productivity and profits by working more efficiently and effectively.

Judy has worked with organisations of varying size and complexity for more than 25 years to improve and streamline the access to their business information.

As a result of her vast experience managing information services and as a consultant to government agencies, Judy was appointed as an independent Auditor for Archives New Zealand Public Records Act Audit Programme four years ago.

Meanwhile Judy realised that small businesses throughout New Zealand get little or no advice on how to set up systems and processes that will result in better management of electronic and paper files.

Recently Judy has focused on working with these small to medium businesses in the Wellington (New Zealand) region so they can find the information they need quickly and easily when they need it. She aims to help them reduce risk, improve productivity and therefore increase profits.

Now Judy has taken that wealth of experience to benefit small businesses beyond her immediate geographical area with her blog and free eBooks. Her eBook (Keeping Good Business Records for Small Businesses) provides clear step-by-step instructions that anyone can use to create their own filing system to organise their own business information.

More information is available on this eBook [here](#).

## What people have said about Judy

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“Judy brings the experience and skill to make simple and reliable an electronic filing system that had grown tangled and complex over the years”. Sarah.

“Thank you Judy, for your report after visiting my office. I was surprised at the level of detail included and the additional suggestions for things that I hadn’t even considered. I have immediately implemented some of your suggestions and I am enjoying the benefits of them already”. Sandy.

“We contracted Terrace Filing Services to assist us to implement an electronic filing system. Judy Owen project managed and did the majority of the work for us to a very high standard. Judy consulted with the team and designed and implemented our new system. The associated documentation and help files was first class and I would unreservedly recommend Judy to any business looking to implement or upgrade their filing systems, documentation or staff training in their filing systems”. Stuart.

“Judy came to help me with both my paper files and the electronic ones. Both were a mess! She was quick and clear. It has made such a difference that this year my tax returns were filed early and my accountant was most surprised and pleased”. Barbara.



**Keeping Good Business Records** – a workbook for owners and managers

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## Introduction

The volume of email arriving in the email inbox has become a major problem for many people. Since I've been working with small business owners I've realised just how big this problem is.

From time to time I've shared my thoughts on managing the email ogre in [my blog](#). Now I've put some of those blogs together here so you have hints and tips on managing your email in one place. This will make it easier for you to use this advice to keep your email under control.

## De-mystify your email inbox

When I've been talking to small business owners about improving their business systems and processes, their eyes have lit up when I say that I can help them manage their email inbox.

Email inboxes seem to be dreaded by many people for a variety of reasons. For instance:

- ◆ Your inbox is so full that new incoming emails are blocked so you can't receive them
- ◆ You know there is an email in there somewhere that you need to reply to but you can't find it
- ◆ Your business emails are all mixed up with personal stuff
- ◆ You have subscribed to various e-newsletters but never seem to get to read them and they're cluttering up your inbox
- ◆ You've opened all your email messages and read some but not all. So you don't really know what action you need to take, if any, but you don't want to delete them in case there might be something important in them. But you never get around to checking.

You wonder how other people manage their email. (Well - judging from the response I've had recently, a lot of people don't!)

You think there must be a better way.

Well –there is.

First up take a few minutes to look at recent emails - say over the last month and note how you can sort them into groups. When you sit down and think about it you might find you have emails from clients or customers, from suppliers, from sales people, from friends and relatives.

Or you might look at the different topics of the emails and decide to group your email messages by topic.

It doesn't really matter how you group them or what you call the groups. The important thing is that it makes sense to you and anyone else in your business who needs to access your emails.

Next, check out the email product you're using and see if there is a way of setting up separate folders for each of the groups of email senders you've identified.

If you're using Gmail you can create folders for each group you want.

Gmail has a priority inbox where it automatically puts some emails that it thinks are important for you. You can put stars on some emails so they stand out amongst the rest and you can add them to a To-do list.

You can check out the features of the Gmail priority inbox [here](#)



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Gmail also has some new inbox features so that you can organise your email into five tabs: primary, social, promotions, updates and forums. These categories make it easy to read messages of the same type all at once, and keep track of your emails.

Other email products will do similar things to help you to keep your email under control.

The products can only help you so far though. To really manage an overflowing inbox you need to have some good habits.

Like taking time to empty your inbox regularly. Once you get into good email habits you'll find you can delete unnecessary messages as you go rather than having them build up and causing a clutter that is a pain to get rid of.

## Good habits around email

I have talked already about the dreaded email inbox and given you some ideas on how to keep it in control. Now I can give you some hints for good email habits.

### Email Good Habit 1

Turn off email alerts (like the flapping envelope on the bottom of your screen or the ringtone) so you aren't distracted every time a new message arrives.

Make a point of checking emails only once or twice a day. Put an action alert beside any that need action today or tomorrow, then make sure you take that action on time.

Set aside uninterrupted time each day to deal with emails. Put this time in your calendar or diary and make sure others in your office know that this is not the time to knock on your door and ask if you want to go out for a coffee or to invite you to an impromptu meeting.

### Email Good Habit 2

Set up folders so that emails on specific topics or from specific people or groups are stored together and don't clutter up your inbox.

Use a star or a different colour for emails that need action, need to be read or are just for interest or reference

### Email Good Habit 3

Set up rules or filters to send emails directly to specified folders when they arrive. This will help you to control your inbox. When you're ready to read your emails on a particular topic or from specific people, you can focus on one folder at a time.

## It takes time to get into good habits

Over recent months I've been relating some of my experiences with clients who want help to organise the information they use in their business. Sometimes it's about getting their email under control; sometimes it's their electronic documents causing them grief because they can't remember where they saved an important document or spreadsheet. I've also given a networking colleague some ideas for sorting out the stuff on her desk.



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Let's talk about her for a moment because her experience is so relevant to this blog on habits. Jill had piles of paper, promotional folders and an array of spilt business cards on her desk when I first saw it. It had been like that for most of her time in that business. However in 3 weeks with some help from me she got it tidy and she loved being able to work so much more efficiently.

But – 2 months later she confided that she had been really busy and her desk had got messy again. And I realised that although the strategies I had given her for getting out of the mess she was in, it had not become a habit to keep using those strategies.

And we all need to keep using those strategies or we will get swamped again; with paper; or with emails; or by not having and using simple rules for organising electronic documents.

So now I have some tips for creating a new habit around managing your business information and making it stick.

- ◆ It takes 3- 4 weeks to make a new habit run on autopilot. So you need to commit a little time **every day** just for a month to keeping your desk tidy or your email under control
- ◆ Write a check list of what you plan to achieve in the month
- ◆ Take no more than 15 minutes **each** day (and **every** day) and tackle **one task per day**. This helps you to build up the habit of sorting out **one messy area at a time**. You get a sense of achievement without getting bored or fed up
- ◆ Make that time at the same time every day – so choose a time of day that you know you can commit to over the first month. If necessary reorganise some of your other activities so you can make the same time consistently every day over that month
- ◆ At the end of the first week, check how different things look and congratulate yourself. This will give you the motivation to keep going into the second week
- ◆ If you find you're forgetting, take time at the end of a day to plan the task for the next day and create an alert about what you are going to do the next day
- ◆ Tell someone what you're doing and show them your progress so they can help you keep motivated.

If you find yourself slipping think how much more productive you will be if:

- ◆ You have a tidy desk where you can find everything you need very quickly
- ◆ You can see all your emails neatly organised into folders
- ◆ You know exactly where to look for that pricing list or draft contract and don't have to recreate it.

Check back every week to see how you're going against that checklist you created at the beginning of the month.

Think about the benefits of making this habit stick.



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## Your email inbox is not a filing cabinet

### What does your email inbox look like?

Does it hold just the latest incoming messages? Or do you use it as a storage place for hundreds or thousands of email messages?

If the latter, how do you ever find the message you want? And how long does it take you? In fact which of these messages will you ever want again?

Why do so many of us store so many emails in our inbox?

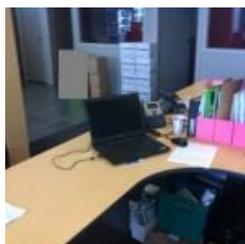
Often the reason is simply that dealing with the inbox is just too overwhelming to think about. So we just let the messages build up and up. We delete a few each day – but we don't delete as many as arrive each day. So the number continues to grow till it gets to the point where you simply can't face dealing with them because you think it will take too much time. Who wants to spend hours cleaning out the inbox?



This reminds me of a client whose desk closely resembled a large rubbish pile. Much of what was on and around his desk probably was – it hadn't always been that way but as time went on a lot of the 'stuff' just stayed there.

Jack confided in me that he really couldn't face dealing with it because he didn't want to give up a whole day one weekend cleaning up. I told him that wasn't necessary. He looked somewhat stunned. It was going to take him hours so how else would he be able to clean up his desk.

I introduced Jack to [my 15 minute action plan](#). I told him to put some blocks of 15 minutes into his diary each week and take that time to tackle one part of his messy desk space. I helped him to decide on a time each week that would work for him without interruptions from clients or colleagues.



I didn't hear from Jack for a couple of weeks so I sent him an encouraging email to ask him how his 15 minutes were working out. Again I didn't hear back.

A week later I sent him another encouraging email. Still nothing. One day I was passing his office so popped in – and was delighted to see the difference in his desk. Not perfect – but hey – he could see it and find what he needed.

It's the same with your email. Use my action plan to empty your email inbox. Set aside 15 minutes each day for a week – and see what a difference it makes. You won't get bored and you will delete hundreds of messages that you no longer need.

## New Year's resolutions – and email

It's a good thing I didn't make a New Year resolution to write a blog each week. Last year it was my intention to have a weekly blog but I didn't actually make it a resolution on 1 January. At the rate



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I'm going it's going to be one a month. However think I can do better than that now I've got started again.

The biggest thing to hit me so far this year is the problems people have with their in-box. It was right up there with losing weight and getting fit as a NY resolution.

Before we had email it used to be the in-tray that caused people grief, especially on a Friday afternoon when the tray had got higher and higher during the week and there'd be no time to move into it.

It became a Friday afternoon job to sort the in-tray and move stuff on to other people, like the journals that were circulated around the office. You'd have a quick flick through to see if there was anything interesting. If there was, you'd send it on without crossing your name off the circulation list so it would come back to you another time when you hoped you'd have time to read it (that seldom happened!). If there was nothing that took your eye – you'd cross your name off the list and send it on its way to someone else's in-tray, where it would sit for another week or two in someone else's in-tray.

It's worth using the same sort of technique with your email inbox. Spend a few minutes every Friday afternoon going through your emails. You'll be amazed how many you can delete in 5 or 10 minutes even. Then the rest will look more manageable – until next week at least!

## It's easy to manage your email inbox: don't send email

The email inbox is still the biggest problem for lots of people I work with. The best advice I've seen recently about managing your inbox is **don't send email**. Really?? How does that work? You simply can't live without email!

How often do you send an email to say "thanks" for a message sent to you? Is that message really necessary? How often do you receive an email message that simply says "thanks" or "OK?"

Your email message generates emails back. Think carefully about the next email you send. Ask yourself these questions:

- ◆ Why are you sending this information by email?
- ◆ Is it really necessary?
- ◆ How will that email benefit you and the receiver?
- ◆ What does it add to the information the other person needs?

Is this the best way to communicate your message? Or is there another way to get your message through to someone else?

Don't do long email threads. If the email conversation is generating a worthwhile discussion, phone the person, go to their desk/office and talk to them or arrange to go out for a coffee or lunch. If more than one person is involved, arrange a meeting – even if only for a few minutes.

If you need to keep a record of the phone or in person discussion, write a quick note when you get back to your desk and file it. If you need to remember something important from that discussion – say the time and place for another meeting, make a note of it – in a notebook or in your Smartphone.

Now you're not going to stop the emails altogether. And I don't suggest you do. Email is a very effective way of communicating with other people. But use it sensibly.



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Organise the emails you go get into folders so emails like newsletters, social media alerts and such don't actually reach your inbox. Google has started to do this very effectively with Gmail. Check out [this video](#).

If you don't use Gmail, it's worth taking a few minutes to follow the Google's advice and set up your own folders in the email package you use.

## My email has stopped working. Grrrr!



All my email messages are still there and I can still see them. But the little line at the top of the screen says "not responding" and I'm getting tired of trying to make it respond.

I can get by though because I have a backup email system that contains all my email. I also have important messages saved in my directory structure. So I can find most of the emails I need.

Does that sound a bit like [Little Goody Two-Shoes](#)? Maybe so but to me it's simply [good business practice](#).

What I am missing is the folder structure I had set up in my usual email (MS Outlook). In particular my "Action Required" folder where I saved anything that needed some action from me.. I don't have that same folder structure in my backup system ([Gmail](#)). Now if I had only set that up before this happened ...

Anyway, now it's off to my [IT support](#) team to sort me out in Outlook so I don't waste any more time searching for emails that require me to take some action. And when they've done their bit, I'll set up a mirrored folder system in Gmail so I won't have the same frustration next time.

Maybe I'll use the [Gmail Priority Inbox](#) system.

## Do you check your e-mail first thing in the morning? Big mistake

Here's what Tim Ferris has to say in [the Huffington Post](#) in an article entitled "[9 Things You Should Never Do At Work](#)." In particular:

### **Do Not Email First Thing in the Morning or Last Thing at Night**

"The former scrambles your priorities and all your plans for the day and the latter just [gives you insomnia](#)," says Ferriss, who insists "email can wait until 10am" or after you check off at least one substantive to-do list item.

### **Do Not Check Email Constantly**

Batch it and check it only periodically at set times (Ferriss goes for twice a day). Your [inbox is analogous to a cocaine pellet dispenser](#), says Ferriss. [Don't be an addict](#). Tools like strategic use of the auto responder and [Boomerang](#) can help.



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## Other reference material

Free eBook “Learn how to control your business documents”

eWorkbook “Keeping Good Records for Small Business”

>>[purchase your copy today](#)<<

## eWorkbook “Keeping Good Records for Small Business”

If you would like to:

- ◆ improve your business productivity,
- ◆ reduce your business risks, and
- ◆ improve staff efficiency and business profits,

I recommend [purchase our eWorkbook](#) to guide you through the process of designing a good system for organizing and keeping track of your business files.

### Features and benefits of this eWorkbook - for your business

#### Feature 1

A basic introduction and easy to follow step-by-step instructions for designing a filing system.

#### Benefit 2

Provides context for understanding the importance of a good filing system for a small business. Allows business owners and managers to design a bespoke filing structure that will work well for their business. Not a one-size-fits-all solution.

#### Feature 3

Includes information on what is needed for a complete filing system, including a sample policy statement and procedures manual.

#### Benefit 3

The policy statement and procedures are based on international filing standards and can be adapted to meet individual business needs.

#### Feature 4

Emphasis on information and training for all staff about the new filing system.

#### Benefit 4

Often new business systems don't work effectively because staff are not involved in the development process and are not trained to use the new system.

#### Feature 5

The key to success is to create a filing system that is meaningful to the business.

#### Benefit 5

It will also be meaningful to a new owner when a business is sold. This also part of a business operations manual and an exit strategy.



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## Why this eWorkbook?

**Q** If someone is comparing your offering (your eWorkbook) with others, why should they use yours?

**A** There are a number of books with information about home filing or de-cluttering offices. I'm not aware of any books or eBooks that focus on designing a filing system plus step-by-step instructions to go through the process to design, develop and implement a comprehensive filing system for a small business e.g. alignment with business plans, training, communication with staff.

**Q** What makes your eWorkbook the perfect solution?

**A** Any business that has a filing mess can follow the clear instructions to create a filing system to organise their business information. The business owner or manager can work at his/her own pace, to design and develop a system that is aligned to their particular business needs and knowing that at the end they will have a system that works perfectly for their business.

**Q** Can you tell me why the information you are giving in the Workbook is, in your opinion, worth at least ten times the value of the retail price.

**A** The e-workbook provides the same information that I use when I work personally with clients. When I design and implement a filing system in person for an individual client with 2-3 staff, it typically costs up to \$2000. For larger businesses of up to 10 people it can cost up to \$8000 or even more.

## Improve your business productivity

- ◆ Do you waste time looking for information that you have filed "somewhere"?
- ◆ Do you get frustrated when you can't find a paper or email that you know "is there somewhere"?
- ◆ Would you like to run a more efficient business, have more freedom and still increase your profits?

If you answered "Yes" to any of these questions, purchase Judy's [eWorkbook](#) to guide you through the process of designing a good system for organising and keeping track of your business files.

You can contact Judy for more help or you can read about more hints and tips to improve your business in her [free eBook](#) "*Learn how to control your business documents*"; and even more if you [purchase her eWorkbook](#) that gives you a full set of instructions on how to set up a filing system for your business, including filing emails.



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