



# The Power of Email Delegation



**KATIE KIMBALL**

THE VOICE OF HEALTHY KIDS COOKING @ KIDS COOK REAL FOOD

HELPING FAMILIES STAY HEALTHY WITHOUT GOING CRAZY @ KITCHEN STEWARDSHIP

COACHING ENTRE-FAMILIES TO BALANCE WORK AND A THRIVING BUSINESS



# MAXIMIZE YOUR ENTREPRENEURIAL POWER AND IMPACT

How many hours a week does the average entrepreneur spend writing and answering emails?

My guess? Too many.

As an entrepreneur, you are the CEO of your company. We should think of ourselves as being in those old black and white films where the boss is always dictating a letter to the secretary.

Does the boss spend time at a typewriter?

Nope. He probably doesn't even know how to type. He has more important things to do, and so do you!

Let's get started streamlining.

## CONVINCING YOURSELF

When I say that I have someone sorting my email and answering some for me, sometimes people react in shock.

*How can you trust your email to someone else? What if they mess up? Doesn't that reflect badly on you?*

Before you can save yourself time, we have to get your mindset correct.

**First, I want you to spend some thought time convincing yourself that this is important.**

You are the CEO of your company.

You should be creating business connections, writing content, making marketing plans, setting and following up on quarterly goals, and doing all the high level things that will keep your business running smoothly and growing rapidly.

If checking email takes more than an hour a day, you need more time to work *ON* your business instead of *IN* your business.

**Second, I'm here to convince you that it really is possible.**



Even the most Type-A-perfectionist-control-freak can let other people in their email. (Ask me how I know this.)

Think about this - if you wanted more time in your week and had the money to do it, you probably wouldn't hesitate to hire someone to clean your house. But **if your email is full of clutter**, it deserves the same attention and delegation so that your brain doesn't need to be full of all that clutter, too. The person who manages your email does NOT have to be you.

Let me repeat that. ***This person does not have to be you.***

They don't have to write as you, or even convince someone that they are you. They can be themselves...in *your* email.

Here's what you need to think about when you choose a team member or hire someone new to manage your email.

**Look for someone who:**

1. Can understand or learn how you think.
2. Understands how you prefer to treat people and can treat them in the same way when they write.
3. Has a strong writing voice.
4. Is at least slightly more organized than you.

You'll teach this assistant to write on your behalf, as themselves.

This is both important and possible!

Mindset all set? Now let's jump into the systems.

**"The person who manages your email does NOT have to be you."**

# SYSTEMS TO SET UP TO DELEGATE EMAIL



As you think about your own email, I want you to decide on some general categories:

1. What a team member can do *for* you
2. What a team member can do *with* you
3. What you must do *yourself*
4. What needs *immediate* attention.

As you spend too much time in your email this week, start to consider how to explain what belongs in each category. I'll tell you what to do with those categories in the next section.

Another system you need to set up when delegating email is some blocks of time, such as:

1. **When** you might be in email throughout the week. (This is optional, but can be helpful to your assistant.)
2. Regularly scheduled **meetings** with your email manager.
3. **One dedicated time** to answer emails filed in a certain folder.



# HOW TO TRAIN A TEAM MEMBER TO MANAGE YOUR EMAIL



First, when you first start training a new person in your email, start with explaining those philosophical ideas:

- How you are connected to certain people
- How you treat people
- What tone you use in your emails

Let them start opening emails that you've written for a couple days so they can learn your **basic business philosophy for communication**.

Next, you need to create some folders or filters. I simply do this in my Gmail - no special software needed.

All of these folders are for **training purposes**, and anything that goes into them will be reviewed by you for a few weeks to a few months before actions are taken. This allows for plenty of mistakes and trial and error and nothing can be lost, so **you don't need to worry**.

## **Folder List recommendations:**

- *Archive*
- *Unsubscribe*
- *VIPs*
- *Work on Together*
- *Starred Emails*
- *Answer on Phone*
- *Admin*

You may need other folders depending on your business, such as customer service, promotions for later, or any number of ideas. These will become clear as we get going.



## FOLDER: ARCHIVE

This folder is just for training purposes.

You'll do your best on a call with a screenshare or side by side at a computer to explain to your new email manager what types of emails are coming in simply "for information."

These emails might be receipts, notification of payment, certain lists you're subscribed to for future reference but don't need to read right away, etc.

Anything that this person can **archive without you seeing it** goes in this folder.

Once your team member is getting this correct all of the time or at least 90% of the time, you can stop using the folder and give them permission to simply archive.

## FOLDER: UNSUBSCRIBE

Every email begins to get full of **subscriptions that aren't needed.**

Maybe you signed up on purpose, but don't need these emails anymore. Or maybe you got on a list by accident.

In order to streamline your email for both yourself and your assistant, create a folder called *Unsubscribe*.

Your assistant will put emails in here that he or she hopes can be unsubscribed from, and after you approve them, they do the unsubscribing.

Believe me, this will save you time both in the short- and long-term.

This is also a temporary folder just to get things organized. In the future, your assistant should regularly be asking you if certain email lists can be ditched.





## FOLDER: VIPS

In this folder, you and/or your assistant will put emails from **people who seem to be regularly important to your business.**

These are recurring contacts, people you know in real life, or really anyone whose email address should always be paid attention to.

This folder will take the most trial and error, but it's basically like building a human-managed whitelist.

Over time, in the first few months, your assistant will begin to learn who these people are. And in fact, your assistant will probably be communicating with them, so they will get to know him or her too!

This folder is temporary and for training purposes, because once your assistant understands who is important to your business, those emails will go somewhere else.



## FOLDER: STARRED

I use Gmail for my email, and I prefer to have **anything that I need to look at** have a star on it. I like this because if I'm on my phone and happen to see an email that's important, I can add a star with one tap.

I can also use the keyboard shortcut "gs" to go directly to my stars whenever it's time for me to answer emails. As the CEO, I shouldn't really be hanging out in my main inbox at all. That is delegated to my assistant.

Each entrepreneur will need to make their own decisions about **which emails can't be delegated.** That's what the stars are for.

Often in my starred emails will be decisions I need to make after perusing someone's website, links I need to click that no one else can approve for me, or newsletters that I really want to read with information important to my business.

As you work with your new email manager and get to know more about what he or she can do, your starred emails should diminish. As an entrepreneur and CEO of your business, you really should only **live in your stars and one other folder.**



## FOLDER: WORK ON TOGETHER

I had someone managing my email for years before implementing this next system, which has been life changing.

Every week I spend an hour **on the phone with my executive assistant** using this folder. These are emails that I can evaluate and answer while I'm folding laundry or going on a walk.

My assistant's job is to give me a summary of what's in the email, and then I answer the question. She takes a few notes and later that day **she answers the actual email.**

Here's how to systematize this:

- The email must not be time sensitive for less than a week.
- The email gets an immediate reply like this: *"[Assistant's name here] on [CEO's name's] behalf. We will be addressing your email during our [Tuesday morning] meeting, and I'll get back to you right after that. Thanks so much! "*
- After the meeting, the assistant answers as himself or herself, but with the information from the CEO.

At first, this may feel awkward, but I guarantee that over time you will love it.

## FOLDER: ANSWER ON PHONE

There are some emails that require a longer response than I can share with my assistant on a phone call.

As long as this type of email doesn't require me to open any software on my computer, or click around a lot, I've trained my assistant to put certain emails into "Answer on Phone."

This is because I find that **dictating voice to text** is an incredibly efficient way to blast through a lot of emails.

I have a specific hour set aside where I'm sitting in a vehicle waiting for a child at lessons every week. Sometimes during our email meeting, I'll tell my assistant, "Just put that in the phone folder," and that way I can work through a ton of them at once.

This system may not work for everyone, but it's golden if you can dictate voice to text quickly and have time in your week that is well-suited for this.



## FOLDER: ADMIN

Finally, over time, you will be able to train your assistant to completely take care of some emails without you even knowing they're there. This might include:

- **Scheduling a meeting** to talk to someone using an online scheduling tool.
- **Filling out a form** for you to be a speaker that's very similar every time it's done.
- **Organizing certain recurring promotions** and filing information in other systems your team uses like Slack, Trello, or Asana.
- **Coordinate** with other team members on your behalf.

There's no greater feeling in the world to realize that a huge handful of emails have been taken care of and archived without you having to touch them.

This folder will be a permanent folder, but at first it will take a lot of training.

Plan to get on screenshare calls with your assistant at least three times a week in the beginning, because you're basically going to do things side by side. They will watch you, then you will watch them, and then you approve them to do things on their own.

## URGENT & TIME SENSITIVE

There will be some emails that are time sensitive or just so important to your business that you want to jump on them right away.

Be sure to **set up a system** with your team member where they can ping you wherever you are, even if you're making dinner, to let you know that a certain email came in.

I often explain to my assistant while I'm working on certain projects to let me know right away if so-and-so replies. She pings me on Google Hangouts, and includes the permalink to the email, as well as the name of the person.

If I'm on my computer, I can click the permalink and it opens right up. If I'm on my phone, I can search for the name of the person if I need to respond immediately (or even voice dictate to my assistant and she responds as me, because it's my words).

Anything that's very time sensitive would automatically fall into this category. Typically, my assistant also throws a red star on those in Gmail in case I don't follow up right away.



# HOW TO EVALUATE AND TWEAK YOUR SYSTEMS

At first, when training your new email assistant, you'll want to **check all of those training folders at the end of every day**. I like to give immediate feedback, so that the next day my assistant can use that feedback and adjust her process.

For example, if she gets everything right in the archive folder, I'll just let her know that she can archive them all. I want her to do it, not me, so she sees them one more time.

When I go into the Unsubscribe folder, there are always emails that my assistant hopes she can unsubscribe from that I still love for whatever reason. I generally will put a checkmark by all of those then turn on a screen recorder like Screencast-o-Matic or Loom and record myself quickly describing why I'm removing each of those from the folder. By the end of my one- or two-minute description, the folder now only has approved unsubscribes in there. Now my assistant can go and actually unsubscribe from all of them.

I use screencasts or live meetings to work through the admin, stars, and work-on-together folders. Open and clear communication is a must. Keep reminding yourself how important it is to free up your time, and how amazing it will be to have 5-10 more hours in your week.

Besides that, you also free up important brain space that you can use for the creative executive work you need to do as CEO. As you go, I imagine you might add other folders or other categories, and you'll learn to train your team member to do certain things with you and for you.

**“Open and clear communication is a must.”**

# LIVING THE DREAM



The bottom line here, my entrepreneurial friend, is that you need to dream about all that you'll be able to get done when you are not in your email.

- Will you be spending more time with your family?
- Will you be finally writing that book proposal you've been dreaming about for years?
- Will you be wrapping up a huge project or setting high level goals for your team?
- Will you have time to hire someone new to take on a project that will grow your business exponentially?

I'm even very grateful for what I get done during my hour-long email call each week.

I've gone grocery shopping, folded laundry, and gotten in some steps on a beautiful sunny day. I've cooked dinner!

It is multitasking at its finest, and it helps my life and business run a lot more smoothly.

## MAY THE FORCE OF EMAIL DELEGATION BE WITH YOU.

**Interested in more help? Got a question about your business that could use fresh eyes? Hop on a clarity call with me and let's see what we can do with 15 minutes to balance you out!**

<https://calendly.com/katie-kimball/clarity-call>