



Five Secrets to Take Control of Your Inbox

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Zap Your e-clutter!



5

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Five Secrets to Take Control of Your Inbox

Forward

Have you ever wondered how you managed to accumulate so many emails in your Inbox? If you ever looked at your Outlook or Gmail account and wondered, "How am I ever going to catch up on reading and responding to all of these messages?", then keep reading.

Imagine for a moment that when you go out for your morning commute that there are no traffic laws, no divider lines, no signs for directions, no



red-lights or speed limits to control the safe flow of traffic. What would happen? Chaos! The fact is that we are taught the rules and must prove that we have a good understanding of the laws before we are issued a driver's license. Without this process and the agencies that patrol and enforce the laws, our roads and highways would probably get jammed up and over-loaded, just like your e-mail inbox.

As traffic has increased on the web and more users have turned to e-mail to communicate, the amount of messages in the inbox has become harder to manage. The problem is that we built and began using the technology, without establishing some basic rules of the road between the other e-motorists.



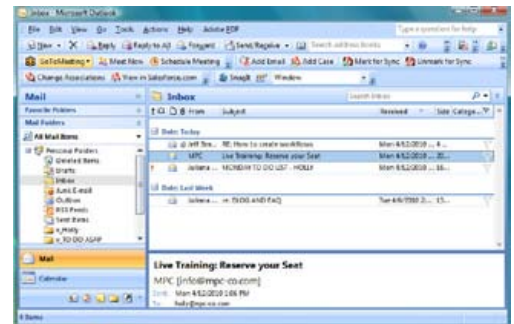
Understanding the integral role e-mail plays in our business communication is key to establishing e-mail's place as a fundamental element in the customer relationship management (CRM) process. It should also be noted that e-mail is only a single component of CRM, and is not a worthy contact management solution when standing alone.



Here are some factors to consider:

- E-mail and CRM should work together, without double data entry.
- Can you send e-mail and mass e-mail from your existing CRM?
- When you send e-mail from MS Outlook or Gmail, a history should be created in your CRM directly on the contact page of the person to whom you sent it, including attachments.
- Your Inbox should serve as a temporary holding area for new messages that should always be completely processed.
- Received e-mail should be processed and stored in history of your CRM on the contact's page
- Your Inbox should be EMPTY at the end of each work day.
- So should your "sent" box.
- How? By processing the information to your CRM, where you can assign tasks and projects to yourself and other team members.
- Does your CRM allow you to generate e-mails and e-mail templates 1-to-1 and 1-to-many?
- Your CRM should allow you to send emails, mass e-mails, and include e-mails as components of a more advanced automated workflow.

MPC has created a set of easy-to-follow, electronic rules of the road called **e-DARTS®**, an acronym for **Delete, Archive, Reply, Task, Sync**. These are the five options most commonly exercised when a message enters a user's inbox.



e-DARTS® IN ACTION



1 Delete

When a new message arrives in the inbox, odds are that a large percentage are promotional or advertising in nature, so we “Delete” or “Archive” these messages for future reference.

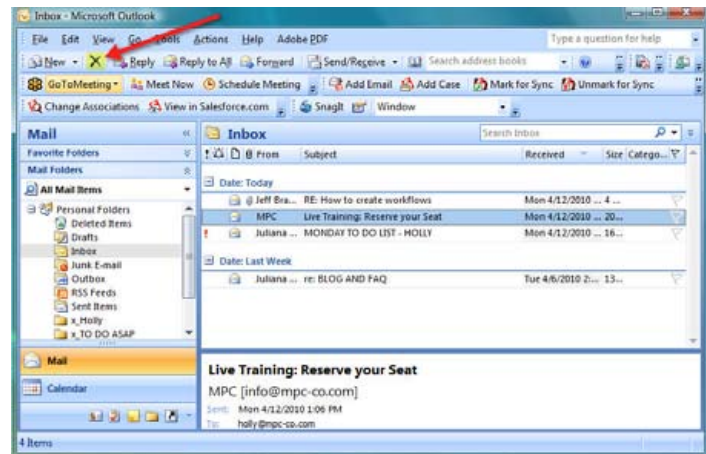
For clients that are experiencing extreme inbox overload (500+ Message), we recommend unsubscribing from all lists and RSS feeds until your Email Inbox is under control.

Since there is a good chance that you are also receiving unnecessary emails from your friends, colleagues, and team members, it is a good idea to have a plan to teach those contacts how to best communicate with you.



A great way to redirect all of that non-business communication from your Outlook inbox is to request that your contacts join you on Facebook (FB) and encourage them to communicate with you there. It should be noted that your Facebook account settings should not automatically email you the newsfeed updates from your FB friends.

{ Delete }



2 Archive

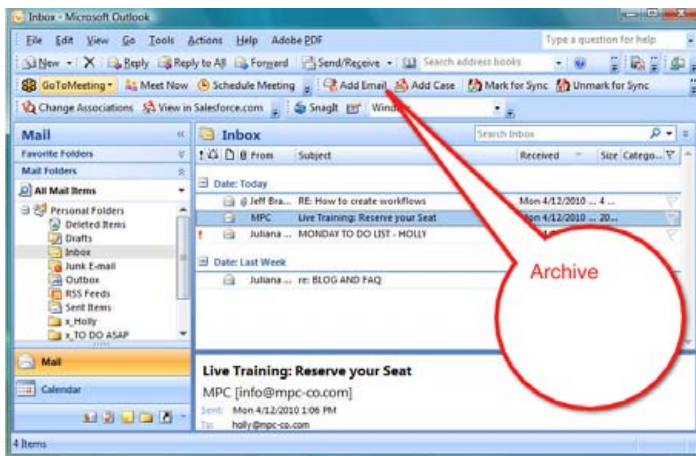
For the messages that are important to keep, but require no action, it's best to "Archive" the message by linking it to the sender, contact and/or transaction to whom or which the message is most directly related. Each archived message should automatically include a time and date stamp.



You should also consider the subject line. Does it accurately describe the content of the email? Edit the subject line to make finding it later, easier. This will also provide the CRM user (or a team of users) a system to track all messages related to contacts, projects, transaction, etc.

Tier One CRM systems, such as Mortgage Planner CRM, allow users to mass archive multiple messages from a single sender or mass archive a series of emails about specific project.

{ Archive }



The above Archive ("Add Email") feature in MS Outlook is available with MortgagePlannerCRM. It may be different or not available with your current system.

3 Reply

For messages that require a response, we recommend that you edit the subject line if necessary when replying.

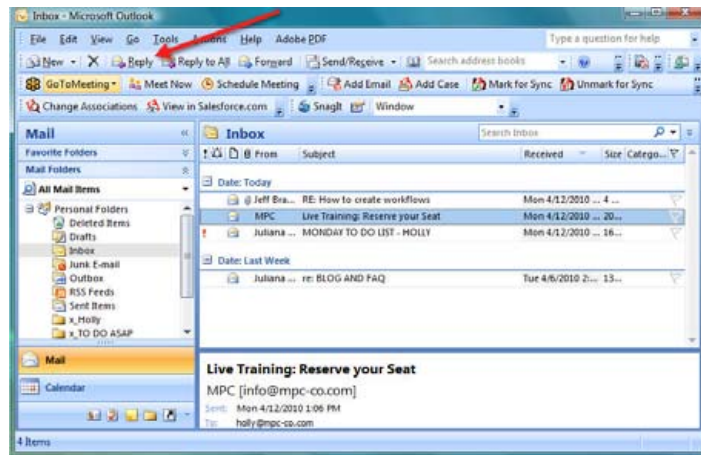
Then “Archive” the message into your CRM by linking it to the sender, contact and/or transaction to whom or which the message is most directly related.



Follow the rules of the road and do not cc other contacts on your reply message unnecessarily. The members of your team should always be able to access the message from the CRM.



{ Reply }



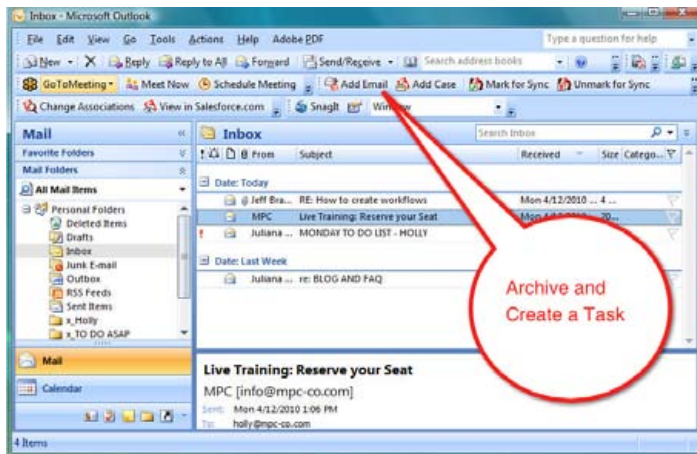
4 Task

According to the Wiktionary, the noun usage of a **Task** is defined as (1) A piece of work done as part of one's duties. (2) A difficult or tedious undertaking. (3) An objective. (4) A process or execution of a program (computing).



Although most may agree with these definitions of a Task, there is definitely some disagreement and confusion among CRM users concerning the effective use of a Task within the realm of contact management. This divergence extends far beyond the bounds of electronic data management, because too many users still find it necessary to manage "to-do" lists on legal pads, Post-it notes or whatever scraps of paper are handy at the time.

{ Task }



The above Task ("Add Email") feature in MS Outlook is available with MortgagePlannerCRM. It may be different or not available with your current system.

For messages that require an action on the part of the CRM user, best practices dictate that the e-mail be archived into your CRM by linking it to the sender, contact and/or transaction to whom or which the message is most directly related. This should be followed by the creation of a task, series of tasks (project), or the launch of an automated workflow that contains a series of tasks assigned to multiple users.



Each task should contain a due date, subject line, detailed instructions, priority and status. If the CRM offers an email notification, use sparingly. A good use of the email notification option would be when one or more of the team members is mobile, but is able to receive email on their iPhone or Blackberry.

Many have not completed the transition from the pen to the keyboard, while others are waiting for the day when their notes can be transferred or transcribed seamlessly from an electronic notepad to their PC or Mac. However, understanding the integral role that effective "Task" use plays in our business process is fundamental in maximizing a return on investment with any customer relationship management (CRM) system.

Here are a few tips to take your tasks to the next level in CRM:

1. Be consistent.
2. *Create tasks in one place.*
3. Completely fill out the task form.
4. Link the task to a contact and/or a transaction whenever possible.
5. Review your task list each morning to prioritize your work.
6. Assign the task to a user, even if it is always you.
7. *Assign a due date for each task.*
8. Be descriptive when filling out the subject line.
 - The biggest mistake most users make is to use generic subject lines, making task retrieval from an archive very time consuming.
9. Never close and save a task without setting up a new or follow up task.
 - If it's the very last step in a series, you can always KIT (Keep In Touch).
10. *Don't be a Task Master. Instead, Master your Tasks.*
 - Tasks are the best tool to track accountability within your team and for yourself.
11. Only use reminders on Tasks, when it is time sensitive. Otherwise they become nuisances that you will quickly start to ignore.
12. Use the comments box to leave yourself special instructions.
13. When using automated workflows, make sure that the Tasks are universal and easily understood.



Here are a couple of advantages when using electronic tasks over paper lists:

1. You don't have to have good penmanship.
2. You can standardize subject lines and processes, which makes scalability easier.
3. Advanced CRMs allow you to set up recurring tasks.
4. Your entire team may have access to more information.
5. You can assign tasks across the enterprise of users.
6. Follow up tasks can be setup more easily.
7. Advanced CRMs allow you to set up a series of Tasks to appear automatically.



5 SYNCHRONIZATION (SYNC)

CRM solutions may offer manual and automated SYNC options and both should be used based on individual needs. The primary benefit of SYNC is to connect multiple devices and contact management systems for continuity and to eliminate double and triple data entry. Advances in synchronization allow users to stay connected with wired and wireless option. Look for flexibility and device compatibility when considering CRM solutions and the devices that will be able to support it.



SYNC Your Calendars.



There are few things in life as certain as the limitation of time. It can never be replaced and each person is allotted only so much. If you've read the works of H.G. Wells, you may also believe that time is not something to be trifled with unless your plan is to alter the fabric of the future. When it comes to business, it seems that there is never enough time to get all of the projects completed and tasks checked off, let alone enough time to spend with our peers, clients and partners.

However, in the realm of contact management, CRM experts strive to maximize and leverage as much of that darned stuff as possible. The key factor is Events, or appointments, as the primary way to set aside time to meet with leads, prospects, clients and partners.

Tips to optimize your Events to take your CRM to the next level:

1. **Have a purpose and agenda**
- don't schedule the Event until you do.
2. **Sync your Events with all devices**
- PC, mobile device, and laptop.
3. Allocate time in your schedule to address low-priority items - If you only work on high-priority tasks, the small stuff may turn into a large mess.
4. **Time Block and Batch your Tasks.**
(examples below)
 - a.) Return calls between 10-11:30AM and 2:30-4PM.
 - b.) Process your e-mail inbox at 8AM, 12 Noon & 4PM.
 - c.) Read (personal development & industry news) from 7-8AM.
 - d.) Workout for 45 minutes, uninterrupted.
5. Link appointments to all attendees.
6. Invite attendees via phone (1st) and e-mail (2nd).
7. **Confirm appointments** with an electronic confirmation request.
8. Track invitees' responses.
9. Audio record or take electronic notes of the meeting.
10. **Archive the meeting notes** by attaching the audio/notes file to the contact page of the lead, prospect, client or partner.
11. Agree on next steps and plan the next meeting before you adjourn.

"We were making the future and hardly any of us troubled to think what future we were making. And here it is!"

~HG Wells

Advantages when using electronic events over paper events:

1. A top CRM will sync Events with MS Outlook, Google Calendar and most wireless devices or PDAs.
2. You can standardize subject lines and processes, making scalability easier.
3. Advanced CRMs allow you to set up recurring events.
4. **Your entire team may have access to each other's schedule** to better plan team events.

If it's worth your Time, an Event should be done correctly and with the maximum effectiveness taken into account.



SYNC Your Contacts?

I prefer NOT to sync the contacts in my CRM with Outlook and my iPhone. At least not all of them. Instead I have a group of roughly 250 friends, family, clients and partners that I sync with my iPhone using Google Apps with Salesforce.

Mortgage Planner CRM is accessible through a free app for iPhone and Blackberry users. So, if I need look up a contact from my entire database, I'm covered. There is the added benefit of logging a call when I dial the number from the iPhone app.



SYNC Your Tasks?

I have not synchronized my tasks to Outlook for years. I found it redundant having 2 tasks list and the reminder alarms were annoying. Tasks are not a standard option on the iPhone, so I don't SYNC to my mobile device either. This is another area where my CRM shines. Mortgage Planner CRM is accessible through a free app for iPhone and Blackberry users. So, if I need to manage my tasks while I'm on the road, I'm covered. I can also assign new tasks to my team if I receive an important email or voicemail from a client or lead. There is the added benefit of logging the task on the contact's main page in activity history.

If you are a Blackberry user, direct task sync is an option. And for hardcore "berry clickers," a useful one, as they tend to spend more time on the device than in front of a computer. There also a number of task apps for blackberry and iPhone if you must have a list on your phone. Open the app store on your device and type "task" or "to do list" in the search box. Verify that the App will SYNC with your CRM or Outlook, to avoid double data entry.



FINAL THOUGHT: TAKE ACTION TODAY!

Many of the concepts and systems should have appeared as common sense or too simple to be effective. Something does not necessarily have to be complex or difficult to be effective. What is required is action, and that is where the proverbial rubber hits the road. One of my mentors, the late E. James Rohn, had a quote that brilliantly conveyed why so many people struggle with the execution of a new systems or best practice, especially when the new practice was so seemingly easy. Jim said, "Easy to Do. Easy Not to Do." And that is the conundrum, professionals face with changing behavior or adopting a new practice into their business.

Easy to Do...Easy Not to Do!

~Jim Rohn
Business Philosopher

The best results come from the best preparation. So here is the final suggestion as you prepare to execute on your plan to take control of your Inbox.

- Visualize what it would be like to have an empty e-mail Inbox at the close of business each day.
- Visualize that 90% of your messages have real value, meaning your customers and partners are sending you requests that generate income.
- Visualize that you are in total control of your personal work station and that your team members are also enjoying the benefits of eDARTS.

- Visualize how impressed your partners and clients are that you are the most professional and organized person they know.

Thank you for taking the time to examine "5 Secrets To Take Control Of Your Inbox." It is my sincere hope that you have found it as useful to read as I found it rewarding to write. Good fortunes and DARTing!



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- Gather, Assign & Tasks
- Track your leads
- Track your loan pipeline
- Track + Analyze your results



Email Marketing

- Send Customized Marketing Campaigns to Clients & Prospects
- Birthday Campaigns + Reminders
- Annual Review Campaigns
- Generate custom queues and rule assignments
- Send high-impact, template-based, branded e-mail messages
- Sync with your Outlook, Google apps, iPhone/ BlackBerry!



Time and Task
Management

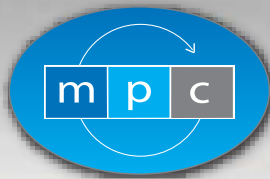
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- Task assignment & tracking
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On Demand Technology Built for the Loan Business

The Mortgage Industry's Premier Web Based CRM
Built on the Award Winning Salesforce.com



The Mortgage Industry's premier Database Management Solution built on Salesforce.com

Business strategy solutions: The more quality time you spend with qualified prospects, the more loans you fund. It doesn't matter if your contacts are in a shoe box, drawer, or in three separate, non-compatible software programs. You face the same challenges:

- How do I maximize face-time with the best potential business contacts?
- How do I communicate effectively, efficiently and consistently?
- How do I identify the best 10-20 opportunities each and every month from a database of 1000s?
- How do I best track all of the work that I have done and need to do?
- How do I ensure that my past clients are not only satisfied, but also feel appreciated?

MPC, the developer of **Mortgage Planner CRM**, has partnered with Salesforce.com to offer a mortgage specific version of their award winning CRM application.



Automated Marketing & Alerts

Put your follow-up on auto-pilot
Personalized email campaigns with your logo/ photo/ branding



RED HOT Opportunity Reports

Easily find high interest rates to Refinance your clients in lower rates
Easily find opportunities for Adjusting ARMS that need to be refinanced



Outlook Sync

MortgagePlannerCRM integrates with Microsoft Outlook, Google & Lotus Notes
Sync your Contacts, Calendar, Tasks, Emails
Use an email program you already know
Save Time on Data Entry



Sync with your Blackberry, iPhone, Windows Mobile

Follow up on the road with our Mobile App
Sync your Contacts, Calendar, Tasks, Emails
Stay Connected anytime, anywhere



Track your Contacts, Leads, Loans, Referrals & more!

Get a complete customer picture at a glance—including contact info, properties they own, loans, latest news, and more with MortgagePlannerCRM
Build stronger, longer-lasting relationships
Turn more Contacts into Sales!!

Features

- ⚡ Stay connected anytime, anywhere through cloud computing
- ⚡ Add Clients & Prospects to customized Marketing Campaigns
- ⚡ Automate your follow-up marketing
- ⚡ Prioritize activities, Set Reminders, Assign tasks for yourself and your team
- ⚡ No software to install
- ⚡ Manage your Loan pipeline, Leads & Referrals
- ⚡ Sync with MS Outlook, your Blackberry or your iPhone

// The best investment I've ever made in my business. I save time, focus on priorities, and connect my clients when I can help them most. ~ C.R. //

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