

Email Management Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

Email management helps you stop using your inbox as a memory test. Jessanol can help sort, flag, draft and follow up on emails so you can see what needs your attention without trawling through everything yourself.

The aim is not to remove you from important conversations. It is to make sure those conversations are easier to find, manage and respond to.

THIS IS USEFUL IF

This type of support may be useful if:

-  Your inbox is busy and difficult to keep on top of
-  Important emails get buried under less important ones
-  You keep meaning to reply, but the day runs away with you
-  You use your inbox as a to-do list
-  You want someone to help organise emails without handing over every decision
-  You need a clearer way to spot follow-ups, actions and client requests.

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help manage and organise incoming emails so important messages are easier to find, track and respond to.

This may include:

- Sorting emails into agreed folders or labels
- Flagging emails that need your attention
- Drafting replies for review
- Using or creating templates for common responses
- Identifying emails that need follow-up
- Adding follow-up actions to an agreed task list, CRM or project area
- Helping reduce inbox clutter

RECOMMENDED RHYTHM

This can be done daily, weekly or at agreed times depending on the level of support needed.

For example:

- A daily inbox check or weekly tidy-up for lower-volume inboxes
- A one-off inbox sort if things have got messy
- Agreed check-in times during busy periods, launches or projects

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Email inbox access
- Agreed permissions
- Guidance on priorities
- Examples of common enquiries
- Any existing folders, labels or templates
- Access to any task list, CRM or project area where follow-ups should be recorded

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- What Jessanol can deal with independently
- What must be checked with you first
- Whether replies should be drafted only or sent on your behalf
- How urgent, sensitive or financial emails should be handled
- Which emails should never be deleted or archived without approval
- How often folders, labels and templates should be reviewed

Important emails should not be missed or overlooked during the filtering process.

Any filters, folders and templates should be reviewed regularly so they continue to work properly for the business.

STEP-BY-STEP INSTRUCTIONS

1. Review the inbox at the agreed frequency.
2. Sort incoming emails into agreed folders, labels or categories.
3. Identify emails that need action, reply, follow-up or filing.
4. Flag anything urgent, sensitive or outside Jessanol's agreed authority.
5. Draft replies using agreed tone, templates or previous examples where available.
6. Save drafts for review or send approved types of replies if agreed.
7. Add follow-up actions to the agreed task list, CRM or project area.
8. Keep the inbox structure tidy and suggest improvements where needed.

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- Access to the relevant inbox
- A short explanation of the main types of emails you receive
- Examples of emails that are urgent, important or low priority
- Any existing reply templates or examples of your preferred tone
- Guidance on what Jessanol can do without checking first
- Guidance on what must always come back to you
- Details of where follow-up actions should be recorded.

You do not need to have your inbox perfectly sorted before support starts. A short walkthrough and a few examples are usually enough to begin.

WHAT YOU'LL GET BACK

You should have:

- A clearer inbox
- Fewer missed follow-ups
- A more consistent way of handling common emails
- Better visibility of what needs your attention
- Less time spent digging through messages trying to work out what matters

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: jane@jessanol.com