



NCBA Center for Practice Management

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North Carolina Bar Association

www.ncbar.org/cpm

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Mischief Managed: Taking Control of Your Inbox

Catherine Sanders Reach
Director, Center for Practice Management
North Carolina Bar Association



Christopher Mims @mims

10 Jul

I declare Inbox Zero over. The new hotness: Inbox Infinity, in which you assume anything really important will reach you by other means.

Expand

← Reply ↻ Retweet ★ Favorited ... More



Email philosophy condensed

- Deal with email once
 - Read and delete (or just delete)
 - Read and act (if under 2 minutes)
 - File/Flag for later action
 - Defer/delegate
- Filter noisy, frequent, or non-urgent items
- Schedule a time to check e-mail



Getting a response to your email

- Descriptive subject line
- Main points at the top
- Close the loops
 - E.g. use MeetingWizard, Google docs form, y/n questions or surveys, make recommendations
- five.sentenc.es
- Send links





Anatomy Of A “Whoops” Moment

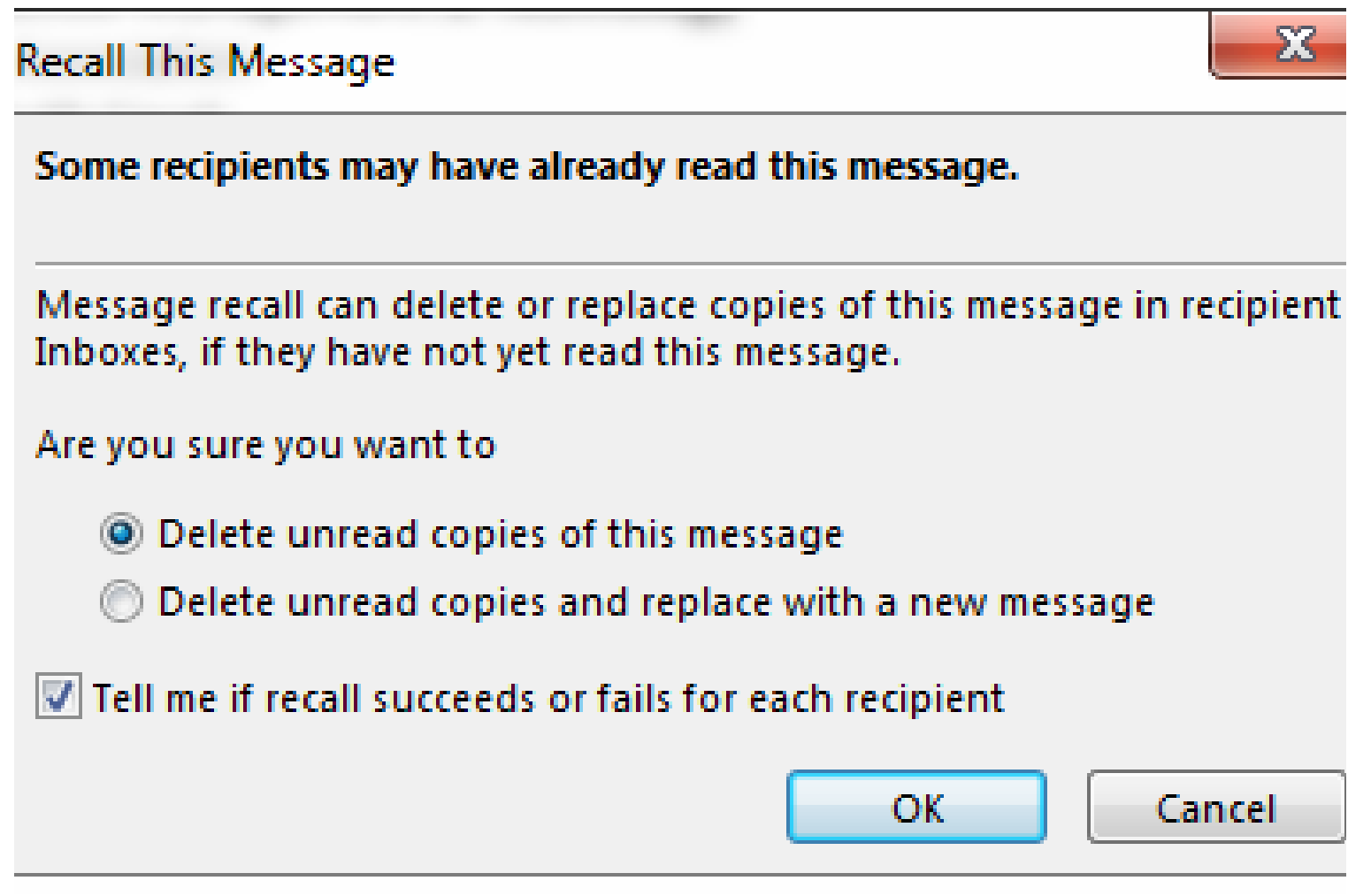


The Culprits

- Auto-complete feature in email applications
- Reply vs. Reply All
- BCC
- Emailing from mobile devices
- Lack of attention
- Poor impulse control



What About MS Outlook Recall?



Recall This Message

Some recipients may have already read this message.

Message recall can delete or replace copies of this message in recipient Inboxes, if they have not yet read this message.

Are you sure you want to

- ☒ Delete unread copies of this message
- ☐ Delete unread copies and replace with a new message

☒ Tell me if recall succeeds or fails for each recipient

OK Cancel

10 Seconds to Undo

ine. Tap and the Law Slide deck"

Sending...

Undo

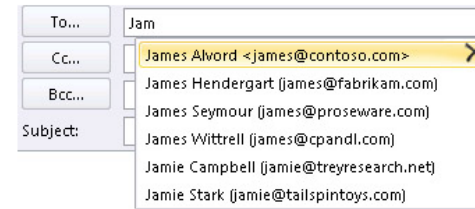
X

Turn off Autocomplete

Turn on or off Auto-Complete List name suggestions

The Auto-Complete List is a feature which displays suggestions for names and e-mail addresses as you begin to type them. These suggestions are possible matches from a list of names and e-mail addresses from the e-mail messages that you have sent.

Applies to:
Outlook 2010



By default, this feature is turned on in Outlook. To turn on or off Auto-Complete List name suggestions, do the following:

1. Click the **File** tab.
2. Click **Options**.
3. Click **Mail**.
4. Under **Send messages**, select or clear the **Use Auto-Complete List to suggest names when typing in the To, Cc and Bcc lines** check box.

[TOP OF PAGE](#)

Did this article help you?

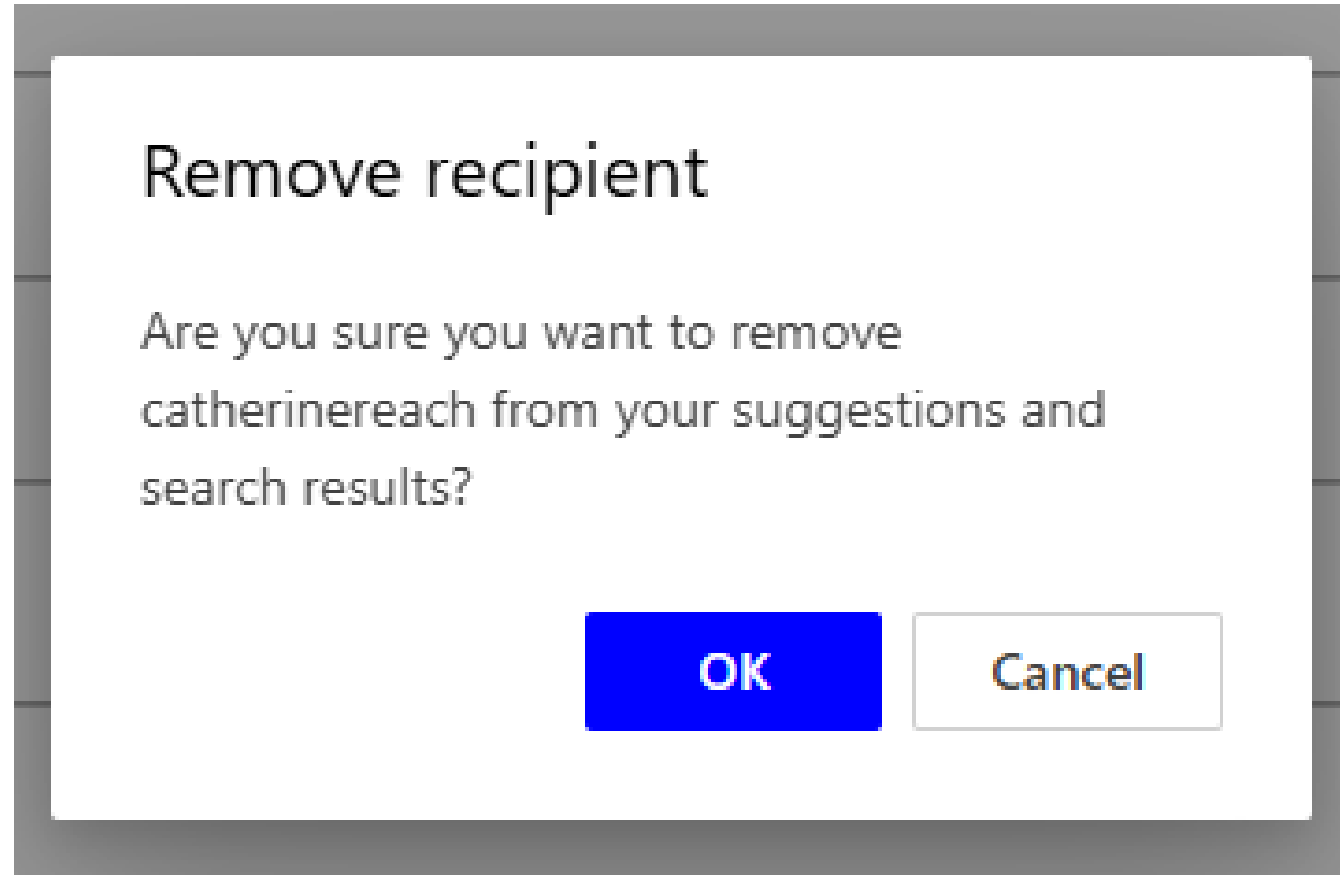
Yes

No

Not what I was looking for



Easily Remove Address From Auto Correct





BCC – Just
Don't do it



“Mail Merge”

New mail

Message Insert Format text Draw Options

Editor Check accessibility Schedule send Start mail merge

Proofing Send Show fields Tracking Tags Print Format Save Options

Every recipient will receive their own copy of this email without other recipients listed.

Send mail merge From: csandersreach@ncbar.org

Recipient

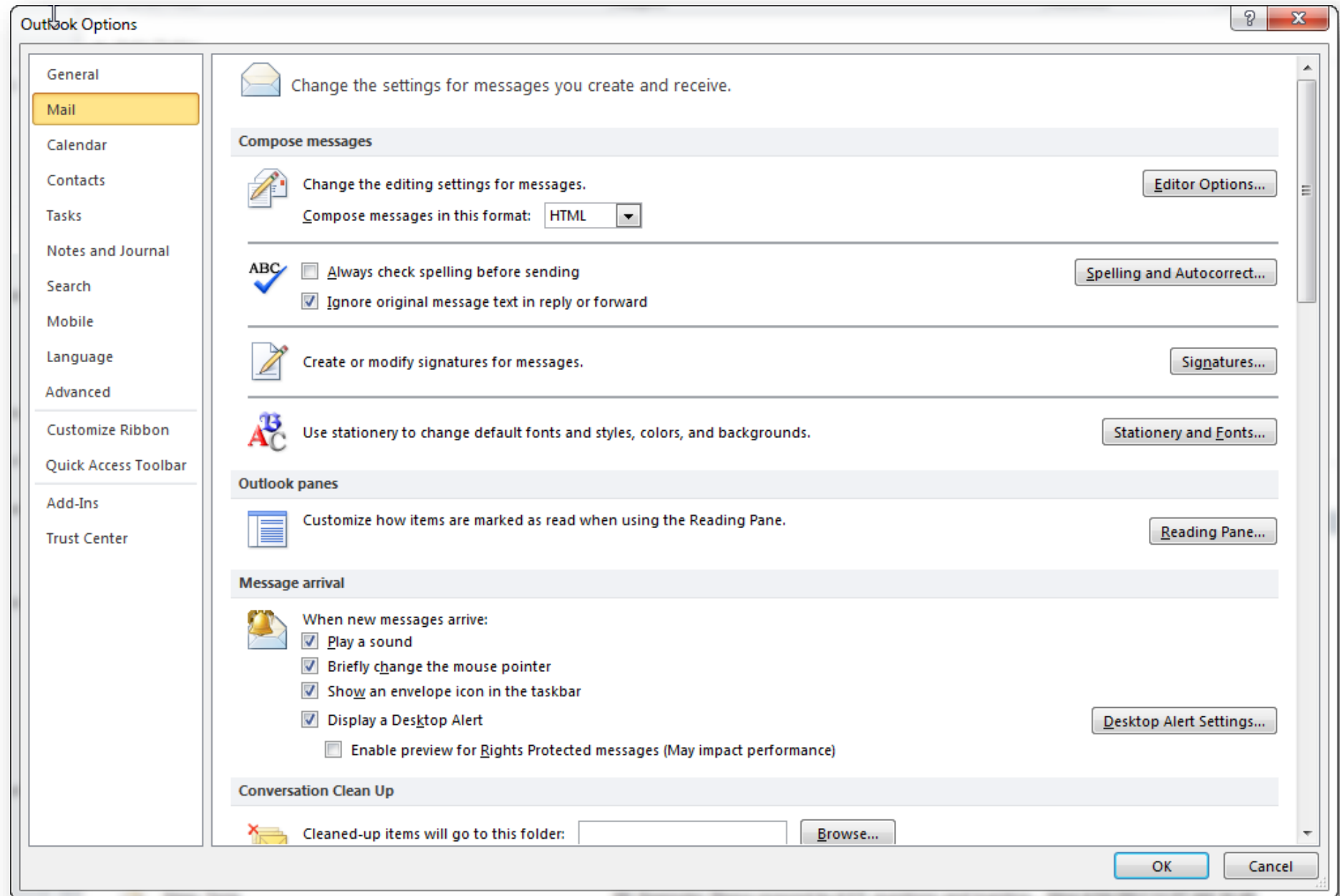
Add a subject

Type / to insert files and more

Draft saved at 6:11 PM

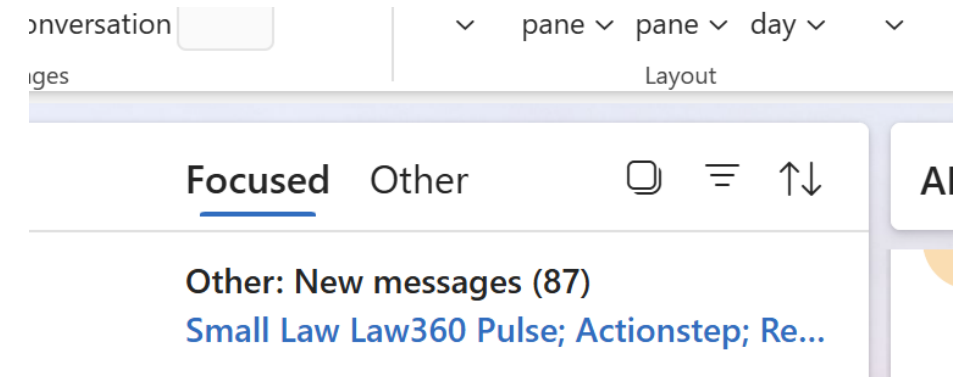
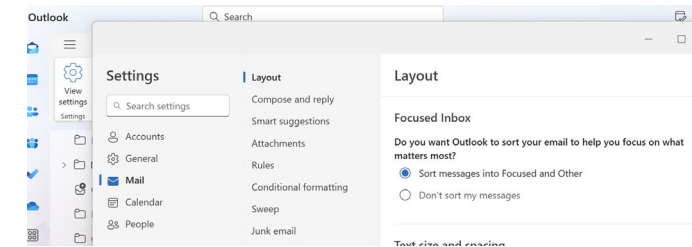
MS Outlook - Organize & Customize

Options



Focused inbox

- Focused Inbox separates your important emails into a "Focused" tab, while less important emails go to the "Other" tab
- The system learns what is important
- You also can train the designation
- Use the right click menu to move messages to the other tab and to designate importance
- Set up in Focused Inbox sorting in the View menu settings



Ignore Conversations

- For conversations that don't need to involve you
- Moves email threads directly to the Deleted Items folder
- Future messages will be discarded too
- Emails with the same subject are considered part of the conversation
- Use carefully – undoing is hard

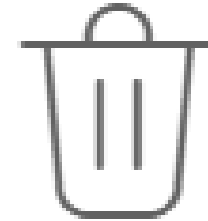
Home

View

Help

 Ignore

 Block ▾



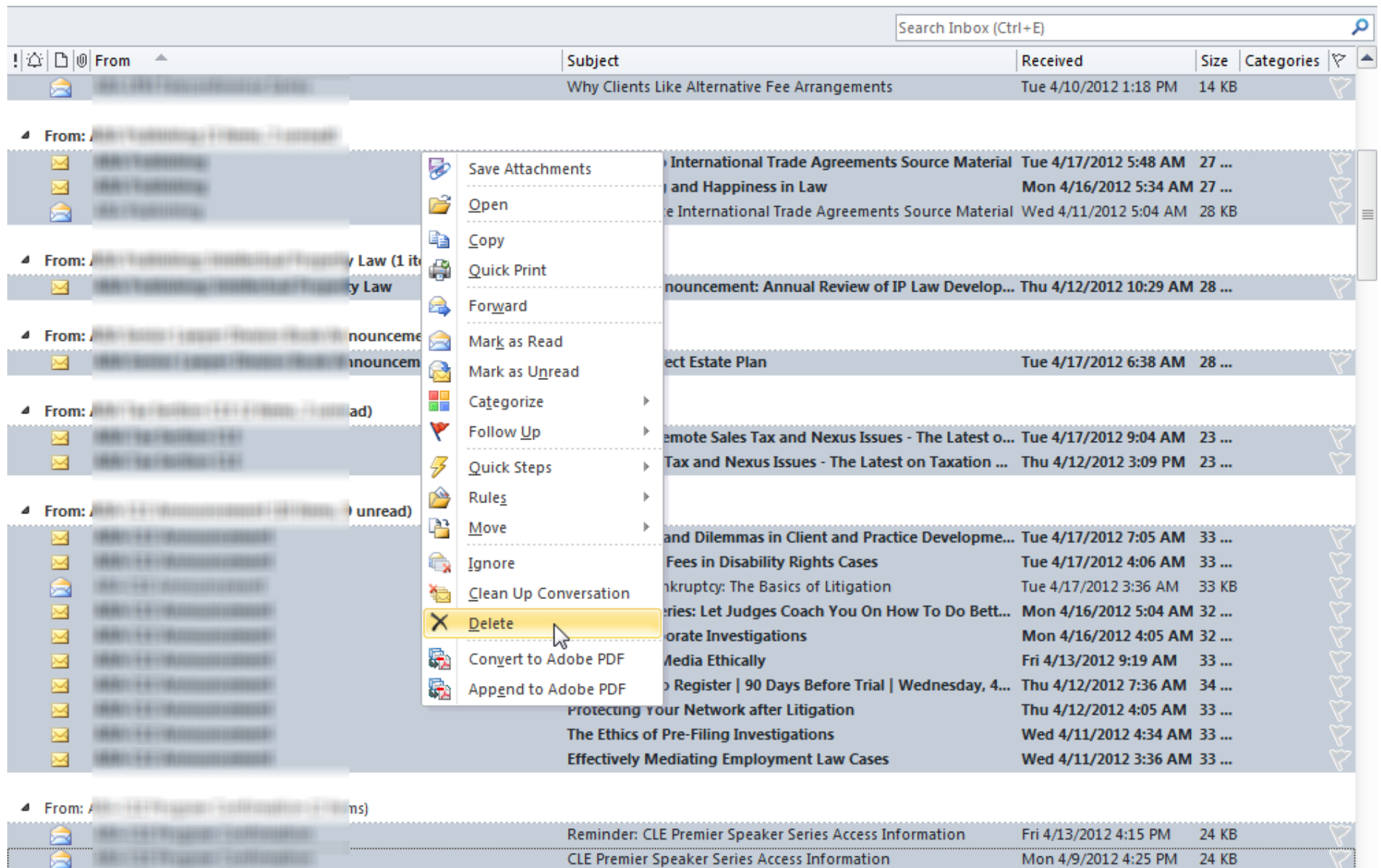
Delete



Archive

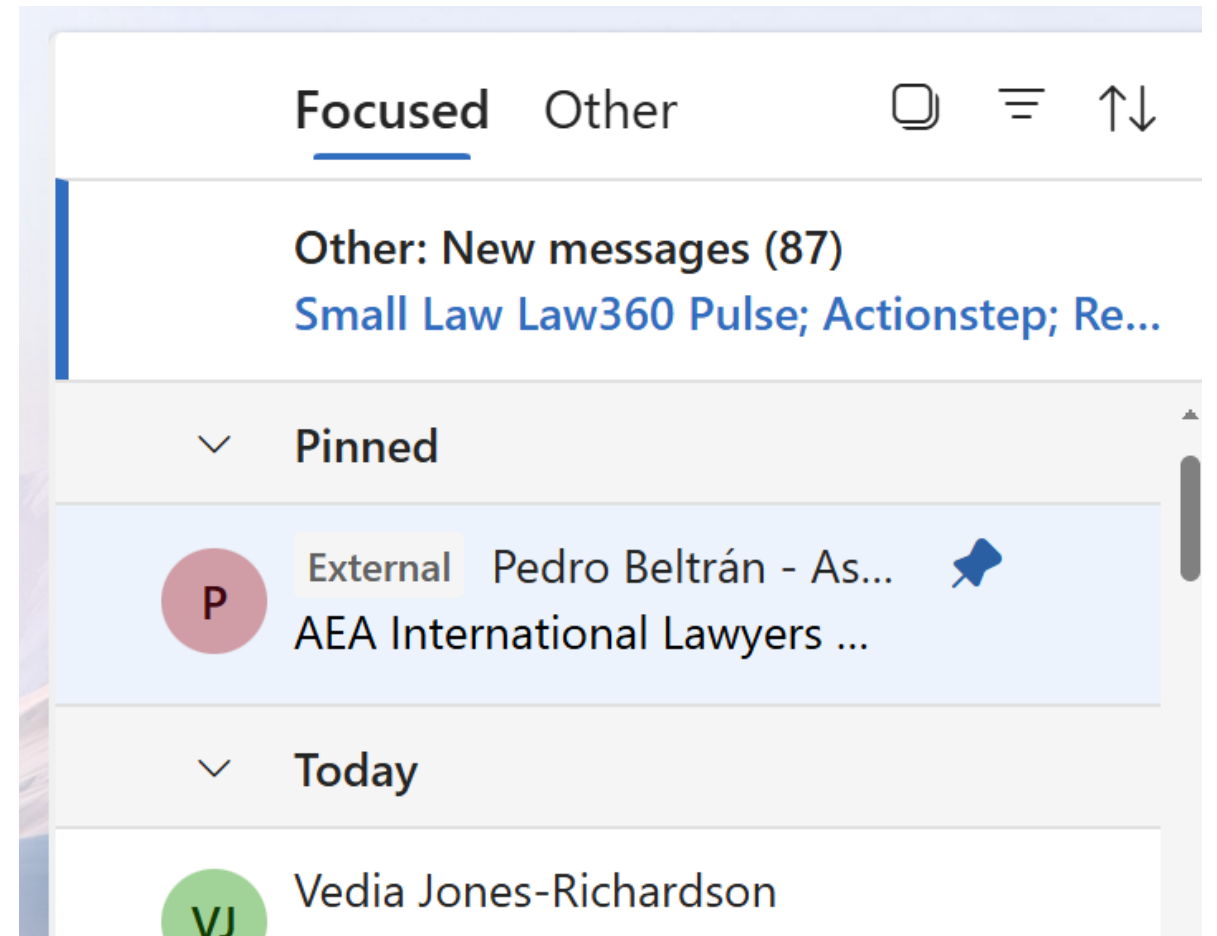
Delete

Sort (and Destroy)



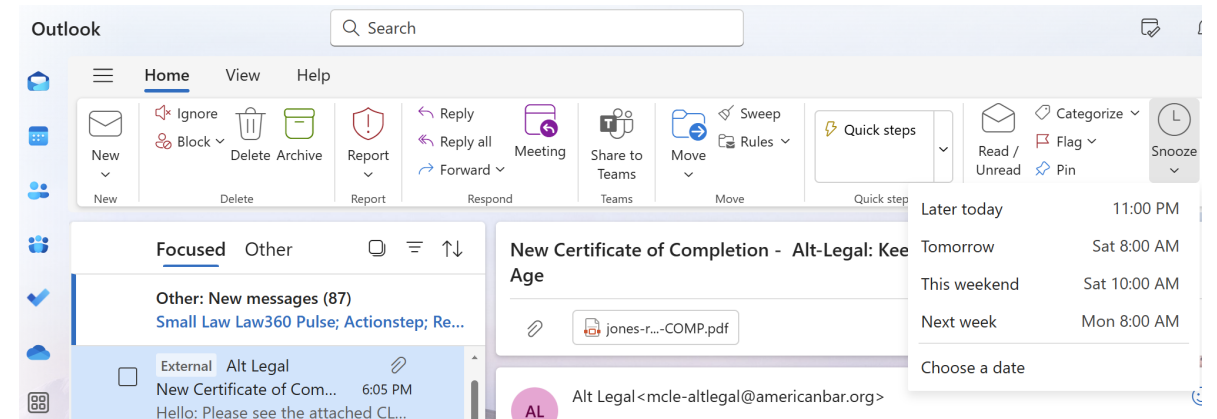
Pin an email to the top

- Pin important emails to the top of your inbox for quick access
- Right click an email to display the Pin feature on the list of options

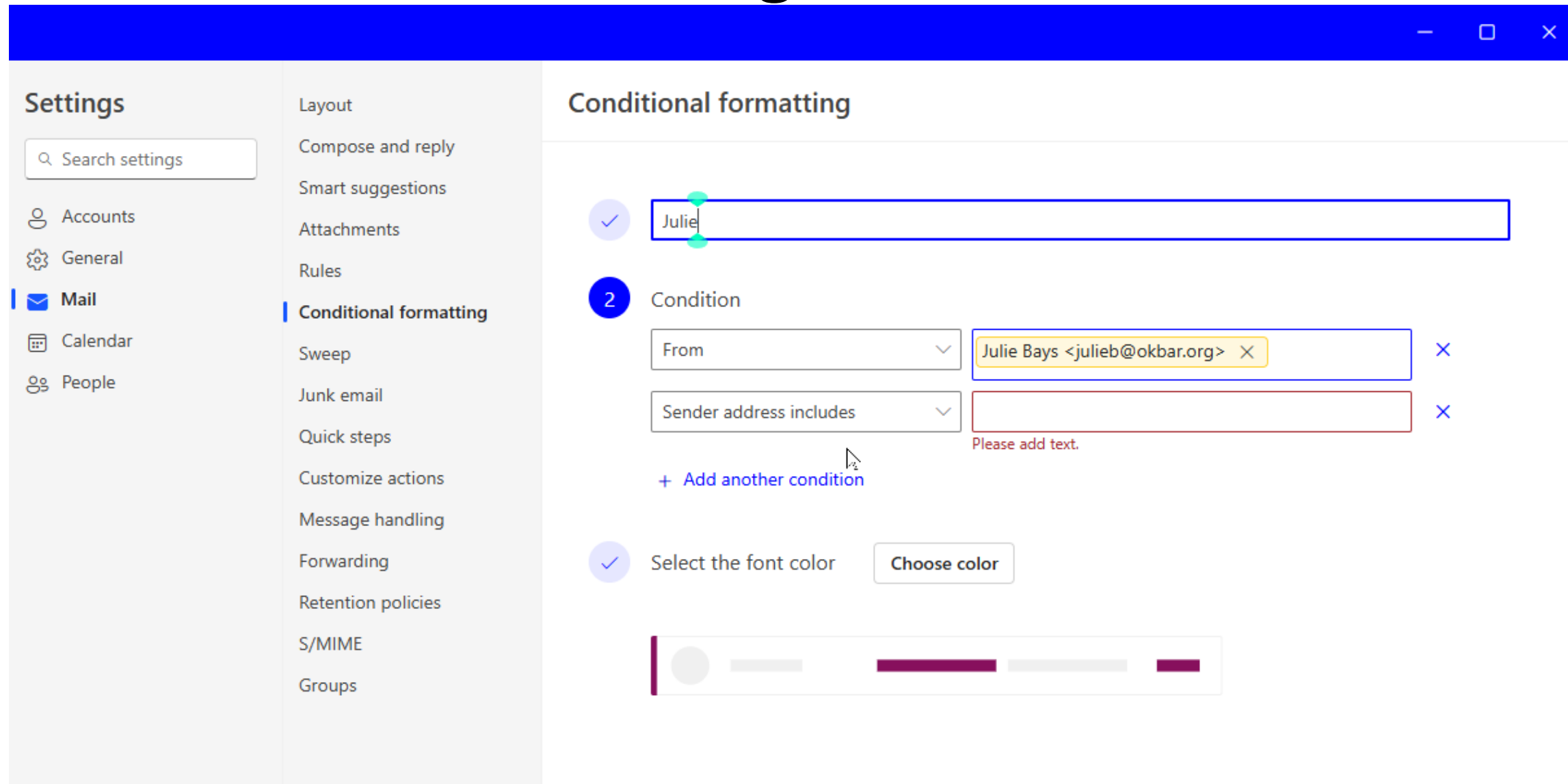


Snooze feature

- Snooze emails until later
- Temporarily removed from your inbox
- Returned at an appropriate time that you determine
- Stored in a folder named Snoozed if you need to retrieve early



Conditional Formatting Is Easier to Find



The screenshot shows the Outlook 'Conditional formatting' settings window. On the left, the 'Settings' sidebar is visible with 'Mail' selected. The 'Conditional formatting' option is highlighted in the left-hand menu. The main area is titled 'Conditional formatting' and contains two sections. The first section, marked with a checkmark, shows a text box containing 'Julie'. The second section, marked with a '2', is titled 'Condition' and contains two dropdown menus. The first dropdown is set to 'From' and the second to 'Sender address includes'. The first dropdown has a value 'Julie Bays <julieb@okbar.org>' and the second is empty with a red border and the text 'Please add text.' below it. A '+ Add another condition' link is present. The third section, marked with a checkmark, is titled 'Select the font color' and has a 'Choose color' button. Below this is a color bar with a gradient from light to dark purple.

Settings

Search settings

Accounts

General

Mail

Calendar

People

Layout

Compose and reply

Smart suggestions

Attachments

Rules

Conditional formatting

Sweep

Junk email

Quick steps

Customize actions

Message handling

Forwarding

Retention policies

S/MIME

Groups

Conditional formatting

✓ Julie

2 Condition

From Julie Bays <julieb@okbar.org> X

Sender address includes Please add text. X

+ Add another condition

✓ Select the font color Choose color

Color bar with gradient from light to dark purple

Voting buttons

- Voting buttons provide more options
- Allow you to create polls within your emails
- Easily gather opinions and decision feedback
- Votes from responders will be returned to you for review

Time to Decide on a Procedure

Message **Insert** Format text Draw Options

Attach file ▾ Link ▾ Signature ▾ Record Pictures ▾ Emoji ▾ Table ▾

Include

Apps ▾ Polls ▾ Viva Insights ▾ Loop components ▾ Scheduling poll ▾

Add-ins Collaborate Find time

➤ Send ▾

To Susan Freya Olive X

Cc Shelley B. Fullwood X Jodie C. Antone X

Bcc

Time to Decide on a Procedure

Do we want to go forward on this? Which approach is best?

📊 Polls

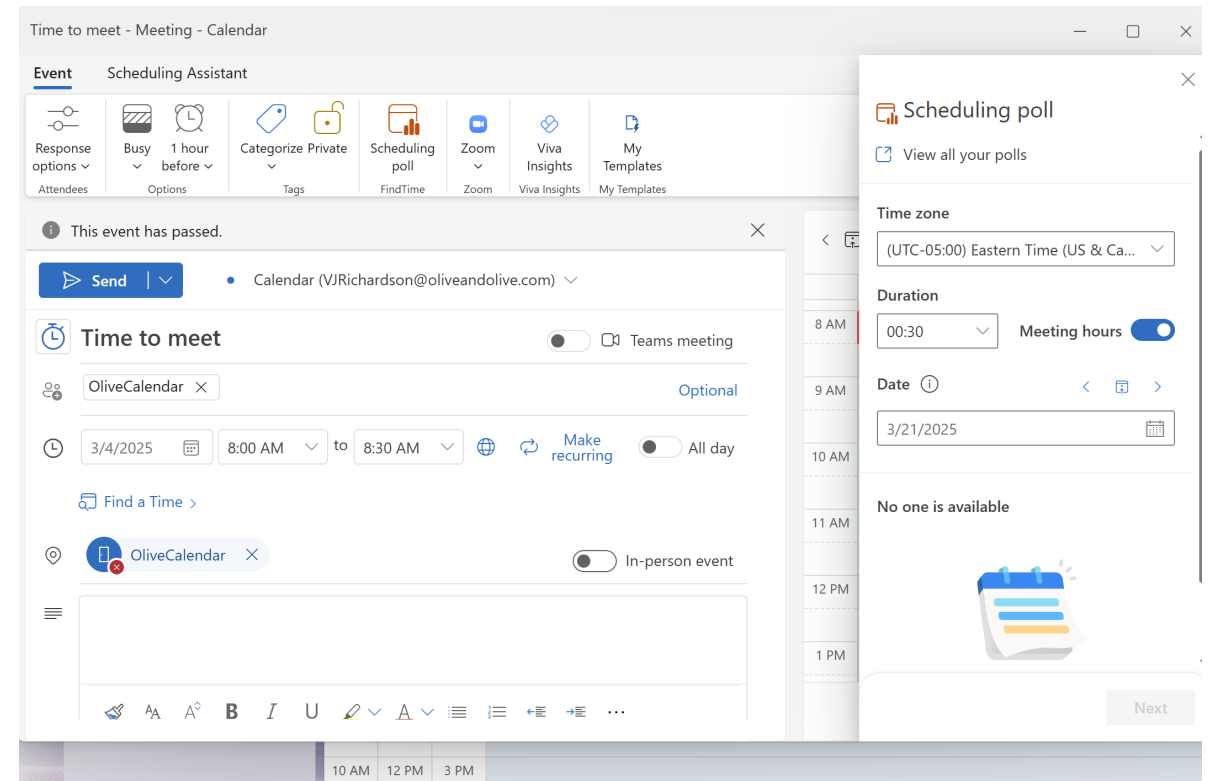
☒ Multiple Choice ▾

Enter your question here

☐ Option 1 

Scheduling polls

- When trying to arrange a meeting, a scheduling poll can help to find the best meeting times
- Outlook will show times when recipients appear to be available
- The invited participants can provide feedback on their preferred times
- Minimizes the back-and-forth of scheduling





Templates



My Templates



01- Schedule Consultation

Hi,

I'd be delighted to help. If you want to choose a time that works with your schedule we can have a discussion about your particular concerns: <https://calendly.com/csandersreach> or let me know some times that work for you.

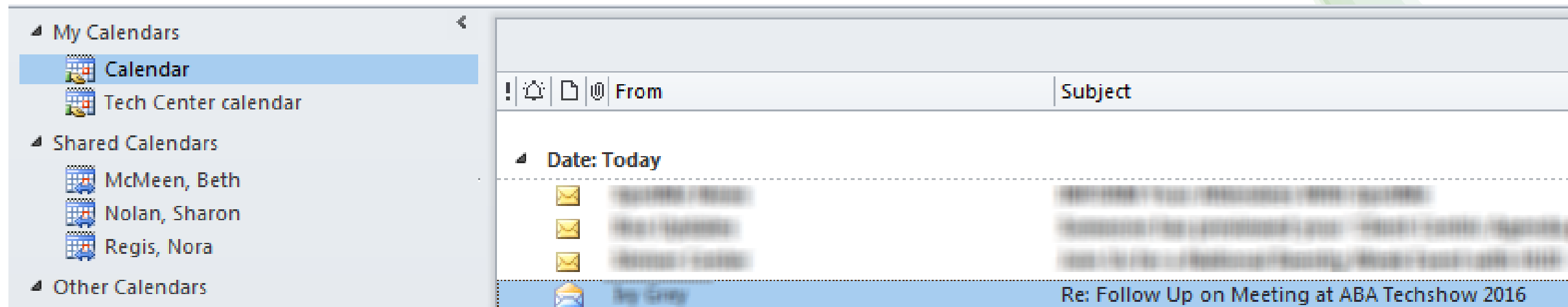
Thanks,

Catherine

02 - Find a time

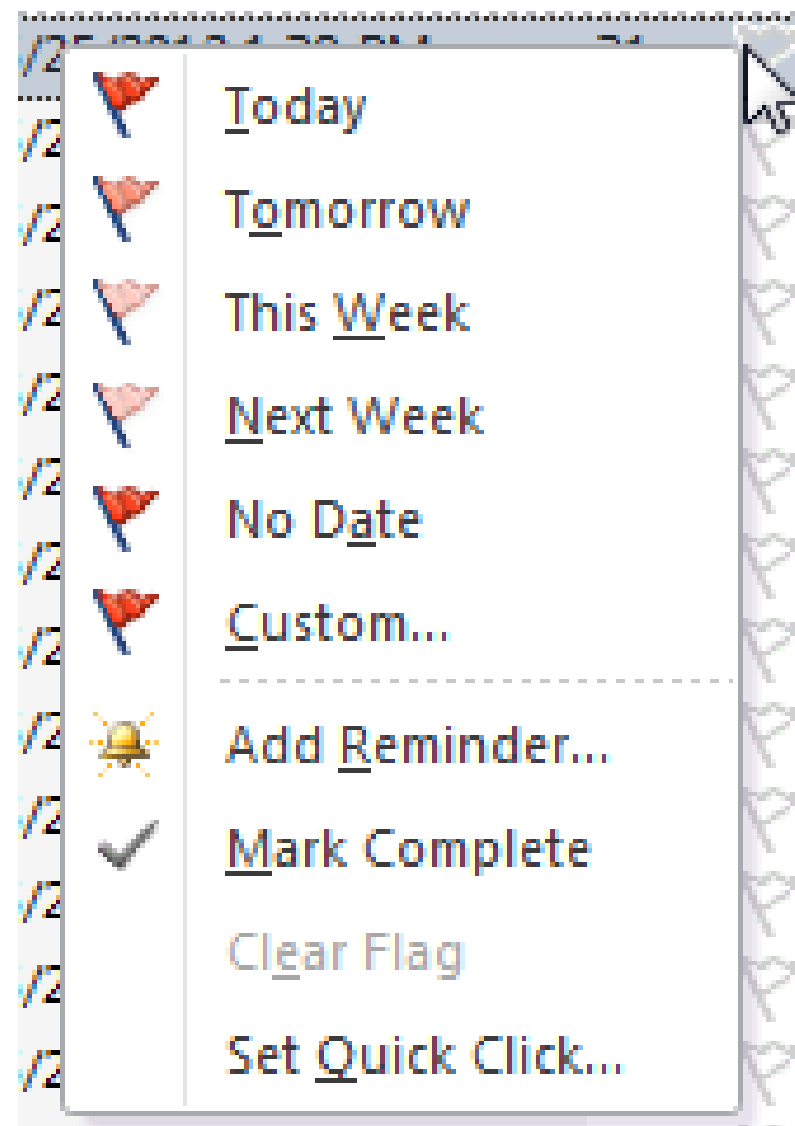
Find a time that works with your schedule here: <https://calendly.com/csandersreach> or let me know some times that work for you.

Calendar & Tasks



Drag an Email to Calendar/Task/Contact

Flag Email for Follow-up



New Out of Office Options

Automatic replies

Use automatic replies to let others know you're on vacation or aren't available to respond to email. You can set your replies to start and end at a specific time. [Click here for more information.](#)

☒ Automatic replies on

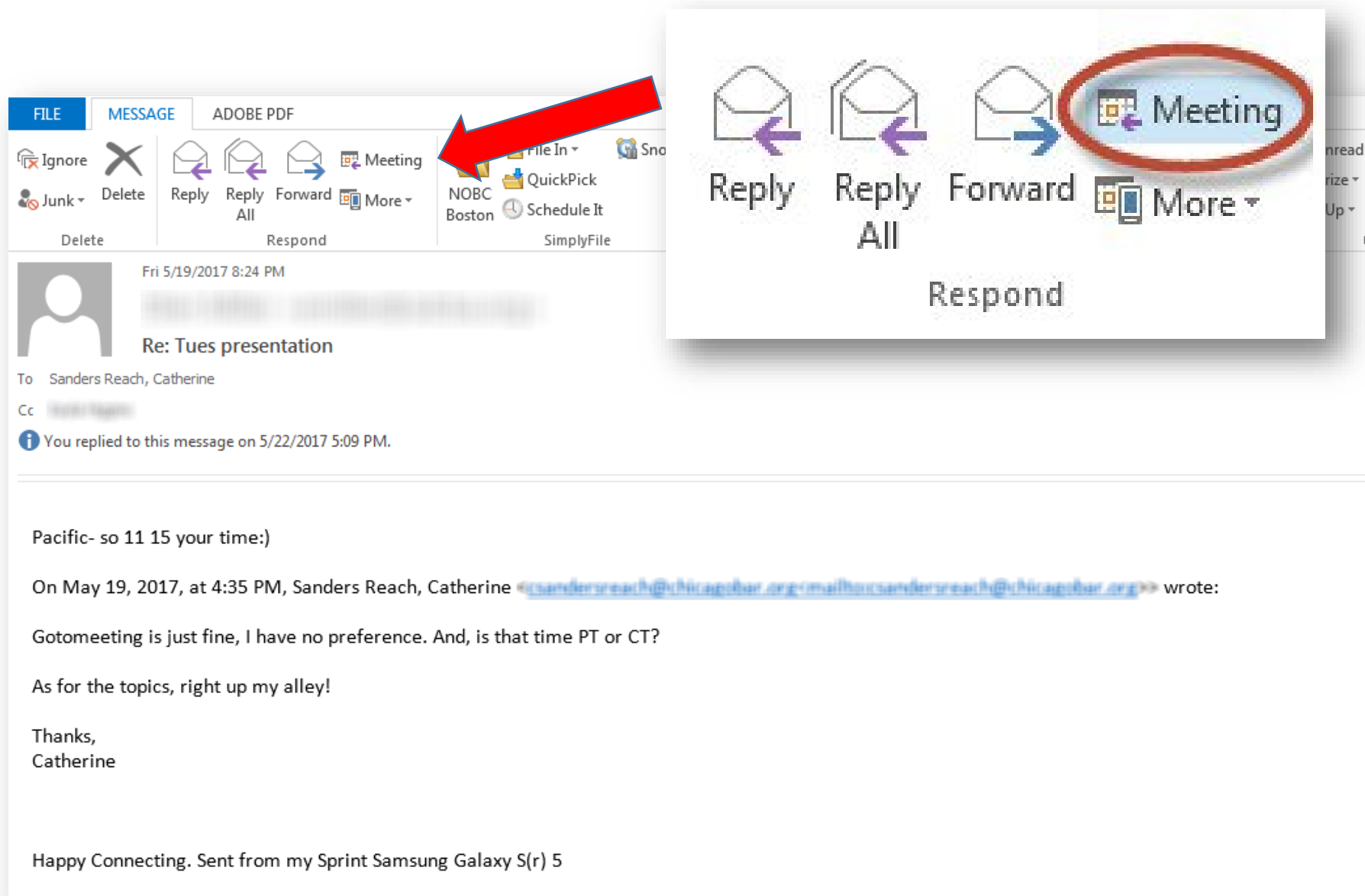
☒ Send replies only during a time period

Start time 2025-02-10  3:00 PM 

End time 2025-02-11  3:00 PM 

- ☐ Block my calendar for this period
- ☐ Automatically decline new invitations for events that occur during this period
- ☐ Decline and cancel my meetings during this period 

Reply with Calendar Invites Not Emails



The screenshot shows an email client interface. At the top, there are tabs for 'FILE', 'MESSAGE', and 'ADOBE PDF'. Below these are various action buttons: 'Ignore', 'Junk', 'Delete', 'Reply', 'Reply All', 'Forward', 'More', 'Meeting', 'File In', 'QuickPick', 'Schedule It', and 'SimplyFile'. A red arrow points to the 'Meeting' button. Below the buttons is a message header for 'Re: Tues presentation' from 'Sanders Reach, Catherine' dated 'Fri 5/19/2017 8:24 PM'. The message body contains the following text:

Pacific- so 11 15 your time:)

On May 19, 2017, at 4:35 PM, Sanders Reach, Catherine <sandersreach@hicagoher.org;mailto:sandersreach@hicagoher.org> wrote:

Gotomeeting is just fine, I have no preference. And, is that time PT or CT?

As for the topics, right up my alley!

Thanks,
Catherine

Happy Connecting. Sent from my Sprint Samsung Galaxy S(r) 5

A callout box on the right side of the screenshot highlights the 'Meeting' option in the 'More' menu. The callout box contains the following text:

Reply
Reply All
Forward
Respond
Meeting
More

Send Calendar Invites Not Emails

File Meeting Insert Format Text Review

Calendar Appointment Scheduling Assistant Cancel Invitation Address Book Check Names Response Options

Invitations have not been sent for this meeting.

To... McMeen, Beth; Bednarz, Jessica; Stanton, Karen;

Subject: Meet to discuss directory

Location: Dial 322-888-9999 code: 1234 and go to www.join.me/chicagobar

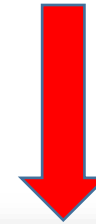
Start time: Wed 1/16/2013 3:30 PM All day event

End time: Wed 1/16/2013 4:00 PM

Thanks for agreeing to meet.

Dial 322-888-9999 code: 1234 and go to www.join.me

The agenda is below and attached



To... Stanton, Karen; McMeen, Beth; Bednarz, Jessica;

Cc...

Bcc...

Subject: Meeting re: directory Dial 322-888-9999 code: 1234 and go to www.join.me/chicagobar

Thanks for agreeing to meet.

Dial 322-888-9999 code: 1234 and go to www.join.me/chicagobar

The agenda is below and attached

Catherine Sanders Reach
Director, Law Practice Management & Technology
The Chicago Bar Association

Duplicate an event

- Duplicate a calendar event to create another similar meeting
- No need to start from scratch or copy and paste
- Open meeting to be duplicated and select Duplicate event in top menu
- If creating a new virtual meeting, first turn off the Zoom or Teams option and remove the meeting ID from the notes field
- A new meeting ID can be created after entering the other details

R/JCA mtg with Peggy - Meeting

Event

Scheduling Assistant



Edit



Cancel



Duplicate
event



Forward



Reply
all

Actions

Additional time zones

- Add multiple time zones to your calendar to manage meetings across different regions more effectively
- Swap where zones are displayed to help you stay oriented when away

← Today			<	>	March 24, 2025 ▾
Hawaii Pacific Eastern			24 Monday		
8 AM	11 AM	2 PM	TM Group Weekly client projects mtg Microsoft Teams Meeting; OliveCalendar Vedia Jones-Richardson		
9 AM	12 PM	3 PM			
10 AM	1 PM	4 PM			
11 AM	2 PM	5 PM	SFO/KH - Finance Skills OliveCalendar Kris Hamm		

Event Scheduling Assistant

Delete

Response options

Reply all

Busy

15 minutes before

Categorize

Private

Scheduling poll

Find Time

Zoom

My Templates

Viva Insights

Send to OneNote

You haven't sent this meeting invitation yet.

Save Calendar (csandersreach@ncbar.org)

RE: 2025 Annual Review Program — Interest and Scheduling

Invite required attendees

Invite optional attendees

10/16/2025 2:30 PM to 3:30 PM Make recurring

Add a room or location



From: Yessy Anorve-Basoria <yanorve-basoria@ncbar.org>
Sent: Tuesday, June 3, 2025 7:44:12 PM
To: Catherine Sanders Reach <csandersreach@ncbar.org>
Cc: Rebekah Lakey Hayes <rlakeyhayes@ncbar.org>
Subject: Re: 2025 Annual Review Program — Interest and Scheduling

Hi Catherine,

We are thrilled to have you present at the upcoming **NCBA 2025 Annual Review CLE program!**

Rebekah and I have scheduled you to present **in-person at the NC Bar Center (Cary) on Thursday, October 16th, from 2:30-3:30 PM.** Please inform us if there have been any changes.

Thank you for sharing with us that you would like to keep your session title and description from last year. As you prepare for your session, please take a moment to review the key deliverables (below) and the [NCBA CLE Program Speaker Guidelines](#) page. The Speaker Guidelines page includes helpful document templates and guidelines.

Key Deliverables and Due Dates

- Updated bio, headshot, draft materials due **Thursday, August 21st, 2025.**
- Final materials and manuscripts due **Thursday, October 2nd, 2025.**

Thank you for participating in the **NCBA 2025 Annual Review CLE program** — we look forward to working with you!

MS Outlook Event Email Reminders

Thu, Oct 16, 2025

Clio Conference in Boston

12 PM Put together ICYMI

1 PM

2 PM

2:30 PM - 3:30 PM

3 PM

4 PM Navigating the Latest in Law Practice Management and Technology: 2025 Annual Auditorium

5 PM

6 PM

7 PM

8 PM

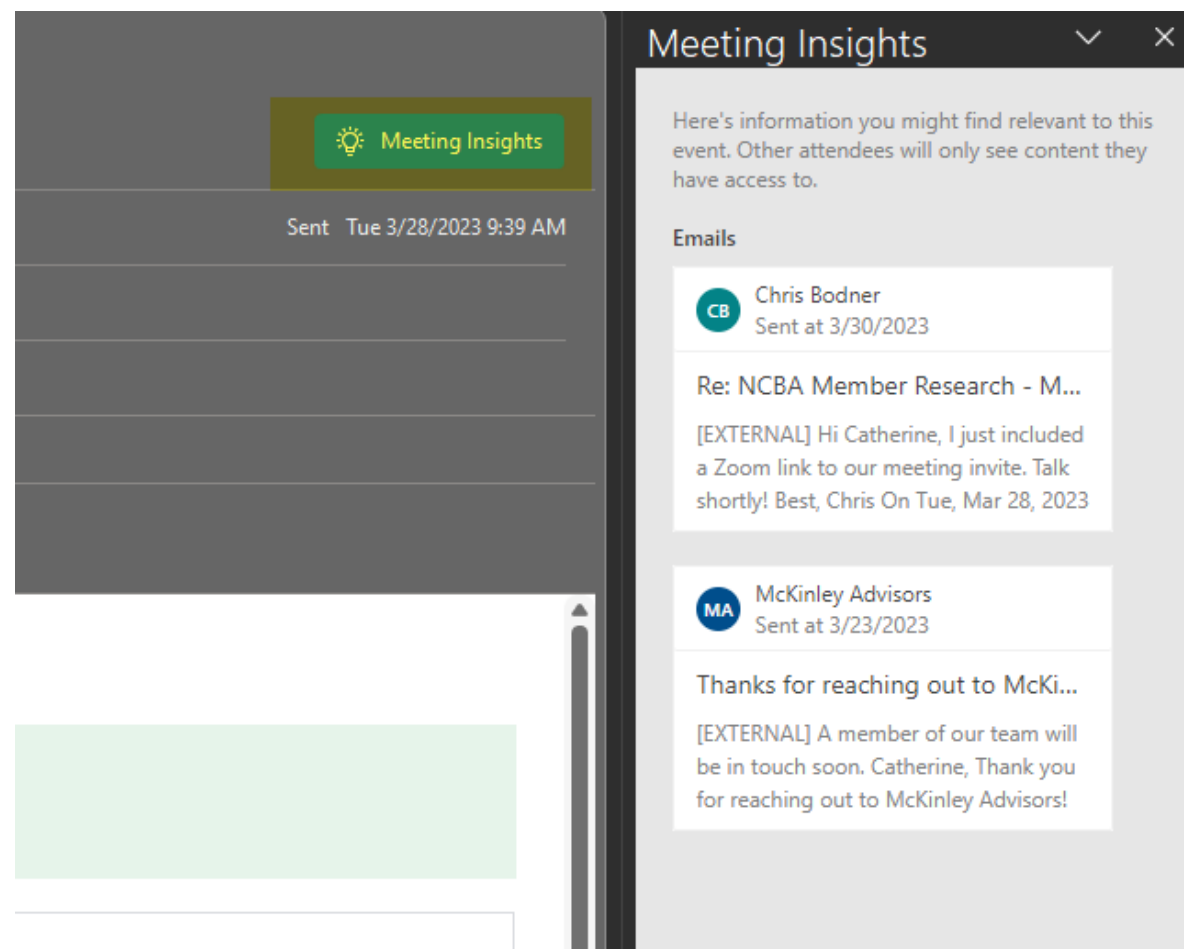
9 PM

10 PM

11 PM



Meeting Insights in MS Outlook Calendar



Automate

MS Outlook - Quick Parts

The screenshot displays the MS Outlook interface with a Quick Parts gallery open. The gallery shows a 'Client Correspondance' section with a 'nonengagement letter' template. The template text is as follows:

Dear [Name],

This letter is to confirm that this firm will not represent you in the [insert subject] matter. Since we are not currently representing you on any matter, we will not be able to monitor changes in the law or your circumstances which may affect the strength of your case.

You should be aware of the fact that time limits [could be] (or) [are] involved. We have not researched these time limits and we are unable to advise you on the applicable time

General

Circular 230

Circular 230 disclosure
Any tax information or written tax advice contained in this email is not intended to be and cannot be used by any taxpayer for the purpose of avoiding tax penalties that may be imposed on the taxpayer. This statement is made pursuant to U.S. Treasury Regulations governing tax practice.

The 'Create New Building Block' dialog box is also visible, showing the following details:

- Name: nonengagement letter
- Gallery: Quick Parts
- Category: Client Correspondance
- Description: General non-engagement letter after free consultation
- Save in: NormalEmail
- Options: Insert content only

The 'Insert at End of Document' option is highlighted in the gallery's context menu.

Quick Steps

Edit Quick Step

Name: Reply BCC

Edit the actions the quick step performs.

Actions

Reply

To...

Bcc... Sanders Reach, Catherine

Subject: RE: <subject>

Flag: No Flag

Importance: No Change

Text:

☐ Automatically send after 1 minute delay.

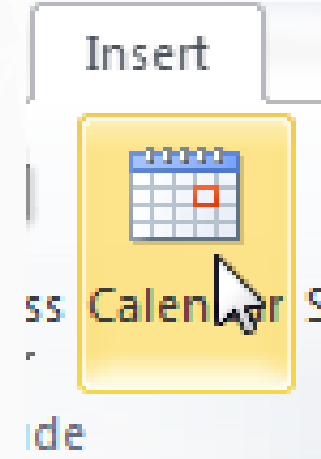
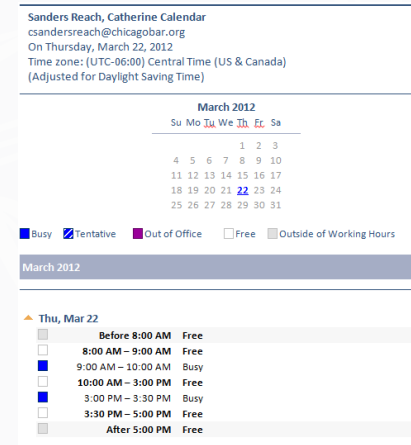
Optional

Shortcut key: Choose a shortcut

Tooltip text: This text will show up when the mouse hovers over the quick step.

Save Cancel

MS Outlook - Sending Your Schedule



Send a Calendar via E-mail

Specify the calendar information you want to include.

Calendar:

Date Range:

Thu 3/22/2012

Detail: Time will be shown as "Free," "Busy," "Tentative," or "Out of Office"

☐ Show time within my working hours only [Set working hours](#)

Advanced:



More Intelligence in Contacts

The screenshot displays a contact profile for Shawn Holahan. The 'Files' tab is selected, showing a list of recent files and email attachments. The interface includes a search bar and a filter dropdown.

Contact Information:

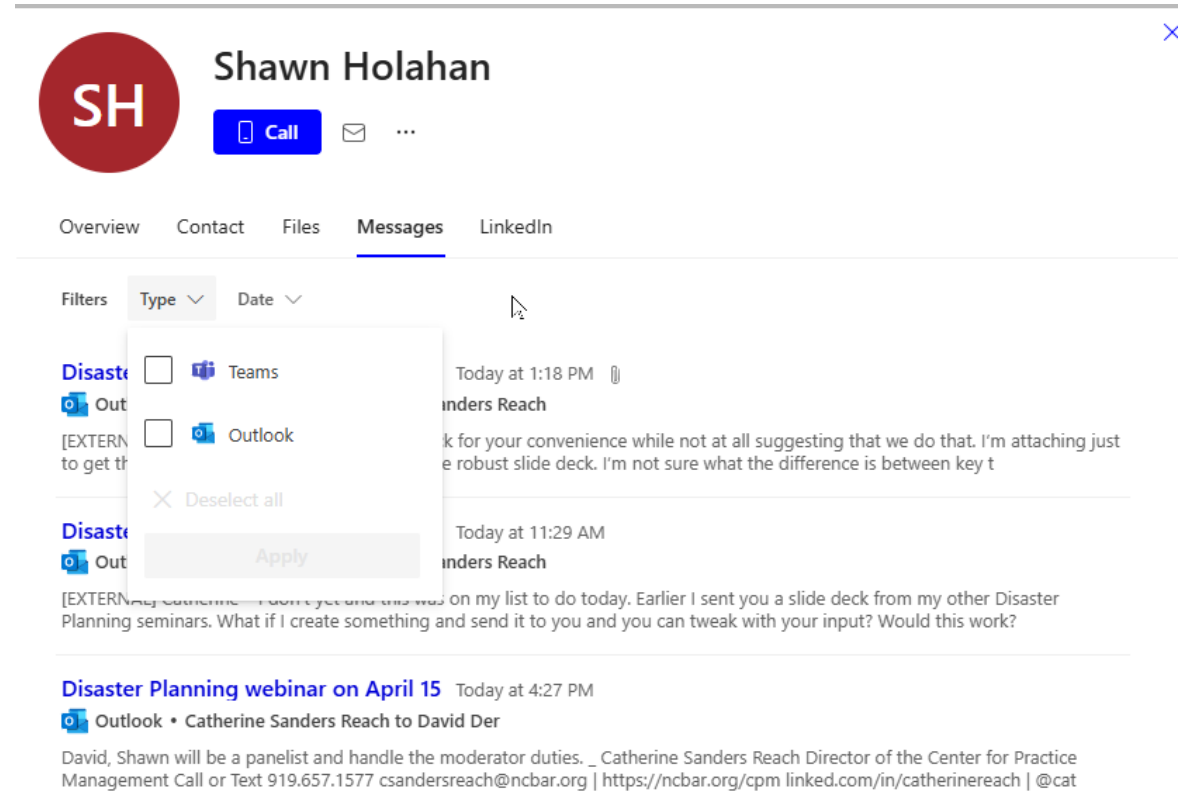
- Name:** Shawn Holahan
- Profile Picture:** Red circle with 'SH'
- Actions:** Call, Email, More options

Navigation Tabs: Overview, Contact, **Files**, Messages, LinkedIn

Recent files and email attachments

File Icon	File Name	Time
	Disaster Planning - It's Not Just for Hurricanes! [Autosaved] Outlook • RE: Disaster Planning webinar on April 15	1:18 PM
	2Disaster Planning - It's Not Just for Hurricanes! Outlook • ABA Disaster Planning Webinar: April 15, 2025: Related Slide Deck	02/03/2025

More Intelligence in Contacts



The screenshot displays the Microsoft Teams interface for a contact named Shawn Holahan. The contact's profile card at the top shows a red circular avatar with the initials 'SH', the name 'Shawn Holahan', and buttons for 'Call', 'Email', and a more options menu. Below the profile card are tabs for 'Overview', 'Contact', 'Files', 'Messages' (which is selected), and 'LinkedIn'. In the 'Messages' tab, a 'Filters' dropdown menu is open, showing options to filter by 'Type' and 'Date'. The 'Type' dropdown is currently expanded, showing checkboxes for 'Teams' and 'Outlook', with a 'Deselect all' option and an 'Apply' button at the bottom. The message list below shows three messages from Catherine Sanders Reach. The first message is timestamped 'Today at 1:18 PM' and contains the text 'k for your convenience while not at all suggesting that we do that. I'm attaching just e robust slide deck. I'm not sure what the difference is between key t'. The second message is timestamped 'Today at 11:29 AM' and contains the text '[EXTERNAL] Catherine Reach sent you this message on my list to do today. Earlier I sent you a slide deck from my other Disaster Planning seminars. What if I create something and send it to you and you can tweak with your input? Would this work?'. The third message is timestamped 'Today at 4:27 PM' and is a link titled 'Disaster Planning webinar on April 15' from Outlook, mentioning Catherine Sanders Reach to David Der. The message body for the third message states: 'David, Shawn will be a panelist and handle the moderator duties. _ Catherine Sanders Reach Director of the Center for Practice Management Call or Text 919.657.1577 csandersreach@ncbar.org | https://ncbar.org/cpm linked.com/in/catherinereach | @cat'.



Selected Text Functions

What's To Like About the New Outlook?

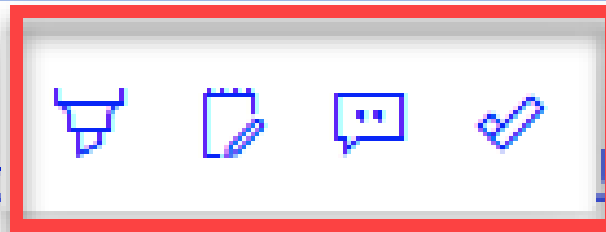
The new Outlook rolling out to business Office 2007. If you are a power user of Outlook. While there are a lot of feature

<https://www.ncbar.org/2025/02/25/wha>

and consumer users is a significant Outlook, you may be disgruntled with missing, what are some options that

has been mostly unchanged since the Ribbon appeared in mail and the browser version of Outlook, may prefer the new

[s-to-like-](#)



[outlook/](#)



Schedule Send

Send

▼

Send

Schedule send

Cc

Add a subject

Type / to insert files and more

Power
Automate
F/K/A Flow

On new email ...

Folder	Inbox
To	Recipient email addresses separated by semicolons (If any match, the
CC	CC recipient email addresses separated by semicolons (If any match, 1
To or CC	To or CC recipient email addresses separated by semicolons (If any m
From	ER Erin Robbins ✕
Include Attachments	Yes
Subject Filter	String to look for in the subject line.
Importance	Normal
Only with Attachments	Yes

[Hide advanced options](#) ^

↻ Apply to each Attachment on the email ...

*Select an output from previous steps

Attachments ✕

Create file ...

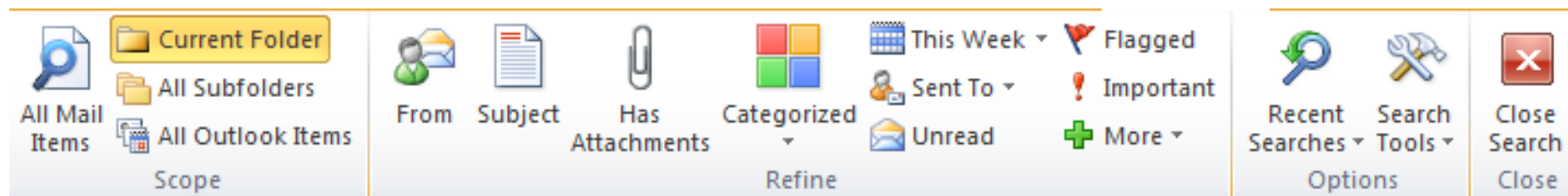
* Folder Path	/CPM
* File Name	Attachments N... ✕
* File Content	Attachments C... ✕

OneDrive for Business Root / CPM ✕

Marketing	>
Marketing Workshop	>
NC CLE	>
NCBA Staff Training	>
Planning and Administration	>
Projects 2018	>
Projects 2019	>
Projects 2020	>

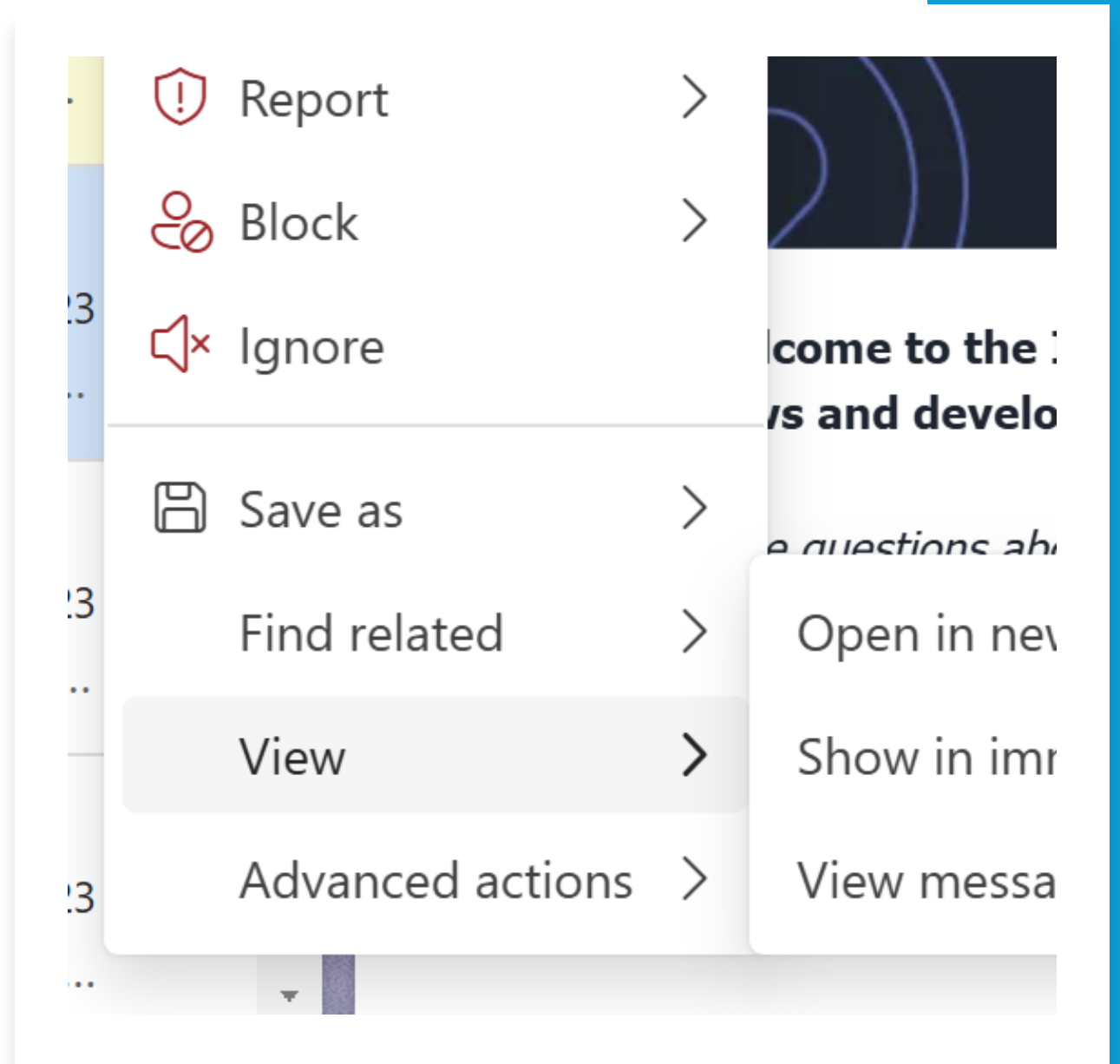
Search & Categorize

Search



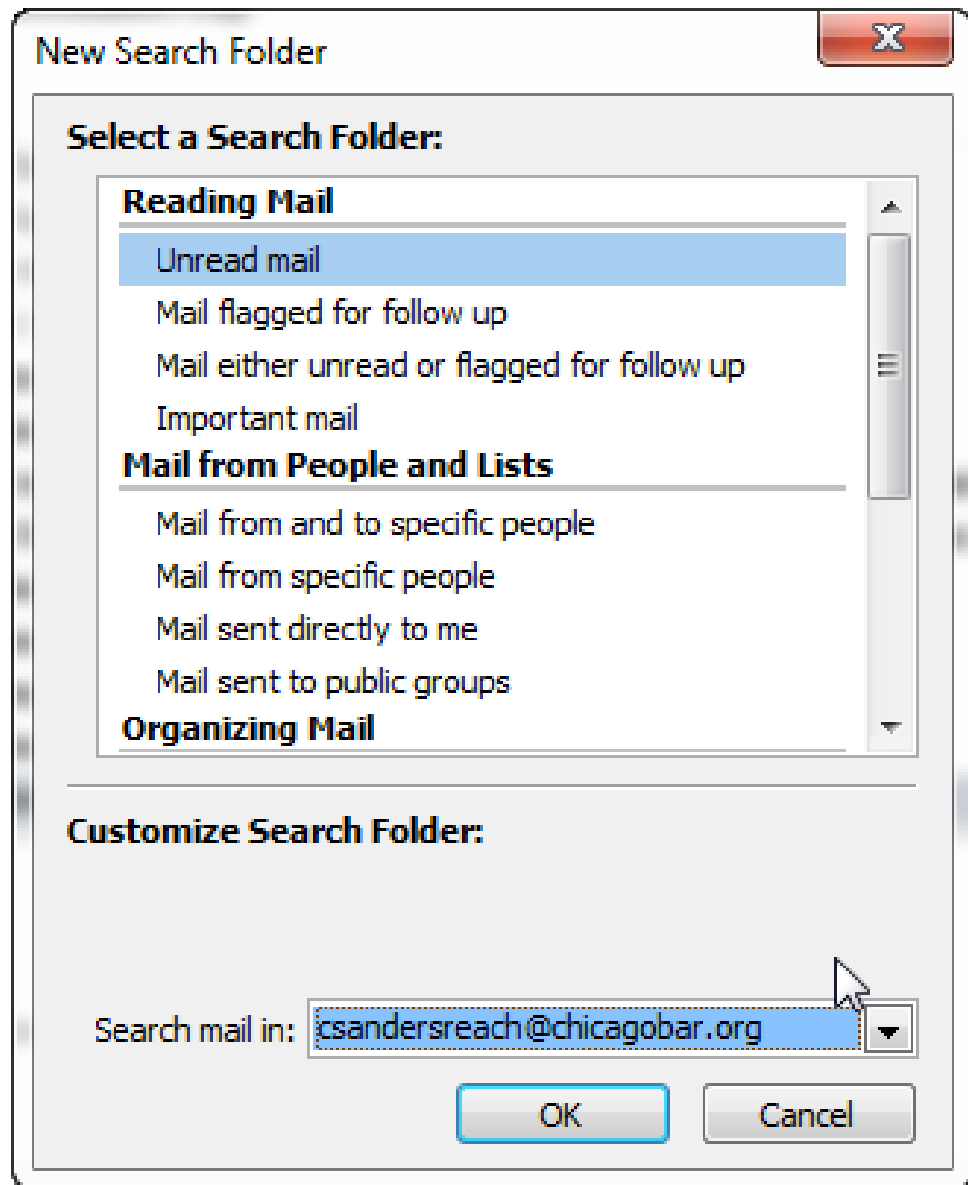
Immersive Reader

- Can make long emails easier to read
- A view option

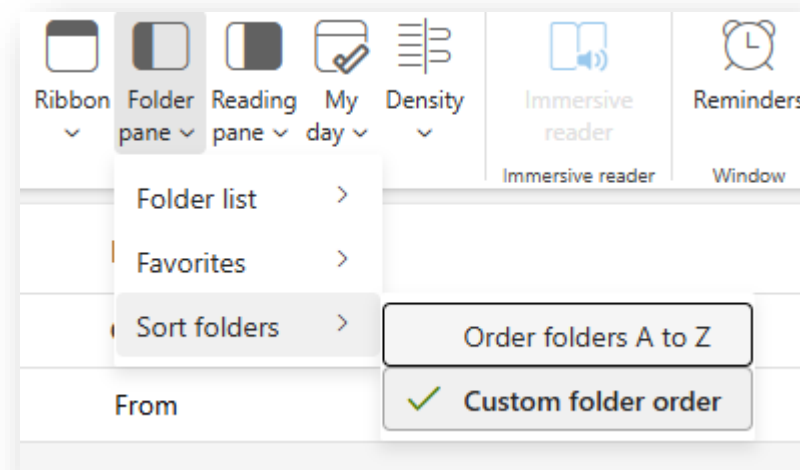
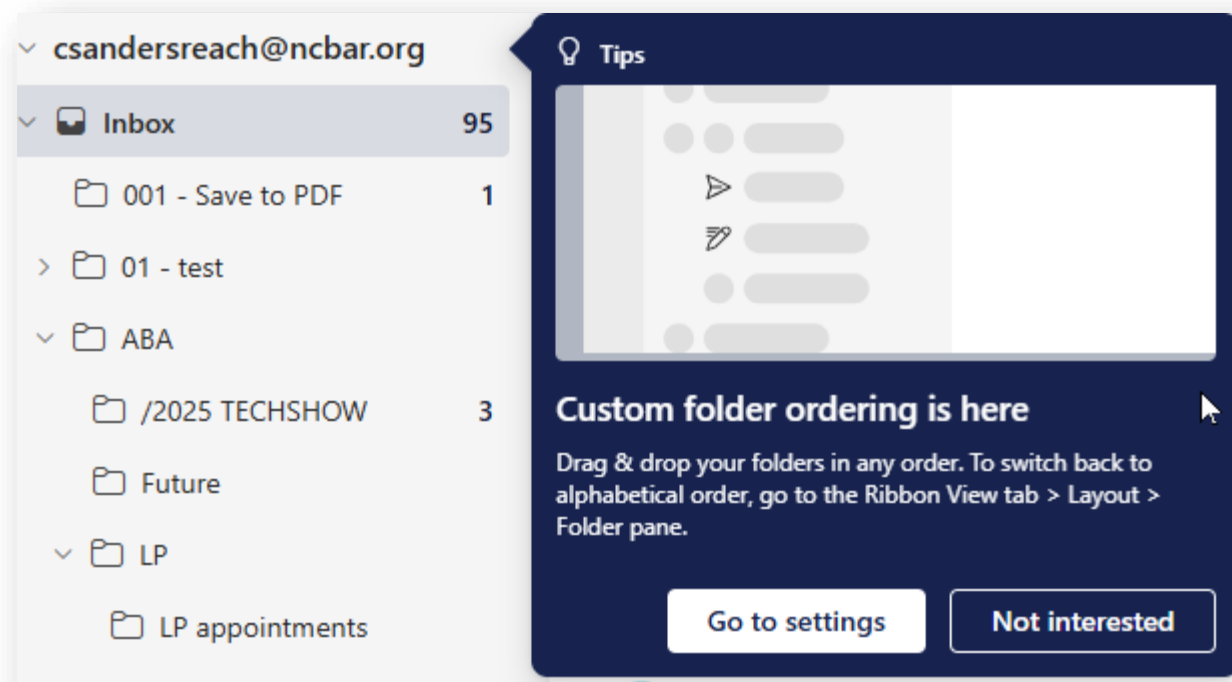


MS Outlook

- Search Folders



Put Your Folders In Any Order



Outlook - Create Categories

or Categories

assign Color Categories to the currently selected items, use the checkboxes next to each category. To edit a category, select the category name and use the command.

Name	Shortcut key
☒ CBA CLE Program	
☒ Client X	
☐ Evercon	
☐ Hands'	
☐ How To	
☐ Jones m	
☐ Judicial	
☐ Member	
☐ PMA Call	
☐ Test Category	
☐ Test for class	
☐ Tx Team Call	
☐ ...	

Add New Category
Name:
Color:
Shortcut Key:

Outlook – Sort by Categories

All Unread		Search Current Mailbox (Ctrl+E)		Current Mailbox	
FROM	CATEGORIES	SUBJECT	RECEIVED		
Categories: Membership Appreciation Week: 1 item(s)					
Stephanie Phelan	Membership Appreciati...	Re: MyCase Update	Fri 4/21/2017 3...		
Categories: How To Training Series: 1 item(s)					
Stephanie Phelan	How To Training Series	Re: MyCase Update	Fri 4/21/2017 3...		
Categories: Hands' On training: 1 item(s)					
Stephanie Phelan	Hands' On training	Re: MyCase Update	Fri 4/21/2017 3...		

Outlook – Search for Categories

The screenshot shows the Microsoft Outlook interface. The 'Categorized' dropdown menu is open, displaying a list of categories with corresponding color swatches:

- CBA CLE Program
- Client X
- Evercontact
- Hands' On training
- How To Training Series
- Jones matter
- Judicial review
- Membership Appreciation Week
- PMA Call
- Test Category
- Test for class
- Tx Team Call
- YLS fun
- Any Category
- No Categories

The search bar at the top right contains the query: `category:="How To Training Series"`. Below the search bar, the email list is displayed with columns for SUBJECT, RECEIVED, and actions. The following table represents the visible email data:

SUBJECT	RECEIVED	Actions
ip Apprec... Re: MyCase Update	Fri 4/21/2017 3...	
ng Series FW: Phone Call Tomorrow at 10am	Thu 10/13/201...	
ng Series Fwd: E-Ticket Confirmation-ELKNMT 20OCT	Mon 10/3/2016...	✓
ng Series INSTRUCTIONS FOR CREATING EXTENDED ABSENCE GR...	Wed 8/3/2016 ...	
ng Series test	Tue 4/19/2016 ...	

Below the email list, the text "Showing recent results..." is visible, followed by a link labeled "More".



Settings

Search settings

Accounts

General

Mail

Calendar

People

Email accounts

Automatic replies

Signatures

Categories

Mobile devices

Storage

Categories

Categorizing your email and calendar can help you organize and track messages and events related to a project, task, or person. You can create new categories and assign them names and colors.

+ Create category

2023/4 Survey



2024 TECHSHOW



CLE



Consulting



Ebar



Filed to Clio



Follow Up



LP Book



Membership Month



Most Contacted



My Contacts



Outlook training



Personal



PMA's



TECHSHOW

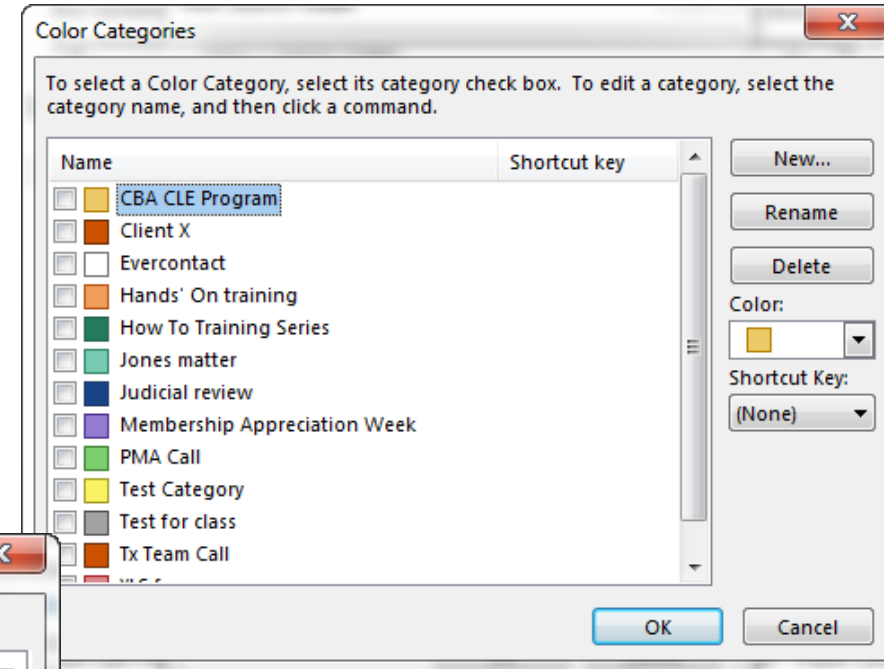
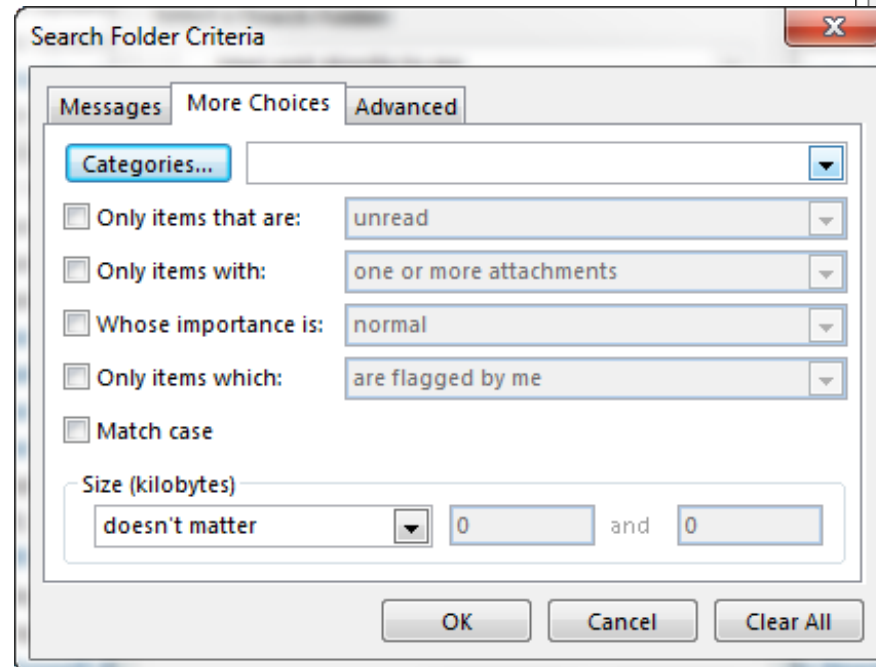
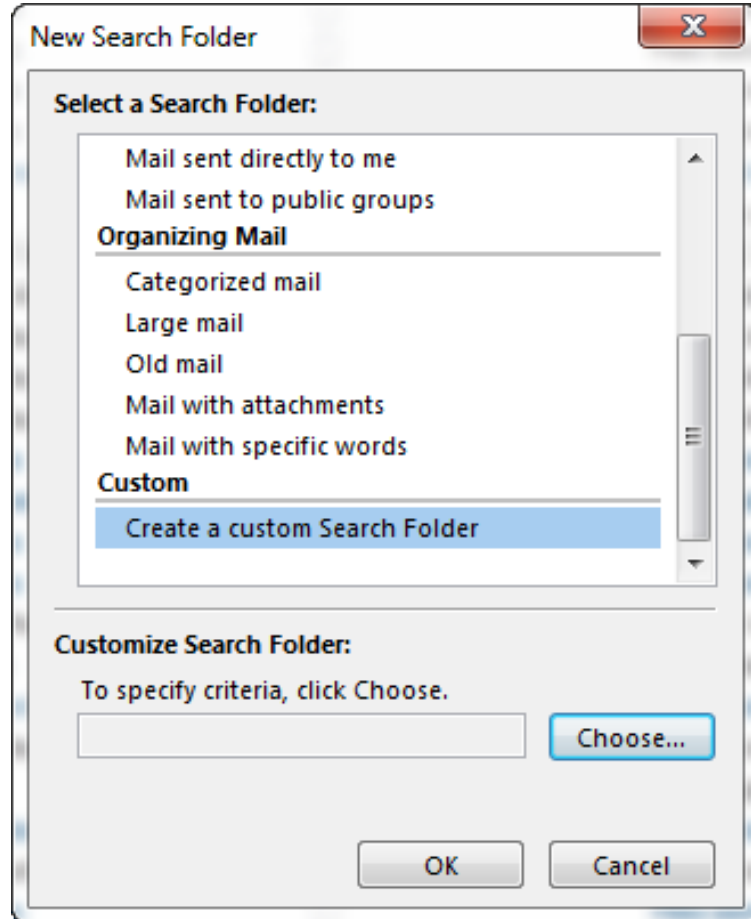


Webinars



Favorite Categories

Outlook – Create Search Folder for Category



Finding Related Emails is Easier

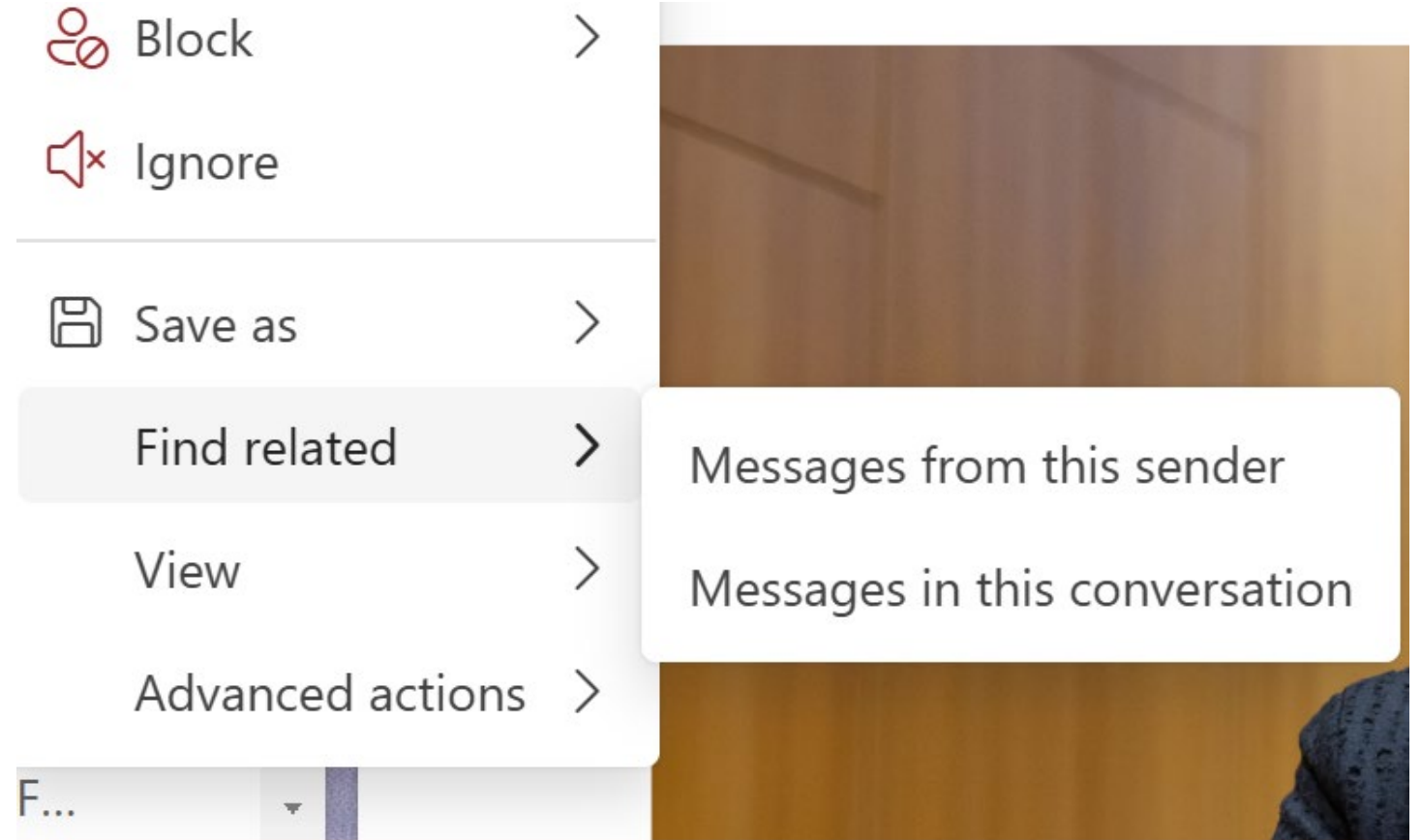
Instead of sorting emails by sender

Use Find related function instead

Find messages from the same sender in the same way as Message in this conversation

A more logical placement of an old function

Managing the entire group is easier



Sweep Messages

Sweep messages

For messages from:

Roberta Tepper (Roberta.Tepper@staff.azbar.org)

- ☒ Move all messages from the Inbox folder
- ☐ Move all messages from the Inbox folder and any future messages
- ☐ Always keep the latest message and move the rest from the Inbox folder
- ☐ Always move messages older than 10 days from the Inbox folder

Move to:

Deleted Items

Search for a folder

Consultation

E-Bar and Notices

Archive

ABA Disaster Planning

LP

24 Expert Series

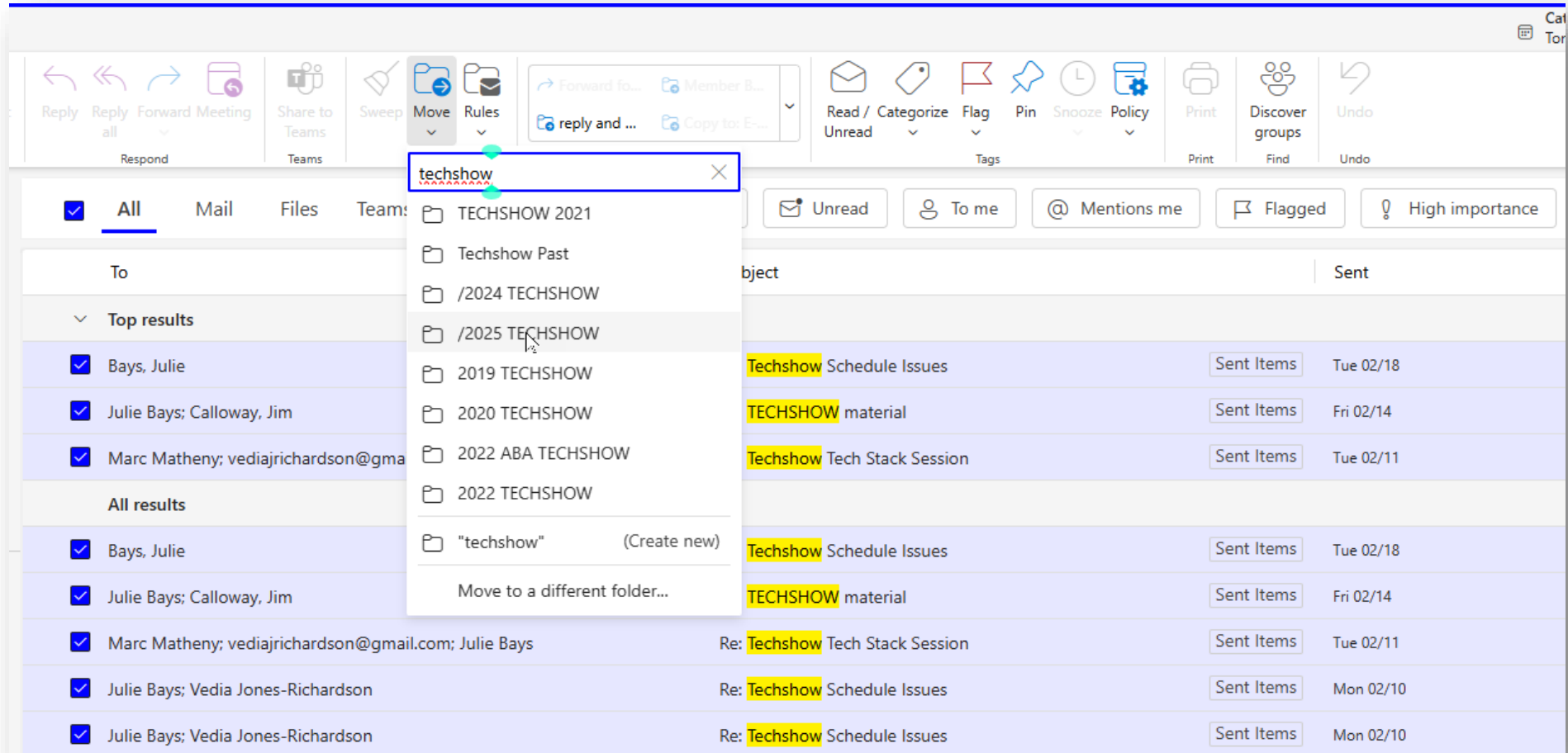
Oklahoma

Book

Create new folder

Move to a different folder...

Move to Folder





QUESTIONS?

Email Catherine at
csandersreach@ncbar.org

Call or text 919-657-1577

Catherine Sanders Reach, MLIS
Director, Center for Practice Management
North Carolina Bar Association
<https://www.ncbar.org/cpm>

