Conquering the Information Deluge -- Handling E-mail

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"I thought the 'e' in e-mail stood for electronic... I was wrong. It stands for exasperating."

"I must have the world's largest inbox... e-mail is coming in faster than I can keep up."

"It takes me hours a day to wade through all the e-mail that I receive -- and most of it is unimportant."

Can you relate to the quotes above regarding e-mail? Here are some statistics regarding messaging and why we feel inundated with information:

- Ferris Research (July 2000) study indicates there was a 50% increase in corporate email
- IDC Study (August 2001) indicates a doubling of email each year from 0.4B in 1995 to 15.9B in 2001
- Businessweek indicates from November 2001 to January 2002 email increased 14%; spam increased 46%
- "Communications of the ACM," 'Internet Time Out' by Peter Denning, notes an average of 1500 spam emails was sent to users in 2001; 10-15% of employee time is spent evaluating email

Back in the 18th Century, it took approximately five (5) weeks for out of town mail to be delivered. The art of letter writing back then was highly valued. Part of the problem we see now is that most people do not know how to properly compose an e-mail message, when it is appropriate to send one, and how to organize the e-mail they wish to save.

Times have changed, and so our need to deal with the new communication vehicles is critical. The purpose of this paper is to provide tips to help:

- organize your incoming e-mail
- process your messages
- create e-mail messages that are effective and easy to read
- send e-mail appropriately

…and to tame the paperless tiger. We will take a look at each of these in detail. Plus, to further get e-mail under control you will also need to learn how **not** to be part of the problem.

ORGANIZE

It is estimated the average worker spends at least 28 minutes per day searching for information they had previously filed. Organizing your e-mail and personal folders will help you to quickly locate information you need, keep track of what messages need responses, file important messages for future use, and ultimately save time.

Let's begin with organizing your e-mail and personal folders. There are several simple methods you can use to help with handling your Inbox and with filing into Personal Folders.

- If you haven't done so already, you should have an archive file set up, preferably on another server. This is where you can place older e-mail messages you want to keep for future reference. For example, you may wish to keep human resources information, contact information, and key directives for the longer term.

  Don't just archive all information. On a regular basis, clean out your folders. Not only does it save space, it make it easier and faster to find items in the future.

- Create Personal Folders with headings that are meaningful to your roles in the company. Some suggestions might be:

  o general (for HR, corporate directives)
  o names of your products
  o names of people who report to you
  o name of your manager
  o VACATION -- where you will filter your Inbox when you are out of the office or on vacation. The Inbox can easily overflow if you do not redirect your incoming mail while not regularly processing it.
  o "Reply/Action Required" for messages that require a response

- Create filters for your incoming mail. For example, in Microsoft Outlook you do this under the tools menu and Rules Wizard. The number of filters available depends on the amount of memory on your machine.

- Create some subfolders under your Inbox or regular "Personal Folders" to redirect your Inbox. Here are some typical filters applied to the Inbox itself:

  o messages that contain large attachments, especially Powerpoint presentations. This is useful when you are dialing in and do not want to wait the extraordinary time it takes to synchronize.
  o messages where you were CC'd. (we will discuss the rampant CC phenomenon in the section on sending e-mail)
  o messages from your direct reports
  o messages from your manager
  o messages from a special interest group

- all messages when you are on vacation or out of the office -- direct them to your VACATION folder

- Create an "Archived Sent Items" folder in your archive as a holding area for the messages you have sent in the last time period (week, month, quarter). You will be using this holding pen for messages you may wish to refer to or forward -- thereby reducing the need to CC everyone in the world. If someone later requests a copy, you can forward one from your "Archived Sent Items."

PROCESS

Next you must learn how to handle your e-mail effectively. The basic tenets of the process are the 4 D's:

- **Do it!**
  If there is an action to take, either do it immediately if it is short; or schedule it (make an appointment in your planner)

- **Delegate it!**
  If this message is not relevant to you, but rather to someone you know, forward it, then delete it.

- **Delete it!**
  Junk mail, irrelevant mail, FYI -- read it, unsubscribe if possible, then delete it. To get off junk e-mail lists, go to www.e-mps.org/en and choose the "E-mail Preference Service" link.

- **Delay it!**
  If you do not need to take immediate action, file the e-mail in your "Reply/Action Required" folder. If actions are in flux, sometimes it is better not to take immediate action. However, do respond with a message indicating receipt.

Other Useful Tips:

- Don't let your inbox accumulate unprocessed email.
- Set your out-of-office agent on when you are out of the office for at least a day. Describe who to contact for information or emergencies during your absence and give phone and/or e-mail addresses.
- Backup your e-mail files daily to a server that is being managed (with its own nightly backups).
- Don't auto-reply to ALL, unless the message is for a special interest group.
- Get rid of junk e-mail via the subject line and preview. Unsubscribe to any junk mail from outside sources. You can generally do this by following the instructions at the end of the message.
- Don't open e-mail from sources you don't recognize. Delete the e-mail from the "Deleted Items" folder to get it completely off your disk.

- Don't send thank you's. Have an agreement with those you communicate with that thank you messages are not to be exchanged.
- The netiquette for e-mail is to reply within 24 hours. Sometimes this is just to verify receipt and to let the sender know that you will not be able to reply with answers until xx/xx/xx date. If you need to have information quicker than 24 hours, use a different communication medium, such as phone or walk-in.
- Block off time in your planner for the morning and afternoon to handle your email. Use this time to respond to your most important e-mail messages first. If you use Outlook for your appointments (and everyone should... it makes meeting arrangements infinitely easier), simply make an appointment with yourself to block the time on your schedule, so it will not be usurped by others' meeting arrangements.
- Set recurring appointments in your planner and/or recurring tasks to do the following:
  - at least once a week archive your sent items to the "Archived Sent Items" folder in your archive file.
  - delete the oldest week's entries from the "Archived Sent Items."
  - each week, delete the oldest week's entries from your "Deleted Items" folder.
  - use your Personal Folders to store e-mail messages you wish to keep. Having relevant names for these subfolders will make your retrieval easier. Also, use the Find capability search for specific e-mail messages.
  - once a quarter, clean out your Personal Folders

CREATE

Many of the problems we encounter with e-mail have to do with the lack of effective e-mail message construction. In this section you'll learn to plan and design your e-mail, to make it easier for others to read and respond for your desired results.

PLAN YOUR MESSAGE:

- Think before you start typing, and certainly before you press the Send button
- Choose the best medium for the message... is e-mail appropriate? Could a phone call or a visit better serve your needs? Remember, phone messages should be answered in a few hours; e-mail, within 24 hours.
- What's the purpose of your message? What do you want the reader to do with the information? On the first part of the subject line, use standardized (with at least your group, if not the division) terms to denote what type of message it is, or what action is to be taken. Here are some standard actions:
  - ACTION REQ'D
  - FYI
  - REVIEW REQ'ST
  - MEETING REQ'ST

- o REPLY REQ'ST

These subjects can then be filtered, if desired, into Personal Folders or subfolders of your Inbox.

- Your e-mail should be clear, concise, and relevant. Backup material can be appended or pointed to, if on a server or webpage.

DESIGN YOUR MESSAGE:

- What is the main point of the message? What do you need done, and when?
- Preview the 3 to 5 areas to be discussed in bullet form
- For each bullet, create the details or supporting information
- Summarize or review the main points and any actions required (with dates). **Note**: The main point and preview should be viewable in its entirety, with the Preview function
- Only use HTML template

REVIEW YOUR MESSAGE:

- Do not use all capital letters in e-mail messages. IT APPEARS AS SHOUTING!
- Review for syntax, grammar, and spelling.
- Be courteous and use conversational language. If you have written something in the heat of anger, do not send it immediately. Let your anger subside and re-read your message. Discretion **is** the better part of valor. Don't reply to inflammatory email!

SEND

Once you have your e-mail message drafted and proofed, use the following tips in appropriately sending your e-mail to the appropriate audience:

- Do not use a large distribution list if you are only targeting a few of the members with your e-mail
- Type out the individual names on the TO: line
- Do not CC people as a political safety methodology. Save sent items in your "Archived Sent Items" folder, or other personal folder .If you later need to copy someone, you can do so at their request.
- Consider your e-mail as in the public domain. **E-mail is not confidential**.
- Copy yourself on highly important messages and file them in an appropriate subfolder.
- For e-mail that has an action requested: do not send it to multiple people unless it is your intent they all do the same action.
- Use a professional signature with your contact information on every message.

Finally, the control tips provided in this paper are just a starting-off point for handling communications more effectively. Other areas that also must be controlled include regular mail, paper files and locating information, magazines and newsletters, meetings, and technical information.

For further information on controlling e-mail, consult the web. The new books on organizing generally have tips on e-mail. Ask your associates and friends for best practices for handling e-mail messages.

The last tip is a reiteration of one in the process section -- block time on your appointment schedule to handle the daily influx of e-mail traffic. Do not let your e-mail accumulate, as it then becomes an overwhelming stack. Be in control.

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