

The Email Warrior



3D Approach

Process email like an Email Warrior

Dedicate

Dedicate time for email throughout your day. Resist multi-tasking by closing/minimizing email while doing other work. Turn off your alerts to reduce interruptions. Strive for reasonable, versus instantaneous responses (recognizing that people will call if it is urgent).

Do

Adopt the One-Touch principle. The first time you read an email, *do* the associated task. Read / respond / forward / delete / file. Avoid costly redundancy and resist closing the email before acting on it. Do it now to avoid low-value re-reads later.

Defer

Where necessary, defer the task. This applies to bigger tasks when you cannot apply the One-Touch principle. Add the task to your Master Action Plan and move the email out of your inbox.

Reduce Email Volume

Simple ways to scale back

- Avoid email conversations
- Cut back on cc's
- Book regular status meetings
- Focus on fewer projects at any one time
- Tighten your backlog
- Leverage rules for automatic filing
- Unsubscribe

Team Email Charter

Suggestions for team email policies

- Clear subject lines
- Brief and structured messages
- Clear request
- CC and Reply All
- Signatures
- *What* not to email
- *When* not to email

Notes

The Email Warrior



My Ideal Time Allocation

	Day	Week
Meetings (including associated travel)		
Focused, independent work (pre-planned, blocked time)		
Informal communications (email, unscheduled calls, drop-by visitors)		
Personal (lunch, breaks, etc.)		
Total		

My Ideal Email Frequency

Before Work		Evenings	
During Work		Weekends	

My Email Policies

How much time do I currently spend on email? (too little / just right / too much)

How can I adjust my time commitments? (meetings, email, focused work)

How can I establish more realistic response expectations with other people?

The Email Warrior



My MAP (Master Action Plan)

Category:

Date: Task

Date: Task

Category:

Date: Task

Date: Task

Category:

Date: Task

Date: Task

Centralized



Complete



Categorized



Commitment



Consulted

Which tool will I use for my MAP?

(Recommendations: Outlook Tasks; OneNote; Evernote; Wunderlist; Word; Excel; PowerPoint)

When will I build my MAP?

(Date & time)

Daily Planning Guidelines

- Build your day around your top priorities.
- Commit to writing down your plan for each day. (Or use an electronic system.)
- Plan tomorrow as you wrap up today.
- Think of your daily plan as a bring-forward version of your MAP.
- Keep your daily plan reasonable (i.e., less than five tasks) considering other work will come up throughout the day.
- Review your plan with your assistant each day.

Sample Daily Plan

1. Prepare for meeting
2. Review document

- Call Abram
- Prepare agenda
- Book dentist

The Email Warrior



My Inbox Count

Before: _____	After: _____
---------------	--------------

Clear My Inbox: Streamline folders

My folder plan

1.
2.
3.
4.
5.
6.
7.
8.
9. SORT or ARCHIVE

Move all email older than:

(date)

to sort / archive folder



Clear My Inbox: Guidelines

Tips to clear my inbox in less than three hours

- Apply the 3D Approach: Dedicate; Do; Defer (as necessary).
- Work up from the bottom of your inbox.
- Automatically move all emails older than one month into a sort or archive folder. Don't spend too much time sorting through emails older than one month.
- Process sequentially and be decisive.
- Keep going until you have < 10 emails in your inbox.
- Populate your Master Action Plan (with deadlines) for deferred tasks.
- Don't keep any emails older than one week in your inbox.



Team Email Charter

By Ann Gomez, Clear Concept Inc.

Are people addicted to email in your organization? Is your inbox flooded with reply-all messages? Are you sick of seeing non-urgent emails marked as urgent? If so, your team may need email protocols.

Email is a critical communication tool. Busy professionals can easily get 100 emails a day – and often many more. Given how prominent email is, we need to make sure we are using the tool correctly. After all, a small amount of email abuse by individuals can add up to a tremendous drain on a team.

See below for some suggested Dos and Don'ts. I suggest you review these with your team and identify the policies that are most appropriate for your organization. You could even have everyone sign a Team Email Charter. There is a sample template at the end of this article.

Email Policies: Dos and Don'ts

Don't reply all

While the reply all feature can be handy, it tends to be overused. In most cases, only the sender needs to see your response. The rest of us really don't need to know what kind of pizza you want at the meeting.

Pretend the "reply all" button does not exist. Force yourself to manually type people's names if you have a solid rationale for why they need to be copied.

Don't over CC

Similarly, the CC feature is used far too much. People copy their managers simply to demonstrate they are doing their work. It's as if they are saying "look – I'm doing what you asked me to do." This pulls the manager into far too many details and prevents them from focusing on other important work.

Copying someone has its rightful place in certain situations. For example, we should copy a team member when they need the information to act. However, let's all agree not to copy someone unless they need the information for a specific reason.

Don't expect people to respond immediately

Monitoring email constantly throughout the day is extremely inefficient. It leads to multi-tasking and we know focusing is much more efficient.

We should not expect people to respond to our emails immediately. After all, they might be in a meeting or focused on other work. Rather, we should all process email in batches throughout the day. Email response time expectations will vary based on the nature of our job and we should have the flexibility to close email to focus on other work as appropriate.

Don't have email conversations

Many people use email in lieu of conversations. They bounce email responses back and forth, disrupting other work in process. This is far less efficient than having an actual conversation.

Email is not designed to replace a conversation. If you need to discuss something, either pick up the phone or walk down the hall. Use the rule of three to gauge whether you are slipping into an email conversation. If an email bounces back and forth three times, it is time to talk.

Do send fewer emails

Emails are like boomerangs. They always seem to come back – and they often bring friends. I once heard we receive three emails for every one email we send. This makes sense when you consider excessive cc'ing and email conversations.

Strive to send fewer emails. Walk down the hall to talk to someone. Consolidate related questions in one email or save them for your next meeting. Even better – decide it isn't worth sending the email at all.

Do use structure

Long blocks of text are tough to read on a computer screen. When people see long paragraphs in their email, they might be tempted to print an email simply to make it easier to read. Obviously, we want to mitigate the need for someone to have to print our email – especially with many of us moving to a paperless environment.

Where possible, avoid long paragraphs. Break up your text with bullets, subtitles and bolded key words. This will make it easier for people to read (and respond to) your emails.

Do keep your emails brief

People are inundated with information and don't have time to read large blocks of text. Research has proven that beyond 100 words, people start to skim electronic messages. On the other end of the spectrum, some people cut so much out of their email it comes across as blunt.

Strive to keep your message as succinct as possible. I once read a blog challenging people to cut 50% of their words as part of the proofreading process. I began forcing myself to do this and was pleasantly surprised to see how achievable this was.

There are some obvious exceptions to this rule. For example, you might need to summarize key decisions or notes after a meeting. The key is to not expect a long, potentially confusing email to replace a conversation.

Do keep it professional

Emails are easy to fire off and can far too easily come across as blunt, unclear or offensive. Despite how easy and accessible email is, it should still be treated like a formal form of written communication.

Begin your emails with a pleasant opening – especially when contacting people outside your immediate circle with whom you have not recently communicated. Use punctuation and avoid excessive use of acronyms. Stick to sentences unless bulleted lists make more sense.

Do proof your message

Far too many people skip the critical proofread before sending emails. Just because we clearly defined something in our mind doesn't mean we have clearly translated this in writing.

Pause to proof your email before sending. With automatic spelling and grammar checking at our fingertips, there isn't an excuse for sloppy writing. We also need to be cautious of the auto word generator feature. A perfectly good word can slip through the spell and grammar check, but that doesn't mean it was the word you wanted to use.

Do make your emails easy to answer

Long, unclear emails with multiple questions are tough to respond to. They end up languishing in inboxes and contributing to stalled projects.

Do strive to make your emails easy to answer. Clearly state your requests and limit your questions where possible. Use an active voice and avoid burying your ask at the bottom of a long message. Suggest a meeting if you need a discussion to support a more complex topic or decision.

Do include a signature

This is another pet peeve of mine. I can't tell you how many times I have gone searching for someone's contact information, only to wind up frustrated I cannot find it in any of our email exchanges.

Include a tight email signature with your core contact information. Streamline it on replies if you like, but don't drop it completely. A reply email may be the only source one has to contact you. This email policy is especially critical for anyone who is in contact with people outside their organization (which applies to practically all professionals).

Do make your subject line specific

Given email overload, people rely quite heavily on the subject line to decide whether to open our email now versus later. Make sure to add enough detail to help people make this decision. "Budget" is not specific enough. "Q2 budget projections are due Friday" is much better.

We also need to update the subject when the email string shifts to a new topic. Even better: don't start a new conversation thread on an old email chain. Start a new email instead.

Do add your recipient's name last

The last thing you want is to accidentally send an email before it is completed and proofed. Take it from me – this can happen all too easily.

Adding recipient names should be the LAST thing we do – after proofing our message and making sure we have included the intended attachments.

Don't use email for emotionally charged topics

Email is great for information transfer. However, email should NOT be used to address sensitive topics. Sometimes, sitting in front of a computer leads us to saying things we wouldn't say in person. As well, we simply cannot gauge someone's reaction, clarify misunderstandings and adjust our message over email.

When we have a delicate message to convey, we should do it in person (or at a minimum, by phone). We should also avoid writing something in an email that we wouldn't say to someone's face.

Do treat what you write as front-page news

Be cautious about what you choose to send via email. Act as though anything you write in an email will be published on the front page of the newspaper tomorrow morning.

People often send confidential information without appreciating how easily it can travel. Emails are far too easy to circulate to trust with confidential information.

On the other hand, we should seek permission before forwarding a message; especially if there is any doubt the original sender would be concerned. Just because it is easy to forward a message from someone else doesn't make it the right thing to do.

Do tread carefully with humour and sarcasm

You might be the funniest person on your team but that doesn't mean everyone will get your humour over email. Humour and sarcasm are heavily linked to tone and body language. As such, they are difficult to detect over email. People often take written messages quite literally and may not pick up on the nuances. In the worst-case scenario, someone could be easily insulted over email which could leave them stewing.

In fact, any form of emotion doesn't translate very well over email. A quickly crafted email can be easily misunderstood. Research indicates while people think they have correctly interpreted the sender's tone 90% of the time, they only have a 50/50 chance of getting it right¹.

Tread carefully with humour and sarcasm over email. Exceptions are warranted when you know your audience well, but it is hard to tell if your humour was received in the appropriate way.

Do make "thank you" emails specific

The humble "thank you" email has a bad rap these days. Many people curse them as a huge contributor to email overload. I'm not convinced about this. In fact, I'd go so far as to lobby in favour of the "thank you" email. After all, we all value being appreciated.

¹ <http://www.apa.org/pubs/journals/psp/index.aspx>

However, we want to make our “thank you” emails specific. A simple “thanks” comes across as unauthentic and even trite. On the other hand, a more detailed message outlining exactly what you liked and why goes a lot further.

Don’t overuse the urgent feature

When we mark too many emails as urgent, we become known as the digital equivalent of the little boy who cried wolf. While justifiable last-minute requests do come up, it is generally our responsibility to avoid letting our emergencies become other people’s emergencies.

We should strive to only use the urgent feature selectively. Act as though you only have a dozen urgent cards (or even less) to dole out in a year. Use them sparingly.

Do unsubscribe

Sometimes, email overload results from subscribing to too many email newsletters. The less applicable newsletters end up absorbing more of our precious time than is warranted and clutter our inbox.

We should unsubscribe from any emails we have no intention of reading. It is often straightforward to do so. Simply scroll to the bottom of the bulk email and click on “unsubscribe”.

Don’t send unsolicited emails

Sending bulk email messages is very common. However, all bulk email communications should adhere to anti-spam regulations. Obtain permission before including anyone in a distribution list.

We all support our own individual causes and have our own news to share. While something may be appropriate to share with your inner circle, avoid sending company-wide messages inviting people to sponsor your favourite charity or buy cookies from your children’s school.

Don’t use read receipts

Thankfully, read receipts seem to be a thing of the past. All a read receipt tells us, after all, is that someone has clicked on and opened our email. It doesn’t say whether they have made a decision or even focused dedicated attention on the topic.

If people in your network are still using them, please tell them to STOP! Email is reliable enough that we don’t have to track whether someone has read our email. Let’s respect one another and accept that people will respond when they can.

Don’t print

It’s rare to see people printing emails these days. But there are still a handful of people who seem intent on eradicating trees through excessive printing. Printing emails is an inefficient way to remind you to complete tasks. It leads to countless pieces of paper that are hard to organize and difficult to search through. If you are worried about remembering to do something, add it to your [Master Action Plan](#) and don’t print the email.

Many teams are going paperless and storing all information electronically. If your team isn't quite there, you may have select emails you want to print. These might include detailed instructions you need to process or extended attachments you'd rather review on paper. As long as we make this the exception, printing the occasional email may be appropriate.

This sums up our recommendations for email policies. Do you have any to add? Please share with us at info@clearconceptinc.ca.

Appendix – Sample Team Email Charter

Once you and your team have settled on the most appropriate policies, consider establishing a Team Email Charter. The following sample is designed for you and your team to build upon.

Team Email Charter

We, the members of <<team name>>, are committed to using email as a strategic communication tool and adhering to the following policies:

- We will only use the CC and Reply All functions when people absolutely need the information.
- We will not expect people to respond to emails immediately. We will respect their need to focus on other work and focus during meetings.
- We will proof our emails for clarity, accuracy, spelling and grammar.
- We will batch related questions, where possible, to avoid repeated emails about the same topic.
- We will strive to keep our emails brief and easy to answer.
- We will use structure (such as bold, font size, bullets, etc.) to make our messages easy to read.
- We will include detailed subject lines and will update subject lines where appropriate.
- We will not use email when a conversation is more appropriate. We will never write something in an email we wouldn't otherwise say.
- We will include an email signature so people know how to get in touch with us.
- We will avoid marking emails as urgent unless absolutely necessary.
- We will not print emails unless absolutely necessary.
- We will not use read receipts.
- We will not send unsolicited bulk emails.

This Email Charter was reviewed and adopted on <<insert date>> by the following team members:

<<Team Signatures>>

This article is part of [The Email Warrior](#) series. For more email tips, please contact us: info@clearconceptinc.ca.