

Effective Email Management

Edited from Harvard Business School's Tips for Mastering E-mail Overload (Steven Robbins, 2004)

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SUMMARY ADVICE

FIRST THOUGHTS

- Understand how people prefer to be reached, and how quickly they respond.
- Use separate messages rather than bcc (blind carbon copy).
- Use separate e-mails for separate topics ... up to a point.
- Check e-mail at defined times each day.
- Edit forwarded messages.

SENDING E MAILS

- Use a subject line to *summarize*, not *describe*.
- Give your reader full context at the start of your message: start off your messages with enough context to orient your reader.
- Mark out why each person should care.
- Make action requests clear.
- Combine separate points into one message.
- Make your e-mail one page or less.
- When scheduling a call or conference.

RESPONDING

- Use a paper "response list" to triage messages before you do any follow-up.
- Charge people for sending you messages.
- Train people to be relevant.
- Answer briefly.
- Send out delayed responses¹.
- Ignore it.

¹ (In Outlook, choose **Options** when composing a message and select **Do not deliver before**. In Eudora, hold down the **Shift** key as you click **Send**.)

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Before e-mail, senders shouldered the burden of mail. Writing, stamping, and mailing a letter was a lot of work. Plus, each new addressee meant more postage, so we thought hard about whom to send things to.

E-mail bludgeoned that system in no time. With free sending to an infinite number of people now a reality, every little thought and impulse becomes instant communication. Our most pathetic meanderings become deep thoughts that we happily blast to six dozen colleagues who surely can't wait. On the receiving end, we collect these gems of wisdom from the dozens around us. The result: Inbox overload. The problem of e mails is that readers now bear the burden.

Taming e-mail means training the senders to put the burden of quality back on themselves. What's the best way to train everyone around you to better e-mail habits? You guessed it: You go first. First, you say, "In order for me to make *you* more productive, I'm going to adopt this new policy to lighten your load..." Demonstrate a policy for a month, and if people like it, ask them to start doing it too.

Setting a good example only goes so far. You also have to train others explicitly. Explain to them that you're putting some systems in place to help you manage your e-mail overload. Ask for their help, and know that they're secretly envying your strength of character.

Together, maybe we can start a revolution.

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FIRST THOUGHTS

1. Understand how people prefer to be reached, and how quickly they respond.

If something is important, use the phone or make a follow-up phone call. IF there has been a delay: do it politely; a delay may not be personal. If you have time-sensitive information, don't assume people have read the e-mail you sent three hours ago rescheduling the meeting that takes place in five minutes. Pick up the phone and call.

2. Use separate messages rather than bcc (blind carbon copy).

If you bcc someone "just to be safe," think again. Ask yourself what you want the "copied" person to know, and send a separate message if needed. Yes, it's more work for you, but if we all do it, it's less overload.

BAD BCC:	GOOD BCC:
To: Fred Bcc: Chris Please attend the conference today at 2:00 p.m.	To: Fred Please attend the conference today at 2:00 p.m. To: Chris Please reserve the conference room for me and Fred today at 2:00 p.m.

3. Use separate e-mails for separate topics ... up to a point.

If someone sends a message addressing a dozen topics, some of which you can respond to now and some of which you can't, send a dozen responses—one for each topic. That way, each thread can proceed unencumbered by the others.

Do this when mixing controversy with the ordinary. That way, the mundane topics can be taken care of quietly, while the flame wars can happen separately.

BAD MIXING OF ITEMS:	GOOD MIXING OF ITEMS:
We need to gather all the articles by February 1st. Speaking of which, I was thinking ... do you think we should fire Sandy?	Message #1: We need to gather all the articles by February 1st. Message #2: Sandy's missed a lot of deadlines recently. Do you think termination is in order?

4. Check e-mail at defined times each day.

Why do we tolerate e-mail when we're trying to get something useful done? Turn off your e-mail "autocheck" and only check e-mail two or three times a day, by hand. Let people know that if they need to reach you instantly, e-mail isn't the way. When it's e-mail processing time, however, shut the office door, turn off the phone, and blast through the messages.

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5. Edit forwarded messages.

For goodness sake, if someone sends you a message, don't forward it along without editing it. Make it appropriate for the ultimate recipient and make sure it doesn't get the original sender in trouble.

BAD FORWARDING:	GOOD FORWARDING:
<p>To: Bill</p> <p>Sue's idea, described below, is great.</p> <p>---</p> <p>From: Sue</p> <p>Hey, Abner:</p> <p>Let's take the new design and add sparkles around the border. Bill probably won't mind; his design sense is so garish he'll approve anything.</p>	<p>To: Bill</p> <p>Sue's idea, described below, is great.</p> <p>---</p> <p>From: Sue</p> <p>Hey, Abner:</p> <p>Let's take the new design and add sparkles around the border...</p>

SENDING E MAILS

1. Use a subject line to *summarize*, not *describe*.

People scan their inbox by subject. Make your subject rich enough that your readers can decide whether it's relevant. The best way to do this is to summarize your message in your subject.

BAD SUBJECT:	GOOD SUBJECT:
Subject: Deadline discussion	Subject: Recommend we ship product April 25th

2. Give your reader full context at the start of your message.

Too many messages forwarded to you start with an answer—such as, "Yes! I agree. Apples are definitely the answer" It's very, very difficult to get to the core of the issue. We must read seven included messages, notice that we were copied, and try to figure out what apples is the answer to. Even worse, we don't really know if we should care.

You're probably sending e-mail because you're deep in thought about something. Your reader is too, only they're deep in thought about something else. Even worse, in a multi-person conversation, messages and replies may arrive out of order. And no, it doesn't help to include the entire past conversation when you reply; it's rude to force someone else to wade through ten screens of messages because you're too lazy to give them context. So, **start off your messages with enough context to orient your reader.**

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BAD E-MAIL:	GOOD E-MAIL:
<p>To: Billy Franklin From: Robert Payne Subject: Re: Re: Re: Please bring contributions to the charity drive</p> <p>Yes, apples are definitely the answer.</p>	<p>To: Billy Franklin From: Robert Payne Subject: Re: Re: Re: Please bring contributions to the charity drive.</p> <p>You asked if we want apple pie. Yes, apples are definitely the answer.</p>

3. Mark out why each person should care – if you have to copy lots of people (a heinous practice that should be used sparingly).

Just because you send a message to six poor coworkers doesn't mean all six know what to do when they get it. Ask yourself why you're sending to each recipient, and let them know at the start of the message what they should do with it. Big surprise, this also forces *you* to consider why you're including each person.

BAD CC:	GOOD CC:
<p>To: Abby Gail, Bill Fold, Cindy Rella Subject: Web site design draft is done</p> <p>The Web site draft is done. Check it out in the attached file. The design firm will need our responses by the end of the week.</p>	<p>To: Abby Gail, Bill Fold, Cindy Rella Subject: Web site design draft is done</p> <p>AG: DECISION NEEDED. Get marketing to approve the draft</p> <p>BF: PLEASE VERIFY. Does the slogan capture our branding?</p> <p>CR: FYI, if we need a redesign, your project will slip.</p> <p>The Web site draft is done. Check it out in the attached file. The design firm will need our responses by the end of the week.</p>

4. Make action requests clear.

If you want things to get done, say so - clearly. There's nothing more frustrating as a reader than getting copied on an e-mail and finding out three weeks later that someone expected you to pick up the project and run with it. Summarize action items at the end of a message so everyone can read them at one glance.

5. Combine separate points into one message.

Sometimes the problem is the opposite—sending 500 tiny messages a day will overload someone, even if the intent is to reduce this by creating separate threads. If you are holding a dozen open conversations with one person, the slowness of typing is probably substantial overhead. Jot down all your main points on a piece of (gasp) paper, pick up the phone, and call the person to discuss those points. I guarantee you'll save a ton of time.

6. Make your e-mail one page or less.

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Make sure the meat of your e-mail is visible in the preview pane of your recipient's mailer. That means the first two paragraphs should have the meat. Many people never read past the first screen, and very few read past the third.

7. When scheduling a call or conference, include the topic in the invitation. It helps people prioritize and manage their calendar more effectively.

BAD E-MAIL:	GOOD E-MAIL:
Subject: Conference call Wednesday at 3:00 p.m.	Subject: Conference call Wednesday at 3:00 p.m. to review demo presentation.

RESPONDING TO OTHERS

1. Use a paper "response list" to triage messages before you do any follow-up.

The solution to e-mail overload is pencil and paper? Who knew? Grab a legal pad and label it "Response list." Run through your incoming e-mails. For each, note on the paper what you have to do or whom you have to call. Resist the temptation to respond immediately. If there's important reference information in the e-mail, drag it to your **Reference** folder. Otherwise, delete it. Zip down your entire list of e-mails to generate your response list. *Then*, zip down your response list and actually do the follow-up.

2. Charge people for sending you messages.

One CEO I've worked with charges staff members five dollars from their budget for each e-mail she receives. Amazingly, her overload has gone down, the relevance of e-mails has gone up, and the senders are happy, too, because the added thought often results in them solving more problems on their own.

3. Train people to be relevant.

If you are constantly copied on things, begin replying to e-mails that aren't relevant with the single word: "Relevant?" Of course, you explain that this is a favor to *them*. Now, they can learn what is and isn't relevant to you. Beforehand, tell them the goal is to calibrate relevance, *not* to criticize or put them down and encourage them to send you relevancy challenges as well. Pretty soon, you'll be so well trained you'll be positively productive!

4. Answer briefly.

When someone sends you a ten page missive, reply with three words. "Yup, great idea." You'll quickly train people not to expect huge answers from you, and you can then proceed to answer at your leisure in whatever format works best for you. If your e-mail volume starts getting very high, you'll have no choice.

5. Send out delayed responses.

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Type your response directly, but schedule it to be sent out in a few days. This works great for conversations that are nice but not terribly urgent. By inserting a delay in each go-around, you both get to breathe easier.

(In Outlook, choose **Options** when composing a message and select **Do not deliver before**. In Eudora, hold down the **Shift** key as you click **Send**.)

6. Ignore it.

Yes, ignore e-mail. If something's important, you'll hear about it again. Trust me. And people will gradually be trained to pick up the phone or drop by if they have something to say. After all, if it's not important enough for them to tear their gaze away from the hypnotic world of Microsoft Windows, it's certainly not important enough for you to take the time to read.