

Email Management

Email Management

The Productive Leader
Releasing time to lead™





Email Management: introduction

This module is typically delivered as a facilitated session to focus on the issues you face in managing your emails and the impact this has on your productivity.

The email model is based on best practice guidelines and offers a systematic way to send and receive emails. During your facilitated discussions, you will be encouraged to consider your current working practice and what changes you need to make to manage emails more effectively.

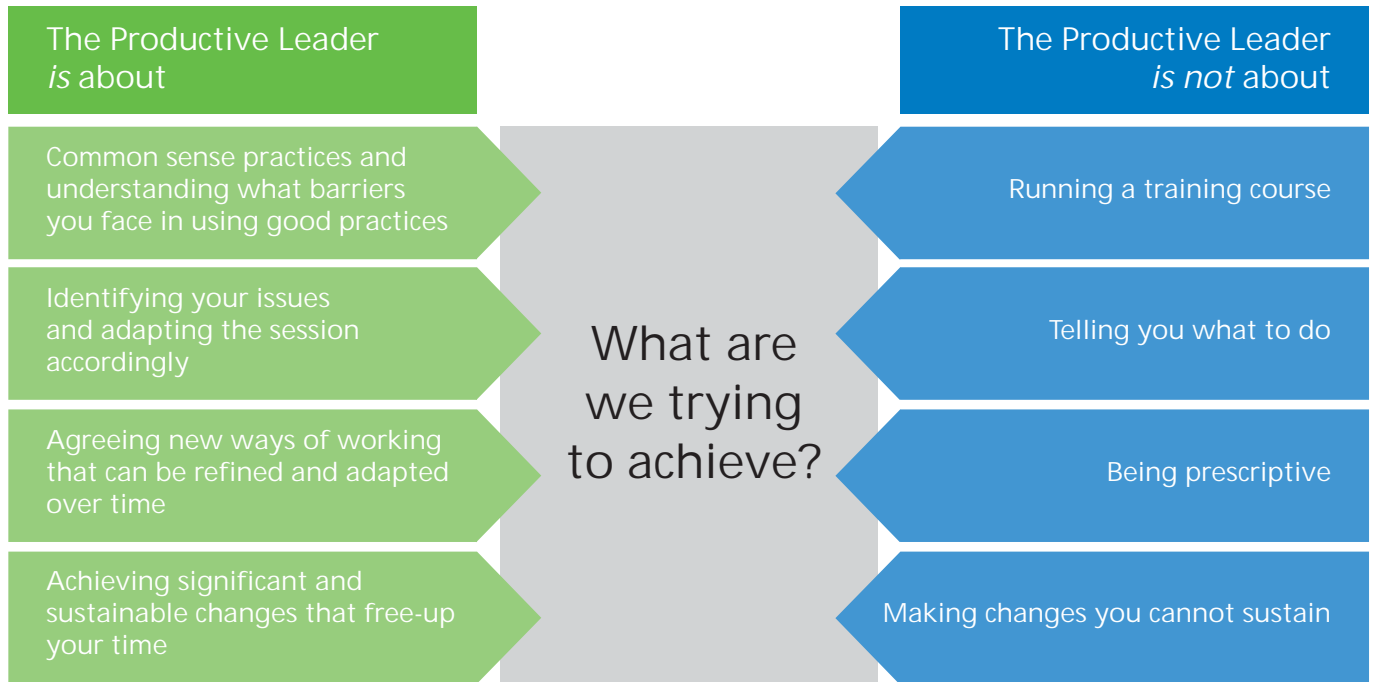
The session concludes with you making personal and team commitments aimed at improving your email practice and performance.

Purpose, objectives and context

- What is The Productive Leader trying to achieve
- What issues you face with email management



What is The Productive Leader trying to achieve



What issues do you face with email management?

Your notes:



How are you currently performing?

- Where are you as an organisation?
- Managing your emails more effectively



NHS leaders do not typically follow best practice email management

Research undertaken within the NHS, as part of the development of The Productive Leader, found that:

- policies outlining best practice in email are rarely used
- only 16% of leaders have had training in how to use their email systems and how to manage their emails
- there is a lack of clarity between leaders and their PAs in how emails are managed
- leaders feel overwhelmed by the number of emails they receive every day – 84% stated they receive unnecessary emails and dread looking at their inbox.

While most leaders know the basics of how to manage emails effectively, few follow them. In this respect, NHS leaders are no different from leaders in any other sector.

Where are you as an organisation?

Review your personal effectiveness questionnaire team profile in relation to email management

Your notes:

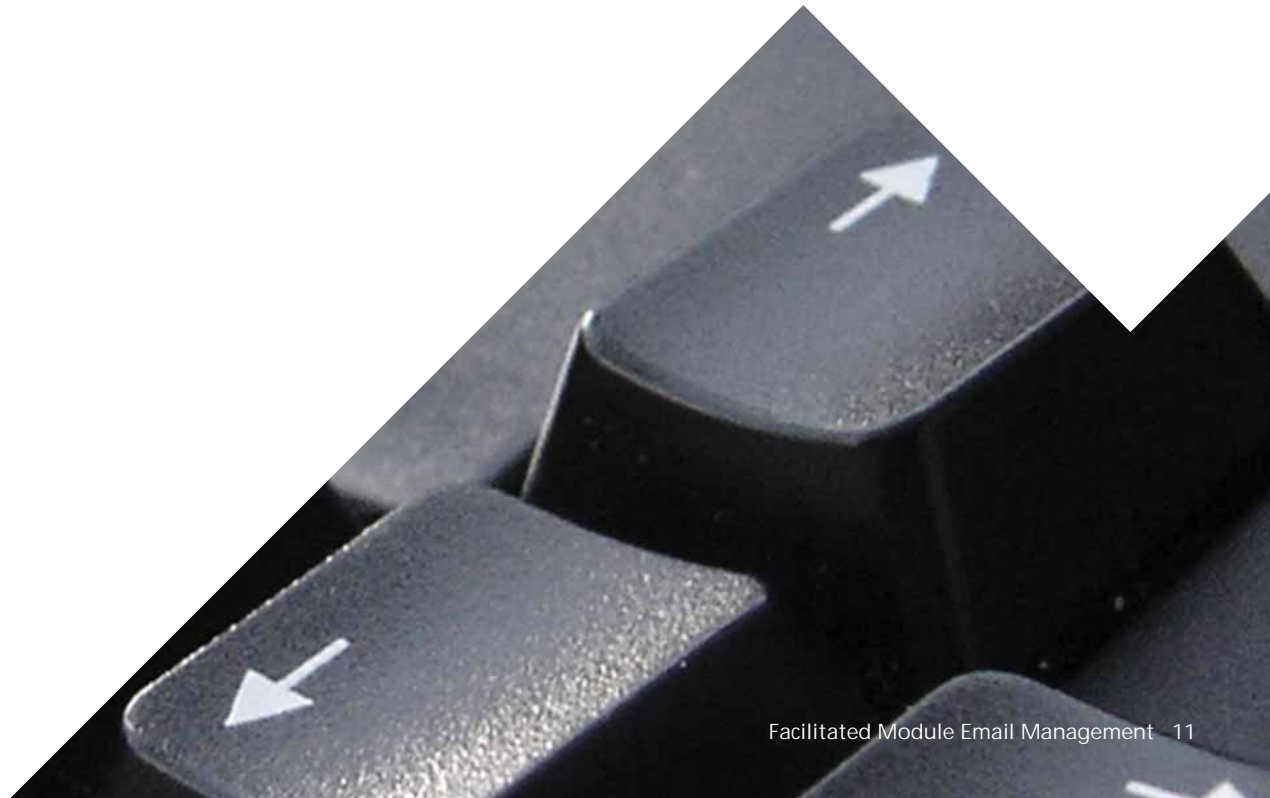
The impact of inefficient email management

What happens if you do not follow good practice in email management?

Your notes:

The benefits of managing your emails more effectively

- Reduce the amount of time you spend dealing with emails.
- Manage your inbox and reduce unwanted items.
- Reduce the stress you feel in managing your emails.
- Improve the quality of emails you send and receive.
- Reduce the number of emails you receive.
- Get better responses to the emails you send.

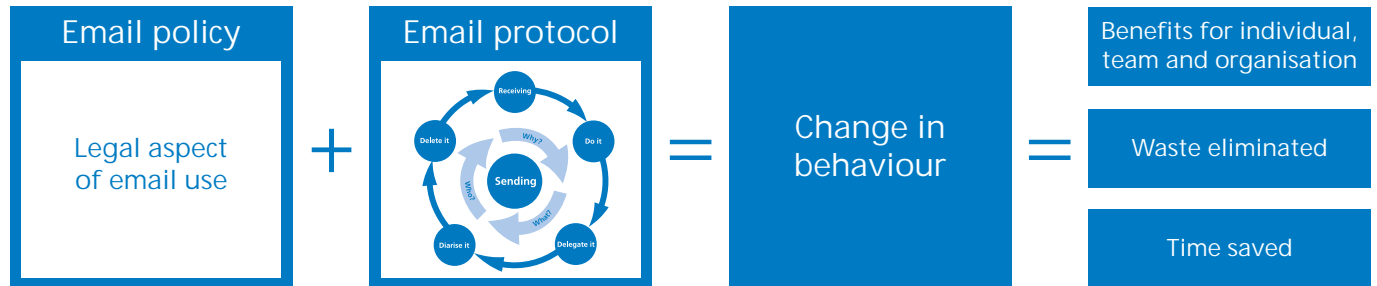


Influences on email management



An email policy is only the first step to managing emails within your organisation

Email policies generally only cover the legal aspects of an organisation's approach to email management.



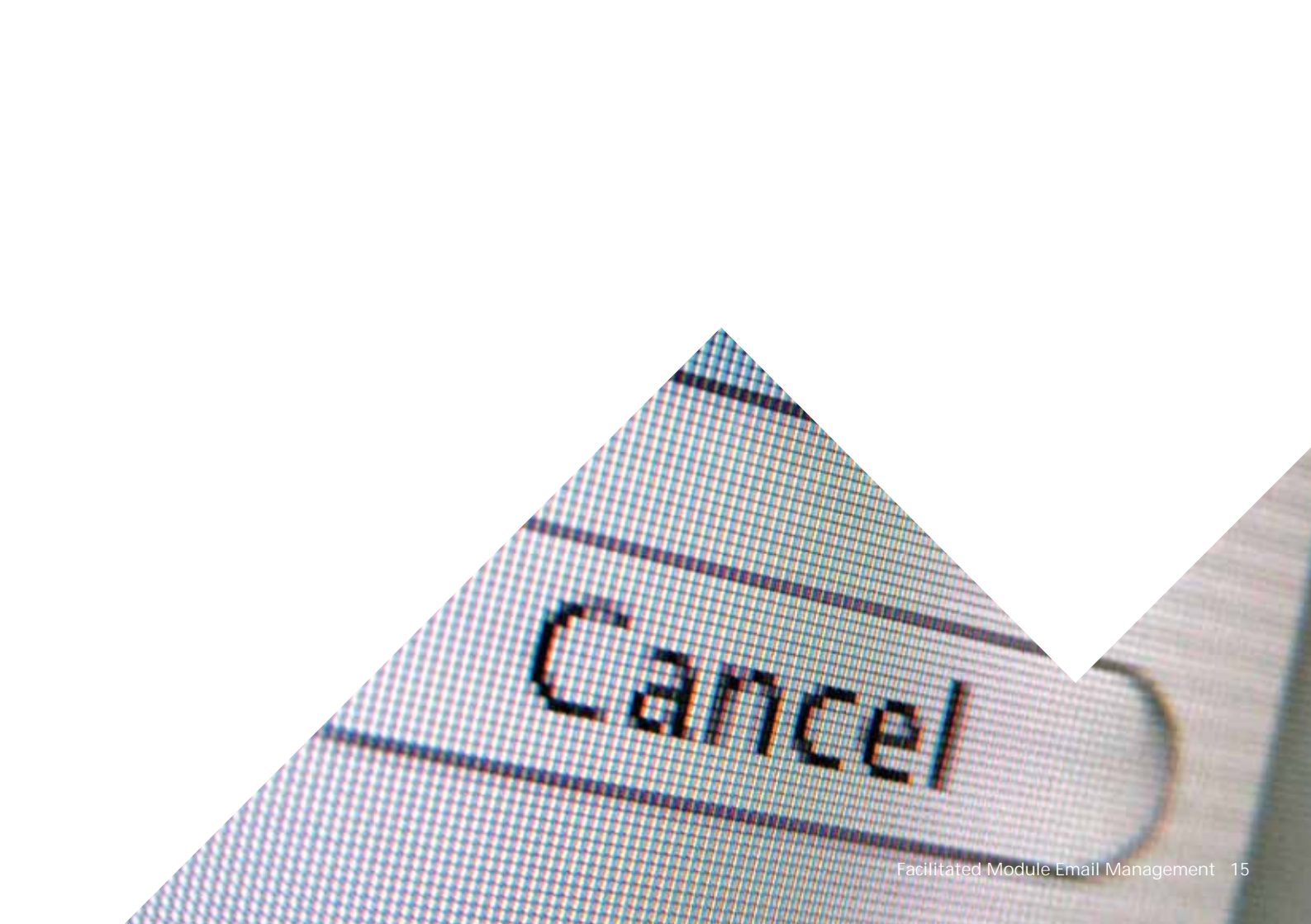
An holistic approach to email management is vital.

Many factors affect the quality and quantity of your emails

You can begin to change the external influences by addressing your email behaviours.



Communicating your expectations to your team and to the organisation is key to managing your email inbox.

A close-up, angled photograph of a computer screen. The screen displays a button with the word "Cancel" in a bold, black, sans-serif font. The background of the screen is a fine, blue and white grid pattern. The button is rectangular with rounded corners and is framed by a thin black border. The image is partially obscured by a white triangular shape in the upper right corner.

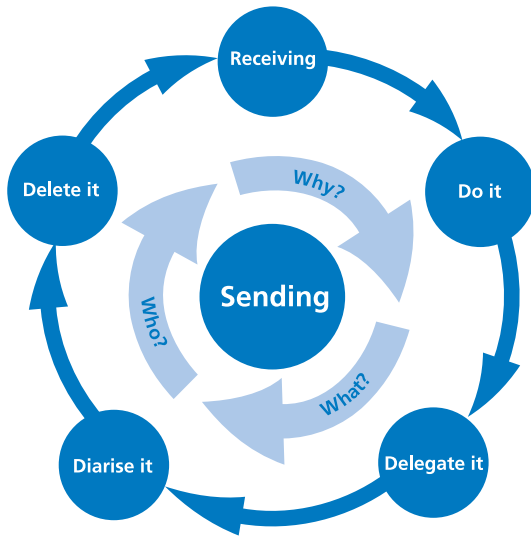
Cancel

A model for email management



Role-modelling email best practice

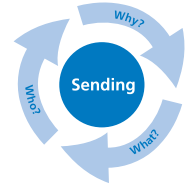
You should adhere to best practice email management for the emails that you send and receive.



It is important to consider three key questions before you send an email



1. **Why** you are emailing?
2. **What** you are emailing?
3. **Who** you are emailing?



Is email the best way of communicating?

You should ask yourself the following questions when deciding whether to send an email.

What am I hoping to achieve by sending this email?

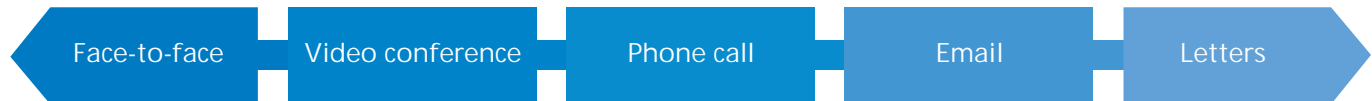
Am I only sending this email to put off having a difficult conversation?

Is an urgent response needed? If so, an email may not be picked up in time.

Could we talk face-to-face?

Would a phone call be better?

Richness of communication



Sending: why?

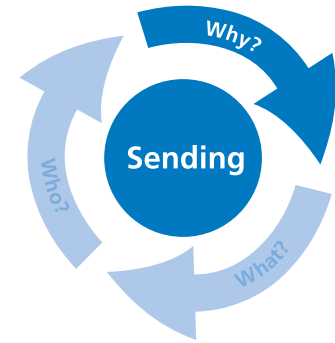
Consider why you are sending an email.

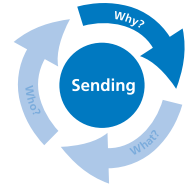
What outcome do you want to achieve through your email?

Have you articulated the purpose of the email in the first paragraph?

Do you need to explain the context of the email?

Is the email and the subject line action-focused?





Is the subject line clear?

You should use action-focused email subject lines.

Subject lines should:

start with the action required

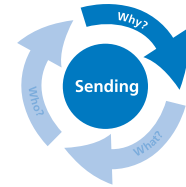
- action required = a physical action is required, ie filling in a form
- for information = there is no action required
- response required = action is required in the form of a response

contain a clear description of the email's purpose, eg

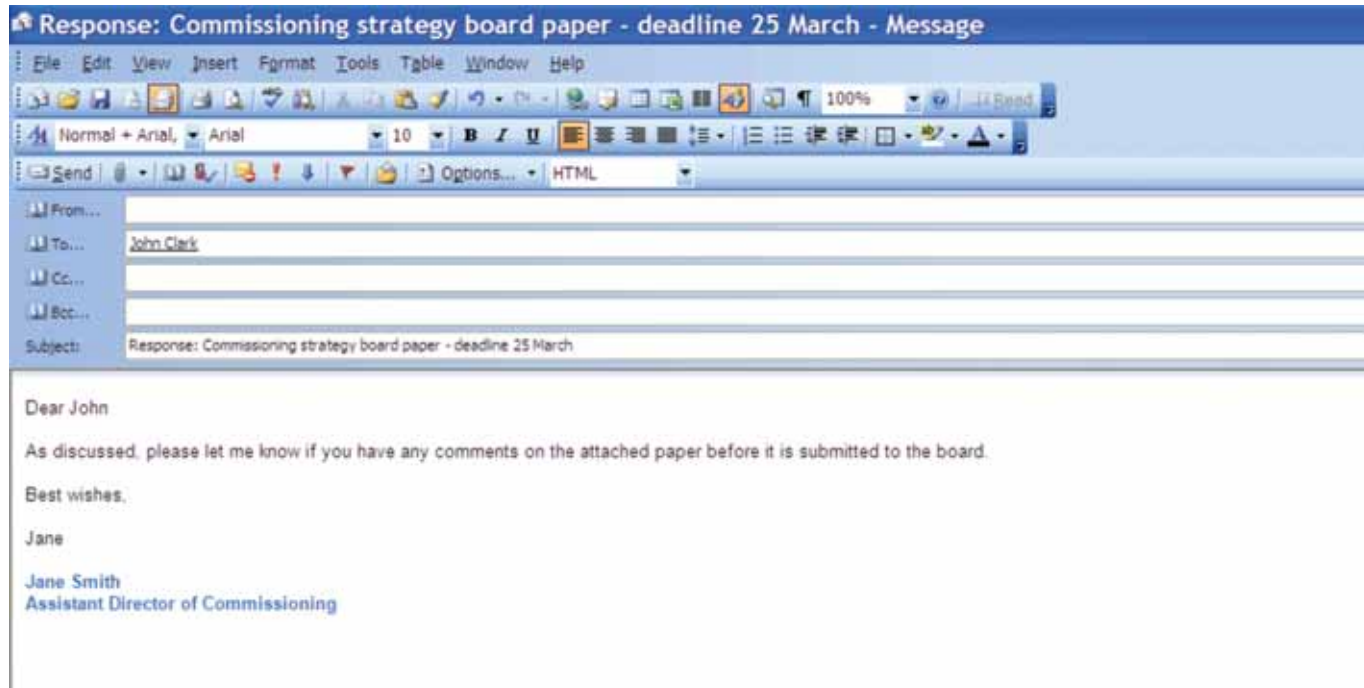
- action required: questionnaire on staff morale

contain any timescales if necessary, eg

- action required: questionnaire on staff morale by 7 June.



Example of best practice email





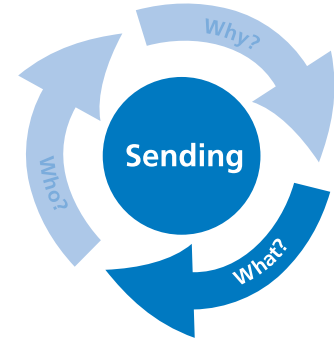
Sending: what?

Consider what you are sending in an email.

Your emails should be short, concise and action-focused

Do you need to send an attachment?

What does your email say about you and your organisation?





Your emails should be short, concise and action-focused

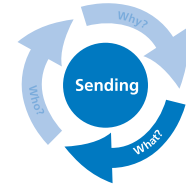
Language and formatting should be used appropriately to ensure clarity.

Formatting

- Only use bold and underlining to emphasise key points.
- Use paragraphs, bullets and numbering to structure the email.
- Use an electronic signature in your house style with contact information.

Language

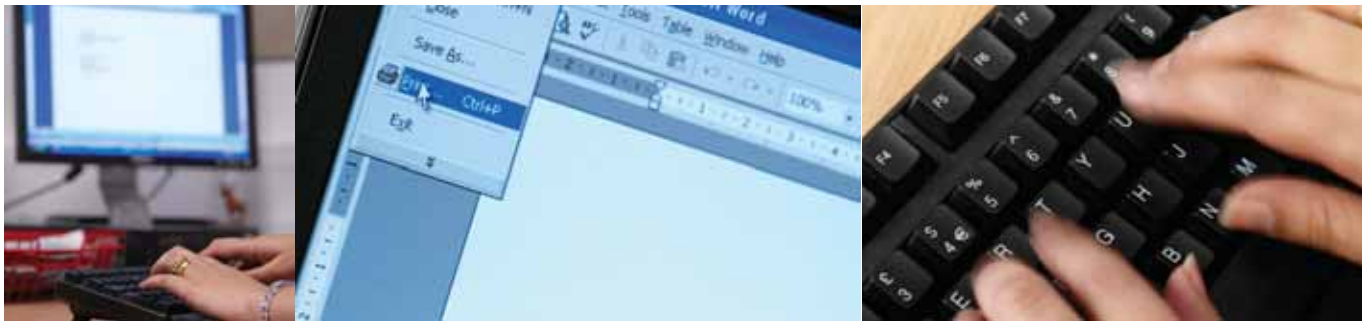
- Is your email brief and to the point?
- Have you used appropriate language?
- Have you considered your target audience and their level of understanding of the subject?
- Is your style and tone appropriate?
- Have you kept abbreviations to a minimum?
- Have you used CAPITAL letters appropriately?

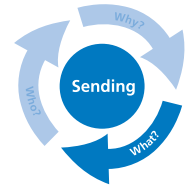


Do you need to send an attachment?

Wherever possible:

- avoid sending email attachments when the recipient has access to the same server and shared files
- use web links
- offer to send the information if requested – do not default to sending it out to everyone
- remove attachments from emails that are being forwarded
- reduce the size of documents using the zip file application where possible
- paste relevant sections of the text into the message.





What does the email say about you and your organisation?

You can minimise the negative impact that emails can have by:

- checking the email before sending it to ensure it is clear and concise
- checking you have not written anything that could be misinterpreted
- never sending an email in the 'heat of the moment' or with a negative purpose
- ensuring that the email correspondence trail does not contain any sensitive content
- checking that the email contains all the required information
- using the spell check facility.

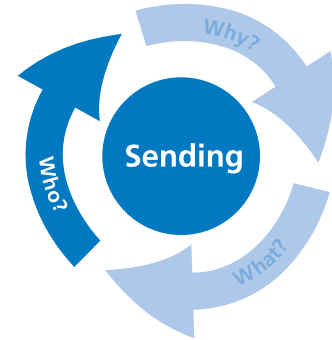


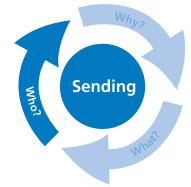
Sending: who?

Consider who are you sending an email to.

Are you sending the email to the most appropriate individuals?

What actions do you want the recipient to take?





Are you sending the email to the most appropriate individuals?

- To – individuals who are required to take action
- Cc – individuals who are copied in for information
- Bcc – should not be used without good reason

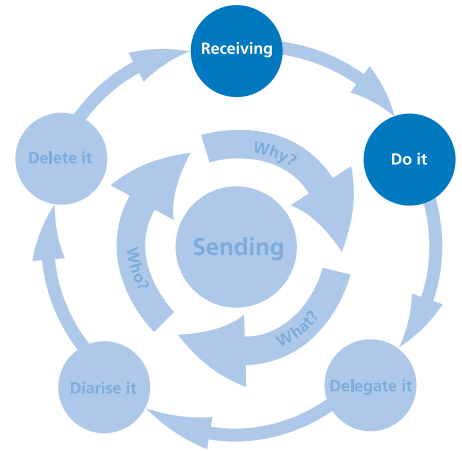


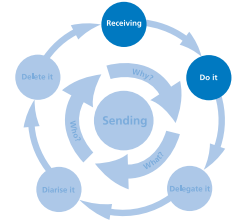
Receiving: do it

On receiving an email think about your next action.

Is it appropriate for you to reply?

The two-minute rule





Is it appropriate for you to reply?

You should evaluate the requirements of the email and where necessary, respond yourself.

If it takes less than two minutes do it!

If this is not possible you should consider the following options:

- **delegate** the email to another member of your team
- **diarise** time to action the email if you cannot take action immediately
- **delete** the email immediately or once actioned.

Once you have determined the action for the email you should file it for reference.
See the Workload Management module for more detail on this.

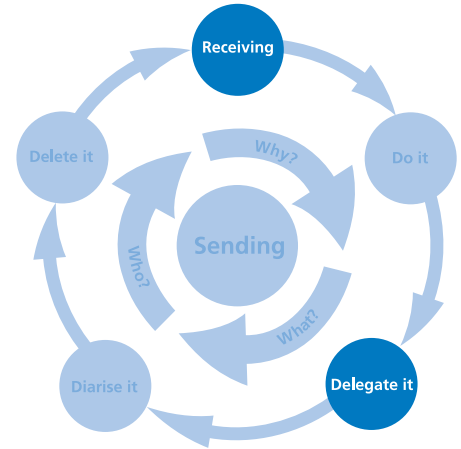
Ensure that you minimise the time spent checking your emails.
Where possible, only handle each email once.

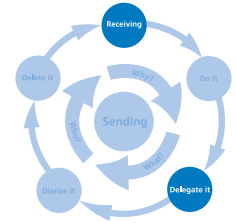
Receiving: delegate it

When delegating an email give clear instruction on next action required.

You should clarify roles and responsibilities

Hold regular reviews of your email management system





Roles and responsibilities for effective email management

Managing a leader's inbox becomes complicated when there are two people involved. You need to clarify email management responsibilities between leader and PA.

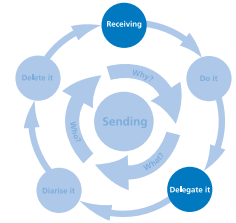
Decide who is taking control of the inbox and when

Agree how you are going to communicate actions

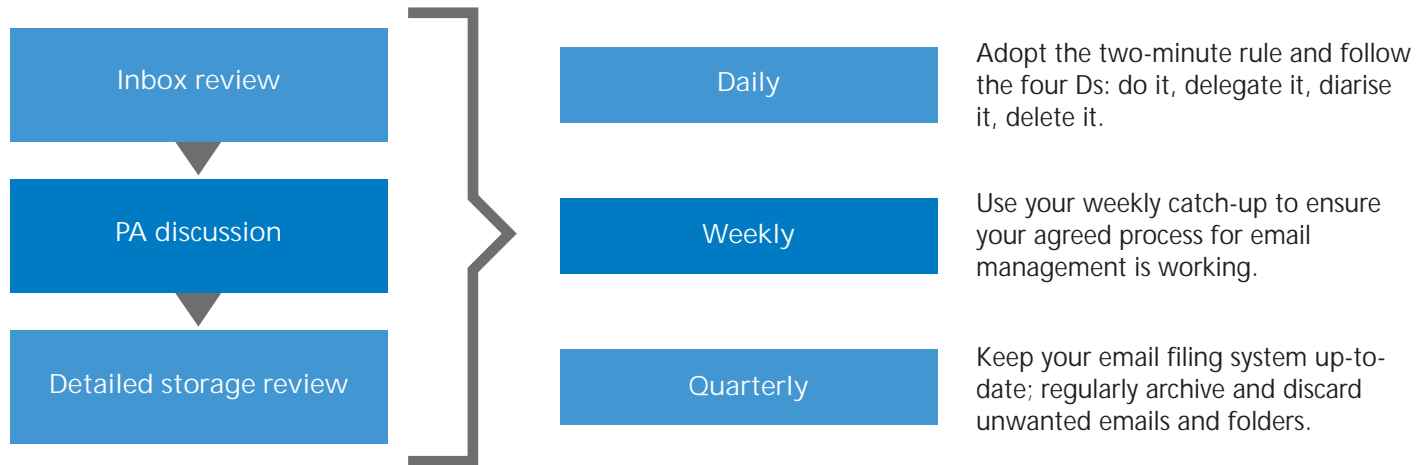


Agree the process for dealing with incoming emails

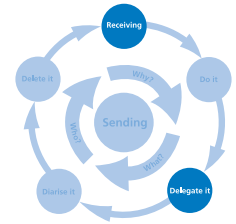
Agree the folder structure



Maintaining an effective email management system



Additional help and support in managing emails can be found in the Workload Management module.



Setting up an effective email filing system

It is vital to set up an email filing system that is simple and easy to use by both leader and PA. You may want to consider the example below.

Folders should be simply named for easy recall

Regularly review both file names and content and delete anything irrelevant

Use an @ sign at the beginning of the folder name to bring it to the top of your list

Set up an @ACTIONS folder for any items you cannot respond to in the two-minute rule.

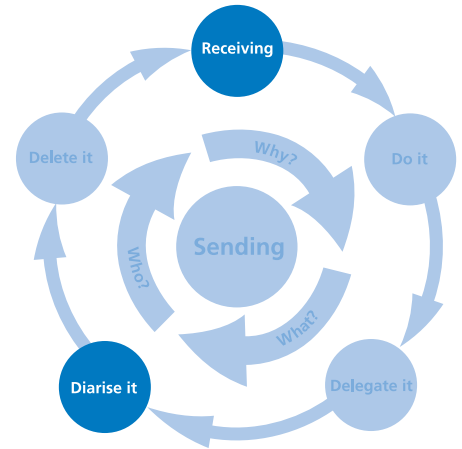
Create folders for key colleagues to store follow-up emails

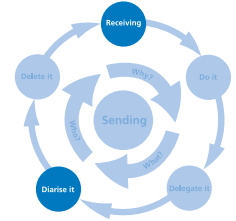
Receiving: diarise it

Set time aside to deal with emails that fall outside the two-minute rule.

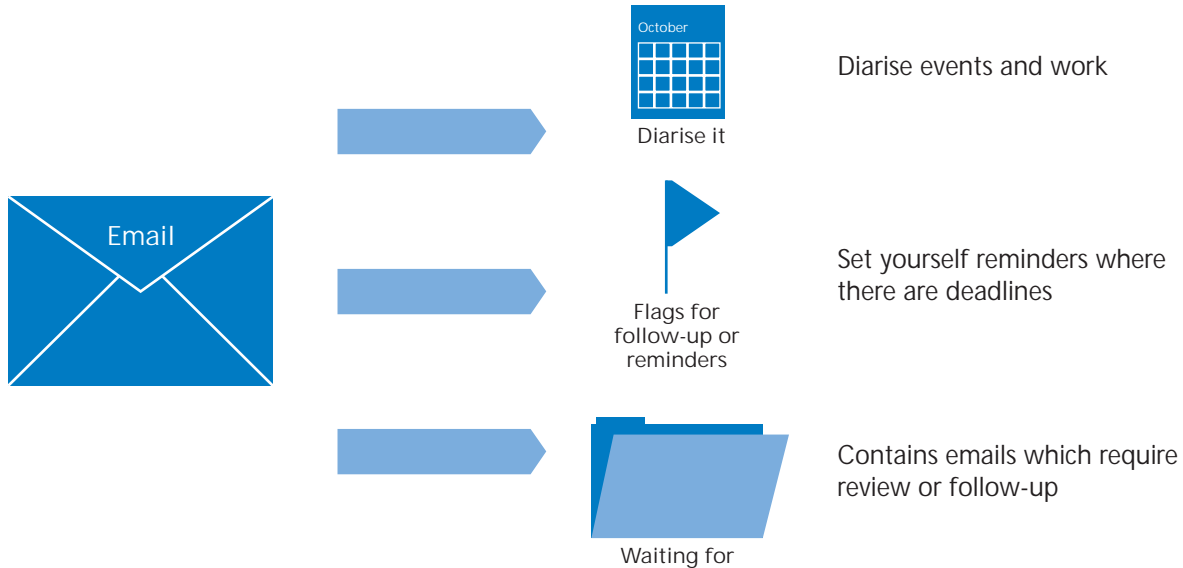
Set yourself reminders where there are deadlines

Schedule time to deal with emails as part of your working week

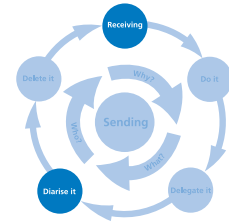




Reminders for future actions



Do not use your inbox as a storage facility

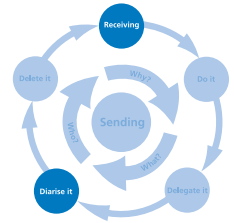


How to attach an email into your calendar

Select the email you want to put a reminder on and drag into the relevant time and date in your calendar. A calendar item will then be created with the email embedded within it (see page opposite).

Alternatively:

- in your inbox, highlight the relevant email
- go to edit/copy
- go to your calendar and select the relevant date and time
- paste email in at the bottom of the calendar entry
- complete subject line and timings.



Shortlisting of tenders - Appointment

File Edit View Insert Format Tools Actions Help

Save and Close Recurrence... Invite Attendees

Appointment: **Scheduling**

Subject: Shortlisting of tenders

Location:

Start time: Wed 19/11/2008 09:00 All day event

End time: Wed 19/11/2008 11:00

Reminder: 15 minutes Show time as: Busy

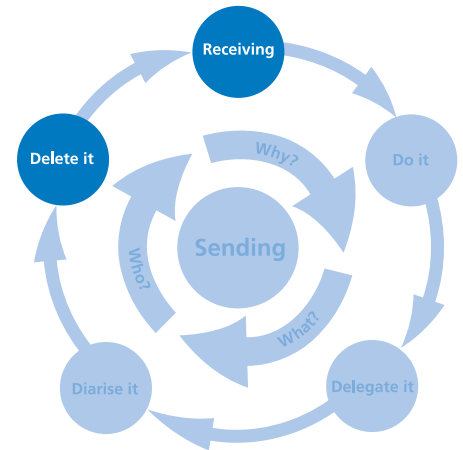
Tender
Tenders for review

Receiving: delete it

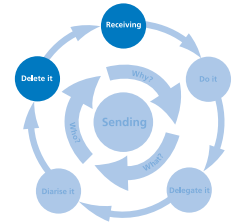
Only keep emails you need or may need to refer to in future.

Delete unwanted emails and file remaining items

Archive regularly to keep your IT server healthy



By regular purging of unwanted emails you will find what you are looking for more easily!



Processing your emails is key to maintaining a manageable inbox

You have two options for an actioned email:

Delete



or

File

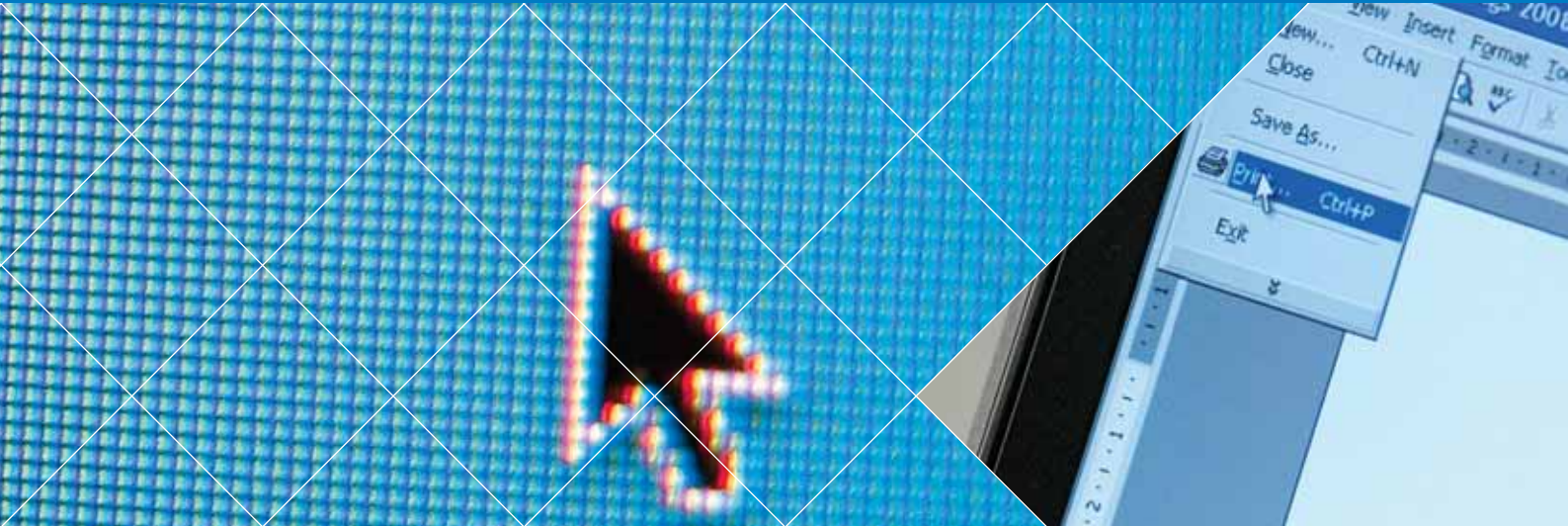


Don't forget to archive regularly.

This will create a copy of your emails and folders on the server freeing up valuable space in your inbox.

Email critique exercise

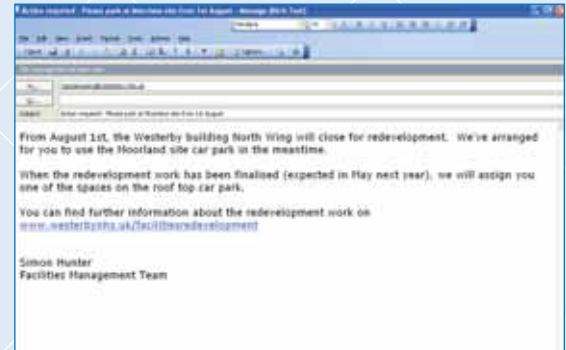
- This exercise will be provided by the facilitator at your Email Management session or can be accessed online at www.institute.nhs.uk/productiveleader in the resources section



Email critique exercise

Spent five minutes working through the email examples

Then spend five minutes providing feedback on the examples



Next steps

- Easy-to-implement technical aids
- Examples of email management team improvement plans



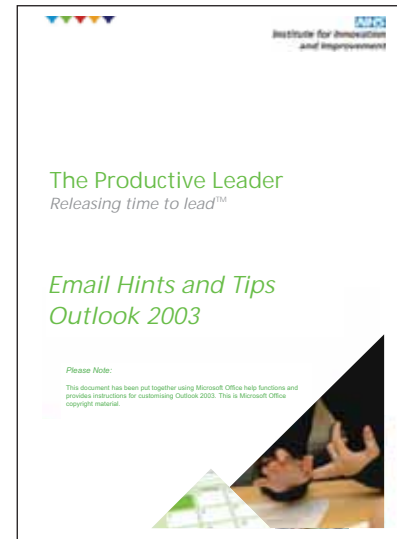
Email system training

There are many easy-to-implement technical aids you can employ to support best practice. Your IT team can provide email system training, alternatively you can download the Outlook Email Hints and Tips document from www.institute.nhs.uk/productiveleader

Simple hints and tips* including:

- create folders to file emails
- use flags for follow up
- use 'out of office' messages
- use the signature block for template response
- use colours to highlight important incoming emails
- create rules to file new emails
- create a calendar/task list reminder from an email
- use voting buttons to gain consensus
- set expiry dates on emails
- use short cut keys, ie Ctrl+N.

* Based on Outlook 2003. The email system training will be based on the organisation's email system.



Example of an email management team improvement plan

Aim

Always have a clear subject line, with action, purpose and timescales if required

Only use 'reply to all' where necessary

Reduce the number of emails that are copied

Use shared drives for circulation of documents

Agree responsibility for managing emails between leader and PA

Undertake email system training

Measurement

Audit of emails

Qualitative feedback

Number of emails sent and received

Number of emails sent and received

Number of attachments

Time spent managing emails

Uptake of training by team

Example section of email management team improvement plan – Stockport NHS Foundation Trust

Aim

Ensure that all emails sent have a clear subject line with clearly stated actions and timescales using the subject line action indicators:

- action required
physical action required, ie fill in form
 - response required
no action required but response is needed
 - for information
no response or action required
-

Ensure that all emails sent have a clear, stated action with timescales and owners within the body of the email

Ensure that meetings materials for executive team meeting are uploaded onto the shared drive for easy access rather than emailing

Measurement

Total number of emails sent

Number of emails sent with a clear subject line

Total number of emails sent

Number of emails that have a clear, stated action

Number of attachments sent out for the weekly executive team meeting

Develop your email management team improvement plan

Aim

Measurement

