

Communicating in the Workplace

Administrative Accounting and Bookkeeping Program

Handout: Taking Control of Email

Email *is* one of the greatest communication tools ever invented. It's universally available, incredibly easy to use, automatically preserves a written record, can be sent to an individual or a group, and can connect you instantly to almost anyone, anywhere on the planet. That's amazing. Putting such a powerful tool in the hands of so many makes email a miracle technology.

Why then, has an overflowing inbox become a major blight of modern life? Why does the incessant flow of emails provoke such a deep, burning rage in the hearts of so many? These problems, however, aren't the fault of email — which is just a tool. They are caused by how we use it. The problem, in other words, is us.

Email Is an Asynchronous, Written Channel

The main thing we get wrong with email is not understanding how it works as an *asynchronous* communications channel. That is, sender and receiver are not both connected to it at the same time. In consequence, a sender fires off email messages whenever it is convenient to them. These are delivered to the receiver's inbox almost immediately — whether it's a good time for them or not. In consequence, the receiver may answer immediately, whether they're sitting at their computer, or not for days, if they're travelling or on holiday.

A terrible response to this is that many offices put an expectation on their employees that they stay connected to email and available to answer messages almost all the time. The constant interruptions this creates make it almost impossible to get any real work done. But it's the only way to make email work for messages that require a quick answer, or group feedback.

I believe the better response to email's asynchronous nature is to accept that it is not a good communication channel for certain types of messages.

The Problems with Email

Email is the Wrong Tool for Discussions

To start, the fact that you can quickly send a message to a whole distribution list, tempts too many users to use group emails for asking the following:

- Open-ended questions,
- Brainstorming,
- Group discussions,
- Setting a meeting time, or
- Finding a team consensus on other types of decisions.

The asynchronous nature of email makes it absolutely the worst channel for all of these — or any sort of communication that requires a back-and-forth conversation. The varying amounts of time each recipient takes to respond soon sows chaos as their replies become hopelessly scrambled and out of order. These group emails soon turn into giant hairballs of interleaved messages, a problem is made worse by email's generally poor handling of interleaved message threads. In consequence, the victims of these attempts at email collaboration waste far too much of their time working through a chain of messages in often futile attempts to find out whether a decision was ever reached. All to reach produce a decision or get an answer that would have taken five–ten minutes in a face-to-face meeting.

Email is the Wrong Tool for Project or Task Tracking

As an asynchronous tool, email is also a terrible way to track the progress of projects or tasks. Such information needs to be a reference that's always available for the entire team to check at any time, not something that comes into the Inbox at random times and disappears in the stream of more recently arrived messages. Trying to send updates by email will just have your team wasting time searching up and down their Inboxes as they wonder which message is the latest update and which has been superseded.

Email is the Wrong Tool for Reference Material

Email is also absolutely the wrong tool for holding reference material — for similar reasons to why it's so bad for project and task tracking. Yet, the fact that so much *stuff* arrives by email, combined with it automatically preserving a written record (for forever, if

you want) makes it far too tempting to turn email into a reference library. When a message signature block includes someone's phone number, for example, I've seen too many people hang onto it — just in case they need that number someday.

Email is just not designed to make this information easily retrievable, and using it for such contributes to those overstuffed inboxes you see with hundreds (if not thousands) of orphaned messages. Even if you attempt to create some additional folders to organize this, the result is a mess in which it's almost impossible to find anything. Some of my saddest minutes have been spent watching my staff trying to retrieve a needed phone number as they frantically searched through thousands of old Inbox messages.

Obviously, there are better places, to hold properly organized reference information (see below).

We Don't Respect Email as a Written Channel

One of the great strengths of email is that it automatically preserves a written record of your correspondence. This has tremendous value when you're sending follow-up messages to verbal agreements or meeting minutes and records of decisions. However, even when email is the appropriate channel, its speed and ease of use too frequently tempts us to treat it as a form of instant communication. This mentality that an email should only take a few seconds (or minutes, at most) to dash off is intensified by the pressure imposed by the weight of too many messages. Yet, the asynchronous nature of email quickly turns an unclear message into one of those dysfunctional discussion threads described above. This both clutters up your inbox and takes way more time than composing a properly clear message in the first place would have done.

I've seen far too many attempts to set up a routine meeting go something like this:

- **SENDER:** "We don't need the whole team to discuss the event menu. As the facility liaison, maybe just the two of us could sort it out face-to-face?"
- **YOU:** "Sure, when do they want to do meet?"
- **SENDER:** "Any time's good for me."
- **YOU:** "Okay, how about tomorrow at 3:00p?"
- **SENDER:** "Oh, sorry, that won't work for me. I'm leaving early tomorrow."

As this point, you realize you're five messages in and still haven't sorted out a meeting time. Worse, because the SENDER was too thoughtless to include a workable

suggestion in their last message, you're no closer to setting up a meeting than you were at the beginning. And, thanks to the asynchronous nature of email, this so far useless exchange might well have taken a day or two to reach this stage (depending upon how plugged in each of you have been). Not only is that a lot of your time wasted, it means that setting up this meeting has remained an undone task (what David Allen calls an "open loop") gnawing at your attention and sapping your available energy for the whole time.

Far better to have taken five minutes to send a proper message in the first place. Then the thread looks like this:

- **SENDER:** "We don't need the entire team to discuss the event menu. As the facility liaison, maybe just the two of us could sort it out face-to-face? Shouldn't take more than fifteen minutes. If you're agreeable, I'm available to meet in your office at the following times:
 - Tomorrow (Wednesday) at 2:00p;
 - Thursday at 1:00p; or
 - Thursday at 4:00p."
- **YOU:** "Totally agree. Thursday at 1:00p works for me. And, since I'm hosting, I'll bring the coffee!"

Done! When you take the time to draft a clear, concise, and *complete* message, you save time in the long run.

Finally, We Let Email be the Boss of Us

Messages don't just hit our inboxes at random times dictated by the sender. Email speed and ease of use also fools us into thinking it's a suitable channel for all kinds of quick messages that don't require a written record: asking simple questions, proposing meeting times and confirming attendance (when you're soon going to see the recipient in person), asking unnecessary questions, etc. It's far too easy to hunt and peck a few words and click "Send" to fire off a message. This misuse for trivial matters means that most office workers are inundated by a flood (horde, flock, multitude) of unimportant and unnecessary messages.

Worse, the speed of email means it's often used for urgent messages, and so an expectation has developed that messages will be answered almost immediately — putting a gigantic burden on the receiver. This idea that you should constantly monitor

your email — staying plugged into the “hyperactive hive mind”, as Cal Newport puts it — has made the repeated “dings” of incoming message alerts one of the most annoying features of modern office life (and one of the most destructive to team productivity). In essence, by staying plugged in, we’ve turned control of our schedule to all the random correspondents hitting our Inbox — we’ve let email become the boss of us.

Modern neuroscience has revealed how destructive this constant distraction is for any real productivity, and the horrifying amount of time any interruptions costs before you can fully switch back to your previous task. Two of their findings are especially relevant here:

- The fatigue cost of making decisions means we have a limited daily capacity for deep, focussed work; and
- The cost of context switching, away from and back to a task whenever you’re interrupted, is *enormous*.

The Solution to Email

Once you can see the problems caused by using email for the wrong things, the solutions become obvious. Unfortunately, you can’t control how your larger organization uses (or misuses) email, but you can lobby it to adopt better practices. And, meanwhile, you can set a sane email policy for any staff you supervise. Given how other departments and other organizations will continue to (mis)use email, the result won’t be perfect, but it should make their lives easier. The following is, I think, a good starting point for a sane office policy on email use.

Don’t Use Email for Asynchronous Communications

If possible, never use email for the following:

- Back and forth discussions and open-ended questions.
- Brainstorming or team collaboration.
- Project or task tracking.
- Emergency messages that need to be answered immediately.

Instead, synchronous communications channels are better for these:

- **Use team meetings, phone calls or office hours for discussions.**

- **Use regular team and other meetings for collaboration (face-to-face or Zoom).**
- **Use project boards, and shared documents for project and task tracking.**
- **Use telephone, text, or face-to-face office visit for emergencies.**

Minimize Email for Routine Messages

The use of email for quick, routine messages should be minimized, when possible. For example:

- **Use a shared calendar for making and confirming meetings and appointments.**
- **Alternately, use quick office visits, face-to-face meetings, and phone calls for making and confirming meetings and appointments.**
- **Use text, telephone, or face-to-face conversations for quick or routine questions.**
- **Use office hours for routine discussions and check-ins.**

Do Not Use Email as Your Reference System

Whenever reference material arrives by email, copy it into the appropriate reference system and delete the email (unless it's needed for other purposes). Appropriate reference systems include:

- **Use an address book for contact information (addresses, phone numbers, birthdays, notes on spouses, etc).**
- **Use a calendar for appointments and events.**
- **Use task list or status board for personal tasks, follow-ups, etc.**

Do Use Email Appropriately

As a channel that connects everyone in the organization and automatically preserves a written copy of all correspondence, email should primarily be used for the following:

- **Use email for one-way communication (such as announcements and sending document attachments).**
- **Use email for written follow-ups to confirm decisions made verbally (such as meeting minutes and records of decisions).**

- **Use email for logistical coordination when you won't have a chance to coordinate face-to-face in the near future.**
- **Use email for sending meeting agendas and minutes.**
- **Use email for quick status updates.**
- **Use email for simple, non-urgent questions.**

Note: Take the time to draft all emails as carefully as a formal, written communication channel deserves. That is, ensure they are clear, concise, and *complete*.

Email Expectations

When email is used appropriately, it's possible to set reasonable expectations for its use:

- The receiver has up to 24 hours to reply to any email before it is considered overdue.
- But, all email will be answered within 24 hours (send an interim reply if necessary).
- Don't look at email before 10:00 (don't even open the email app).
- Have a couple of set times a day to batch process email.
- Turn off all dings, badges, notifications in your email app.
- Have a trusted system to store all the stuff that doesn't belong in email (addresses, appointments, etc).

Don't Let Email Be the Boss of You

If the costs in lost productivity are so great, why do we ever let email be the boss of us? I think a lot of us have a shameful little secret that letting email take charge is an easy way to plan our day when we're running low on energy. Every decision we make takes a certain amount of mental energy and, for knowledge workers, that starts with deciding what to do each day. If you're working on many projects, some of which have become alligators snapping at your ankles, it can be difficult to set priorities.

It's much easier, then, to turn to your email inbox and start working through it from top to bottom. No decisions to make — just the satisfaction of clearing out a bunch of messages. Of course, the problem is that you've just put the senders of those messages — people you may not even know, and who certainly don't know your priorities — in

charge of your schedule. So, there's a good chance you're spending your time on email that has nothing to do with your priorities. Meanwhile, those alligators are reaching for your knees.

A more productive way to overcome decision fatigue, that works for many, is time blocking. That is, organizing your daily schedule around a standard set of time blocks. These define what you'll do in each block, automating the decision about what to do next as much as possible. And, consigning email to a couple of fixed blocks, isolates it from your time for focussed work. Here's a generic set of time blocks I found useful as a starting point for my routine:

- 08:00–09:30: FOCUSSED WORK
- 09:30–10:00: BREAK (Go Outside)
- 10:00–11:30: FOCUSSED WORK
- 11:30–12:30: BATCH PROCESS EMAIL
- 12:30–1:30p: LUNCH
- 1:30–2:30p: MEETINGS
- 2:30–3:00p: PHONE CALLS; MEETING FOLLOW UP
- 3:00–3:30p: BATCH PROCESS EMAIL
- 3:30–4:00p: STAFF CHECK INS; OFFICE HOURS

Email Tips

The biggest problem with email is its use for things that aren't email. Once you've climbed that strategic hill, here are some tactical tips for better email use.

Treat Email as a Written Channel

That is:

- Include a salutation and a subject block.
- Write grammatically and with correct spelling.
- Respect the rules of written business communications.

Write Clear Subject Lines (And Edit Them on Replies!)

- Don't use "meeting" as a subject.

- You can edit the subject line on your replies to clarify any added content (Square Brackets).

Likewise, you can type SNIP in your replies and delete anything below to keep replies under control

Don't Let Your Inbox Pile Up

Inbox Zero an arbitrary and often unobtainable ideal, but an inbox with hundreds of messages is an unacceptable source of stress. Triage it with this system:

- Delete spam and routine notices you won't act on (UNSUBSCRIBE).
- Answer routine questions or matters you can answer in two minutes or less.
- Forward tasks that are meant for another person.
- Work on remaining email with rest of session.

(Be bold about deleting: routine emails you've dealt with; all the messages in a thread, save the last one...)

Have a Filing System

You only need three folders:

- WAITING: drag sent messages here that need a reply, or messages you can't act on yet.
- REPLY TO: messages you need to reply to but don't have time right now.
- ARCHIVE: messages for the record that have been dealt with.
- (No need for project folders with efficacy of search).

(I do create temporary project folders to separate and event while it's generating a lot of traffic, deleting and archiving messages as appropriate once it's over.)

Don't Email After Hours (It's Rude)

- Save as Draft until working hours.
(Use "Send Later" if your email program has this feature.)

Reply / Acknowledge ALL Action Emails

- Even if only with a simple, "will do".

- A thumbs up response is increasingly becoming a way to provide this.

Send Acknowledgements for Deeds Received

- This can be done quickly with keyboard shortcuts.

Send an Interim Reply if You Can't Answer Right Away

- Admit you can't answer now and will follow up within so many days.

Don't email angry

- An absolute rule!

Use a Proper Signature Block

- Don't include graphics, if your company's standard allows.