

Process and Organize Your Email to Increase Productivity

Contributed by Sally Mc Ghee, McGhee Productivity Solutions

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From: the Boss@ourcompany.com

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Subject: Email & Productivity

As president of a 45-person structural engineering firm, I receive over 50 emails a day. Most of these are legitimate e-mails, as our spam filter does a pretty good job of stopping the junk mail. I typically spend at least an hour a day responding to the emails. We ran across this article on a Microsoft® website and thought it was worth sharing.

Do you have an effective way to process and organize your e-mail so that you get to an empty Inbox on a routine basis? If you have lots of e-mail in your Inbox, you might want to re-think your processing methods.

No doubt you've opened e-mail messages and thought, "Hmmm, not sure what to do with this. I'll deal with it later!" — and promptly closed the message. If you do this over and over again, it doesn't take long to end up with several hundred messages in your Inbox. Developing a new approach to processing your Inbox helps you gain more control, improve your response time, and keep up with critical actions and due dates.

Success Factors for Processing and Organizing Your E-Mail

There are four key factors to help you process your e-mail more efficiently:

- A simple and effective e-mail reference system
- Uninterrupted time to process e-mail
- A methodical system for processing items
- The "Four D's for Decision Making" model

Set Up A Simple and Effective E-Mail Reference System

The first step toward an organized Inbox is understanding the difference between **reference information** and **action information**.

- **Reference information** is information that is not required in order to complete an action; it is information that you want to keep in case you need it later.
- **Action information** is information you must have in order to complete an action.

Most people receive a lot of reference information through e-mail. Having a system that enables you to quickly transfer messages into your e-mail reference system is essential. As engineers, you probably

need to set up project folders for meeting minutes, drawings, and other important project information. You should immediately save relevant attachments in your e-mail to these project files on the server.

Schedule Uninterrupted Time to Process and Organize E-Mail

How many interruptions do you experience each day? It's nearly impossible to complete anything when you allow constant interruptions. Therefore, you must set aside time to process and organize your e-mail.

Establish a regular time

Establish a regular time each day to process e-mail. Many e-mail messages require you to make a decision. Good decisions require focus, and focus requires uninterrupted attention. When you do the bulk of your processing during your scheduled e-mail processing time and not randomly throughout the day, you're a lot more able to focus.

Find a time when you're least likely to be interrupted or get meeting requests. Book yourself a recurring appointment for an hour a day to process e-mail, and mark it as "busy." During this time don't answer the phone or take interruptions, and work only on processing your Inbox. People find they are much more productive in achieving their objectives, like completing design work, when they are not jumping back and forth answering e-mail throughout the day.

Keeping these appointments takes discipline, but over time it becomes habit. Once you get to zero e-mail in your Inbox, you'll stick to it like glue.

A methodical system for processing items

When you process your e-mail, the first step is to sort it in the order in which you want to

process it. For example, you can filter by date, subject, or person.

Begin at the beginning

Resist the temptation to jump around in your Inbox in no particular order. Begin processing with the message at the top of your Inbox and only move on after you've handled it first.

The MPS "Four D's for Decision Making™" Model

The "Four D's for Decision Making" model (4 D's) is a valuable tool for processing e-mail, helping you to quickly decide what action to take with each item and how to remove it from the Inbox. It allows you to handle each e-mail message only once before taking action. Under the 4 D's model, you have four choices:

1. Delete it
2. Do it
3. Delegate it
4. Defer it

Delete It

Statistics suggest that about 50% of what you receive you can delete. You may be hesitant to delete messages for fear you might need them at some point. That's understandable, but honestly: What percentage of information that you've kept do you actually use?

Use the questions below to help you make more effective decisions about what to keep and what to delete.

1. Does the message relate to a meaningful objective you're currently working on? If not, you can probably **delete it**. Why hang on to information that doesn't relate to your main focus?
2. Does the message contain information you can find elsewhere (for example, on an internal or external Web site or another network resource)? If so, **delete it**.
3. Does the message contain information that you will refer to within the next six months? If not, **delete it**.
4. Does the message contain information that you're required to keep (for example, legal or human resources information that relates to your company)? If not, **delete it**.

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Do It

(in less than two minutes)

If you can't *delete it*, you need to answer the questions, "What specific action do I need to take?" and "Can I **do it** in less than two minutes?" If you can, just **do it**.

You'll be amazed at what you can accomplish in less than two minutes. You can file the message, you can respond to the message, and you can make a phone call.

Delegate It

If you can't *delete it* or *do it* in two minutes or less, ask yourself, "Can I **delegate it**?" Statistics confirm that, on average, 10% of your e-mail messages can be delegated, but people often forget to ask that question and miss opportunities to delegate actions.

If you can **delegate it**, do it now. Try to compose and send the delegation in less than two minutes. If it takes a bit longer, that's okay. The key is asking yourself if you can **delegate it** to ensure you are using your time wisely.

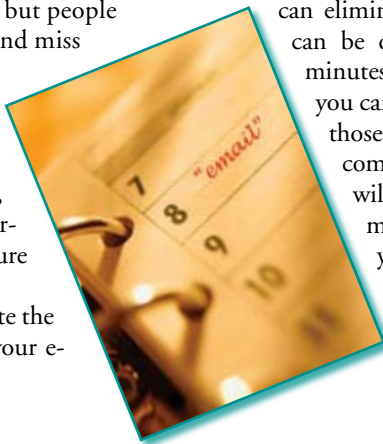
Once you have delegated it, delete the original message or move it into your e-mail reference system.

Defer It

If you cannot *delete it*, *do it*, or *delegate it*, then the action required is something only you can accomplish and will take more than two minutes. Because this is your dedicated e-mail processing time, you need to **defer it**.

Some e-mail processing software allows you to **defer it** by moving message into a task list. If you know you need to respond to the message in the next couple of days and it will take 30 minutes, turn the message directly into an appointment.

When you **delete** the items you can eliminate, **do** the items that can be done in less than two minutes, and **delegate** what you can, you end up with only those items that you need to complete yourself and that will require more than two minutes. At this point, you can prioritize that list and then schedule time to ensure the priorities get done.



Do It Daily

On average, you can process 60 e-mail messages an hour. If you receive 30 to 60 messages per day, all you need is one hour of uninterrupted e-mail processing time to get through your Inbox.

Of course, if you have a backlog of hundreds of messages, it will take some time to get to the point where daily routine keeps you up to date. But it's important to get that backlog down, so set aside some time to work through it — and then begin using your new technique from a clean slate.

Book yourself an hour of e-mail time a day and use the 4 D's. It can transform your Inbox and help create better work-life balance.

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Comments

After reading this, I realized that sometimes you may not immediately force yourself to delete information as you think you may need it later. If it is really important, make sure you delegate it, defer it by turning it into a task or appointment or save it to a project folder. Transfer the remaining mail to a temporary folder. Then every two weeks delete everything in the temporary folder that is older than two weeks. One phone call could also eliminate the constant e-mailing back and forth. When information needs to be exchanged, coupled with questions and/or brainstorming, speaking directly with an individual can save valuable time as well as promote a good one-on-one working relationship.

Introduction and comments are written by Steven E. Schaefer, P.E.

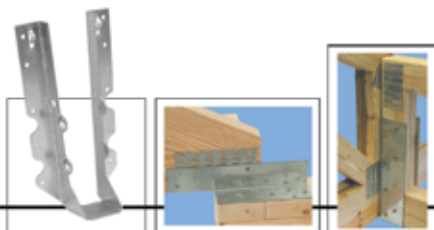
Mr. Schaefer is president of Steven Schaefer Associates, Inc., of Cincinnati, Ohio, and a member of the STRUCTURE® magazine Editorial Board.

Sally McGhee, a recognized thought leader and innovator in the field of productivity management, has trained thousands of people in the corporate environment. She has 25 years experience as a consultant and an executive coach, and is the founder and managing partner of McGhee Productivity Solutions (info@mcgheeproductivity.com, www.mcgheeproductivity.com).

Ms. McGhee's book, Take Back Your Life! Using Microsoft Outlook to Get Organized and Stay Organized, is available from amazon.com and other bookstores. Outlook® is a registered trademark of the Microsoft® Corporation.

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