Managing Time and Priorities

Presentation for The Academic Steering Committee

June 23, 2008
Dost thou love Life? Then do not squander Time:
For that’s the Stuff Life is made of.
--Benjamin Franklin
Change Your Approach, Change Your Results

To accomplish True Change Requires Significant Paradigm Shifts
I Can Tell You What Your Real Priorities are if You’ll Show Me Two Key Pieces of Information
Some Beliefs That Limit Productivity

1. There’s too much information coming at me too fast.
2. I get too many interruptions.
3. I don’t have the discipline to be organized.
4. I have to keep everything.
5. I can’t find what I need when I need it.
6. It takes too much time to get organized.
7. Organization cramps my freedom and creativity.
8. I’m no good with technology.
9. There’s not enough time in the day.
10. I’m not organized by nature.
We Form Our Own Beliefs About What is Possible and Impossible

Actions
Feelings
Behavior
Abilities

Area-of-the-Possible
Area-of-the-Impossible
We Must Expand Our Belief of What is Possible
The greatest revolution of our generation is the discovery that human beings, by changing the inner attitudes of their minds, can change the outer aspects of their lives.

--William James
Small things done consistently in strategic places create major impact.

For example, if every time you open an e-mail you make a decision about what to do with it and Where to put it, you can immediately remove it from the Inbox and dramatically reduce your e-mail volume.
Time as a Resource

- The Broader Contexts of Time Management
- Model for Illustrating the only Two Ways to Save Time
- Using Technology as a Tool for effective time management
- It’s Not about the Technology!!!
  - It’s about creating a Paradigm or a System that makes you more productive as a human being
Quadrant II Time Management

**Quadrant I**
*Important and Urgent*
- Crises
- Pressing Problems
- Deadline-driven projects

**Quadrant II**
*Important and Not Urgent*
- Preparation
- Crisis Prevention
- Values Clarification
- Planning
- Relationship Building

**Quadrant III**
*Not Important and Urgent*
- Interruptions, some phone calls
- Mail, some reports
- Many pressing activities

**Quadrant IV**
*Not Important and Not Urgent*
- Trivia, busy work
- Some mail
- Some phone calls
- Time wasters
- Many pleasant activities
### Results of Operating in the Respective Quadrants

**Quadrant I Results**
- Stress
- Burnout
- Crisis Management

**Quadrant II Results**
- Vision, perspective
- Discipline
- Balance
- Control, few crises

**Quadrant III Results**
- Short-term focus
- Crisis management
- See goals & plans as worthless
- Feel victimized

**Quadrant IV Results**
- Total irresponsibility
- Fired from jobs
- Dependent on others or institutions for basics
Definition of Time

Time is the occurrence of events in sequence one after the other.

- Albert Einstein
Our Goal Should Be To

Get out of the **reactive** mode
and into the **proactive** mode
A Natural Law

The appropriate control of events
initiates
a feeling of inner peace
The Basic Element of Time

The Basic element of time is an event.

The key to managing time is event control.
Effective Habits

Internalized principles and patterns of behavior

Knowledge
(what to, why to)

Skills
(how to)

Desire
(want to)

HABITS
Og Mandino—An Example of How Changing One’s Habits Can Change One’s Life

I will form good Habits and Become their Slave.
--Og Mandino
Old Proverb

The more you do of what you’re doing, the more you’ll get of what you’ve got.

Knowledge  
(what to, why to)

Desire  
(want to)

Skills  
(how to)

HABITS
The Perspective of the Week

Normal View
(The Weekly Perspective)
- Urgency
- with Long-term Importance
- Felt needs
- with Fundamental Needs
- Tasks and Activities
- with Direction
- Next Steps
- With Big Picture

Close-up View
(The Daily Perspective)
- Urgency
- Felt needs
- Tasks and Activities
- Next Steps

Wide-Angle View
(Vision and Mission)
- Long-term Importance
- Felt needs
- Fundamental Needs
- Direction
- Big Picture

Normal View
(The Weekly Perspective)
- Urgency
- with Long-term Importance
- Felt needs
- with Fundamental Needs
- Tasks and Activities
- with Direction
- Next Steps
- With Big Picture
A Model for Managing Time and Priorities
Model for Illustrating the Only Two Ways to Save Time

You can save time by:

**Doing Less**
1. Delegate
2. Say No

**Working Smarter**
1. Filter Out Interruptions
2. Set Priorities
3. Develop a Paper Flow System
4. Use New Technological Tools
The Pareto Principle

- Named after the 19th century Italian Economist and Sociologist, Vilfredo Pareto

- **STATES:**
  - The significant items in a given group normally constitute a relatively small proportion of the total items in the group.

- The terms **VITAL FEW** and **TRIVIAL MANY** extend the Pareto Principle to a great variety of life’s situations.
The Pareto Principle Illustrated

The “Trivial Many” situations or problems:
- 80% of the time expended

The “Vital Few” situations or problems:
- 20% of the time expended

produces

20% of the results

produces

80% of the results
The Myth of Efficiency

• It is important to avoid overstressing efficiency and neglecting the careful selection of areas which efficiency ought to be sought.

• The *MYTH OF EFFICIENCY* lies in the assumption that the most efficient manager is *IPSO FACTO* the most effective.

• The most efficient manager working on the wrong task will *not* be effective.
“The important task rarely must be done today, or even this week. The urgent task calls for instant action. The momentary appeal of these tasks seems irresistible and they devour our energy. But in the light of time’s perspective their deceptive prominence fades. With a sense of loss we recall the important tasks pushed aside. We realize we’ve become slaves to the tyranny of the urgent.” -- Charles Hummel
Urgent vs. Important

In a word:

- That which is *IMPORTANT* is seldom *URGENT*.

- That which is *URGENT* is seldom *IMPORTANT*.
The T R A F Method

- **Toss**—No interest? Out
- **Refer**—Of interest to “X”? Pop it over
- **Act**—Wish to go? Send in the form. Too early to decide/ “Resurface” the brochure in a month or two (using a “Pop-Up” or “Tickler” File)
- **File**—Maybe you collect sample brochures? File it.
Developing a Paper-Flow System*

First, convince yourself that there are only three kinds of paper

- Action--Immediate
- Action—Pending (Tickler System)
- Read and Distribute or Toss

*More on electronic “paper” later—but there are many analogies to virtual paper.
What is Personal Productivity?
What is Personal Productivity?

- Defining Personal Productivity
- The Cycle of Productivity
  - Step One: Identifying Meaningful Objectives
  - Step Two: Creating Strategic Next Actions
  - Step Three: Scheduling and Completing Strategic Next Actions
  - Step Four: Review and Acknowledging Progress Toward Objectives
- Introducing the Organizational Hierarchy Model
  - Keeping Your Focus—four questions
- Introducing the Integrated Management System (IMS Model)
  - The Collecting System
  - The Reference System
  - The Action System
  - Introducing the “ControlPanel”
Definition of Personal Productivity

- Completing strategic actions that link to meaningful objectives
The Cycle of Productivity demonstrates how to increase productivity.
Keeping Our Focus—Four Questions

1. What are your meaningful objectives?
2. What are your Strategic Next Actions?
3. When will you get them done?
4. Where will you get them done?
Introducing the Integrated Management System

- The Collecting System
- The Reference System
- The Action System
The Collecting System

- A series of *approved Collecting Points* where you and others place your commitments and communications.
The Reference System

- The Reference System enables you to track information that does not require action, but that you want to keep to access later.

- You’ll store this type of reference information in
  - Contacts or in folders you create in the Folder List in Outlook
  - In your Windows My Documents folder
The Action System

- The Action System will track any information that requires you to take an action, e.g.,
  - Your Meaningful Objectives,
  - Supporting Projects
  - 1:1 Meetings, and
  - Strategic Next Actions (SNA’s)
- You will track this type of action information in the Microsoft Outlook Task list and Calendar
The IMS Consists of Three Systems

Collecting System

E-mail, Voice Mail, Inbox, Notebook, Task List

Reference System

Personal Folders
My Documents
SharePoint
Contacts

Action System

Calendar
TaskPad
Introducing the “ControlPanel”

- After you Integrated Management System is set up in Outlook, the *ControlPanel* is the quickest way to see an overview of your Action and Reference Systems.
- The *ControlPanel* is a particular arrangement of panes that you create in the Outlook window—next slide.
- The *ControlPanel* gives you immediate access to multiple pieces of information that support your productivity.
The “ControlPanel”

- Much like the dashboard of a car, which shows you how fast you are driving, how much gas is left, what direction you’re going, and what time it is, the *ControlPanel* in your IMS gives you an overview of how well you’re meeting your objectives.
The Control Panel Provides A Central Location for All of Your Commitments and Agreements

The Reference System

The Action System

- Identify Meaningful Objectives
- Review and course correct
- Create Strategic Next Actions
- Schedule and complete Strategic Next Actions

The Action System

- Identify Meaningful Objectives
- Review and correct
- Create Strategic Next Actions
- Schedule and complete Strategic Next Actions

The Reference System

- Identify Meaningful Objectives
- Review and correct
- Create Strategic Next Actions
- Schedule and complete Strategic Next Actions
The Three Phases for Creating an Integrated Management System

- Phase 1: Collecting
  - Is Your Head a Collecting Point

- Phase 2: Processing and Organizing
  - Introducing the Workflow Diagram

- Phase 3: Prioritizing and Planning
  - Introducing the Weekly Review

- Focusing on Small Things First
The Three Phases for Creating an Integrated Management System (IMS)

Phase 1: Collecting

Phase 2: Processing and Organizing

Phase 3: Prioritizing and Planning

The Three Phases for Creating an Integrated Management System
Question?

“How many Collecting Points (buckets) do you have?”
Answer

- Most people typically say four to six.
- However, after closer scrutiny, it is really like 25 to 30!
Which “Buckets” are the Most Useful?

- By deciding which buckets are the most useful and practical, you can consolidate your 25 to 30 categories down to 5 to 10.
- The result is a Collecting System that will help simplify your life and ensure that you’re capturing everything you need.
Setting Up Your Approved Collecting Points

- Identifying Your Current Collecting Points
  - Where Do You Really Store Your Information?
  - Are Your Collecting Points Working?
  - Identifying Approved Collecting Points

- You Are Not a Collecting Point!
Where Do You Really Store Information?

Where are you currently capturing your commitments and agreements?
Identifying Approved Collecting Points

The Collecting System shows how to funnel your information into five approved Collecting Points.
Basic Suggested Collecting Points

- A paper inbox and/or a portable paper inbox for the road
- A paper note pad and/or digital note pad
- Voice mail
- The Microsoft Outlook Task list
- E-mail
Taking Advantage of the Outlook Task List

- The Outlook Task list, and specifically the *Categories: (none)* category, is an ideal Collecting Point for capturing to-do's from your head, and actions from conference calls and voice mail.
Categories (none) in the Outlook Task List is an Effective Collecting Point
Setting Up the Categories: (none) Collecting Point

To set up the Categories: (none) Collecting Point, follow these steps:

1. Click the Folder List button in Outlook, and click either the Tasks folder or the Tasks icon at the bottom of the list.
2. Right-click the gray column-heading button labeled Subject, and select Customize Current View.
3. In the Customize View dialog box, click Group By.
4. In the Group Items By section of the Group By dialog box, click the drop-down menu, and select Categories.
5. Click OK.
6. Click OK again.
7. At the top of the Task list you’ll see a Subject heading. Under this heading is a field with the words “Click here to add a new Task.” Click this field and type WEEKLY REVIEW.
8. Press the Enter key and the task will automatically show up under the Categories (none) list.
You Are Not a Collecting Point!
Success Factors for The Collecting Phase

- **Be aware of the number of physical locations that you’re using to collect your commitments and agreements**

- **Define the approved Collecting Points that you’ll use, and eliminate the rest.**
  - By minimizing your Collecting Points to between five and eight, you’ll find it easier to seamlessly capture data, find it quickly, and process it easily into your IMS.

- **Use only approved Collecting Points to collect your information.**
  - This means that you have to identify specific behavior changes to ensure you keep using these points and not others.

- **Use Categories: (none) as a Collecting Point.**
  - It synchronizes with your PDA, which enables it to be portable.
Introducing the Planning and Action Categories

- Meaningful Objectives
- Supporting Projects
- 1:1 Meetings
- Strategic Next Actions
- Someday Maybe
## Sample—Roach’s Planning and Action Categories

![Sample—Roach’s Planning and Action Categories](image-url)

<table>
<thead>
<tr>
<th>Categories: (none) (0 items)</th>
<th>Status</th>
<th>Due Date</th>
<th>% Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEEKLY REVIEW</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: SNA Desk.</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: SNA Computer</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: SNA Call</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: 1/1 Half-Fuller</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: Supporting Projects: Personal</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: Supporting Projects: Business</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: Meaningful Objectives: Personal</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
<tr>
<td>Categories: Meaningful Objectives: Business</td>
<td>Not Started</td>
<td>None</td>
<td>0%</td>
</tr>
</tbody>
</table>
Setting Up The Planning and Action Categories, Cont’d

**Planning categories:**
- Meaningful Objectives: University
- Meaningful Objectives: Personal
- Supporting Projects: University
- Supporting Projects: Personal
- 1:1 Meetings

**Action categories:**
- SNA Call
- SNA Computer
- SNA Desk
- SNA Errand
- SNA Home
- SNA Online
- SNA Waiting For
- Someday Maybe
Entering the 13 Planning and Action Categories
Setting Up Your Reference System

Reference System

- Personal Folders (Outlook)
  - My Documents
  - Contacts (Outlook)
Getting Started—Five questions That Will Help you Increase Your Awareness

1. How many locations are you currently using to store reference information?
2. What type of data are you storing in what type of system?
3. What Folder Hierarchy are you using to store files, and is it working?
4. Do you use the same Folder Hierarchy across all reference locations?
5. What percentage of the data that you’re storing are you using?
Some Recommended Reference Systems*

- **Folder List**—tracking e-mails
- **Contacts**—tracking contacts
- **My Documents**—tracking documents \((Excel\) spreadsheets, PowerPoint presentations, Word documents, PDF files, and Pictures and music files)
- **Filing Cabinet**—tracking paper

*Each of these systems except for the paper system, can all be accessed through either the Folder List or the Start button on the ControlPanel.
The ControlPanel Shows Your Reference System
Folder List: E-mail Reference System

- The *Folder List* is the ideal location to store e-mails.
- It’s easy to drag and drop messages from your inbox directly into this folder.
- This is one of the easiest reference Systems to work with, and you can get tremendous value from it when it’s set up and running smoothly.
Deciding Which Locations to Use

◆ Setting up your *Reference System* is much like setting up your *Collection System*.
◆ You need to analyze where you’re capturing data and decide which of those buckets you want to eliminate, which you’ll keep and combine, and what new systems you want to create.
Creating a Folder Hierarchy That Works

◆ A critical element to successful reference storage is creating the right kind of *Folder Hierarchy*.
◆ There’re millions of ways to store reference date, but you need to find a *Folder Hierarchy* that fits your needs and reflect your work and home life.
◆ Most people drive the creation of their *Folder Hierarchy* from the information they *receive*.
  – When an e-mail comes in that they want to keep, they create a new folder for it.
  – This type of filtering system is very broad.
  – This can lead to a cumbersome and confusing *Folder Hierarchy* that has too many folders.
Recommendation on Creating a Folder Hierarchy

- Create your *Folder Hierarchy first*, before you file any e-mail—this is one of the most powerful time-saving statements in the entire presentation!!!
- This is the complete opposite of what most people do!!!
- By creating a *Folder Hierarchy* and then putting data in in that fits the hierarchy, you’re creating a natural filtering system.
- This filtering system forces you to be more discerning about what data you keep.
A Challenge

- Create only 15 or fewer top-level file folders in your *Folder Hierarchy*.
- Multiple studies about *Reference Systems* have indicated that finding and filing information is easier when you have 15 or fewer top-level folders.
- However—Here’s the good news!!!!
  - You can have as many subfolders as you want.
- The question then becomes: “How do you label these top-level folders?”
Organizing Your Top-Level Folders by Meaningful Objectives

- There are many ways to create a Folder Hierarchy.
- However, everything in your IMS has been build around *Meaningful Objectives*—the *Cycle of Productivity*, the *Workflow Model*, and the *Planning and Action Categories*.
- Because everything else is driven by objectives, it is **strongly suggested** that you do the same thing here!
- The best filtering system in the world will be your *Meaningful Objectives* and your *Supporting Projects*. 
Organizing Your Folders by Function and Role

- If your *objective* and *project* folders really represent what you’re doing, you won’t need additional folders for functions or roles.

- Sometimes, the fact that you need these additional folders is an indication that your objectives are not clear and could use a little adjustment.

- However, there are examples in which a few additional function and role folders come in hand, e.g., you might need to store information related to organizational policies.
  - These can be filed in an “Organizational Policies” folder, or in a folder that indicates to you that it stores general information about organizational guidelines.
Using a File Hierarchy Consistently Across Systems

- You have several locations you can choose to store information:
  1. Personal Folders
  2. Contacts
  3. My Documents
  4. Paper Files

- Once you have a **Folder Hierarchy** set up, you can take this very same folder structure and use it across all of your systems.

- You can literally take the same taxonomy you used for your **Folder List** and set up the exact same top-level and sub-level folders in **My Documents, OneNote, and SharePoint**.

- You won’t believe how simple that makes filing and finding!

- You’re creating a path that will become automatic, so using it will become habit, and you won’t have to think twice.
Tips for Using Reference Folders

1. Stop Using Your Inbox as a Reference System!
2. Store Documents in “My Documents”
3. Determine What to Keep and What to Delete
4. Take the Time to Set Up Your Folder List
5. Keep Your Folder List Current
6. Keep Your System Simple
Success Factors for Creating an Effective Reference System

1. Define the differences between action and reference information so you know what data to store in which system.
2. Decide what locations you’re going to use to store information and minimize the list to six systems, if you can.
3. Create a clear Folder Hierarchy based on objectives, functions, and roles so you’re driving your IMS from this focus.
4. Use 15 or fewer top-level folders so that you can simplify your system.
5. Mirror your file hierarchy across systems to create a consistent taxonomy that makes it easy to find and file data.
Prioritizing and Planning
Are You Planning from Your Calendar or Your To-Do List
Important Point re Prioritizing and Planning

- One of the most important aspects of the Prioritizing and Planning is coming to grips with the reality of using a calendar to support accomplishing your Meaningful Objectives and maintaining balance.

- A calendar has clear boundaries:
  - You have only 24 hours in a day.
  - No matter how well you manage them, you can’t make them 25.
  - Conversely, they won’t become 23 if you mismanage them.
Imagine looking at your time as though it was money.

- Your Calendar is Your Bank Account—each day you deposit $24.

- Your Task List is your Credit Card.
Using Your Calendar to Prioritize and Plan
# The Importance of The Baseline Calendar

<table>
<thead>
<tr>
<th>Baseline Calendar Activity</th>
<th>Length of time needed</th>
<th>Reoccurrence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Process e-mail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2  Weekly Review time to plan upcoming week</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3  1:1 Meetings with direct reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4  Staff meetings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5  Reading time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6  Exercise time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7  “Sharpening the Saw”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8  Reflective time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9  Family time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Spiritual renewal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Factors to Keep in Mind for Prioritizing and Planning

1. You will always have more to do than you can do—paradigm shift number 1
2. Realize “I am as important as others”—paradigm shift number 2
3. Move from being reactive to proactive—paradigm shift number 3
4. Create a Baseline Calendar that accurately reflect the reoccurring activities that need to complete to support your objectives
5. Schedule uninterrupted time to complete your Weekly Review. Make this appointment a priority
Factors to Keep in Mind for Prioritizing and Planning

6. Use your Calendar and Daily Task List as the central location to track all of your planned commitments.

7. Keep your appointments with yourself so that you can take care of yourself and do a better job of taking care of others.

8. Review and prioritize your Planning Categories so that you’re managing the 30,000-foot view and gaining a higher perspective on your Objectives, Projects, and Tasks.

9. Prioritize your Action Categories and calendar them to ensure that they get done.

10. Review your Calendar for work/life balance, and identify what you need to do to maintain and sustain equilibrium.
Making the Control Panel Your Default View—VERY Important

To make the Control Panel your default view in Outlook, follow these steps:

1. On the menu bar, choose Tools, Options.
2. On the Other tab of the Options dialog box, click Advanced Options.
3. In the General section of the Advanced Options dialog box, click Browse next to Startup In This Folder.
4. In the Select Folder dialog box, click Calendar, and click OK.
Keeping Your ControlPanel Up-to-Date
PlanPlus for Outlook

Planning software with fast and easy Outlook integration
PlanPlus Homepage
PlanPlus Today Page

Calendar:
- Tuesday:
  - 11:00 AM - 1:00 PM: WNIT South (3DA Meeting)
  - 4:00 PM - 6:00 PM: Tech Tuesday (business networking)
- Wednesday:
  - 9:00 AM - 1:00 PM: Change Process workshop
  - 6:30 PM - 8:30 PM: Board Meeting
- Thursday:
  - 10:00 AM - 12:00 PM: Project Team meeting
- Friday:
  - 12:40 PM - 1:30 PM: Staff Brown Bag (monthly lunch)

Messages:
- Inbox: 0
- Drafts: 0
- Outbox: 0

Weekly Jump-Starter:
- Delay always breeds danger; and to protract a great design is often to ruin it.
  - Miguel de Cervantes

Daily Tasks:
- A1: Schedule oil change
- A2: Ask Maria to review draft copy
- B1: Dig out patio area to 6" depth
- B1: Rent tamper from hardware store
- C1: Remove fence panel (for delivery truck)
PlanPlus Today Page
Maxim

Where you start is where you stay!
Processing and Organizing E-Mail
Processing and Organizing E-Mail

- E-Mail is a Communication Tool
- The TRAF Method
  - The Purpose of the To Line
  - The Purpose of the Cc Line
  - The Purpose of the Bcc Line
- Processing and Organizing Your E-mail
- Emptying the Inbox and Getting to Zero
- Establishing Effective E-Mail Guidelines [ref chap]
  - Writing Effective E-Mail Messages
- Changing the E-Mail Culture
  - Establishing Effective E-Mail Guidelines
- Success Factors for Processing and Organizing E-Mail
Conquering E-Mail Clutter

Reducing the E-mail Glut, and Other Executive Strategies and Tactics
Employ A Three-Point E-Mail Program

1. Shrink the number of e-mails you receive in the first place;
2. Prioritize; and,
3. Apply a host of e-mail efficiency methods.
TRAFF

- **Toss** = Delete
- **Refer** = Forward
- **Act** = Act
- **File** = Archive
Shaping the e-mail

- Establish a common vocabulary, so you’ll understand an e-mail’s meaning…
  - Its urgency
  - How thoroughly you need to study it, vs. just being informed
Shaping the e-mail, cont’d.

- The main tool is to ensure that the e-mail has a specific subject line.
- To compose an effective subject line, use the following criteria:
  - Use the subject line to convey the nature of the e-mail:
    - “Action required”
    - “FYI”
    - “Meeting Update”
    - Etc.
Shaping the e-mail, cont’d.

- When possible, put the entire message in the subject line so the e-mail doesn’t need to be opened. For example,
  - “meeting at 3:00 p.m. Thursday is on.”
  - “I’ll be in Conway on Thurs and Fri
  - “Need by the 24th”
Shaping the e-mail, cont’d.

- The two-phase response: first acknowledge, then reply
- Prioritize e-mails based on the day’s events, using a two-phase approach
  - “I got it, read it, and will read it again—and I’m going to respond next week.”
  - “Got it, read it, and here’s my quick response. Expect a longer one next week.”
The Six-Point E-Mail Courtesy Program

1. Can this information be held for a meeting or another convenient time?
2. Can it be summarized?
3. Can it be subsumed into a broader status report?
4. Is there a real “need to know”?
5. How many people really want to be copied?
6. **Important:** If your e-mail is part of a long series, it would be very, very considerate to begin with a two- or three-sentence recap so people don’t have to go back and read the old emails trailing your message.
Consider prioritizing incoming e-mails by sight via color-coding: red for your boss, green for key subordinates, purple for your spouse and other personal messages.

When directing an e-mail to your direct reports:
- Summarize the action required
- Designate the lead person
- Provide a date for follow-up, and
- When appropriate, designate a separate follow-up date for your assistant
An Additional Tip

- Save readers’ time and speed responses by numbering or bulleting the main points in your message rather than sending out a block of undifferentiated text.
Summary of Five E-mail Rules that Executives Live By

1. To reduce people in the loop, ask this question: If you had to photocopy this material, put it in envelopes, and stamp and mail it, who would be on your distribution list?

2. Follow journalistic style: Put head points at the top, then follow with detail

3. Summarize information to date at the top of a long string of e-mails.

4. Adopt a “no-scroll” rule: All messages should fit within one screen. Send longer materials as attachments.

5. Try to fit the whole message into the subject line: “Meeting at 3:00p.m. Thursday is on.” “I’ll be in Conway on Thursday and Friday.”
When is it better to phone or to talk to someone in person, rather than e-mail?

Three points of concern executives have expressed regarding e-mail as a means of communication:

1. It eliminates human interaction and nuance.
2. It is an inappropriate means to convey complex or controversial information.
3. And it is inefficient.
Never, never, never attempt to resolve conflict via e-mail!!!
Key Reminder re e-mail

Keep in mind that an email is one of these Core Functions

1. Calendar
2. Contacts
3. Tasks
4. Notes
Key Reminder re e-mail

Turn the email into what it is, i.e.,

1. A calendar item
2. A Contact
3. A task, or
4. A note
The Four D’s for Decision Making

- Delete It
- Do It
- Defer It
- Delegate It
Establishing Effective E-Mail Guidelines

- Guidelines will help reset the standards by which e-mail is managed.
- Get on the agenda at a staff meeting to talk about establishing and reinforcing e-mail guidelines.
- Identify a point person to track the decisions and distribute a document that reflects the agreed-upon guidelines.
Success Factors for Processing and Organizing E-Mail

- Use the TRAF method
- Use the To, Cc, and Bcc line effectively to reduce e-mail and increase the effectiveness of your communications
- Use the Subject line to help recipients anticipate the purpose of your e-mail even before they read your message.
- When you open an email, make a decision using the Four D’s for Decision Making: delete it, do it in less than two minutes, delegate it, or defer it. **Never close an e-mail back in the Inbox!**
- Schedule time to process and organize your e-mail each day so you can empty the Inbox.
- Clarify e-mail guidelines
High-Tech Workplace Myths

- **Myth One**: We Are More Connected
- **Myth Two**: All our electronic tools have made communication faster, better, and more accurate
- **Myth Three**: Having people come to a central place to work in groups is being made obsolete by the new tools.
- **Myth Four**: When people multitask they get more done
I strive for the best and I do the possible.
--Lyndon B. Johnson