Taming The Email Tiger

A STRATEGIC APPROACH TO BETTER MANAGING EMAIL OVERLOAD

RESOURCE GUIDEBOOK

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www.emailtiger.com.au
28 Benwerrin Drive, Burwood East
Victoria Australia
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Solutions for Success                Steuart Snooks
28 Benwerrin Drive                  Solutions for Success
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The Challenge of Email Overload

One of the biggest issues facing organisations over coming years will be the increasing complaints about ‘loss of productivity’, ‘being overwhelmed’, feeling ‘stressed’ and even staff ‘burnout’ as a result of email ‘overload’.

As email plays an ever-larger role in business life, its volume has become truly staggering. According to researchers, if we received the equivalent mail through the post as we receive via email, most people would receive a staggering 133 pieces of mail every day! This is especially true for those organisations where the majority of internal and client communications now take place via email.

With such numbers, it is not surprising that so many employees find going through email an overwhelming ordeal, rather than a productive experience.

Although email overload is widely recognised as a problem, there is a tendency to accept it as a nuisance and a cost of doing business without recognising its full implications. The cost can be severe! The emails that get lost in overloaded in-boxes aren’t just numbers; each represents something: a piece of business knowledge, a part of a process, a potential liability, a risk that needs to be managed, an opportunity that may otherwise be missed.

In summary, the problems with email overload are:

1: IT capacity
2: risk of lost information and/or intellectual property
3: individual employee productivity

When addressing email overload, it is important to remember the problem’s origins: the tremendous utility of email for exchanging information and knowledge among workers. Email is not the enemy, and the answer is not to try to force users off email.

Rather, organisations must acknowledge the importance of email in daily work, and give employees the training and tools to overcome the problems it can sometimes present. Learning and utilising a Best Practice approach to managing email will significantly reduce;

- the amount of time you spend reading, writing and handling email
- the nagging sense of ‘urgency’ associated with email interruptions
- many of the ‘hidden’ costs for your organisation

and increase your workplace performance, productivity and morale.
The Current Reality

In regard to managing email, what’s working well for you right now? Here’s what many people say they like about using this communication tool.

- It’s quick
- It’s easy
- It’s cheap
- You can keep track of a conversation
- It’s easy to contact multiple recipients
- Emails can be kept and stored
- You can have an asynchronous conversation (no need for both people to be available at exactly the same time). For example, many people stay in touch by email with family and friends overseas who they would rarely ring at some odd hour of the morning.
- You can turn the email into a meeting appointment or add to their task list or to their Calendar
- You can send (and receive) attachments quickly (documents, plans, photos, maps, diagrams etc)

In regard to managing email, what’s NOT working well for you right now? Here’s what many people say they find frustrating about using this communication tool.

- Getting no response to an email that clearly requires a response (or the response is too slow)
- People trying to resolve complex issues via email
- Email interruptions when you’re working on other, higher priority tasks
- Procrastinators who wait till the last minute to request something from you (when they’ve had ample time) and then they say it’s not their fault because they sent you the information
- Subject lines that are unclear or don’t match the message
- People who ‘CC’ you (and everybody else) just to “cover their butt” (CYA) – whether you needed to know or not.
• Needless, one-line responses like “thanks”, “OK”, “you’re welcome” etc
• Others replying to your message without including the previous message (so that you can’t remember what the original issue was)
• People who call you instead of checking their email when you’ve already sent the information they needed or requested
• Bad grammar, spelling and punctuation
• People who send last minute meeting cancellations by email which you don’t get till AFTER you’ve arrived for the meeting
• Too many attachments or attachments that are too big
• People who use Read Receipt on everything they send you
• People who send non-work related messages that clutter up your inbox and distract you from your work
• Auto responders that don’t mean anything; eg: “Thanks for your message. I will respond as soon as I can”
• Attachments that come without any explanation in the body of the message, so you don’t know what they are about
• People using abbreviations, shortcuts and ‘jargon’ such as 4U (instead of ‘for you’), Gr8 (instead of ‘great’) in email.
Best Practice Email Management

There are 5 ‘Golden Rules’ of Best Practice for strategically managing your email more effectively and productively;

1. **Use the Calendar as your default setting**
   (rather than the inbox)

2. **Schedule times to monitor and process your inbox**
   (rather than simply react as they arrive)

3. **Keep the inbox empty**
   (handle each message only once)

4. **Store email messages and attachments appropriately**

5. **Communicate with Clarity**
   (use 7 Ways to Write More Effective Email)
Rule #1: Use Calendar View

Managing email effectively begins with having the bigger picture of your workload and overall productivity in mind.

When you are looking at your calendar (or diary or to-do list), as shown below, whose agenda and priorities are these?

Of course, your calendar should reflect your current workload, scheduled meetings, tasks and activities. These are all the things you have to do before you even consider looking at what is in the inbox.

In fact, much of the work showing in your calendar will be the result of previous emails. This is work you are yet to complete.
When you are looking at the inbox, as shown below, whose agenda and priorities are these?

The inbox will contain new decisions that have to be made and more work that has to be integrated with all of the tasks and activities you already have to deal with.

How often do you check email first thing in the morning (before checking your calendar, diary or to-do list) and find it takes half an hour, half a morning or even half a day before you get around to asking yourself “now, what am I trying to do today”?

Starting the day in the inbox means you are highly likely to be distracted by a wide range of low priority issues that are best dealt with AFTER you have considered the overall perspective of your day, and identified the most important issues that should demand your attention and focus.
How to change your default view from In-box to Calendar

By making the calendar view your default, instead of your In-box, you will start the day with a broader perspective of your workload and priorities for the day. The In-box need only be accessed at a time of your choosing and when you actually intend to process each message.

**In Outlook 2003/2007**

- Select **Tools** and then **Options** from the menu bar at top of screen
- Click the **Other** tab
- Click **Advanced Options** button
- Under the General settings section, to the right of **Start up in this folder** at top of screen, click the **Browse** button and then select **Calendar** from the list of folders shown
- Click **OK** to save
- Click **OK** on the **Options** window

**In Outlook 2010**

- Select **File** in the top left hand corner and from the drop down menu, select **Options**
- In the new window which pops up, select **Advanced** and then under the Outlook start and exit in grey text you’ll see **Start Outlook in this folder**. Click the **Browse** button to the right of this and change from Inbox to Calendar (see below).
- Click OK to finish
How to turn off default reminders in Calendar

The default setting on Outlook sets a reminder for every entry you make in the Calendar. Many of these are unnecessary, create unwanted interruptions and lead to you ignoring the alarms because they occur so often. It’s better to turn off the default reminders so that you can choose to set a reminder only for those occasions when you really need one.

In Outlook 2003/2007

- Select Tools and then Options from the menu bar at top of screen
- Under the Calendar section of the Preferences tab, uncheck the Default reminder
- Click Apply and then OK to save your new settings

In Outlook 2010

- Select File in the top left hand corner and from the drop down menu, select Options
- In the new window which pops up, select Calendar and then under the Calendar option section untick the box beside Default reminders.
- Click OK to finish

By changing these defaults, you will move from an orientation that is inbox-based, interruption-driven and reactive, to something that is instead calendar-based, plan-driven and proactive. This is both a much more productive and more satisfying way to work.
Rule #2: Schedule Times to Handle Email

There are two steps involved in handling email. These steps are;

Step 1: **Monitor** or check for new email

Step 2: **Process** or take action on new email

Both steps are best handled by scheduling specific times of every day. Most importantly, DO NOT always begin the day by opening your In-box. You risk wasting what can be the most productive part of the day on somebody else's agenda.

Email is a TOOL not a TASK

Many people get caught in the trap of being busy all day long doing things, taking calls, sending faxes, managing unexpected interruptions and handling lots of emails. They often get to the end of the day feeling they have accomplished very little and frustrated at not having enough time to get everything done.

One of the major activities people get ‘caught up’ with is handling email. One way to avoid this trap is to understand the difference between tasks and activities, processes, tools and outcomes.

<table>
<thead>
<tr>
<th>Tasks &amp; activities</th>
<th>Processes</th>
<th>Tools</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>What to do</td>
<td>How to do it</td>
<td>To help do it</td>
<td>Results achieved</td>
</tr>
</tbody>
</table>

Many people tend to think of email as a task and they have a nagging sense that they have to ‘do their email’. In fact, email is just a tool – the ‘task’ is to communicate or to exchange information. Email is just one of a range of tools we can use to communicate.
The Impact of Interruptions

One of the keys to maximising your productivity is to minimise or eliminate email as a source of uncontrolled interruptions.

There are a number of negative consequences of allowing email as an interruption.

1. Distraction from task at hand
2. Loss of focus
3. Attempt to multi-task
4. Delayed and poorer decision-making
5. Lack of ‘think’ time
6. Organisational dysfunction
   ▪ Manager/sub-ordinate interactions & relationships
   ▪ Meeting length and effectiveness
   ▪ Workload management and planning
   ▪ Ineffective communications
   ▪ Slower/poorer decision-making, increased costs
7. Mental health and well-being
   ▪ Stress
   ▪ Chronic distraction
   ▪ Attention deficit disorder
   ▪ Lowered IQ
8. Work life balance & quality of life

You can read fuller details about these impacts in the Special Report entitled ‘The 8 Critical Impacts of Email & Information Overload’ which is available for free download from the www.emailtiger.com.au website – see the right hand side of any webpage.
The Cost of Interruptions

Research by both Intel and the New York researchers Basex shows that knowledge workers can expect an average of just three minutes of uninterrupted work on any specific task before being interrupted. These interruptions include e-mail, phone calls, instant and text messages, colleagues, customers and other distractions.

Studies show that internal, mental distractions are as common as ‘external’ interruptions, as workers struggle to maintain concentration on any one task for a prolonged period. Significantly, most of these interruptions and distractions are attended to immediately, at the expense of whatever work was in progress (even if it was a high priority).

The result is that workers average only 11 minutes on any one “working sphere” or project before switching to another project altogether. This extreme fragmentation of work results in a severe cumulative time loss, with some estimates as high as 25-28 percent of the work day (see diagram below).

Combined with the inability to concentrate on any task requiring more than a few minutes, this has a devastatingly negative effect on a worker’s capacity to achieve optimal results.
The Impact of Interruptions on IQ

New research reveals that those who constantly disrupt meetings and important tasks to read and respond to their email messages and other distractions significantly reduce their IQ.

In a series of tests carried out by Dr Glenn Wilson*, Reader in Personality at the Institute of Psychiatry, University of London, an average worker’s functioning IQ falls dramatically when working in an environment where they are constantly distracted by ringing telephones and incoming emails.

\[
\begin{align*}
\text{Impact of interruptions on IQ} & = 10 \text{ points} \\
\text{Impact of smoking marijuana} & = 4 \text{ points}
\end{align*}
\]

Other research on sleep deprivation suggests that an IQ drop of ten points is equal to missing an entire night of sleep. This IQ drop was even more significant in men who took part in the tests.

*See Appendix #1 for details of study mentioned above.

How Often Should You Check the In-box?

Research by the University of Oklahoma shows that the most efficient model of responding to incoming email is at four (4) scheduled times a day (to a maximum of 45 minutes on each occasion). This model will allow you to successfully reply to all incoming email within a 24 hour timeframe.

This research is based on email volumes in America. In Australia, you should find that 4 blocks of half an hour each are sufficient.

For most people in most roles, these are the most appropriate times to check your in-box.

1. Early in the morning (but not first thing)
2. Just before lunch (approx. 30-45 mins)
3. Any time during the afternoon
4. Just before the end of your day (approx. 30-45 mins)
How to Open the Inbox in a Separate Window

Instead of switching from your Calendar to the Inbox when you visit it at a designated, 'single-tasking' block of time, simply right click on the mail icon and select Open in New Window.

This opens the mailbox in a separate window which you close one you’ve checked and processed the inbox (using the proven 4D method), returning to the Calendar view and resuming your schedule of other high priority tasks, activities and commitments.

This way, you only go to the inbox (in a proactive way) when you intend to address email and make 4D decisions, rather than having the inbox open all the time and being constantly distracted as new messages arrive (working reactively).
How to Control Email Interruptions

Here are 3 strategies for controlling interruptions from incoming email;

1. Turn off all email alerts
2. Reschedule the send/receive interval
3. Work offline

How to turn off email alerts

In Outlook 2003/2007

• Select Tools and then Options from the menu bar at top of screen
• Under the Email section of the Preferences tab, click the Email Options button
• Under the Message handling section, click the Advanced Email Options button
• In the ‘When new items arrive in my Inbox’ section, uncheck all four options;
  - Play a sound
  - Briefly change the mouse cursor
  - Show an envelope icon in the notification area
  - Display a New Mail Desktop Alert
• Click OK, then OK and then OK again

How to re-schedule the automatic send/receive function

• Select Tools and then Options from the menu bar at top of screen
• Select the Mail Setup tab, then click the Send/Receive button
• Under the Setting for group “All Accounts”, change the Schedule an automatic send/receive every to your preferred number of minutes
In Outlook 2010

- Select **File** in the top left hand corner and from the drop down menu, select **Options**
- In the new window which pops up, select **Mail** from the list on left hand side
- Under the ‘Message arrival’ area, below the text ‘When a new message arrives’, uncheck the 4 boxes;
  - Play a sound
  - Briefly change the mouse cursor
  - Show an envelope icon in the taskbar
  - Display a Desktop Alert
- Click **OK** to finish

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How to re-schedule the automatic send/receive function

- Select **File** from the menu bar at top of screen and then **Options**
- In the new window which pops up, select **Advanced** and then scroll down to the **Send/Receive** section
- Click the **Send/Receive** button
- Under the **Setting for group “All Accounts”**, change the Schedule an automatic send/receive every to your preferred number of minutes
- Click **Close** and then **OK**
How to Manage Expectations

Finally, you can manage other people’s expectations of how quickly you will respond to their messages by either or both of;

1. Sending a ‘one-off’ e-mail explaining that you have improved your e-mail management practices, asking for their assistance to help you be more productive, using a message such as this;

   In an effort to increase my personal productivity and efficiency I am implementing a new approach to managing my email. I have recently come to understand that I spend too much time shuffling through a stack of emails in my inbox and not enough time focusing on my real work; that is, the stuff I'm actually paid to do! Email has become too much of an unnecessary distraction that is creating longer lead times on my ever-growing ‘to-do' list.

   Consequently, I have decided that serious change is required. Therefore, I will now only be checking and responding to my email at [ ] and [ ] on weekdays. I shall try to get back to you via email in a timely manner and will most certainly be handling my email in a way that is seen as professional and responsive. Therefore, if you need a response from me outside of these times, please do call me on my mobile number [ ]. It'd be good to hear your voice anyway - much more personal than electronic mail!

   I trust my new approach to email helps you get the most out of me. For my part, I believe it will allow me to spend more time on productive work output and creating value for my organisation. Thanks greatly; I'm looking forward to putting email back where it belongs; supporting my work, not driving it!

2. Adding a P.S. to your signature block to begin educating others about how promptly they can expect a response from you? See example below;

   P.S I am not always at my desk but I do check my email 3 or 4 times per day. If your matter requires my urgent attention, please contact me directly on my mobile number.
Rule #3: Keep In-box Empty

The objective or task of checking your In-box is to empty or clear it completely every time you go to it. It is not necessarily to answer or respond to all the messages right then and there.

Do not allow the In-box to run your day. Unexpected (and mostly low priority) email must not take precedence over the work you have planned and prioritised for the day.

The Letterbox analogy:

One of the biggest productivity problems with email is that people read the same email message 2, 3, 5 or even 10 times BEFORE they take action on it! Even then, the message is still often left in the In-box! (The same thing happens with all the various bits of paper handled every day).

The key to avoiding this problem and the huge amount of extra and unnecessary handling of emails is to make it a rule to handle each message just once before moving it on. This simple strategy will eliminate up to 80% of the double-handling of each individual email message.

Handle each message only once

The key to handling each email message just once is to use the two minute rule to simply to make a decision on the NEXT ACTION required to move the message along. Ask yourself;

1. What is the NEXT ACTION with this email?
2. How long will that action take?

Your answer to these two questions will then determine which of the following actions you should take to process each email message using the 4D methodology.
The 4D Methodology

1. **Ditch or Delete**
   If there is no action needed and you don’t need to keep the message, simply delete it (eg: spam, jokes, information you don’t need to file, etc)

2. **Deal with it NOW (less than 2 mins )**
   If you can take the next action (a reply or forward, update a document, schedule a meeting etc) in two minutes or less, it’s quicker to do it now that the time it takes to store the message, track it, retrieve it, read it, get up to speed on it and then do it later.

3. **Delegate**
   If the next action requires you to delegate the email, you can either forward the message on to the appropriate person, print it and pass it on, or add it to your Task list and then use the Assign a Task function to send it to them (but still keep track of it on your own list).

4. **Decide**
   If the next action requires that the email be relocated somewhere more appropriate, you can do one of three things;
   - **Where** – decide where to file it in one of your email folders (eg: Client A, Subject 2) or file it along with an existing Task or Appointment
   - **When** – if the email will take more than 2 minutes to process, convert it to a new Appointment in the Calendar (ie: schedule when you are going to do the work that has arrived via email)
   - **Wait** - Add to a Pending Reply folder (as a sub-folder of the inbox) as no further action is possible right now (right click on the message to add a reminder if necessary)

**TIP:** Use the preview pane to reduce number of mouse clicks required to open and close each message. It also allows you to see enough of the message to make one of the 4 decisions above.
Converting an email to a Task or Calendar item

When the NEXT ACTION for an email will take more than two minutes, it can be converted to a Task or Calendar item.

In this way, you can take an incoming task (that usually arrives unexpectedly, uninvited and often un-negotiated) and turn it into planned, prioritised work to be done at a more appropriate time.

As a result, you’ll work in a more calendar-based, plan-driven and pro-active manner instead of an inbox-based, interruption-driven, reactive way!

Here’s how to convert an email to a Task or Calendar item;

- Click on message to select it.
- Left click on the message and hold as you drag and drop email message to the Task or Calendar folder. If the message has an attachment, right click, drag and drop and select either Copy Here as Appointment with Attachment (leaving the original in the in-box to then be moved to an appropriate folder) OR Move Here as Appointment with Attachment. Alternatively, you can use the shortcut keys to copy (Ctrl + C) or cut (Ctrl + X) the email and then go to your Calendar where you can see your overall schedule and then click on the appropriate date and time and then paste (Ctrl + V) the message.
- To ensure you stay in control of the task:
  - Make sure the Subject line description is action-oriented (the first word must be an adjective or ‘doing’ word).
  - Select an appropriate colour for this task (under the Categorise icon)
  - Establish the Priority, add a Reminder if necessary, make it Recurring if appropriate.
- Click Save and Close.
Converting to Task or Calendar: which is better?

When converting an email, you have a choice of moving it to your Task or Calendar . . . but which would be best?

The problem with adding another item to your Task list is that it doesn’t address the question of when you will do it! Most of us don’t have a problem knowing what we need to get done; it’s deciding when we will do it that is the struggle! Given that we have to make that decision sooner or later, it is better to decide on the next action required as the work ‘shows up’ rather than waiting till things are about to ‘blow up’ with a pending deadline or other crisis.

Take a little extra time to ask yourself ‘how long will this take?’, and then look at your Calendar to see ‘when do I have time?’ and ‘when would be the best time?’ for scheduling this task. Questions like these help you to be much more realistic about the amount of work you’re taking on, how long it will take to complete and integrating it with what you already have in your workload. Your Calendar will then quickly tell you when you are overloaded and make it easier to then negotiate workload and timeframes accordingly, instead of being overwhelmed and falling behind.

So, it’s best to convert that email into your Calendar. It takes a little extra time and thinking, but it gives you a far greater sense of being well organised and in control. What do you think?

The ‘CC’ Rule

If you receive a large volume of ‘cc’ email (most people report nearly one in three of all messages are like this), you might wish to set up a rule that automatically transfers these messages to a specific ‘cc’ folder where they can be stored for you to review at a later and more appropriate date and time.

This is a better option than allowing these non-time critical messages to interrupt you while you’re doing important work. By definition, ‘cc’ emails should not require you to either take any action or respond to them (and they are certainly not urgent), so they can wait till a more appropriate time for you to deal with them.
Here’s how to create the ‘CC’ rule in Outlook 2003/2007

- Open up your **In-box**
- Select **Tools** from the menu bar at top of page and then click **Rules & Alerts**
- Click the **New** tab
- Go to the third sub-section called **Start From a Blank Rule** and click the **Check messages when they arrive** option
- Click the **Next >** button
- Check the box beside **where my name is in the Cc box** from amongst choices in upper window (Step 1: select conditions)
- Click the **Next >** button
- Check the box beside **move it to the specified folder** from amongst choices in upper window (Step 1: select action).
- In the rule description window (Step 2: ), click the underlined specified link - the entire folder list will now be displayed
- Click on **Inbox** to highlight it (so that the Cc folder becomes a sub folder of the In-box)
- Click **New** button
- Type **CC Folder** and click **OK** and then **OK** again
- Click the **Next >** button
- Check **except if sent from people or distribution list** if you wish to make any exceptions (eg: if message is from the CEO, the priority is ‘high’ or the word ‘urgent’ is in the subject line)
- Click the **Next >** button
- In the **Please specify a name for this rule**, type **CC Rule** and then make sure the **Turn on this rule** box is checked
- Finally, double check the rule description window pane and then click **Finish** and then **OK**.

From now on, the rule will automatically process any ‘cc’ messages you receive and place them in the ‘cc’ folder for you to review at a later time. The folder name will become bold, and blue brackets will indicate the number of new unread messages that have arrived.

You can also set a rule for these ‘cc’ messages that will send a reply to say “I have received your cc message and will get to it later – if you require a prompt response, please contact me directly”.
Here’s how to create the ‘CC’ rule in Outlook 2010

- Select Home from the menu bar across top of screen
- In the ribbon below the menu bar select Rules from the Move group and then Create Rule from the drop down menu
- In the Create Rule window, click the Advanced Options button in bottom right hand corner
- Check the box beside where my name is in the Cc box from amongst choices in upper window (Step 1: select conditions)
- Click the Next > button
- Check the box beside move it to the specified folder from amongst choices in upper window (Step 1: select action).
- In the rule description window (Step 2:), click the underlined specified link - the entire folder list will now be displayed.
- Click on Inbox to highlight it (so that the cc folder becomes a sub folder of the In-box)
- Click New button
- Type CC Folder and click OK and then OK again
- Click the Next > button
- Check except if sent from people or distribution list if you wish to make any exceptions (eg: if message is from the CEO, the priority is ‘high’ or the word ‘urgent’ is in the subject line)
- Click the Next > button
- In the Please specify a name for this rule, type CC Rule and then make sure the Turn on this rule box is checked
- Finally, double check the rule description window pane and then click Finish and then OK.

You might use this rule for a short time until others learn to NOT use ‘cc’ when they actually require you to take an action or respond. However, don’t leave it too long or you will clutter up their in-boxes with lots of automatic replies, which they will not appreciate!

Alternatively, you could simply add a message such as this to your auto-signature;

**Please note:** I have created a rule that automatically re-directs messages I have received as CC to a CC folder which I will get to later – if you require any action or a prompt response from me, please contact me directly.
Rule #4: Store email messages and attachments appropriately

Do you receive reminder messages about reaching the limit of your mailbox size? Do you struggle to find what you need because your mailbox is so cluttered? Do you wish you had an effective storage and archiving system for your email and all its attachments?

It is most important to store information in an appropriate location (a folder or file, by subject or by client/contact) so it can be shared with others and/or retrieved quickly later.

There are 4 keys to storing your email effectively;

1. Reduce your mailbox size
2. Use document links instead of attachments (where possible)
3. Establish an email folder structure
4. Use Auto-archiving
1: Reduce mailbox size

According to research by Permessa, based on 15 years of experience with leading global enterprises, 80% of email volume comes from just 4% of messages which, in turn, typically come from just 1% of the user community.

Here’s how to identify the ‘problem’ areas in your email folders so that, with just a little bit of attention to some key areas, you can free up a large amount of storage space in your email system.

**How to check the size of your email folders**

- Select **Mailbox Cleanup** from the **Tools** menu bar at top of screen
- Click the **View Mailbox Size** box at the top of the new screen. This is a convenient way to find out how big your mailbox is and how much space a particular folder is taking up.
- Click the box for **Find items larger than** and select **500kb** and then click the **Find** button.
- Highlight and then delete these emails (you may wish to open the email and save the attachment to an appropriate place on your hard drive before deleting).
Another way to do this is to simply select the Large Mail folder under the Search Folders at the bottom of your email folder list.

If that folder is not showing, right click on the Search Folder and then click New Search Folder, which opens the following window. Now click on Large Mail as per image below and a new Large Mail folder will appear as a sub folder in Search Folders.
Click on the new Large Mail search folder and you will now see all of the large items in your mailbox. Double click on the Size column heading and the folder will present in order of size and shows which folder the email is located in (no need to go searching folder by folder.

Now all you need do is remove the largest of the attachments - save them to an appropriate place on your hard drive if you needed and then delete them.

**How to empty your deleted items folder automatically**

- Select **Options** from the **Tools** menu bar at top of screen
- Click the **Other** tab ox at the top of the new screen.
- Click in the checkbox at top of screen which says **Empty the Deleted Items folder upon exiting**

**How to empty your deleted items folder manually**

- Select and right click on the **Deleted Items** folder
- Select the **Empty "Deleted Items" Folder** command on the shortcut menu
- Alternatively, you can use the **Mailbox Cleanup** dialog box
2: Use document links

An alternative to sending attachments is to send document links instead (where this is appropriate). Given that the majority of email communications are internal, many emails can include a link to a document stored on a hard drive that both parties have access to, saving the need for bulky attachments.

Here are just some of the disadvantages of sending attachments.

- Large size attachments use up lots of storage space
- They take longer to transmit
- Leads to multiple versions of the attachment
- Not secure (an attachment can be forwarded to anyone, anywhere in the world)
- There can be compatibility issues (if receiver does not have the same program, or current version)

Here are just some of the advantages of using hyperlinks instead.

- Smaller size emails use up less storage space
- Are quicker to transmit
- Allow version control as only one document is accessed
- Link is to a current, up-to-date version of the document
- Document links are ‘secure’ – only those authorised to access the hard drive can open them
- Link to shared document overcomes potential compatibility issues

There are a couple of methods you can use to hyperlink a document within an email message. The first of these is to copy the ‘file path’ where the document is situated and send it to the recipient in an email.
How to email the file path

- Navigate to where the file is stored on the hard drive
- Highlight the file path in the Address bar at the top of the window
- Either right click and choose Copy, or choose the Edit drop-down menu and select Copy
- Create a new email message to the recipient and paste the hyperlink into the body of the message by using right click, paste option
- Make sure you press the Enter button after you have pasted in the hyperlink to activate it (it will turn blue)
- Send your message as normal

The second method you can use is to utilise the Microsoft Outlook ‘Hyperlink’ feature.

How to insert a hyperlink

- Create a new email message to the recipient
- Highlight the word you wish to use as your ‘hyperlink’ (for instance, you may type the sentence ‘Click here to open the document’) and you would then highlight the word ‘here’
- Click on the ‘Insert’ tab at the top of the Outlook message window
- Select ‘Hyperlink’
- The ‘Insert Hyperlink’ window will open and you can navigate to wherever your file is kept
- Click on the file you wish to include in your email
- Click on OK
- The word you have chosen as your ‘Hyperlink’ will now be highlighted in blue in your message and if you run your mouse across it you will see the details of the hyperlink appear.

Send your message as normal
3: Establish a folder structure

Most people have their e-mail folders as sub-folders of their inbox. And all the different types of folders are usually mixed up together with only the first letter of the folder name used to categorise them.

This makes it difficult and slow to file e-mail away once it has been dealt with. Here are the three steps needed to get your email folders well organised.

1. Firstly, separate your ‘finished’ business from your ‘unfinished’ business. Reserve the in-box and any of its subfolders only for unfinished work. Once an email has been dealt with and needs to be stored for future reference, it should be relocated to an appropriate folder in a separate section of your mailbox (in the same way as a paper document would be stored in a filing cabinet, rather than on your desk).

   This section can be called Filing Cabinet (in Outlook 2010) or Reference Folders (in older versions of Outlook).

2. Next step is to set up 4 ‘primary folders’ under the Filing Cabinet (in the same way as you would label the drawers of a physical filing cabinet. Experience has shown that most e-mails we need to keep can be categorised in the following 4 ways;

   • Clients (people or organisation you send stuff to)
   • Projects (information relating to outputs by your or your team - products, services, flyers, programs, )
   • Team (information relating to your department or team – meeting notes, business plans, rosters, team projects)
   • ZAdmin (for non-core information - forms, policies, receipts, travel, expenses)

   Set the folders up in this order, with Admin at the bottom (use a Z at the start of the folder name so it appears last on this list). We choose this order as, for most of us, clients are our highest priority, then our projects, then our team and then admin. This structure also works well for your files on the hard drive!
When an e-mail could be stored in two of the above primary folders, always store it in the higher placed folder (ie: if an e-mail could go under either of Clients or Projects, place it under Clients). When an e-mail could be stored in multiple secondary folders (ie: the various folders you have under a primary folder), then store it in the primary folder itself.

3. Finally, now that this filing structure has been set up, simply drag and drop your existing folders from their current location under the inbox and place them in the appropriate primary folder structure you’ve just set up.

Separate ‘finished’ work from ‘unfinished’ work

Create 4 or 5 ‘primary’ folders
4: Use Auto-archiving

To keep the size of your mailbox within limits, you need to clean it out, so Outlook lets you create special folders to store your mail messages on your own computer.

Archiving removes items such as email messages from your mailbox and automatically stores them in folders that have the same hierarchy and names as the folders in your mailbox.

There are three key benefits from archiving your e-mail:

1. **Effective record keeping** - When you archive messages instead of deleting them, you'll have records of your work which can help you remember the details of events, projects, and processes. If you're the kind of person who never throws anything away, archiving is your dream.

2. **Save disk space** - Because archiving makes use of compression, archived items use less storage space.

3. **Cut down on visual clutter** - Archiving removes items from your mailbox and puts them in the archive file. Now that you can more easily see the messages you need, you can work with them more effectively.

You can store Outlook mail messages (and other Outlook data) in an Archive file. This can be done either automatically (using Auto Archive) or manually at a time that suits you.

**Auto Archive** allows you to set up a schedule and archive multiple folders at the same time at set intervals. You'll know you have this feature turned on if periodically you get a friendly dialog box asking if you want to auto-archive now. By default, Outlook turns on the Auto Archive feature.

The catch with Auto Archive is that it doesn't simply archive stuff, it can also delete it. If you want to keep everything, you should adjust your Auto Archive settings accordingly. Archiving can be done either automatically (using Auto Archive) or manually at a time that suits you.
How to change the Auto Archive settings

In Outlook 2003/2007

- Select **Tools** and then **Options** from the menu bar at top of screen
- Click the **Other** tab, then click **Auto Archive**
- You can run Auto Archive manually at any time by clicking **Auto Archive** in the **Mailbox Clean up** dialog box.
- Adjust settings as per diagram below

In Outlook 2010

- Select **File** in the top left hand corner and from the drop down menu, select **Advanced**
- In the new window which pops up, click the **AutoArchive settings** button in the **AutoArchive** section
- Adjust settings as per diagram below

There are really only 3 decisions you need to make to set up your auto-archiving function;
How to manually archive only specific items,

You can manually archive by clicking Archive on the File menu. With manual archiving, you have more control of the specific folders that are archived.

How to get more information and help

Those who use Microsoft Outlook as their e-mail software can learn more about how to manage the size of their mailbox by learning to use the archiving functions.

Here are links to tutorials on the Microsoft website that will help you understand how to use Outlook’s archiving functions.

For Outlook 2003;

For Outlook 2007;

For Outlook 2010;

*It is always best to check with your organisation’s IT department before proceeding with any of the steps outlined in the material above or any of the above tutorials.*

**Note:** When you store information in an archive file on your own computer, you'll only be able to read it on that computer.
Rule #5: Communicate with CLARITY!

The challenge with any form of written communication is to ensure that the reader is able to clearly understand and respond to your message. This is difficult at any time but especially so when using email, due to the sense of urgency associated with this medium and the haste with which the reader will process your message.

People often launch into writing an email without thinking about the result they're after. Effective communication is NOT simply sending an email message. It is ensuring that the message has been not only received, but also clearly understood, and an appropriate action taken.

Two key points to remember when writing emails:

1. **Write to suit the reader**
   While it may seem that the writer is the more important person, it doesn’t matter how well the email message is written at the writer’s end if it is not easily understood at the reader’s end.

2. **Take time at the front end**
   Writing emails that get attention, engage the reader, motivate them to take the action you want (and when you want it) take more time, rather than less time.

7 Ways to Write More Effective Email

1. Think first - What sort of messages and/or people should you NOT email?
2. Communicating in the Age of Speed
3. What is Your Desired Outcome (pssst . . .there are only 4)?
4. How to Write Better Subject Lines
5. Automate your Email Follow up
6. Why the Inverted Pyramid Structure is Best for Email
7. Why You Should Write an Email Backwards
1: Think first

Two key questions to ask yourself are “is email the most appropriate way to communicate for this;

1. Message
2. Person

Here are just some of the type of MESSAGES that are not suitable for sending via email are;

- Confidential or private messages
- Offensive, abusive etc
- When delivering bad news
- Complex issues
- Disciplinary messages or reprimands
- Urgent messages

Sometimes the message is suitable for communicating via email, but the person who is receiving it is not.

Here are some types of PEOPLE with whom it can be difficult to communicate via email;

- Those in roles who don’t access email often or at all
- Those with reading limitations
- Many older people who struggle with email technology
- Certain personality styles who just aren’t email savvy

*See Appendix #2 for tips on how to fine-tune your message for different personality styles.*
2: Communicating Effectively in an Age of Speed

- Do you get frustrated that your emails often don’t get a response?
- Or the response is too slow?
- Or you get the wrong response?

Sending an email is often quicker than the time it takes to catch someone on the phone or to organise and conduct a face-to-face meeting with them. Even more so when it involves multiple people! So if high speed of communication equals high productivity, then email is easily a winner.

But email lacks richness of context and can be easily misunderstood, especially if the subject is complex, highly emotive or easily open to different interpretations. By contrast a richer communication medium such as a face-to-face meeting allows potential misunderstandings to be quickly identified and corrected. A simpler medium such as email (or text, SMS or social media) has little or no context or ‘richness’, can be more easily misinterpreted and take considerable time before that misunderstanding has been realised and corrected. See this graph showing the matrix of media richness vs speed vs potential for misunderstanding.

While email may be quick at the ‘front end’ of the communication process, it can often cost even more time at the ‘back end’ of the process to either follow up a message that hasn’t been responded to or to correct a misunderstanding and any unintended outcomes.

So, before defaulting to email to communicate a message, consider
  1. how easy is it for your message to be misunderstood
  2. what are the potential consequences if this occurs
  3. what time and cost will it take to retrieve the situation if your email is not acted upon or a misunderstanding occurs.

Think of the tortoise and the hare!
3: What is Your Desired Outcome?
(pssst . . . there are only 4!)

Every email you send will have one of the following four outcomes or actions:

1. **Action required** - the reader needs to take a specific action. For example, your desired action might be "Prepare a proposal for a 10% reduction in transport & freight costs by 12 noon on Friday 30th March."

2. **Response requested** - the reader needs only to respond to your message; no other action is necessary. For example, your message might request "Let me know if you are available for a meeting at 2:00pm on Friday 25th."

3. **Read only** - the reader needs only to read your message; no other action or response is necessary. For example, your message says "Please read the attached report before our team meeting on March 2nd."

4. **FYI** - reading the message is optional; no action or response is necessary. For example, your message may be a joke or say "Here is a copy of the latest company newsletter for your interest."

So, if every email has only one of the 4 outcomes above, why not write into the subject line, and make it the very first thing your recipient reads?

If you receive an email with the words **Action Required** in the subject line, would that get your attention? Would that engage you to read the message to find out what’s required of you? And isn’t that what you want your readers to do when you send an email?

For best results, you should also **specify a deadline** for the outcome you desire. By doing this, you help your reader(s) to more effectively prioritise their emails and the resulting actions that are needed. As a result, you’re much more likely to get a **timely response** than if you don’t specify a deadline or timeframe.
Finally, thinking through the desired outcome for your message also helps you to **more accurately target** who you send it to. Those who need to take action or respond should be placed in the **To** address line while those who only need to read it can be put in the **CC** line.

By thinking about your desired outcome before you write your message, you’ll tend to send it to less people (**decrease quantity**) but achieve better results (**increase quality**).

To make this easy, just set up 4 draft emails, each with one of the above subject lines. In future, whenever you are writing a new email, simply go to the **Drafts** folder (instead of clicking **New**), select the draft email with the outcome you want and then choose **Forward** to open up a new message with the desired outcome pre-written into the subject line and your auto-signature in the body of the message.

By going to the **Drafts** folder to select your desired outcome, it makes you **think** about what you’re trying to achieve with this email. This means your recipient doesn’t have to guess or work it out for themselves and so they are far more likely to do what you want them to do and do it more promptly because you’ve made it easy for them.

Why not try adding one of the 4 desired outcomes to your messages for the rest of this week and see what a difference it makes?
4: How to Write Better Subject Lines

The **Subject Line** is probably the single most important aspect of your message. Here are a few considerations about what to put in your **Subject** line:

- Use email subject lines that work - many readers delete an email as soon as they read the subject line. Do your subject lines pass the skim-and-delete test? Make sure your subject lines are short, clear, and closely related to the content.

- Use descriptive, action-oriented subject lines – there’s no real limit on the number of words you can use, but use them wisely.

- Establish ’Team Rules’ to maximise understanding and prioritisation of emails - use priority codes (A, B, C) or symbols to help the reader quickly assess the urgency and/or importance of your message.

  - A standard subject heading could be used to assist your colleagues to quickly identify, sort and prioritise what is required for each message, by agreeing on common terms such as:

    - ☐ CALL: ☐ MEET: ☐ PREPARE:
    - ☐ ACTION: ☐ TRAVEL: ☐ CONFERENCE

- Acronyms in the subject heading are another way to assist colleagues identify the action required for each message;

  - <AR> = Action Required
  - <RR> = Response Requested
  - <RO> = Read Only (no reply needed - NR)
  - <FYI> = For your information

- Include the action required where possible. For example; “Prepare budget for XYZ project”.

- The due date, if applicable. For example; “due by August 9th”.

- An example of an effective Subject line is “<AR> Prepare budget for XYZ project by August 9th".

- Put a short message only in the subject line, and end with acronym <EOM> end of message, so reader knows there’s no need to open the message eg; “Yes, available to meet at 10am tomorrow <EOM>”
Addressing Your Message

It's important to target your message to the appropriate recipients and not distract or overwhelm people with email that does not relate to their role or area of responsibility.

Here are some considerations when choosing how to address your message:

**The To line**

To ensure that the right people take the specified action, make sure they are on the To line. The To line and the Subject line are related: each person in the To line is responsible for taking the action (or part of the action) which has been outlined on the Subject line and/or the message relates directly to one of their roles or responsibilities.

When the Subject line effectively summarises the message and the message is clearly written, each person in the To line will have a clear understanding of the objective or project that the message relates to, the action they need to take, and the due date by which that action is required.

**The CC line**

It is tempting to add many people to the CC line in order to cover all your bases. However, a more appropriate way is to consider only using the CC line when:

- No action or response is expected from those on the CC line; they need only to read and/or file the message.
- Only those individuals whose roles or responsibilities are affected by the message. If unsure whether the message relates to an individual’s roles or responsibilities, check with that person to find out if they want to receive the message (and other similar future messages).

**The BCC line**

This line should be used very carefully. It is often used to protect a distribution list and to keep individuals from receiving a "Reply" or "Reply All" responses. However, beware of escalating an issue using the BCC line (eg: to a manager), as there is always a chance that the individual on the BCC line (ie: manager) could hit "Reply All" and unintentionally reveal that the issue has been escalated!
5: Automate Your Email Follow up

Do you find that many of the emails you send require you to also follow them up some time in the future? One way to keep track of these is to flag them for follow up so they you don’t have to rely on your memory. As you’re composing the message, simply click the follow up icon and select when you wish to follow up.

However, simply flagging a message is often not enough - you probably need to also add a reminder for a specific date and time. A flagged message still requires you to chase after it at some time in the future whereas a flagged message with a reminder comes back to you at the nominated date and time – in the meantime you can safely forget about it until the appropriate time.

You can now keep track of all these emails that require follow up in the For Follow Up folder, located under Search Folders in your folder list (if you can’t see the For Follow Up folder, click here to learn how to set it up).

This folder will show you any email you have flagged for follow up, regardless of which folder it is in (except Deleted Items) – it’s a search folder and searches for flagged messages wherever they are. You can sort these flagged messages by start date, due date or whatever other criteria you wish.

And now, here’s comes the part where you can automate at least the first step of that follow up! Many times the reason you need to follow up an email is that the person
you sent it to has not got back to you. So, you can set a reminder for them, as well as for yourself, in the original outgoing message! This way, that’s one less phone call or email you have to make and the first step of follow up is automated.

Now, I recommend that you seek permission of the recipient before using this feature. You could say something like “it’s very important that we deal with this issue by the due date, so how about I put a reminder on this message for both you and I so we don’t miss it, OK?”.

Once you get their permission, you can reasonably assume that you can do the same again in future whenever it is appropriate. Maybe even let them know in the body of your message that you’ve added a reminder.

When you think about the number of times you follow up emails you’ve sent over the course of a year, this idea could save you lots of time and effort manually following up when you could do it automatically instead.

Why not try this out with a colleague sometime this week and see what a difference it makes?
6: Why the Inverted Pyramid Structure is Best for Email

For most messages, best results will be gained by using the same approach that journalists and newspapers use.

When you read a newspaper, the first paragraph tells you the main point and then the rest of the article is spent supporting that point with the background details, information, explanations, reasons etc, in decreasing degree of importance.

This is known as the **Inverted Pyramid** structure and it is highly valued because readers can leave the story at any point and understand it, even if they don’t have all the details.

The same approach works well when writing email. Remember, most of your email messages will arrive to your recipient as an interruption and/or mixed in with lots of other messages.

That’s why it is vital that you quickly communicate the main point of your message so that it engages their interest. Make sure your main point is at the top of the email.

Your reader can then read as much or little as they need of the supporting details which follow in order to take the action you have requested for your email...same as you do when reading a newspaper or magazine article!
Inverted Pyramid Structure

Main Point
Summary of your main point, request, recommendation or solutions

Supporting details
Background, reasons explanations, details

Where, When Why, How Who
The A-B-C Method

Use the A-B-C method (following the inverted pyramid structure) to construct emails that have real impact!

---

**A: Action summary** (main point)
--- specific action required and timeframe

**B: Background**
--- Explanations, reasons, background details (who, why, where, when, what, how)
--- Use bullet points, numbers

**C: Close**
--- Next steps, sign off

---

**Signature**
Use a horizontal signature | takes less vertical space | minimises need to scroll down page

And here’s why the inverted pyramid structure this is so important . . . read about the **F shape** on next page
The F Shape

Eye-tracking studies show that when reading websites, our eyes follow a distinct ‘F’ shape – we read all the way across the first sentence or paragraph but then only part way across the next and then just scan down the left hand side of the remainder of the text.

The same pattern is likely to be used when reading e-mails on a computer screen. So if your main point is at the bottom of the message, your reader is highly unlikely to see it!

However, writing in the inverted pyramid structure is not natural to you. All your childhood, school and tertiary communications have been encouraged towards the Diamond Sequence in which you give background details, explanations and information before stating your main point – a request, solution or recommendation. But this simply doesn’t work in an email environment!

Take a look at the last 5 emails you’ve sent. Chances are, you’re making the main point at the bottom of the email. Changing this is easy . . . simply cut the main point from the bottom and paste at the top of your message. If your message is a long one you can copy and paste instead, leaving your main point at the bottom as most people will only remember the last thing they read!

Why not try this Inverted Pyramid idea when writing a new email message today!

See more about the F Shape at http://www.useit.com/alertbox/reading_pattern.html
7: Why You Should Write an Email Backwards

Do you sometimes wonder why you don’t get a response to your email? Or the response is slow? Or that it doesn’t actually answer the question you asked?

One way to improve the results you get from the emails you send is to write the email backwards! Let me explain . . .

Your email software is set up so you write an email in the sequence To – Subject - Message. However, for best results try writing new messages in the following sequence.

1. **Message First** - Write your message first and then edit it (ie: spell-check, grammar-check, add bullet points etc). Be sure to use the ‘inverted pyramid’ format we discussed in the last blog post.

2. **Subject Line** - Waiting until AFTER you write the content ensures that the Subject Line accurately summarises and reflects the meaning of your email message. Don’t you find that you have a much clearer idea of how to accurately and succinctly summarise your message in the subject line AFTER you written you message rather than BEFORE?
3. **Addressing your message as the final step** – this improves your focus on sending the message only to those who really need to receive it. You’ll find that you have a clearer idea of who needs to get this message, who needs only to read it and who can be left out altogether AFTER you’ve written a message rather than BEFORE. When you do this as the last step, you’ll tend to omit people for whom there is no action or response required (or place them in the ‘cc’ line if they all they have to do is read it) reducing unnecessary email.

Using these ideas will help you gain a reputation as a good communicator who

- only sends email when it’s relevant to me  
- makes it clear what you want me to do with your email  
- gives me a clear timeframe and  
- an accurate, concise subject line that helps me know what your message is about and makes it easy to find later after it’s been filed.

As a result, I’ll tend to answer your emails first as you make it easy for me. And isn’t that what you want as a sender of email. Why not try one of these ideas on the next email you send today!
Appendix #1

Understanding Communication styles

### Communication Style and Description

**Analysts/Thinkers** are those for whom a sense of order, logic and sound reasoning are necessary ingredients to communicating. For the analyst, alternatives are always considered before arriving at a decision. Analysts take time for reflection and can separate emotion from fact. At their worst, they can come across as unbending, rigid and unfeeling. Their email can be seen by other styles as needlessly lengthy and detailed.

**Amiables/Relators/Feelers** are the analysts' psychological opposites. They're people-centered and have a deep sense of loyalty. Amiables care about the way processes are implemented, because they're sensitive to the reactions of others. They're challenged when they're required to implement procedures that have a negative consequence on co-workers and can be seen as too "soft" to make hard decisions. They've been known to forward chain email and inspirational messages.

**Drivers/Sensers** are fact-based action people. They need to see legitimate evidence before they make a move. Drivers don't have hunches. "Where's the beef?" and "Show me the money" are phrases that resonate with them. When asked: "When do you need this?" their reply is often: "Yesterday." Drivers can be seen as blunt, insensitive, "bulls in a china shop" and short on patience. They have been known to send email in ALL CAPS.

**Expressives/Intuitors** are the psychological opposites of Drivers; they frequently see things that others miss. They are "big picture" visionaries who loathe detail. Expressives believe that others also can see the future and can "connect the dots" in the same way they do. Their leaps of logic in email can cause dizzying reactions from their driver, amiable and analyst colleagues.

The concepts and information above taken from article by

- Maureen Sullivan on careerjournal.com
- People Styles at Work – Boulton and Boulton
How to communicate by email with this style

Be sure that the message is logical and fact-based and that you support your suggestions with relevant data. Demonstrate that you've considered alternatives before you arrived at your recommendations. Above all, be fair and don't cloud your message with emotion.

Include a greeting and a cordial closing. Amiables appreciate messages that are values-based and people-sensitive. They respect tradition and will be receptive to hard or bad news if they know issues important to them were considered before a decision was made.

Get right to the point. Drivers appreciate messages that can be measured rather than felt. Use bullet points and make suggestions for possible actions. Practicality and a sense of urgency are key elements for a driver.

You're writing to an ideas person who's a forward-thinking individual. Appeal to their sense of originality by using a novel approach. Include these types in your buddy lists when changes need to be implemented or when piloting a new program or product. Praise their worthy suggestions.
Appendix #2

Special Report - The 7 Critical Impacts of Information & E-mail Overload

One of the biggest issues facing organisations and their staff in the modern age are the increasing complaints about ‘loss of productivity’, ‘being overwhelmed’, feeling ‘stressed’ and even staff ‘burnout’ as a result of information and e-mail ‘overload’.

As an Intel research report states, “The combination of e–mail overload and interruptions is widely recognized as a major disrupter of employee productivity and quality of life, yet few organisations take serious action against it”.

Almost every organisation employing knowledge workers has been greatly impacted by Information Overload, defined as the mental state of continuous stress and distraction caused by incessant interruptions and the sheer volume of e-mail and other messages.

The Intel report continues “this phenomenon places workers and managers in a chronic state of mental overload. It has a severe but much under-estimated impact on employee productivity and worklife balance, while organisations incur the ‘hidden’ cost of extensive financial loss. “

The impact is so severe that addressing this issue should be a high priority. Not only will solving this problem have a positive and immediate impact on individual productivity, performance and morale, it will also help those organisations who take prompt action to gain a significant competitive advantage.

This special report provides compelling information and statistics to show that taking action should be a high priority. Our aim is to provide decision-makers with the background data and a motivation to persuade their organisations to take such action.

To get a free copy of this report, register at www.emailtiger.com.au. After registering, you'll receive a link to download the report.