

Business & Careers

Turning the e-mail beast into a straightforward task



Luigi Benetton
Hi-Tech

Ever wonder why e-mail stresses people out? Maybe it's the nagging feeling that somewhere among the hundreds or thousands of messages sitting in their inboxes are numerous scraps of information — from appointments to contact information to follow-up tasks to interesting reading and beyond — that they're trying to keep straight using the memory in their heads instead of the one in their computing devices.

If relying on human memory for all this sounds nutty, that's because it is.

Productivity gurus promote an e-mail management system called "inbox zero" that its adherents take literally. For professionals, like lawyers, who handle large amounts of e-mail, an empty inbox means that they have a handle on what they need to do — as long as the information in those messages ends up in the right places.

Recipients aren't fully to blame for messy inboxes. "People don't always think about what those who read an e-mail actually need to know in order to respond with the information they want," says Bruce Mayhew, president of the CPD-accredited marketing and communications training company Bruce Mayhew Consulting. "Many people just mash a whole bunch of information into a message."

As a result, all readers see are "bricks" of information that they need to sift carefully.

Mayhew teaches people to split e-mail content into action items and background information. "Label information at the beginning of the message as action items, write them, then label and provide the background," he advises. This "allows readers to quickly read the action stuff and get a sense of what the e-mail is about, and read the rest later, when they



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need to." Bullet lists, numbered lists and other formatting options sit ready to use in the Outlook Ribbon.

He also advises people use mail folders and rules in conjunction with one another. "Folders and rules work beautifully together," Mayhew says. "You can place e-mails into 'buckets' that are completely customizable to the way you work."

Lawyers may use, for instance, a main folder called "Clients" to contain subfolders for each different client. Those subfolders, in turn, may contain their own subfolders dedicated to matter names or numbers.

There's no reason to manually move relevant e-mails into the right folders when Outlook rules can automatically sort incoming e-mails into those folders.

Properly configuring rules to move e-mails into the right folders can be tricky, so here's a tip to raise the accuracy rate: use a matter number (or other text) in e-mail subject lines that matches the name of a folder into which such matters should be stored.

The rule you then create should only need one criterion: if the subject line of the e-mail contains the matter number/folder

name, Outlook should move the message to the right folder. Since most people reply to messages without changing subject lines, this type of rule is highly effective.

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Bruce Mayhew Consulting

Should a correspondent change the subject line, the message lands in your inbox. You can then file it properly and continue the correspondence, adding text to the subject line that triggers the right rule.

While Outlook may not sort your sent files, Page 22

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Business & Careers

Power: Know when it's better to say nothing

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tions because research says those who display anger appropriately are viewed as “dominant, strong, competent and smart.”

Good interpersonal skills are a must—knowing how to use powerful non-verbal signals to make a positive first impression, wearing appropriate but dominant attire and practising the principles of persuasion. Self-promotion is the ability to convey authenticity with grace and impact—to connect with others through storytelling and talking about yourself in a natural, comfortable way without coming off as an arrogant, self-aggrandizing

braggart. Those who are unable to master the craft of self-promotion fail to capitalize on the best opportunities.

Self-promotion is continuous; it shouldn't be reserved for special occasions like performance reviews. And never assume others will tell your story the way you want it told. Learn how to “schmooze” people (Yiddish for friendly, heart-to-heart talk). Talk to them as if they really matter, listening carefully to draw them out and find the common ground. Then seamlessly plant the positive seeds to advance your cause. Know exactly who you are, what you've accomplished and where

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Declaring yourself out of the game doesn't get you out. You can't not play—you can only play competently or incompetently.

Jim Murray

Course instructor

you want to go. Create pithy, colourful, convincing conversational narratives—make it conversational, not canned, by learning and adapting your scripts as appropriate. Continually revise and tailor your story to the specific opportunities before you.

Power begets more power. Use yours to create real value, help others in meaningful ways and noticeably contribute to the organizational mission. Although “dirty politicians” can and do succeed, the skilled use of positive tactics will ensure there is no regret, remorse or revenge to worry about. Plus, your reputation will become a real source of power

for others to admire. That too is incredible personal leverage.

Finally, if all of this is simply too much to master, then four decades of playing C-suite games with others leads to the following simple counsel: learn when to shut up and how to leave. That advice alone will at least keep you in the game and on top of the fray.

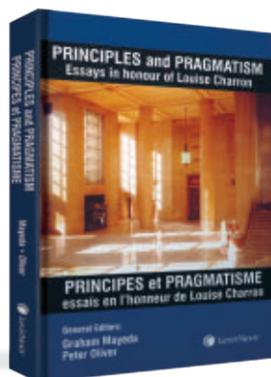
Jim Murray is instructor of The CEO Program: Leading with Purpose for aspiring executives, offered this May by CPA Ontario. For complete details, visit www.cpaontario.ca/PD/PDExecutiveDev/1016page7129.aspx.

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Files: Apps for Outlook available to help

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mail the same way, you can select all the messages in your Sent Mail folder, then run your rules using the contextual (right-click) menu.

Make sure relevant information appears when and where you need it by turning e-mails into calendar entries, tasks and contact cards. Once the relevant information gets stored in the right place (or places) you can store or delete the e-mail itself.

Paste the text from the e-mail into the note field of any one of these objects. If you need to find said objects and all you remember is key text from the e-mail, you can search for that text using Windows Search (or Spotlight for Mac users).

Color-coding everything in a calendar helps you differentiate between client events, personal matters, marketing, administration meetings and other types of appointments. By doing this, “I can quickly assess my day,” says Brock Smith.

Developers of case management and other tools develop Outlook plugins to help lawyers work with their applications from the Outlook window. Smith, a partner at Clark Wilson, uses an Outlook plugin that files most of his e-mails in the firm's document management system.

“When you press ‘Send’ on an e-mail, it gives you the opportunity to assign a file number to that e-mail,” Smith explains. “It attaches what we affectionately call a ‘luggage tag’ to that e-mail and files it in our document management system.”

“If I send you an e-mail with that luggage tag and you reply, it goes to my inbox but a copy of it is autofiled,” he adds. “It saves us time filing e-mails.”



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Brock Smith
Clark Wilson

“I use the Message Save add-on for Outlook, and find it to be invaluable,” says Stuart Rudner, a founding partner at Rudner MacDonald, via e-mail. “I save all relevant or substantive e-mail messages into (shared) folders which are specific to matters or administrative topics. This add-on allows me to easily save e-mail messages, sent or received, and is good at predicting where specific messages should be stored.”

Gareth Oystryk, office product manager, Microsoft Canada, says there's an “app store” for Office applications (like Outlook) so you can push Outlook's boundaries beyond what you get out of the box. LinkedIn for Outlook, for example, can help law firms make rain.

Oystryk recommends using Office 365 to keep e-mails, calendars, contacts and so forth synchronized across all computers, Mac or PC, and mobile devices running Windows Phone, Apple iOS or Android.

Perhaps the most egregious e-mail oversight is the lack of a signature at the end of the message, since they give recipients the information they need to contact you.

Mayhew advises using a full e-mail signature for initial e-mails and a shorter one containing your name, company and phone number for replies. “The person you're responding to already knows who you are,” he notes.

“They should not have graphics, like company logos,” warns Mayhew, noting that many e-mail servers strip images from messages since they may be laced with malware.

We want to hear from you!

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