

White Paper on the Road to Overcoming Overload

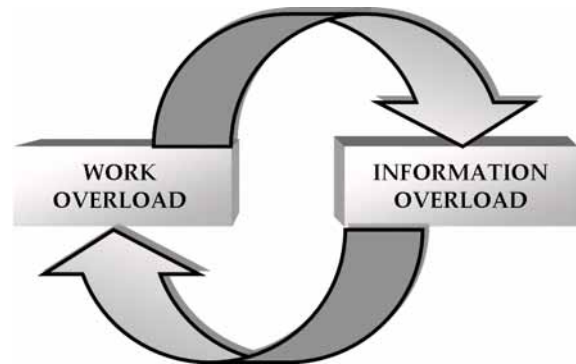


Overcoming E-Mail Overload

Background

How Can You Control The Floodgates That Overload Your World? Martin Luther told us, “I cannot keep a bird from flying over my head. But I can certainly keep it from nesting in my hair or from biting my nose off.” Using practical thoughts and tips we will show you how to control the sources of overload.

In a knowledge based economy, leaders and knowledge workers face a highly interdependent relationship between work overload and information overload. Here, our objective is to help you identify the sources of information overload and control them. We believe that as you manage the sources of information overload you can control work overload as a natural by-product.



As knowledge workers, information enters your world in various ways. The most common are: **e-mail, telephone, paper, and meetings** including one-on-one encounters and **interruptions**. In the coming chapters we will provide some thoughts and tips on how to deal practically and easily with each of these.

Just as with previous sections of this book, please note that we are not presenting a program or a system but a set of “Lego” building blocks. Select what is most appropriate for you and what you can adapt to suit your own needs and style. There will always be exceptions to every rule. Do not let concerns for the exceptions direct and limit your thinking or your personal search for solutions.

Our minds have an amazing capacity to capture images and events and to retain them. Our minds can be likened to a camera that is always on. Everything that comes into our world through our senses is captured and stored indefinitely. The more we focus on an issue, data, or

Note:

* This whitepaper is extracted from our book *Overloaded? From overload to balanced living*. See inside the book at www.amazon.com

* If this page was sent to you by a friend we invite you to subscribe to our e-letter “On The Road To Overcoming Overload.” Please go to <http://www.nomoreoverload.com/request.asp>



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image, the deeper it is ingrained in our minds. Each of these exposures consumes mental energy and occupies storage space in our brain.

As another illustration, our minds are also like a disk drive on a computer. Scientists believe that even before our birth the mind captures sounds and memories of the world around us. This continues without ever deleting anything. Over time our data storage becomes crowded and overloaded. Regretfully, science has not found any delete buttons allowing us to purge our brains of unnecessary clutter.

One of the symptoms of information overload is difficulty in recalling people's names and details. While aging may be a factor, a key reason is our overcrowded minds. Just like accessing data on a heavily loaded disk drive or finding a document in a disorganized filing cabinet, recalling details from the vast quantity of data stored in our minds takes time and mental energy. This explains the reason why small children can recall details faster than older people. This happens primarily because their storage banks are still uncluttered by the huge amount of exposures accumulated with every passing year.

So what can you do?

Hundreds of years ago Martin Luther said, "I cannot keep a bird from flying over my head. But I can certainly keep it from nesting in my hair or from biting my nose off."¹ Just as you can prevent flying birds from making a nest in your hair you can prevent information exposure from settling in your mind **by tackling it at the source**. Our strategy for controlling the information overload is to attack the sources of unnecessary information before they cement their exposure taking more space and mental energy.

In the coming sections we will give tips for each of the five information sources we referred to earlier. But before we do this, let us share four common tips that apply to all of them. Later, we will highlight these common tips giving you examples of how they apply in your day-to-day life.

First Common Tip: Define your communication protocol and communicate it to your important people. What do we mean by a communication protocol? A protocol is an expected code of conduct or behavior that governs our interactions. For example, when you meet someone in the morning you expect him or her to give a greeting such as "Good morning". If you invite someone to a meeting you expect him or her to attend or express regrets. In years past, when you called someone's office you expected a person to answer the phone. That was in the past. Now, the protocol has changed. Today, more likely, you expect to leave a message on a telephone

Ancient Answers to the Information Overload Problem

About 1000 BC – King Solomon, the wisest man who ever lived, said "Be warned: there is no end of opinions ready to be expressed. Studying them can go on forever and become very exhausting!"

Ecclesiastes: 12:12

About 60 - 65 AD – Saint Paul instructs his student, Timothy, saying, "Avoid the idle babblings and contradictions of what is falsely called knowledge."

¹Timothy: 6:20

answering machine hoping that your call will be returned. If there is no answering machine you feel disappointed or frustrated because your communication protocol has been violated.

From the preceding examples, you will note that, in the absence of agreed-upon standards or social norms, protocol is largely defined by the expectations of the originator. Such expectations may not be compatible with your circumstances and life priorities. Therefore, it is important to define a personal communication protocol compatible with your high value roles. This protocol should be based on reasonable priorities and expectations. To avoid any misunderstanding this protocol should be clearly communicated to your important people.

Second Common Tip: Seek the support of your important people for your new communication protocol. If you have ever tried dieting or losing weight you know that this requires commitment and discipline. You also know that success in such disciplines is made easier when you have the support of the important people in your life. Overcoming overload in an overloaded world is not easy. Overcoming information and work addiction will require changed attitudes and priorities that are made easier if you have the support of your important people.

Your new communication protocols will most likely result in changed behavior. Change is often difficult especially if it requires modified behavior on the part of others. With this in view, it is critical that you negotiate for the support of your important people as you implement your new communication protocol.

Third Common Tip: Batch process because this is more efficient. Years back computer memory and processing power were very expensive. Programmers were very careful not to be wasteful in the use of system resources. As a result, systems were programmed and used in a batch-processing mode. As technology became more abundant and cheap we moved to a high demand, multitasking processing environment. This is often wasteful and less efficient in terms of system resource utilization.

Regretfully, our human mind has a finite capacity. Being stretched and overtaxed we need to move back to a more efficient processing model - batch processing. Try it. You will like it.

The concept of “Batch Processing” is to group similar functions into one common, easy to administer process. This common process helps you concentrate on one type of activity at a time. This, by nature, allows the mind to focus and be more efficient. As you practice batch processing, you become better at estimating the amount of time required to complete such activities. You become better at completing tasks on schedule. This will enhance your confidence and your effectiveness. In the following chapters we will give you examples of how to batch process e-mail, phone calls, paper and even meetings and interruptions.

Fourth Common Tip: Make it a habit; it becomes easier. Those of us who commit to an exercise program know that once it becomes a habit it becomes much easier to keep and maintain. Habits, good or bad, are hard to break. You will also find that others are less likely to challenge you or tempt you to return to your overloaded behavior. People admire and respect disciplined individuals. Good habits communicate consistency and stability that result in an

element of security and self-confidence. Good habits will help you feel more in control and reduce the feeling of anxiety that result from our overloaded world.

In the coming sections we will encourage you to develop habitual routines to batch process your e-mail, voice mail, paper and even meetings. Developing a pattern of behavior is healthy and less stressful for you. As a side benefit, you will become more predictable to your team and to those who interact with you regularly.

Summary

- ✓ There are many thoughts and tips that can help you control the sources of work and information overload. Always make sure to personalize the suggested solutions in response to your high value roles, goals, and activities as well as the important people in your life.
- ✓ There are four common tips for handling information sources:
 1. Always seek to define your personal communication protocol and communicate it to your important people.
 2. Seek the support of your important people for your new protocol.
 3. Batch process your information input; it is more efficient and uses less mental and emotional resources.
 4. Whenever possible, make your input processing habitual. This will make the application of new disciplines easier.

Please note: This section will be of particular value to those who had a high score in the Statements 8 to 14 of the [Effectiveness and Overload Gauge](#)

Overcoming E-Mail Overload

Thoughts and Tips are provided to help you improve your effectiveness while reversing the negative impact of e-mail overload.

E-mail has become one of the most important communication tools in the workplace. E-mail volume has increased by more than 2000% in the last five years. This is expected to double by 2006.ⁱⁱ E-mail availability, ease of use, and low cost make it the most common communication tool in many organizations. E-mail has often become a replacement for voice communication and even all-important personal face-to-face interaction.

At the same time there is a significant downside to this impressive development. Participants in our “**Overcoming Work and Information Overload**” workshop often refer to e-mail as the greatest cause of information overload. Some managers spend as much as three hours a day dealing with the flood of e-mail. Studies indicate that e-mail could be one of most misused business tools resulting in reduced productivity, increased stress, poor communication, and increased corporate and/or personal liability.

The risks associated with e-mail were highlighted in a recent survey of large corporations which found the following:

- 62% of employers monitor employees' e-mail and Internet use.
- 51% of employers have disciplined or terminated employees for violating ePolicy.
- 10% of companies were ordered by courts to turn over employee e-mail related to workplace lawsuits.
- 8.3% of organizations have battled sexual harassment and/or sexual discrimination claims stemming from employee e-mail and/or Internet use.ⁱⁱⁱ

In seeking to harness the benefits of this powerful tool, organizations and individual users need to cooperate in the development of a simple, easy to administer policy and appropriate e-mail communication etiquette. The selected policy and etiquette should be tailored to reflect the corporate culture, business needs, as well as its unique legal requirements. In so doing, we suggest you consider your e-mail policy from three interrelated views illustrated in Diagram 9:

- **Legal Responsibility and Liability:** E-mail is a communication gateway between individuals and the corporate world. With this in view, it brings issues, rights and



Diagram 9: E-Mail Policy Framework

responsibilities. Legal minds have not fully articulated what these rights and obligations are. Yet, even today, there are many court cases indicating that e-mail presents employees and employers with significant issues and risks. It is important that you develop a personal and corporate e-mail policy that protects you as an individual as well as the interests of the corporation you represent.

- **Operational Effectiveness and Efficiencies:** Too much of a good thing can be counter productive. Your e-mail policy should serve to limit undisciplined use that results in wasted time, energy, and corporate resources.
- **Professional Communication and Conduct:** Easy access to computers has resulted in careless communication habits. E-mail has become the cause of reduced communication quality that reflects poorly on the image of individuals and the corporation they represent. In the rush associated with the e-mail culture we have neglected most basic etiquette.

TIPS: What can you do? ^{iv, v, vi, vii, viii}

Whether your organization has an e-policy or not, you are responsible for what you can control. Here are some tips that you can consider and tailor to your own needs:

- A. Develop your own e-mail protocol and communicate it to your important people.** Your e-mail protocol defines how and when you respond to the e-mail you receive. If you do not define your protocol, you will be subject to the assumptions and unrealistic expectations of the sender.

Let us give you an example of why this is important .One morning we had a 10:30 client appointment. When we arrived the secretary looked at us with surprise asking, “Didn’t you know that the meeting was cancelled?” “No,” we replied. “I sent you an e-mail this morning,” she said.

The problem was that our e-mail protocol was different from her expectations. As consultants and speakers, we are out of the office frequently. So our e-mail protocol is to process e-mail once, at the end of the day. We failed to communicate this to our friendly secretary who is used to a protocol where her system notifies her the moment any e-mail arrives in her Inbox. Her expectations were that I was subject to a world similar to hers – a world where the e-mail is an instant communication tool. Regretfully, due to the miscommunication of our protocol that morning we wasted a lot of time.

- B. Seek the support of your new e-mail protocol.** Remember your important people are committed to your success. If you explain that your protocol provides for reasonable responsiveness expectations, they are likely to support you. This will make it easier for you to follow through with your implementation.



Example: The experience described above highlights why it is critical that you communicate your protocol and that you gain the support of your important people for your new e-mail protocol. The following is an example of an e-mail you can use for this purpose.

TO: (LIST) Important and teachable people

SUBJECT: Action Requested – My e-mail handling protocol

*It is my desire to improve my effectiveness in handling the flood of e-mail I receive. Towards this goal I have set up my e-mail system to give priority to e-mail directed to me from important people like you. Therefore, e-mail you direct to me personally will be given higher priority and I will do my best to respond to it in **XX** working hours.*

*ALL other e-mail and e-mail where you have copied me will be considered for information purposes or given lower priority. I will seek to process such e-mail in **X** working days.*

*To reduce my e-mail and electronic filing requirements I will assume that the originator always keeps a copy. **Therefore, I may not have to keep one.***

Thank you for your support.

C. Batch process your e-mail at a regular time in the day. Have set times to review your e-mail. For example, it may be first thing in the morning and again, after lunch.^{ix} By so doing, your communication partners become accustomed to your processing cycle and are less likely to impose other expectations on you. So, block this processing time in your day as an important meeting with yourself. You may call such appointment a “**processing meeting**”. Be sure to provide adequate time. Start by estimating approximately three minutes for each e-mail message you need to process. So, if you need to process twenty e-mails a day plan at least half an hour in the morning and additional half hour midday.



The one thing that has contributed greatly to my effectiveness is becoming committed to what I call quiet reflection periods during the day. Such a time period allows me to process, sort, discard, and organize. Having practiced this for some time now, I realize that giving myself this precious quality time reduces my stress and gives me more control of my priorities. Now when I come into the office in the morning I am not rushed, I have time to greet my staff nicely. This is good for the overall atmosphere in the office as well.

The one advice I give to an overloaded person is give yourself “periods of think time” during the day. Providing such periods of reflection, thinking, and processing is critical to help you process, prioritize and improve your effectiveness in a busy workday.

Mr. Gerry Baraneki, People Manager

- D. Apply the “OHIO” - Only Handle It Once - principle.** This is an old, wise piece of advice that is easier said than done. However, if you allow enough e-mail processing time it will be easy to do as you apply the **4 D’s** described in the following steps:
1. **Delete It Now.** Most e-mail you receive you never asked for, and you do not need. Your first questions should be, “Why should I even open it?” “Why not **delete it now?**”
 2. **Deal With It Now.** If the e-mail at hand can be processed in **3 to 5 minutes deal with it now.**
 3. **Delegate It Now.** If processing such an email will help one of your staff or teachable people grow, **delegate it to him or her now.** For example, if you receive an e-mail with a forty-page attachment or study that may be important, ask one of your teachable people to examine it and provide you with a synopsis and recommendations.
 4. **Diarize It Now.** If the e-mail requires more than 5 minutes to process, make a processing appointment with yourself to deal with it later. Be sure to **diarize it now.**
- E. Turn off your e-mail notifier -** you know, the thing that rings or calls your attention every time you get an e-mail. This is a wasteful distraction. If you have committed to batch processing your e-mail at regular intervals, you do not need it. If you do not need it, turn it off. We understand there will always be exceptions, especially when you are anxiously waiting for important mail.
- F. Use rules based filtering aggressively.** Most e-mail systems offer rule based filtering tools. Rules are a set of conditions, actions and/or exceptions that process and organize e-mail messages. These rules are applied to incoming e-mail to help reduce e-mail clutter. Further, rules organize incoming e-mail into predefined folders based on predefined processing priorities that are compatible with your most important roles.
- G. If you get too much e-mail, unsubscribe and get off e-mail lists.** It takes time to delete all those messages, even if you don’t open them.
- H. Don’t print that mail.** Unless you have a need to study and make notes, try to avoid the temptation of printing e-mail. Printing e-mail doubles your filing effort and creates more paper clutter.
- I. Before reading, prioritize;** first prioritize by reading e-mail that is from important people, then important subjects.
- J. If e-mail requires action on somebody else’s part before you can deal with it,** move it out of your in-box into a “Waiting” folder. You should make a note in your calendar for appropriate follow-up.
- K. E-mail messages with important attachments can be deleted after you save the attachment** in your own electronic file or hard disk. In this case, give the attachment your own file naming structure based on how you think, so you can find it easily.
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- L. Set up a “Reading” folder.** File correspondence from e-mail newsletters or discussion groups in a “Reading” folder for an assigned time to read later. If you find that you do not have time to catch up on your reading, do not feel guilty. Most likely you are getting more reading material than you need and you should be more aggressive in deleting some.
- M. Save administrative messages from mailing lists.** When you subscribe to an e-mail newsletter or e-mail discussion group you usually receive a welcome message with information about your subscription, policies about mailing to the group, answers to frequently asked questions, etc. Copy all this in a document or set up a “Mailing Lists” folder to file such messages so you remember what to do if you wish to unsubscribe from a list at a later time.
- N. Use Auto Archive and Auto Delete to reduce the size of your e-mail file.** This will reduce your filing and maintenance overhead and will help your system run faster or more efficiently.



It was depressing to open my e-mail and find a flood of several pages that are more than I can ever go through. People are wrongly using e-mail as a replacement for face-to-face communication. They often copied me on e-mail without thinking of why they were sending this to me. I made a commitment to take control of my e-mail problem. I use the rules based filtering to sort and prioritize my e-mail and focus on my important people. I also apply the OHIO and the 4 D’s principles. Now I go through my important e-mail much faster than ever before, leaving me valuable time to focus on my important roles. More than any other factor, this has helped me become more effective and have more work life balance.

Ms. Kate Agnew, Operations Manager

E-mail etiquette.

The following is a suggested list of e-mail etiquette that could enhance your communication quality. Select the ones best suited for your role and the culture of your organization:

1. Before all else, think of the recipient(s) first. The quality of your e-mail is impacted by what the recipient will think when he or she receives your e-mail much more than what you think when you type your e-mail.
2. Send e-mail to as few recipients as possible. It will enhance your ability to focus the objective of your e-mail and improve your chances of success.
3. Set personal e-mail protocol (etiquette) and responsiveness expectations that are compatible with the most important roles you play. Communicate your protocol to your important people and ensure that you can support their reasonable responsiveness expectations.

4. Be realistic in your expectations; e-mail is not an “**immediate**” communication tool. It is not intended to replace the phone or the all-important face-to-face contact.
5. Frequent use of the URGENT or the HIGH PRIORITY features of your e-mail is like “crying wolf” too many times. Avoid it.
6. Apply the golden rule, “treat others’ e-mail the way you like them to treat your e-mail”.
7. Never write e-mail when you are angry or to let off steam. This could be very damaging.
8. When answering e-mail avoid the “E-mail tag game”. Anticipate all questions and answer each of them clearly.
9. Avoid the use of the “REPLY TO ALL” feature. Unless requested, give the e-mail sender (originator) the privilege of deciding who should receive your reply.
10. If you are sending a mass mailing, personalize your e-mail using mail merge. If you cannot use mail merge, use blind copy (Bcc). This way you avoid distributing other people’s e-mail addresses.
11. Unless necessary for important confirmation purposes, do not request “Delivery” or “Read” confirmation.
12. Avoid forwarding e-mail or attachments without permission. Others may misinterpret e-mail intended for you. Forwarding it carelessly may put you and the originator in potential liability.
13. Define a clear objective for your e-mail. If you can, include your objective in the subject line.
For example:
 - *Action Request, Expenditure Approval or*
 - *FYI Only, Vacation Plan*
14. Limit each e-mail message to one subject. It is easier to understand and file, if needed.
15. Define a clear goal or goals for your e-mail and introduce this at the beginning of your e-mail. To make your communication specific start your goal with a **verb**, for example:
 - Dear Joe:*
 - *Examine my department YTD budget and approve the expenditure of \$3,500 for new furniture*
 - *Advise on how many more \$\$ I should plan for next fiscal year*
16. Write to express, not to impress. Use simple, easy to understand language to communicate effectively. Bulleted points are easier to read than long paragraphs.
17. Avoid using e-mail to discuss confidential information.
18. If you must send sensitive material add an appropriate disclaimer or a legal liability phrase. As an example:

IMPORTANT NOTE *This e-mail may contain confidential information intended solely for the use of the individual or entity to whom it is addressed or to others authorized by them. If you have received this communication in error, **please** notify us immediately by responding to this e-mail and then delete it from your system. This is your rightful and legal responsibility.*

19. Do not overload the recipient's e-mail by sending unnecessary attachments.
20. Forwarding e-mail containing defamatory, offensive, racist or obscene remarks will put you in a compromised position. Do not do it, even if you think it is funny.
21. Do not engage in the SPAM game. Do not ever forward or reply to SPAM.
22. Careless people may send you "hoax" type messages. Do not forward any hoax or virus warning before validating its claim through a reliable source.
23. Start your e-mail with a proper salutation and end it with a proper signature. It adds structure and clarity.
24. Make sure the tone of your communication including the typeface and font support the e-mail objective. As an example:
 - **BOLD FONTS AND CAPITAL LETTERS are more aggressive.**
 - *Normal* fonts and simple sentence structures are more friendly and warm.
25. People like the sound of their name; use it in a reasonable manner if you want to be more personal.
26. Use abbreviations and acronyms carefully. Make sure the recipient understands them.
27. Some slang words introduce cultural conflicts and may be offensive. Avoid them.
28. Do not ramble. Write specific points in short sentences.
29. Use proper sentence structure and layout. Keep your language gender neutral. Do not use only masculine pronouns when writing to a mixed audience.
30. Before sending your e-mail read it once or twice. Check it for content, quality, spelling and proper grammar.
31. Before sending your e-mail consider formatting issues. The recipient's e-mail may have certain limitations that cannot receive the fancy formatting you employed.

Summary

- ✓ Define an e-mail communication protocol that is compatible with your most important role and communicate it to your most important people.
- ✓ Seek the support of your important people for your new e-mail protocol.

- ✓ Batch process your e-mail applying the **OHIO** (**O**nly **H**andle **I**t **O**nce) principle as well as the **4 D**'s (**D**elete it Now, **D**eal with it Now, **D**elegate it Now, **D**iarize it Now).
 - ✓ Apply rules based filtering aggressively.
 - ✓ Apply good processing habits to reduce effort and clutter.
 - ✓ Apply good e-mail etiquette and teach it to others
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ⁱ Jaroslav Pelikan, ed., *Luther's Works*. Volume 21. (Saint Louis: Concordia Publishing House, 1956), page 88.

ⁱⁱ Christopher Saunders, "Study: E-mail to Double by 2006." <http://www.clickz.com/news/article.php/1471801> (5 July 2004).

ⁱⁱⁱ Nancy Flynn and Randolph Kahn, *E-Mail Rules: A Business Guide to Managing Policies, Security, and Legal Issues, for E-Mail and Digital Communications* (New York: AMACOM, 2003), page 12.

^{iv} Kaitlin Duck Sherwood, "Tips for Overcoming Email Overload." <http://www.overcomeemailoverload.com/advice/TopTenTips.html> (11 June 2004).

^v Gihan Perera, "Ten Tips for Filing Your E-Mail." <http://www.firststep.com.au/articles/filing-email.html> (5 November 2001).

^{vi} "Several Answers about Managing E-Mail." <http://www.tmius.com/4tmcorn.HTML> (5 November 2001)

^{vii} "E-mail." <http://www.witc.tec.wi.us/library/tips/nrich/internet.htm#email> (5 November 2001).

^{viii} Ellen Roseman, "Staying on Top of Your Virtual World," *Toronto Star*, 22 February 2004, section C, page 1.

^{ix} Harold Taylor, "Don't Let E-mail Ruin Communications," *Mississauga Business Times*, July 2001, page 34.