



Advisory

The Council of Ontario Directors of Education (CODE) is an advisory and consultative organization composed of the CEOs of each of the 72 District School Boards in Ontario; Public, Catholic and French Language.

Managing Emails

What do I need to know about managing emails?

In a report from Harvard Business School, Stever Robbins talks about chief executive officers being “buried alive” under electronic communication on a daily basis. Robbins notes that the ability to send free information to an infinite number of people can result in every thought and impulse becoming instant communication. <http://www.steverobbins.com/articles/masteringemailoverload.htm>

Directors often receive upwards of 300 emails a day. While some of these emails are critical to carrying out their responsibilities in an efficient and effective manner, many of them are for information only or are copies of messages intended for action by others. It is critical that directors develop strong email management skills and become effective electronic communicators.

Email is a relatively new communication strategy that was not in use until the 1990s. It is estimated that business workers in the U.S. spend at least 25% of the day on email, and countless hours on handheld devices. In 2009, the Bush administration turned over more than 100,000,000 electronic messages to the national archives [SEND publication by Shipley and Schwalbe]. The most important lessons about email are:

1. writing more effective emails; and
2. managing email more efficiently.

What should the director know about sending more effective emails?

1. **Know when it is appropriate to send an email.** The ease of email encourages unnecessary exchanges. It is too easy to engage in brief exchanges via email when they are not relevant to the work at hand.
2. **Choose the most appropriate method of communication for each situation.** Not every message should be delivered by email. Some discussions are better undertaken by telephone – for example, when a more personal touch is needed or when the content of the message is more complex. At other times – for example, in a delicate situation or when there is emotional involvement – a face-to-face conversation is more likely to result in positive outcomes.



Staff Support for Managing Email

Many directors assign an administrative or executive assistant to monitor and read their email. This is an effective practice as long as there are clear expectations for both parties. Directors need to clearly communicate their expectations about the following issues:

- Is the person to read the email only, or to respond on behalf of the director?
- Are some emails marked private that are not to be read?
- Are there emails that should be redirected to another staff member?
- Are there emergency emails that require a telephone call to the director immediately?
- Does the director expect the administrative or executive assistant to manage and file emails in the director's folders?
- The director must retain ownership and responsibility for those messages that require a personal response from the chief education officer/ chief executive officer of the board.

- 3. Avoid overuse of email messages.** Overuse of emails distracts people from key priorities and interrupts the flow of work.
- 4. Remember that emails provide searchable records.** One of the important rules of emails is to stop and think before sending a message. It is essential to remember that the director can be held accountable for everything that the director sends. Email messages from a senior leader may have both system and legal implications.
- 5. Send PDF emails.** Emails can be forwarded, words can be changed, and the intent altered, without the director's knowledge. If the director needs to send a sensitive document via email, the message should be sent in a PDF format.
- 6. Avoid routine sign-off responses.** When an email conversation is complete, or when the message doesn't necessitate further communication, it is better not to send a reply.
- 7. Know when to refuse emails.** Notify senders of unwanted email such as inappropriate jokes, messages, or solicitations that you do not wish to receive their emails.
- 8. Keep messages as brief as possible.** Emails should not be long and involved. They are more useful when they are clear; to the point, state the question or issue succinctly, and indicate what is expected in a response or action.
- 9. Use the subject line.** It is an effective practice to use the subject line to communicate clearly what the email is about. Many individuals read the subject line and do not continue into the body of the email. It is particularly useful to note a recommendation or need for action in the subject line.
- 10. Forward only essential attachments.** Attachments take up valuable server and computer space and may harbour viruses. They should be sent only when it is vital to a required action. Word documents may include tracked changes. When sending a final document, it is important to ensure that any revisions are accepted and purged. Otherwise, anyone receiving the attachment can see the changes that were made by a number of people.
- 11. Check that there is a purpose for listing each individual being copied.** When using a contact list or forwarding messages, avoid sending emails to people who do not need to be copied or informed. If a response is needed from several individuals, it is often more effective to take the time to list the response expected from each one, or to send separate messages that point out the action required of each person.
- 12. Create a dedicated signature.** The director's email signature should contain functional links—for example, to the director's blog, website, online portfolio, etc. This makes it easier for senders to respond and helps ensure a timely response.

How can the director manage emails more efficiently?

The director can learn to use email effectively and learn personal management strategies.

Effective use of the email program:

- 1. Use of Folders.** One recommendation is to use four folders to keep an inbox empty:
 - Follow-up folder: emails that require further action – a response is required;
 - Hold folder: emails that need to be maintained – no action required;
 - Later folder: emails to be read later – action required, but not at this time; and
 - Archives folder: emails that have been addressed and need to be retained. This is different than storing folders by topic. The search function is so powerful now that any required email can usually be found in one large archive.
- 2. Use of Tools.** A number of programs provide automatic tools that assist in managing emails. These programs can:
 - move messages to a particular folder based on who sent them;
 - flag messages from a particular person – for example, by highlighting emails from certain individuals by colour so that they are easily recognizable in the inbox;
 - set up notifications by message or sound when important emails arrive;
 - reply automatically to a certain type of email with a pre-created message; and
 - delay delivery of messages.

Personal management strategies:

- 1. Set a time frame.** Checking email continually is not an effective use of time. It is more productive to preserve uninterrupted blocks of time for important tasks or meetings. Schedule time for checking email messages.
- 2. Read it; answer it.** Some people read all emails before replying to any of them, or read an email several times before responding. A more efficient approach is to read an email and either answer it immediately, file it, or delete it.
- 3. Use a bridging email.** Taking a few seconds to acknowledge an email can mean the difference between leaving a positive or negative impression. When unable to respond quickly to an email that requires attention, send a very brief message acknowledging that the email has been read, and indicate the expected time of response.
- 4. Delete wisely.** Ideally, the subject line will provide enough information to indicate whether the email merits reading or response. Recognizing the sender will also assist in deciding whether immediate deletion is indicated.

Software programs have different tools. Review of these tools is a worthwhile strategy.



Publication:

The following publication provided information for this advisory:

Shipley, David & Schwalbe, Will. (2007). *SEND. The Essential Guide to Email for Office and Home*. New York: Alfred A. Knopf.

5. **Block the source.** Consider blocking emails that are unrelated to the director's role and responsibilities. Some organizations and businesses require special permission to access their servers.

Links to Additional Information:

The following links provide some suggestions of note. However, many of the suggestions for managing email are offered by specific software companies.

<http://www.steverobbins.com/articles/masteringemailoverload.htm>

Empty Your Inbox: Process and Organize Your Email More Efficiently (Microsoft) – <http://www.microsoft.com/atwork/productivity/email.aspx>

5 Tips for Managing the Email Deluge – <http://davefleet.com/2011/02/5-tips-managing-email-deluge/>

If as a supervisory officer, I have concerns and need assistance, what should I do?

- Consult with the information technology department of your board.
- Discuss with your executive/administrative assistant the most efficient and effective way of managing emails.
- Research your software program to determine which tools are most appropriate and beneficial to your needs.
- Attend a workshop on managing emails.
- Search the internet for relevant articles.
- Speak with colleagues who have effective management techniques.

