

Eliminating E-Mail Overload with Time Matters E-Mail

E-Mail – Boon or Bane?

What can be wrong with a technology that lets you do in seconds what used to take days? What downside can there be with a technology that lets you deliver written communications around the world in seconds, without having to pay postage?

If you answered, “SPAM, junk e-mail, or the spread of viruses, that’s what,” you are right. But, those are the obvious e-mail problems that are well known, well publicized, and have plenty of talent dedicated to their eradication. The real insidious downside to e-mail is the negative impact it has daily on business productivity. E-mail Inboxes with hundreds of e-mail messages are not manageable; staff members using their Inbox as a quasi-ToDo list are not efficient; and companies that have thousands of e-mail messages stored in non-shared folders that cannot be effectively searched waste hundreds of hours of time locating information that should be easily accessible to them. The sheer amount of e-mail that is received daily, without an effective method to deal with it, can simply be overwhelming.

In a recent article, *E-mail: Does it simplify lawyers' lives or just increase the stress?* (California Bar Journal, May 2001), the director of the State Bar’s stress management program notes that participants in the program “now cite today’s constant stream of e-mail as a source of stress.” Among the problems that lawyers face are “greater client expectations, ... and, some say, an onslaught of electronic messages 24 hours a day, on top of their telephone voicemail, cell phones and pagers.” As the article notes, “[o]n an average day last year, North Americans sent 6.1 billion e-mail messages, ... [and] [t]hat number will jump to 18 billion e-mails a day by the year 2005.... And researchers expect that more than half of those e-mails will involve business, not personal, matters.”

A good start in handling the problem is to implement well thought out, office-wide policies on how to handle incoming and outgoing e-mail. Then, use Time Matters Software’s new e-mail model to help eliminate “e-mail overload” with tools that let you quickly process e-mail by turning incoming and outgoing messages into Time Matters records that can be easily and quickly searched, associated with a particular client or matter, or used to quickly create a ToDo or Event which is then handled as it should be in a practice management system. Using this system will help alleviate the overload and reduce the stress and inefficiency associated with the ever increasing amount of e-mail traffic.

Pushing Paper

When looking at the root cause of e-mail overload and how it should be overcome, it is helpful to compare it to a well known problem that has been around much longer than e-mail ... the problem of “pushing paper.” Executive organization experts teach that the best way to avoid being overwhelmed by paper is to do the best you can to make sure that you “touch” a piece of paper once, and only once. Many people waste considerable time moving paper on their desks from one stack to another, use these stacks as quasi-ToDo lists, and often end up spending more time shuffling the papers around their desks than it would

take to accomplish the tasks for which the papers call. Just walking into an office with a messy desk can cause confusion and disrupt an otherwise organized day.

One system to reduce this problem that is widely presented is the RAFT system -- Refer, Act, File or Toss. Pursuant to this system, the first time you “touch” a piece of paper you should refer it to the appropriate party to be handled, act on it to completion, file it for later use or reference, or toss it in the round paper file – the waste basket. The diligent application of RAFT can result in a reduction in the amount of paper with which one has to deal, gets it to the person who is best suited to handle the task it represents, and generally increases productivity by reducing clutter and the inefficiency that is inherent therein.

RAFT Applied to E-Mail?

Because the problems associated with e-mail overload are similar to those caused by having too much paper to handle, it is instructive to look at paper overload solutions for the answer to the e-mail overload problem. Instead of having a desk cluttered with paper, you now have an Inbox with 450 e-mail messages. Instead of moving stacks of paper around on your desk, you move e-mail from folder to folder. Instead of using the stacks on your desk to govern the order of your day, you turn to the e-mail in your Inbox to determine what needs to be done next. Instead of not being able to locate a document you need because it is buried on your desk, you can't find the e-mail you need because you don't know what folder it is in or it may be in a non-shared folder. And, for some reason you simply can't seem to bring yourself to delete e-mail messages any more than you can throw away the paper you collect that is infrequently needed or used.

Applying a modified version of the RAFT system to Time Matters' e-mail implementation, and applying the following principals, you can eliminate “E-Mail Overload.”

Your E-Mail Inbox is a Gateway to Time Matters, not a Repository

The Inbox is not a ToDo list, nor is it a repository for e-mail. It is a gateway through which e-mail passes and is appropriately processed. Just as you strive to have a clean desk, free from paper, you should have a clean Inbox, free from e-mail messages. This is accomplished by “touching” an e-mail message once, and only once.

Because Time Matters' Inbox is simply a gateway through which e-mail messages get entered into the Time Matters E-Mail database, and then associated with the appropriate Contact and/or Matter, you should avoid the use of folders. This is probably the most difficult habit to overcome for users of Outlook, GroupWise, Eudora, and the like, who are accustomed to using folders to segregate their e-mail messages.

Who is in Control ... You or Your Inbox?

In a sidebar entitled *E-Mail Addiction*, PC Magazine reports that 34% of office workers check e-mail continually during the day. *PC Magazine*, September 4, 2001, p. 29. This figure strikes us as being low. Nonetheless, it is strong evidence of how improper handling of e-mail can result in office inefficiency. To avoid this,

think twice about having your e-mail Inbox open all the time, and give serious consideration to turning off the sounds and visual clues that sound when a new e-mail has arrived. It is amazing that the same people who closely regulate their schedules, have an assistant screen their calls, and keep in-office distractions to a minimum don't give a second thought to having their e-mail program "ding" every couple of minutes so that they can quickly pop up their Inbox to see what new e-mail just arrived.

But, you say, "I am a very important person and so are my clients. They need to have immediate access to me." Admittedly, there are times when you will want to keep a close eye on your Inbox. For example, if you are in the middle of remote deal negotiations or the collaborative drafting of a document, you will want to check your e-mail regularly. But, outside these special circumstances, if someone really needs to get in touch with you urgently, e-mail is not the preferred medium. Your important clients should contact you by phone or at least give you a "heads up" that an important e-mail is on its way. Absent the occasional urgent need, it simply is not good business practice to assume that everyone else so badly manages their time that they check their e-mail every second of the day.

Schedule specific times during the day to process your e-mail. The first thing in the morning, after lunch, and then late in the afternoon are good times and are frequent enough that you are not likely to miss an important e-mail. As you open each e-mail message, take one of the following actions (in this order):

Throw it Away (Delete It)

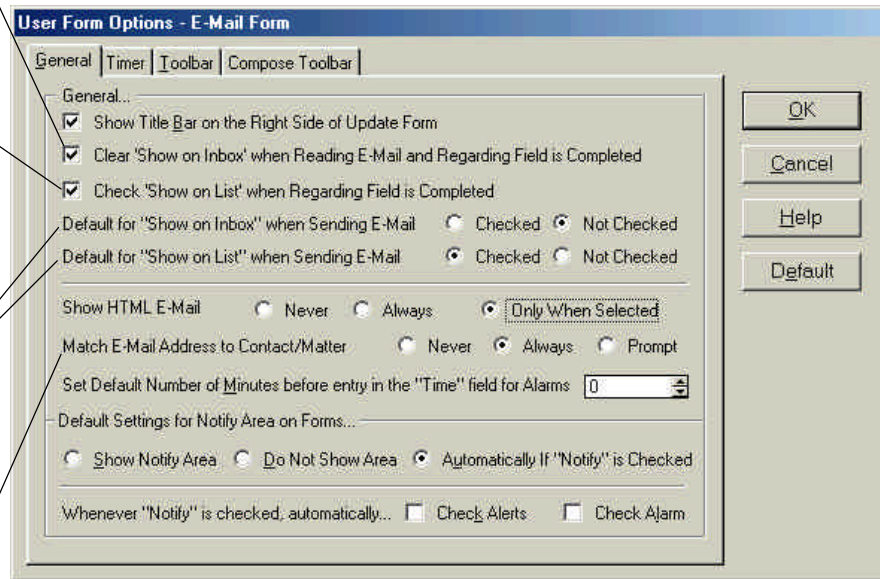
Delete unsolicited e-mail, SPAM, e-mail from unknown sources (especially if they have attachments), jokes, newsgroup and e-mail list serve messages, and other e-mail that you may or may not glance at but have no reason to keep. You will be surprised at how much of this type of e-mail you receive, and quickly deleting it is a good start to overcoming the overwhelming flow of e-mail. As you process this type of e-mail, send a friendly, but firm e-mail to your brother-in-law and others asking that they not send you any more jokes, and make sure that you are taken off any e-mail lists or newsgroups that you really don't need. It is a general and good rule not to respond to SPAM, even if you are requested to do so in order to be removed from the spammer's mailing list. This is often a trick that is used by the spamming party to confirm that your address is still a valid e-mail address to be sold to others.

File It

If no action needs to be taken based on the content of a received e-mail message, but you want to keep it for later reference, you will want to "file" it in Time Matters. In order to understand how to "file" an e-mail, you first need to know what happens to an e-mail message when it is opened. Select **File ► Program Setup ► User Level ► E-Mail ► Set Forms Options ► General** to set the

- When the Regarding fields are filled in automatically or manually the e-mail is removed from the Inbox. Typically, you want this checked.
- When the Regarding fields are filled in automatically or manually the e-mail is placed on the Time Matters E-Mail List. Typically, you want this checked.
- When you Send an e-mail, you can set these options to make sure that the composed e-mail appears on the E-Mail List and/or in the Sent Items folder in the Personal Inbox.
- When an e-mail is opened, search the Contact and Matter database for a match of the Sender's e-mail address. If found, automatically fill in the Regarding fields.

options needed to best process e-mail. There are five checkbox options that operate together to determine what happens to a received e-mail:



When these options are checked as illustrated above, opening the e-mail will result in a quick Search of the Contact and Matter databases. If a match is found, the Regarding field(s) will automatically be completed. In turn, because the Regarding field(s) have been completed the “Show on Inbox” checkbox is turned off and the “Show on List” checkbox is turned on. When you press **Save & Close**, this effectively relates the e-mail to the appropriate Contact or Matter, removes it from the Inbox, and places it on the E-Mail List. The e-mail has been filed.

If the Regarding fields are not filled in automatically, the sender’s e-mail was not located in the Contact database, or the sender is in the Contact database but is using a different e-mail address (this has become a more common problem as people are using multiple e-mail addresses at work, home and when they travel).

From the open E-Mail record, press **Ctrl+Shift+C**, or press the **Add Contact** button that you have added to your Main Toolbar. A new contact record is added to the Contact database that will include the sender’s display name and their e-mail address. You can then manually fill in the E-Mail Form’s Regarding fields as you usually would with Time Matter’s lookup features.

Reply To It

If you have scheduled time to reply to your e-mail, do so at this time. Keep your replies short and concise, but do not use Internet abbreviations and observe standard business etiquette just as you would if you were drafting a letter.

If you are only doing a quick run through your e-mail, or have not scheduled enough time to properly compose your replies, consider transferring to a “To Process” folder the undeleted e-mail to which you need to respond. While our

goal is to dramatically reduce (or eliminate altogether) the use of folders, a “To Process” folder can be used to make sure that your Inbox is kept empty and that you have a temporary place to put e-mail until you have scheduled time to compose your responses. You should only use such a folder if you regularly schedule part of your day to process e-mail. The folder should be empty most of the time ... certainly by the time you leave the office each day.

Open the e-mail as you did when you wanted to file it. If a match is found, the Regarding fields will be completed automatically. Instead of pressing **Save & Close** as you would to “file” it, press **Save**. This has the effect of saving the e-mail with the new Regarding field information and “Show on ...” checkbox changes, but keeps the e-mail open and in focus. Press the **Reply** button on the E-Mail Form (if you don’t have **Reply**, **Reply to All**, or **Forward** buttons on your E-Mail Form review *Changes to the E-Mail, Contact and Matter Forms*, below). When you press **Reply**, the original e-mail will close (you already saved it), it will no longer appear in the Inbox, and a new e-mail will open in Compose mode. Because the Regarding fields were filled out when the e-mail was received, they will have been “inherited” by the new Composed e-mail. Add your reply, and press the **Send** button. Depending on the settings illustrated above, your e-mail will or will not be saved in Sent Items folder, and a copy of the e-mail will be stored on the E-Mail List, related to the appropriate Contact or Matter.

Act On It – Create a ToDo, an Event or Delegate It

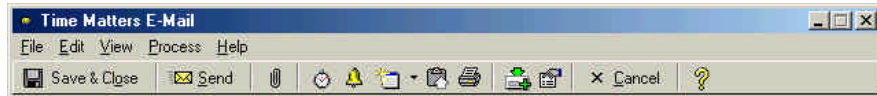
An e-mail will often require that some type of action be taken. If it is not something that you can accomplish quickly, you need to add a ToDo to your ToDo List. A ToDo lets you set a priority, classify it and set a due date – things you can’t do with an e-mail message in the Inbox. An e-mail might confirm a meeting, or inform you of an upcoming deadline. You can quickly add an Event to your calendar, using the information that is contained in the e-mail to establish the date, time and other relevant information. If the e-mail calls for action by someone else you work with, use the Time Matters delegation system to assign the task to the appropriate staff member.

Whether you are adding a ToDo or an Event, the first step is to open the e-mail. This will match the sender’s e-mail and fill in the Regarding fields. Then, if you want to add a ToDo, press the **Add ToDo** button you’ve added to the Main Toolbar, or press **Ctrl+Shift+T**. A new ToDo opens, using the e-mail Subject for the ToDo’s description field, and the body of the e-mail message is copied into the ToDo memo. Because you filled in the Regarding fields when you opened the e-mail, Time Matters’ inheritance makes sure that the Regarding fields of the ToDo are filled in. Moreover, because both the e-mail message and the ToDo are related to the same Contact and/or Matter, if you need the e-mail that created the ToDo, you simply press the E-Mail tab located across the top of the ToDo and you can access the e-mail to read, reply or forward.

At first thought, when you think about delegating a task that is raised by an e-mail, you may lean toward forwarding the e-mail to the person you are going to charge with completing the task. Instead, create a ToDo for the person to whom the task has been delegated using Time Matters’ delegation tracking capabilities to ensure that the task is completed in a timely manner. For more information on how to configure Time Matters to handle task delegation, see our Position Paper on Task Delegation.

Changes to the E-Mail, Contact and Matter Forms

By default, the Time Matters E-Mail Form for composing an e-mail looks like the following.



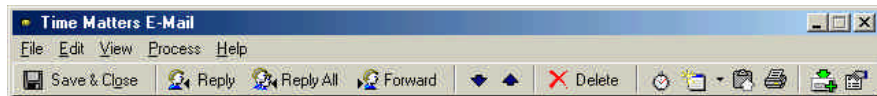
Most e-mail programs have the **Send** button on the far left. Notice that the button on the far left is the **Save & Close** button, not the **Send** button. Some users will compose a new e-mail and by habit press the button on the far left. This has the effect of saving the e-mail as a draft, but doesn't send it. Select **Edit ► Edit Toolbar ► Compose Toolbar** and then swap the position of the **Save & Close** and **Send** buttons so that the Toolbar looks like this:



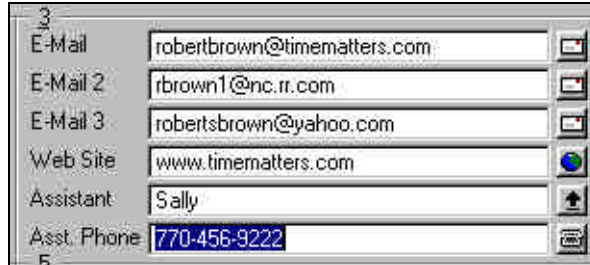
By default, the Time Matters E-Mail Form for e-mail that has been received looks like the following:



When the e-mail is in the Inbox, you have access to the **Reply**, **Reply to All**, and **Forward** buttons that are on the Inbox toolbar. But, when you open an e-mail from the E-Mail List – such as when you access the e-mail sublist for a particular Contact or Matter – there are no buttons to reply or forward the e-mail. To remedy this, select **Edit ► Edit Toolbar ► Toolbar** and then add the **Reply**, **Reply to All**, and **Forward** buttons. You will have to remove a few items to make room. Possible icons you can remove are the Save, Alarm, Delete, Cancel, and Help buttons. Once you have made these changes, your toolbar will look like this:



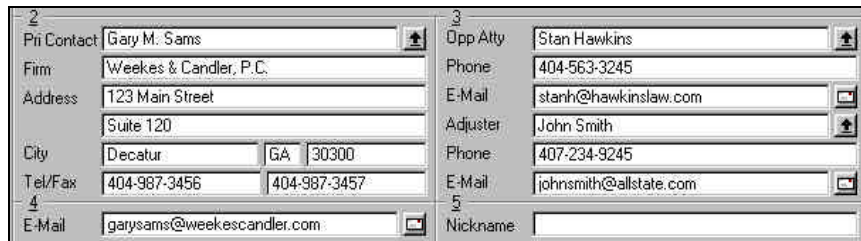
Finally, it seems that people now have more than a single e-mail address from which they may send you e-mail. For example, it is not uncommon for someone to have an office address, a home address, and a web-based e-mail address for use when traveling. When Time Matters searches the Contact and Matter database to locate a match, it can search more than one e-mail field. You may want to change your Contact Form to include several e-mail fields:



A screenshot of a contact form with the following fields:

E-Mail	robertbrown@timematters.com
E-Mail 2	rbrown1@nc.rr.com
E-Mail 3	robertsbrown@yahoo.com
Web Site	www.timematters.com
Assistant	Sally
Asst. Phone	770-456-9222

To help automatically match e-mail to Matters, you might want to display the e-mail of Contacts linked to Matters:



A screenshot of a contact form with the following fields:

Pri Contact	Gary M. Sams	Opp Atty	Stan Hawkins
Firm	Weekes & Candler, P.C.	Phone	404-563-3245
Address	123 Main Street	E-Mail	stanh@hawkinslaw.com
	Suite 120	Adjuster	John Smith
City	Decatur GA 30300	Phone	407-234-9245
Tel/Fax	404-987-3456 404-987-3457	E-Mail	johnsmith@allstate.com
E-Mail	garysams@weekescandler.com	Nickname	

An e-mail from Gary, Stan or John in this example will not only automatically match to their Contact record, but will also match to this particular Matter in which they are listed.