Drive **Time**
LEANing to Create **Capacity**

Email Management Guide

For more information on Email Management see the FLL website (search Boeing intranet, key word "FLL email management")

Front Line Leaders Initiative
Creating Capacity for a Purpose
https://fll.web.boeing.com/

www.mcgheepro.com

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"Technology and production can be great benefactors of man, but they are mindless instruments, and if undirected they careen along with a momentum of their own." Charles A. Reich

1.0 Introduction

This document introduces employees to a new way of managing email through a combination of behavioral and technical solutions. Front Line Leaders (FLL) has partnered with McGhee Productivity Solutions to deliver a Boeing customized tool set which includes an email protocol and email management training materials.

The email protocol will change our collective behavior on how we think about and use email. The protocol establishes "rules of the road" to assist all employees in writing effective business communications. It is available enterprise-wide, regardless of job role (e.g., management, salaried, hourly).

The email management training materials will cover the use of a reference system, Outlook features and the Four D's as an integrated management system. Training on the email management tools and processes will be available via webinars and live virtual sessions.

In 2012, access to the training is limited to managers[i] within BCA SCM&O and Airplane Programs. If you are a manager outside these organizations, have your Finance focal contact Andre Canty (Andre.L.Canty@boeing.com) for more information. If you are not a manager refer to your manager.

1.1 Case for Action

Information overload is a significant impact to productivity. In a September 2009 Harvard Business Review article, author Paul Hemp[ii] references a study that found "*people took an average of nearly 25 minutes to return to a work task after an email interruption.*" Hemp also sites that "*knowledge workers average 20 hours a week managing email.*" Boeing managers also weighed in, identifying email as their 4th largest time driver during Leadership 2010.

The challenge, and therefore the opportunity, is to minimize the time spent on email so managers can focus on developing themselves and their teams. The FLL Initiative has developed an Email Management tool set designed to meet the following objectives:

- Reduce the time spent "doing" email by 25% (e.g., composing, reading, processing)
- Reduce the time spent looking for information by 25% (e.g., storing, handling, locating)

In conclusion, taking steps to proactively address information and email overload not only demonstrates Boeing's commitment to increasing capacity for our leaders, but also reduces the volume of email traffic for all employees.

1.2 Establish a Baseline

The recommended approach is to use the "Email Management Survey" (Appendix) to set an individual or team baseline. The survey covers clarity of email, inbox management and hours spent "doing" email. The suggested steps are:

Step 1. Take survey
Step 2. Implement email management suite of tools
Step 3. Re-take survey 30 to 45 days after implementation
Step 4. Compare results and note efficiency improvements
Step 5. Make adjustments as needed

2.0 Establishing Business Email Protocol "Rules of the Road"

In the United States, driving on the right-hand side of the road and stopping at red lights is an accepted and necessary practice for generating efficient, accident-free driving. As part of Email Management, we are defining business email "Rules of the Road" through the use of a documented email protocol. When followed, the protocol facilitates efficient and effective business communication and provides benefit and time savings for all of BCA. This email protocol is the first step towards repositioning email from an individual-driven process to a professional, business communication vehicle with the specific and intended purpose of moving our business forward.

Creating efficient and effective business email requires thought and consideration prior to typing the message. Sending clear, structured email and responding appropriately will provide timely answers, minimize email threads and identify necessary escalations - all while saving time for both the sender and the recipient.

The email protocol provides guidance on how to:

- Write clear effective business email utilizing the "PASS" model as a simple framework
- Write "Subject" lines that convey meaningful business objectives, actions and due dates
- Identify appropriate recipients on the "To", "Cc" and "Bcc" lines, ensuring that work moves forward while reducing unnecessary email volume
- Respond to and format email to maximize readability and impact

2.1 Choosing the Right Communication Medium

This document addresses only email, but it is important that employees consider the broader spectrum of communication mediums available to them (e.g., instant message, text, phone call and/or in-person meeting) and select the most appropriate. An email may not be appropriate if you do not answer "yes" to the following sample questions:

- Can the work day pass before the recipient responds to the communication?
- Can the message be easily described using words and, if needed, attachments instead of requiring interaction and verbal clarification?

- Does the nature of the message permit and/or require a permanent record of the communication?

2.2 Composing Effective Email – The "PASS" Model

As stated in the email protocol…

The body of an effective business email provides the recipient with a clear understanding of the purpose, actions and information needed to respond accordingly.

The "PASS" model provides a common structure and sequence that helps the author to construct the body of the message in a format that is easily scanned by the recipient.

P – ***Purpose***: Define the purpose of the message and related business objective
A – ***Action:*** Identify the action, priority and responsible individual
S – ***Supporting Information:*** Include information needed to complete the action
S – ***Subject:*** Summarize the purpose, action and due dates in the subject line

ADDITIONAL CONTEXT

The "PASS" model is a method used to help remember the important elements when writing an email. The structure elements of the email body are **Purpose**, **Action** and **Supporting Information**. The **Subject** Line should summarize the body of the message.

The "PASS" model, in conjunction with the proper use of "To", "Cc", and "Bcc" address lines, will help ensure the creation of the most effective, efficient email. An email created using the "PASS" model can be easily scanned, providing the recipient with clear actions and information needed to complete any requested work. To do this effectively the recipient(s) should be the focus when writing the email.

Contrary to what is normally done, start from the bottom-up when drafting an email. First, write the body of the message by clarifying the purpose and include actions and supporting information, if needed. Second, write the subject line and finally, populate the "To" and "Cc" lines based on who does or does not have actions listed in the body of the email. Additionally, populating the address lines last will help prevent accidentally sending the email.

P – What is the Purpose of the communication and does it relate to a business goal and objective?

As stated in the email protocol…

Upfront, clarify the reason for sending the email. Take time to consider how the email relates to the author and/or recipients' priorities. If the message doesn't move business goals and objectives forward, the email may not be necessary.

ADDITIONAL CONTEXT

The sender does not need to know the exact Business Goals and Objectives (BG&Os) of the recipient. However, the sender should have an idea of how the email relates to the recipients' statement of work before time is spent writing and reading it.

EXAMPLE

> **Team,**
> Looking for your input on a one-page brochure for our department's services.

Once the **Purpose** has been confirmed, the next step is to create clarity on the intended outcome of the communication. What is the **Action** and who is responsible?

A – What Action is involved, what is the priority and who is responsible?

> *As stated in the protocol…*
>
> Next, clarify what actions are being asked of the recipient. Most actions fall into one of the following groupings:
>
> - Complete a physical ***action***, e.g., edit a proposal, schedule a meeting
> - Provide a ***response***, e.g., answer a question or make a decision
> - ***Read*** the contents; no additional action or response to the email is needed
> - Content is ***FYI***; recipient is not responsible or accountable for the information
>
> To assist the recipient in prioritizing the request, provide contextual information, e.g., a due date or description of dependent tasks.
>
> If sending a request to multiple recipients:
>
> - Use separate bullets or line items to identify actions specific to each individual
> - When assigning an action to a group, always identify the focal responsible for providing the final deliverable

ADDITIONAL CONTEXT

The sender's responsibility is to be clear on what is being asked of the recipient and why. Most business email fall into one of four **Action** groupings and assist the recipient with quickly assessing what needs to occur.

The groupings are: The sender will need the recipient to do something (*action*) for the sender or a group; provide a response to an inquiry or suggestion (*response*) to help with providing a solution or simply providing input; review the contents of an email or file (*read*) for future use or knowledge for an upcoming event; or the information may simply be of interest to the recipient or "nice to know" about (*FYI*) but the information may not have any bearing on a current project or in-work item. In addition to providing Action, provide the recipient contextual information (e.g., a due date, description of dependent tasks) to assist them with prioritizing the request with their other work items. The "priority" icon ( ) and "flag" icon ( ) indicate sender's urgency, not the recipients' priority level, and should not be used. Action groupings better assist the recipient with prioritizing requests with their work statement.

Multiple Individuals involved and/or Multiple Actions or Responses Needed: To assist in providing recipients with an email that can be quickly scanned for actions assigned and ease in follow-up, use the following suggestions:

- Multiple individuals involved and have actions: List each individual along with their specific action in a separate bullet or line item
- Group request: Identify a point person responsible for providing the final result
- Multiple Actions/Responses: Separate the actions out in a bulleted fashion with the assigned individual's name and date due (if there is one) and provide contextual information

EXAMPLE

Everyone:

- Please provide input on our services (as individuals and a group) to Tom by 1:00pm, Thurs, May 4th
- Please clear your calendars for a 2 ½ hr review meeting on Fri, May 5th at 11:30am

Tom:

- Please schedule the review meeting
- Please send the draft brochure to the team by end-of-day Thurs, May 4th, so they can come prepared with comments/edits

Once the **Action** has been identified and stated, provide any **Supporting Information** that would be beneficial and help with fulfilling the request.

S – What Supporting Information is needed to complete the requested action?

As stated in the protocol…

Once the Purpose and Actions have been written, be sure to include any supporting information needed to complete the requested actions. Slowing down up-front to ensure completeness reduces the likelihood of follow-on questions and additional email volume.

Supporting information can take the form of an email chain, attachment, link or a concise summary of the relevant information.

ADDITIONAL CONTEXT

After clearly stating the purpose, and providing the necessary action, be sure to provide a concise summary of the **Supporting Information** needed by the recipients to complete the request. This will reduce the likelihood of the message being returned with questions, incomplete action being taken, or generating unnecessary email volume. The supporting information should be placed in the lower part of body of the message, usually after the message and before the signature line.

As a technique, providing a concise summary rather than an attachment or link, will ensure the proper action is efficiently completed. If a concise summary is not sufficient, see the options below.

Attachment

When adding information as an attachment, be sure to specifically call out the name of the file(s) to alleviate confusion. Adding files within the body of the message does not guarantee they remain where placed. Depending on the email format structure (Rich Text, Plain Text or HTML) the file(s) may end up in the body of the message or on a line below the subject line entitled “Attach…”.

Examples of when to add an attachment:

- The information is not in a location that is available to every recipient, e.g., a secure server
- Recipient needs a copy, but master file needs to remain intact
- More than one recipient could require access to the file at the same time
- Recipient may benefit from access to the attachment on a mobile device

Link

When adding the information as a link, ensure the following:

- Link does not start with a letter (e.g., X:) and the entire network drive location/path is included (e.g., \\nw\787Lib...)
- Recipient has access
- Links are referenced by name

To correctly embed a link with Outlook 2003:

- Email must be in Rich Text format (to verify, select “Format” on the menu bar)
- From the menu bar at the top of the message choose “Insert”
- Select “File”
- Locate the file
- Select file name (it does not need to show up in the “File Name” box)
- Select down arrow next to “Insert” (lower right hand corner of “Insert File” window)
- Select “Insert as Hyperlink”

Examples of when to add a link:

- Recipient has access to the server
- Recipient needs to edit the original file and/or track changes
- The file is large (e.g., larger than 5MB)

Email Chain

When using an email chain as supporting information, first copy and paste the relevant information into the supporting information section of the new message. This efficiently provides the supporting information without the recipient having to search through the entire email chain.

If the information needs to be kept in context and the entire email chain read, let the recipient know. Specify why reading the email from the bottom-up is needed and what the recipient is looking for.

EXAMPLE

Here's the context -
We continue to have problems with other departments understanding when to engage with us; a brochure explaining our services will ensure that everyone knows when our services are appropriate. My goal is to share the completed brochure with senior managers no later than Monday (8th) close of business.

See attachments, including the brochure template and examples from other groups.

brochures.ppt (58 KB)

Upon completion of the body of the message, with **Actions** and the **Supporting Information**, the next step is to fill in the **Subject** line.

S – Does the "Subject" line effectively summarize the message?

As stated in the protocol…
The last part of the "PASS" model is the subject line which should succinctly summarize the email message, including purpose, actions and due dates.

Using a standard **Subject** line format allows the recipient to scan the message and understand the nature of the request. Begin the subject line with one of the following:

- **Action Requested:** Use for requesting an action; include action and due date
- **Response Requested:** Use for a response or decision; include due date
- **Read Only:** Use when email must be read; no response or action is expected
- **FYI:** Use when recipient is not accountable or responsible for the information

If the message is brief and can be contained in the subject line, use "**EOM**" (End of Message) at the ***end*** of the line.

Examples of easily scanned subject lines are:

- Read Only: Customer forecast assessment in preparation for Jul 23rd meeting
- Action Requested: Sign off time before leaving on holiday EOM.

ADDITIONAL CONTEXT

It is difficult to properly summarize what has not yet been written, which is why the "PASS" model recommends writing the **Subject** line after the **Purpose**, **Action** and **Supporting information**.

The subject line should never be left blank because it is preparatory information for reading the email and critical to efficiently processing the inbox. There are three elements that define an effective subject line:

- Clarity on the related business goal and objective
- Clearly stated action
- A due date, if appropriate

Examples of how to use the keywords in the subject line:

- Action Requested: Review new safety policy with staff no later than Jan 20th
- Response Requested: Provide Go-no-Go on proposed alternative material by Nov 10th
- Read Only: Customer forecast assessment in preparation for Jul 23rd meeting
- FYI: Interesting article on composites

Use only one of the above keywords to start the subject line, even when there are multiple action types within the body of the email. The subject line should succinctly summarize the email message, including purpose, actions and due dates.

When the entire message is short enough to be contained in the subject line, use "**EOM"** (end of message) at the **end** of the line. EOM provides the recipient with the knowledge that the entire message is contained within the subject line, the body of the email is blank and the email does not need to be opened.

Example of how to use EOM in the subject line:

- Action Requested: Sign off time before leaving on holiday. EOM
- Read Only: Out sick today. EOM

When a team/organization has an existing documented procedure (e.g., standard process, PRO, BPI), use these subject lines to augment that procedure when possible.

Upon completion of the body of the message, with **Actions, Supporting Information** and the **Subject** line, the next step will be to add recipients.

2.3 Populating Address Lines – Use of "To", "Cc", "Bcc"

> *As stated in the protocol…*
>
> After using the "PASS" model to construct the body and subject line of the email, the next step is to populate the address lines. Standard use of "To", "Cc" and "Bcc" will reinforce the sender's intended expectation of each recipient

"To":

As stated in the protocol…

Each "To" line recipient is responsible for an action, as outlined in the Action and Subject line sections of the email.

When confirming the recipients in the "To" line, consider the following:

- Does the email relate to the recipient's business goals and objectives?
- Does each individual in the "To" line have an action and can they identify it by scanning the action section?
- If using a Distribution List, expand the list to ensure that all "To" addressees have an action, otherwise move names to the "Cc" line or remove completely.

ADDITIONAL CONTEXT

The "**To**" line and the **Subject** line are intrinsically linked; each individual on the "To" line is responsible for an action, as outlined in the subject line and the **Action** section of the "PASS" model. If the subject line has been effectively summarized, and the email clearly written, each recipient on the "To" line will understand the action they need to take. Additionally, the recipient will know how it is related to an objective or project and how to prioritize this email relative to their other work. Keep the "To" line limited to only those people who have an action to perform.

Be extra careful when using a distribution list (DL). Expand the DL (click on the "+" sign next to the DL name) and verify every person on the DL has a specific action associated in the email. If they do not, take the time to either remove the person from the email entirely; or if the person needs to be aware of the contents but not responsible for an action, move them to the "Cc" line.

"Cc":

As stated in the protocol…

Each "Cc" line recipient needs to be aware of the email contents, but no action or response is expected; the email only needs to be read. Only include "Cc" line recipients if the information is relevant to, and/or impacts, their business goals, objectives or projects.

Be thoughtful when adding 'chain-of-command' to discussion threads. Include them only at specific points (e.g., potential point of concurrence or impasse).

When confirming the recipients in the "Cc" line, consider the following:

- Does the email relate to the recipient's business goals and objectives?
- If using a Distribution List, expand the list to ensure that all "To" addressees have an action, otherwise move names to the "Cc" line or remove completely.

ADDITIONAL CONTEXT

Carefully utilizing the "**Cc**" line shows respect for others' time and may reduce email volume. When an email is written using the "PASS" model, the "Cc" recipients will know they have no requirement to complete an action or provide a response. Placing a person's name on the "Cc" line is similar to sending a direct email with a "Read Only" or "FYI" subject line.

Consider leaving the "chain of command" off of the email chain, until such a time as it is appropriate to compose a "Read Only" email to the "chain of command" (or a one-on-one discussion) with a summary of the email chain's results. Including any "chain of command" in the "Cc" line may have a negative connotation in the mind of the recipient and usually increases email traffic.

"Bcc":

> *As stated in the protocol…*
> "Bcc" should be rarely used and is only recommended in the following situations:
> - To protect contact information from being disclosed to recipients of the email (e.g., customers or competing suppliers)
> - To shield "Bcc" recipients from receiving "Reply all" responses

ADDITIONAL CONTEXT

The "**Bcc**" can be used to shield, or protect, a DL or individuals from receiving "Reply all" responses. Individuals on the "Bcc" line will not receive any reply message when another recipient sends a "Reply all". However, if anyone on the "Bcc" line hits "Reply all" everyone on the "To" and "Cc" lines will receive the reply.

"Bcc" does not guarantee a private communication. For sensitive situations, a technique is to complete the email without "Bcc" recipients. After the subject email has been sent, forward the email record to the private party.

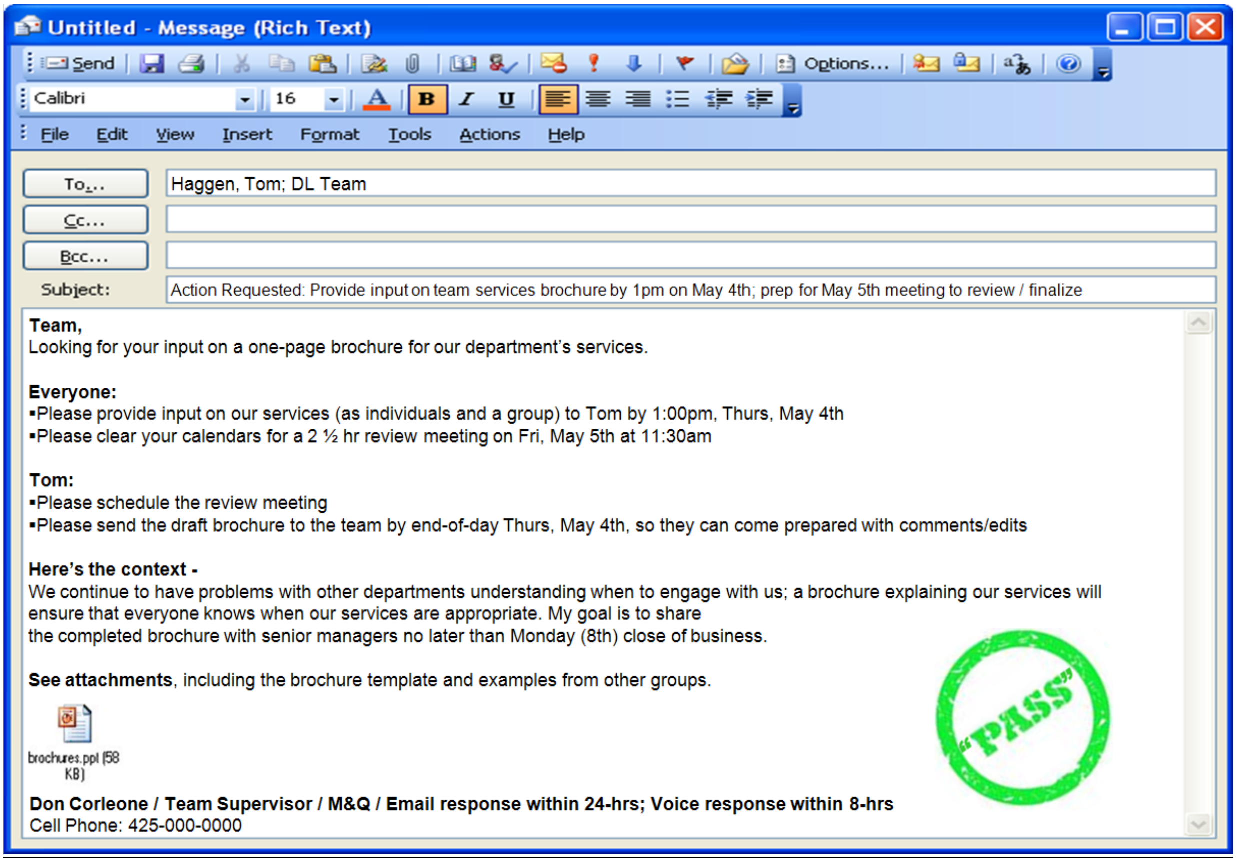
2.4 Before Pressing "SEND"

> *As stated in the protocol…*
> After the "PASS" model has been used to create an effective email, and the recipients have been verified, ask these final questions:
> - Has the email been written so that it will not come back to you with questions?
> - Have links been tested or attachments added?
> - Does the message need to be tracked for follow-up?

ADDITIONAL CONTEXT

- Verify grammar and spelling has been checked and jargon removed
- If emotional about the subject, it may be best to save the email in draft and come back to it later
- Reassess if email is the appropriate communication medium

EXAMPLE



2.5 Responding to Email

As stated in the protocol…

Responding effectively is as important as writing the initial email. Be as disciplined in using the "PASS" model in the response as in the original message.

When replying, ask the following questions:

- **Is a reply warranted?**
  Avoid sending unsolicited acknowledgement / confirmation messages
- **Is email still the appropriate communication mode?**
  If an email chain contains more than three (3) replies, or if a conflict is escalating, consider a different approach (e.g., a phone call or in-person meeting)
- **Are the "To" and "Cc" recipients still relevant?**
  - Verify that all the "To" recipients still have actions
  - Only reply to those whose business objectives are impacted
  - Remove unnecessary recipients from the "To" and "Cc" lines whenever possible, including 'chain-of-command'
  - Unless "Reply to All" was specified, do not include all recipients in the response
- **Do the original Purpose, Actions and/or Subject line still apply?**
  - If not, change them appropriately

Only change the "Subject" line when the email content has changed; be aware that changing the "Subject" line will impact search capability

<u>ADDITIONAL CONTEXT</u>

- Unless recipient is in the “To” line, a response of any kind may not be needed
- Avoid sending a “Thank you” response. If recognition is warranted, take the time to craft a meaningful email of appreciation
- There is no need to send an email acknowledging requested actions or due dates unless they cannot be met
- In most cases, use of “Reply to All” is inappropriate
- If emotional about the subject, it may be best to save the email in draft and come back to it later

2.6 Formatting Email to Maximize Impact

> *As stated in the protocol…*
>
> - Short paragraphs, with no more than 5 or 6 lines
> - Use space to separate paragraphs and areas of detail
> - Avoid, wherever possible, flags, priority settings and categorization

<u>ADDITIONAL CONTEXT</u>

- Use bullets to breakdown the email and to highlight actions
- Bold and/or underline text, but not to excess
- Use fonts between 10 and 12 pts., headlines can be bigger
- Use spell check, but recognize spell check isn’t a substitute for careful editing
- Write clearly and avoid run-on sentences; avoid jargon or acronyms, particularly when an email is being sent to a large audience
- Re-read the email one last time before hitting send

2.7 Tips for Mobile Devices

> *As stated in the protocol…*
>
> Be aware that many email recipients view messages on mobile devices and there are limitations as to what those devices can display.
>
> - Tables and images may not display; server links cannot be accessed
> - Assume black and white text; color fonts may not be supported
> - Long email chains are difficult to receive/read; summarize when possible

<u>ADDITIONAL CONTEXT</u>

- Use attachments in-lieu of links
- Minimize use of advanced formatting (e.g., tabs, non-standard bullets)
- When using images, use only .gif or .jpeg

2.8 Email Signature Lines and Out of Office

- Use complete contact data in your signature lines: name, title, phone number(s), organization
- Tailor signature lines for internal and external email

- Do not include signature line graphics. An email with signature line graphics will appear in the inbox as though it has an attachment which can be misleading
- Out of Office messages should contain coverage information (e.g., for decision making during an absence, emergency contact and date of return)

3.0 Additional Email Management Tools and Processes

In addition to the email protocol, the email management tool set recommends the use of a reference system, Outlook features and the Four D's as an integrated management system.

3.1 Storing Email to Find it Fast

When email contains information that needs to be saved, it becomes reference information. It's important for future use, but is not required to complete an immediate action. While many use the inbox as a reference system, email management recommends emptying the inbox on a daily basis. This is only possible if an effective reference system has been put in place and it is easy to move and retrieve the information at the appropriate time.

The most useful folder naming hierarchy is based on Business Goals and Objectives (BG&Os). This approach creates a filter by highlighting email that are not directly related to a goal or project. A folder hierarchy based on BG&Os supports a clear focus and discernment about which information to keep vs. delete – if the email isn't related to a business priority, why keep it? Keep the folder hierarchy simple, as hundreds of folders mean hundreds of decisions; try to have no more than 12 top-level folders and use second-level folders as-needed.

3.2 Getting the Inbox to Zero

It is helpful to view the email inbox the same as a home mailbox. It is not used for storage or reference. The mail is removed daily, sorted and categorized. Some items may need to be addressed immediately, filed for reference, queued for later action, or simply discarded. The keys to accomplishing this in email, getting the inbox to zero, is to set-up an integrated management system and use the "Four Ds for Decision Making".

3.2.1 Integrated Management System

The integrated management system combines the use of the reference system (3.1), an action system that utilizes the Outlook Tasks and Calendar, and the use of Contacts and Delete.

An email with an action requested is dragged to Tasks and prioritized, or moved to the Calendar and scheduled, thereby removing it from the inbox. An email containing information with no action needed may be moved to the reference system, contacts, or deleted.

3.2.2 Four Ds for Decision Making

The “Four Ds for Decision Making” is another tool for quickly and effectively processing the inbox down to zero. It is way to triage daily email volume within the integrated management system, and move it from the inbox without opening it multiple times.

The Four Ds are:

- Delete it
    - Does not relate to a business goal or objective
    - Can be found elsewhere
    - Will not be referenced within the next three to six months

- Do it
    - Respond, take action or file in less than two minutes

- Delegate it
    - Send to a delegate
    - If needed, track in ‘Waiting For’ or ‘1:1’ category

- Defer it
    - If it will take more than two minutes and cannot be delegated
    - Move to the Calendar if it must be worked on a specific date/time
    - Otherwise, move it to the Task List (e.g., “Strategic Next Action” or “1:1” category)

ADDITIONAL CONTEXT

Task List information relating to “Waiting For”, “Strategic Next Action” and “1:1” categories are covered in the training.

4.0 Appendix

Adobe Acrobat
Document

Email Protocol

Adobe Acrobat
Document

Email Quick Reference Card

Adobe Acrobat
Document

Email Management Survey (Adobe form fill-in)

[i] "Manager" refers to executive level (E-series) to first-level managers (K-level). There are generally eight different management levels within BCA. Five (5) executive levels ranging from directors to BCA's President and CEO; and three (3) non-executive levels including first-line manager, mid-level managers and senior managers.

[ii] Hemp, Paul. Death by Information Overload. *Harvard Business Review*, (Sept 2009) Vol. 87 Issue 9, 83-89.