



## “You’ve Got Mail,” But Is Your Inbox Lean?

Despite the widespread application of lean manufacturing principles in today’s business environment, there remains one technology application that has decreased efficiencies without being noticed. It’s email, and it’s time for employees and executives alike to take back control of their inboxes in the name of lean.

When Microsoft Outlook first came into existence, technology users marveled at its capabilities to increase communication efficiencies. However, what remains unnoticed today is the personalized nature of its use. Companies that have elaborate procedure manuals on everything from data back-up to conference room scheduling, do not have a system in place for the reading and filing of emails. They may have rules regarding downloads or personalized use of email, but they lack standard processes regarding the handling of an email message.

I first recognized this inefficiency in my own work habits. An email would come into my inbox and if it did not require immediate attention, yet had intrinsic value, I was reluctant to delete it. Instead, the email remained in limbo—sitting in my inbox without an established activity or timeframe for completion. Occasionally I had to rediscover its purpose. The exposed elements, the subject line, or the address of the sender did not always clearly communicate its contents, so I would occasionally click on it once more. Internally I would respond by thinking, “Oh that’s right, this is here because I plan on reading it later,” and the process would repeat itself in a day or two.

Having subscribed many years ago to the never-touch-a-paper-twice management philosophy, eventually I realized that repeated “touching” of emails was as unacceptable as the senseless shuffling of paper.

The need for process reengineering was further confirmed for me at a client’s office. While working with the controller to review financials, I noticed that an email message would pop up every few seconds. In response, the controller would turn her head slightly to catch a glimpse and then return to her previous task. This lack of

focus was alarming. After all, scientific studies show that constant disruptions can cause a loss of concentration and lower accuracy, and this person is responsible for the accuracy of accounting information.

Upon further investigation, I learned that more than half of her emails had been sent via “cc:” from other employees, whose motives could have been clearly labeled as counterproductive. The impetus of their actions was to “keep her in the loop” in order to avoid solo accountability, hiding behind the “I included you in the email” claim when things did not go as planned. In actuality, this barrage of emails was producing the very outcome its senders wanted to avoid. That is, the onslaught of emails caused desensitization and independent of their significance, each email received the same glance. A behavior of “scan to delete or scan to leave for later” was manifesting. My theories were proven true when I began to investigate inboxes. One of my clients had more than 3,000 emails in her inbox. Although this is an extreme example, the average—200-300 emails per inbox—was still worrisome.

Once again I retraced my thoughts back to pre-computer days. Would we have allowed people to come into our offices every few seconds and announce information that could possibly be of no use? How was this constant “email subject line” interruption any different? After observing this behavior and recalling my own unproductive email habits, I realized that a standardized system for reading, reviewing and organizing emails was overdue. I began my search for a solution by revisiting the capabilities of Microsoft Outlook and in doing so realized that the other features were severely underutilized. Given this discovery, I developed an email management system, which turned the technology culprit into the efficiency savior.

I decided that the same rules previously applied to paper and desk management should be applied to emails. That is, emails can only be touched once and the email inbox had to be clean by the end of the day. To achieve this, I needed to create a process for organizing and staging my emails, with each being assigned an action, time frame and method for completion. I decided to move beyond the inbox and began to explore how the Microsoft Outlook features of “Task,” “Journal,” “Notes,” and “Calendar” could support me in my endeavor.

To create a uniform system, I determined that I first needed to assign a specific purpose to each feature. I began to follow the logical thought progression of a received email. If an email is not quickly identified for immediate



deletion, it usually is defined as having one of the following inherent characteristics: it contains information requiring “short-term” storage for future retrieval (as is the case with most cc: emails) or a specific action is required in response to the email such as a return message, additional research, a calendar date for an in-person meeting, or a scheduled conference call.

Armed with this knowledge, I defined specific uses for each of the Outlook features. I decided that Calendar would be used only to schedule events when a physical presence is required, either in person or by phone. By adhering to this, a clean view of where I must be at any given moment becomes evident. The Task feature is used when a specific action is required. When an email is moved to the task section, I immediately establish a date for completion. Journal is my “holding unit” for information with possible future use. I identified this type of information as having a short shelf life, such as emails that pertained to a current project, which once completed were irrelevant. If the data has a longtime reoccurring use, then it is better served if filed in My Documents under an appropriate category. In Notes I store tidbits of information that may need to be retrieved from time to time and therefore have a long shelf life. This process is much more effective than trying to memorize it for later mental retrieval. Examples include mathematical formulas, definition, calculations, and verbiage for specific responses such as prospect follow-up or request for appointment.

The “special sauce” in this system is the standardization of the categories. This allows the natural flow throughout the Outlook system. Categories are customized by departments and then standardized for use by employees. This establishes an effective flow of communication among teams; information can be easily retrieved in the absence of an employee. For example, sales departments may use categories such as clients, prospects and open proposal, while the production department may define categories by the processes involved, such as RFQ, customer service issues or order status.

Soon my system began to pay dividends. As an email entered my inbox, I quickly assessed its importance and determined the appropriate placement. If it required a follow-up action, it was immediately moved to Task; if a scheduled meeting was required, it was moved to Calendar; and if it required short-term storage, it was filed in Journal. Lastly, if it contained factual information it was stored under Notes. I further customized the system by adhering to strict use of subject lines, which are retyped as needed prior to filing.



The ability to sort, filter and customize views allows me to organize my days accordingly. For example, I changed the features in Task so that all tasks due that day show in red and any that had not been completed from the previous day are changed to green. With a quick view of my task screen, I'm able to identify what needs to be done for the day. This information, juxtaposed with my calendar, allows me to schedule my activities accordingly. Additionally, when a situation requires retrieving old data; I quickly scan my Journal for the information. My ability to quickly retrieve mathematical computations and other key data from Notes impresses clients, though it's simply my retrieval system that allows me to demonstrate such astute competencies.

Today my email box is completely empty at the end of each day, and I have saved myself hours of unnecessary redundant activity. Furthermore, the system is used throughout my has clients' offices.

I challenge every employee, manager and executive to inspect their email handling behaviors. In doing so, you may find that the biggest culprit of anti-lean principles resides right under your nose.

### **About the author**

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