



Human Resources
Advancement Center

Become an Inbox Ninja in 30 Minutes

Webconference for Members
July 20, 2015

Michael Koppenheffer
koppenhm@advisory.com

Your Presenter for This Session

Michael Koppenheffer

Executive Director

- Advisory Board researcher since 1993
- Responsible for the firm's publishing and content strategy
- (In other words, it's my job to make sure everything we write is insightful, compelling, and effective)

Contact me at koppenhm@advisory.com

Call me at 202-266-5484

Or, check out my blog posts, webconferences, and other assorted items by searching my [name](#) on Advisory.com.



Our Jumping-Off Point

HOW TO

Write Better

RIGHT NOW

QUESTIONS to ask yourself **WHEN YOU'RE WRITING**

<p>Do I sound like a real person? How can I make my writing voice more natural?</p> <hr style="border-top: 1px dotted #000;"/> <p>How do I know what I know? Why am I a credible source?</p> <hr style="border-top: 1px dotted #000;"/> <p>Who am I writing to? Why should they care about my topic?</p> <hr style="border-top: 1px dotted #000;"/> <p>What's the most important point? Is it in the title and first paragraph?</p>	<p>Is this context really necessary?</p> <hr style="border-top: 1px dotted #000;"/> <p>What can I tell the reader that they don't already know? What's the conventional wisdom? Why is it wrong?</p> <hr style="border-top: 1px dotted #000;"/> <p>Could this [sentence, paragraph, chapter, book] be shorter?</p> <hr style="border-top: 1px dotted #000;"/> <p>Can I relate what I've written to something urgent or newsworthy?</p>	<p>Would my [sibling, parent, spouse] understand what I've written? How would I explain it to them?</p> <hr style="border-top: 1px dotted #000;"/> <p>What do I want readers to do? Have I tried hard enough to convince them?</p> <hr style="border-top: 1px dotted #000;"/> <p>Could a [story, quotation, statistic, image, photo] bring this to life?</p> <hr style="border-top: 1px dotted #000;"/>
---	--	---

AVOID clichés **AND** **BUSINESS JARGON**

<p>✗ Deep dive</p> <hr style="border-top: 1px dotted #000;"/> <p>✗ Drill down</p> <hr style="border-top: 1px dotted #000;"/>	<p>✗ Leverage</p> <hr style="border-top: 1px dotted #000;"/> <p>✗ Buy-in</p> <hr style="border-top: 1px dotted #000;"/>	<p>✗ Reinvent the wheel</p> <hr style="border-top: 1px dotted #000;"/> <p>✗ Boil the ocean</p> <hr style="border-top: 1px dotted #000;"/>
--	---	---

Why We Are Email Experts (100M+ Emails Later)

Advisory Board Email Subscription Options



The Daily Briefing



Program updates



Blog alerts



Topic alerts

Update your preferences at www.advisory.com/members/subscriptions



What we try to do

- Get members to open our emails
- Get members to take action
- Get members to value our emails (and not unsubscribe)

Grappling with Email Ourselves as a Company

News Coverage of Our “Email Holiday” Pilot Project

www.washingtonpost.com/business/economy/after-hours-e-mail-companies-are-telling-employees-to-avoid-it/2012/09/21/

By **Cecilia Kang** September 21, 2012   Follow @ceciliakang

Tonight, employees at the Advisory Board have an unusual task: Stay off e-mail.

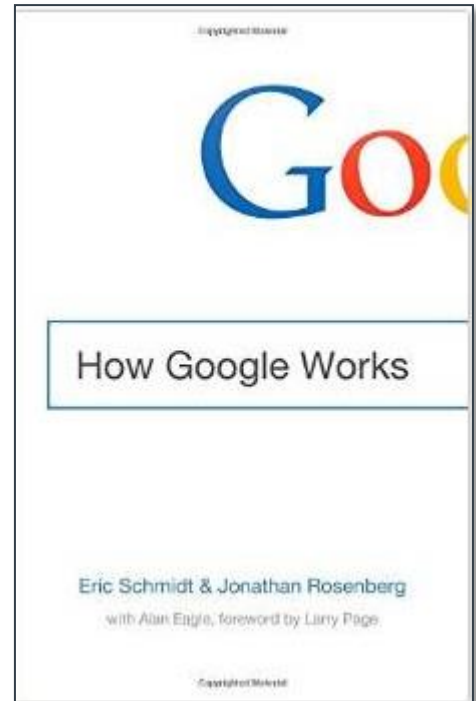
Stash away those smartphones and laptops, the District firm has instructed. For those who just can't stay away, read but don't reply. And while we're at it, ignore your inbox throughout the weekend, too, the firm added.

The consulting firm's push for no after-hours e-mail is part of a growing effort by some employers to rebuild the boundaries between work and home that have crumbled amid the do-more-with-less ethos of the economic downturn.

(Mostly) Good Advice from the Internet

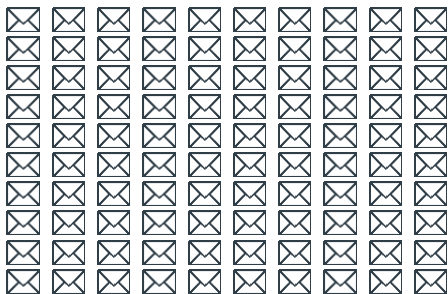
Google CEO's Eric Schmidt's 9 Tips for Email

1. Respond quickly.
2. When writing an email, every word matters and useless prose doesn't. Be crisp in your delivery.
3. Clean out your inbox constantly
4. Handle email in LIFO order. Sometimes the older stuff gets taken care of by someone else.
5. Remember you're a router.
6. When you use the bcc: feature, ask yourself why.
7. Don't yell.
8. Make it easy to follow up on requests.
9. Help your future self search for stuff. If you get something you may want to recall later, forward it to yourself along with a few keywords that describe its content.



Today's Focus: The Inbox (and Emails)

The Reality Incoming Emails Daily



Sources estimate that the average person gets about 100 work emails per day

Recipient's View Daily Time Burden

100
X
30 seconds
=
3,000 seconds
=
50 minutes

Sender's View Email Fate

- Acted Upon
- Read
- Skimmed
- Saved
- Filed
- Ignored
- Deleted

Most desirable



Least desirable

Weapons of the Inbox Ninja

Defensive



Reduce Volume

- Unsubscribe
- Use rules and alerts
- Be conscious of “reply”

Offensive

Capture Attention

- Know your intention
- Target subject line
- Tailor opening
- Consider the hour



Reduce Cognitive Load

- Limit folders, use search
- Flag for follow-up
- Focus on newest messages
- Check less often

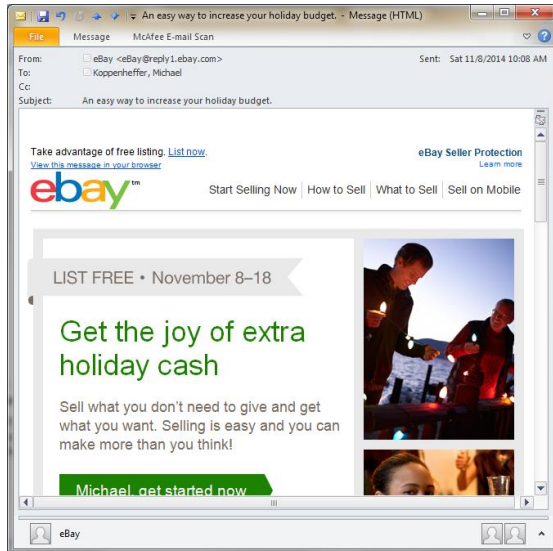
Communicate Clearly

- Keep it short
- Employ formatting
- Use names
- Take it offline



If You'll Never Want to Read It, Unsubscribe

An Opportunity to Practice What I'm Preaching



Results of My Own "Unsubscribe Audit"

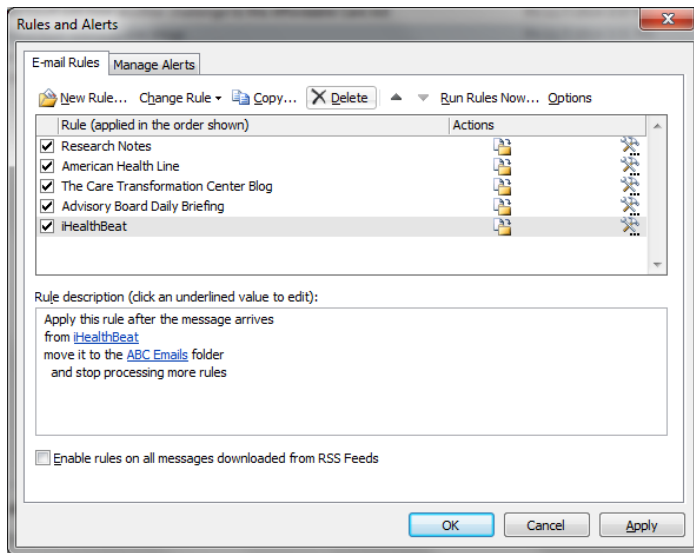
15%

of my "deleted items" are from senders I should unsubscribe from

Would you ever want to read an email from this sender? If not, are they going to keep emailing you anyway? Unsubscribe.

If You Can't Unsubscribe, Use Rules

My Outlook Email Rules



Examples of Automated Email Rules

- Send blogs to a “read later” folder
- Send manager’s emails to a high-importance folder
- Flag emails from important people (or format differently)
- Automatically delete something you can’t (or won’t) unsubscribe from

Be Sparing in Your Replies

The “Polite Reply” Trap

I set up a meeting for us to discuss.

- Thanks!
- No problem!
 - ☺
 - ☺

1 communication, 5 emails.

The “Reply All” Risk

I set up a meeting for us to discuss.

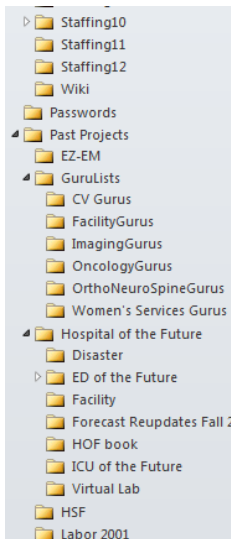
- Thanks!
- Thanks!
- Thanks!
- Thanks!

1 communication, 5 emails.

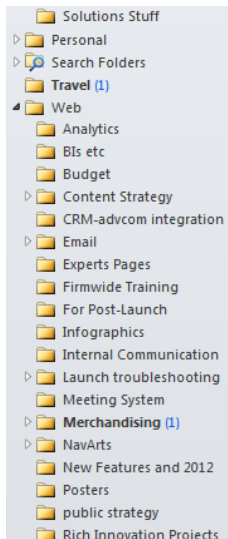
Does your email communicate anything other than acknowledgment?
If not, send it to as few people as possible—or no one at all.

Confessions of a Recovering Folder Addict

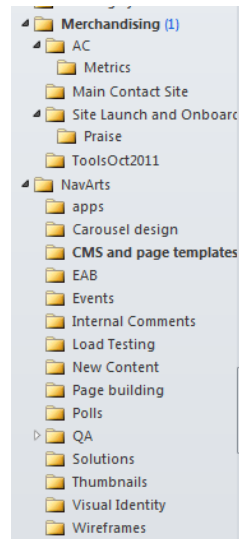
My email folders went on...



...and on...



...and on...



Try saving your emails in a single Archive folder

Develop an Inbox System

Two Common Inbox Management Strategies

Items: 0

Inbox Zero

- Keep as few items in your inbox as possible
- Archive messages that you don't need to act on again
- Delete messages you've evaluated and don't need
- Only retain messages you will need later

Items: 18,101

Inbox Unlimited

- Delete only junk mail
- Respond to relevant messages in the moment
- Use the search function to find old messages later

There are several different viable ways of managing your email; pick one that works and stick to it.

Act (Once) on Most Emails

5 Acceptable Actions for Email from 'Inbox Zero' System



Delete

If no action is required, delete it or put it your archive folder



Delegate

If someone else can respond, forward it to them



Respond

If you can respond in two minutes or less, do so



Do

If you can act on the email in two minutes or less, do so



Defer

If acting or responding would take more than two minutes, flag for follow-up

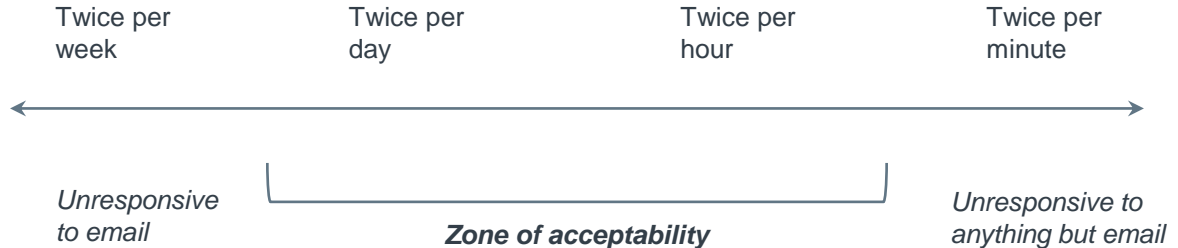
Figure Your 'Flag for Follow Up' Trick

4 Options to Save Emails for Future Action

	Follow-up folder	Move to "tasks"	Flag email	Leave in inbox
Pros	Clear delineation of next step	Allows for additional categorization	Specific and easy to find	Easy to find
Cons	Out of immediate sight	Requires checking an additional app	Clutters inbox	Clutters inbox

Avoid the Temptation to Check Constantly

Continuum of Email-Checking Frequency



To reduce your frequency of email checking, disable pop-up notifications and sounds, to start with. Some people also close their email program when not in use, or even disconnect from the Web.

How Do You Cut Through This Kind of Clutter?

Representative Physician Inbox

The screenshot shows a representative physician's inbox with the following email list:

- Chief Medical Officer**
Upcoming RAC Audit
- Jeffrey O'Hare**
Sale at the Pelican Medical Center Gift Shop!
- Medical Staff Services**
Today's Forum on Patient Safety
- Pelican Medical Center I.T. Services**
Have You Taken the EMR Survey?
- Grandview Elementary School**
Pictures from this Year's School Play



"What do they want me to do about this?"

"Why am I on this list? And who is Jeffrey?"

"I have – why am I still receiving emails about it?"

"Great, this is something I want to read!"

Know Why You Are Sending the Email



Why You Are Sending

Inform

Request or persuade

What You Want the Reader to Do

- Read
- Save for later

- Reply
- Act

Example Message

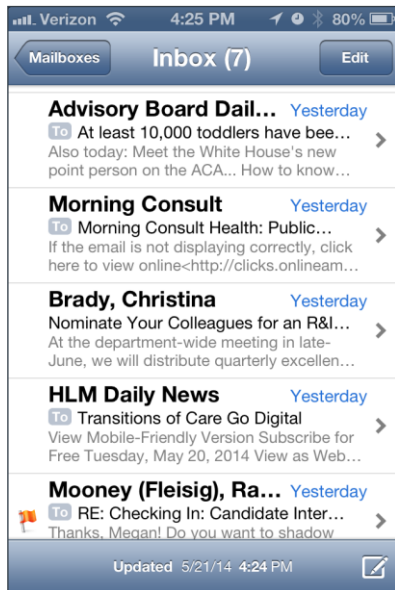
- Update on the new parking lot
- Meeting minutes
- Progress report

- Question on strategy decision
- Meeting request
- Next steps on plan

Before you hit “send,” remind yourself why you’re writing the email in the first place, and make sure the message reflects your intent.

The First Battleground: The Email Open

A Real iPhone Inbox



Controllable Variables



Sender



Subject line



First line of content



Time of day sent

Judging an Email By Its Subject Line

Comparative Physician “Open” Counts *Daily Briefing story*

Advisory Board Daily Briefing
Siting your next retail clinic? Follow
the coffee scent

7 ↑
Opens by
physicians²

Advisory Board Daily Briefing
Starbucks: The perfect neighbor for
your next retail clinic

75 ↑
Opens by
physicians²

1) Advisory Board Company.
2) Includes physician leaders and practicing physicians.

Appealing to Your Audience

Factors That Made Physicians More Likely to Open an Email



Reference
Physician Pay



“Newsjacking:”
Mention Topics
in the News



Include Buzzworthy
Names and
Organizations



Send the Message
in the Morning

Gawande: When checklists don't work

Advisory Board Daily Briefing <dailybriefing@advisory.com>

Sebelius has resigned. Meet Obama's pick to replace her

Advisory Board Daily Briefing <dailybriefing@advisory.com>

Medicare reveals how much it pays each doctor. Here's what the data show

Advisory Board Daily Briefing <dailybriefing@advisory.com>

Write Subject Lines People Want to Open

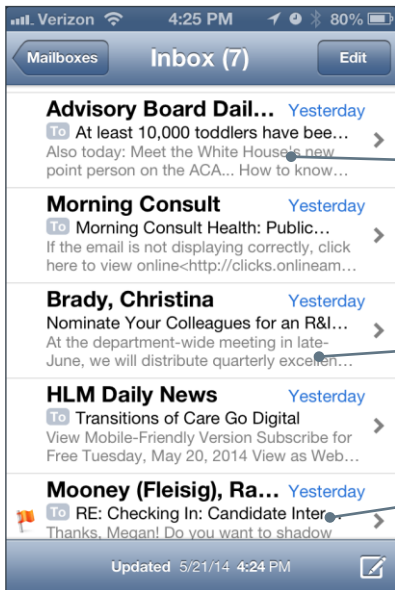
Selected Attributes of Effective Subject Lines

Attribute	Example
Relevant	Next steps from our project meeting last week
Interrogatory	What's our next move on the project?
Personal	Michael, your next steps
Precise	5 next steps for the project group
Low-Effort	RESPONSE NEEDED: confirm next steps
Empathetic	Don't worry about the next steps

Another useful framework for subject lines is "SUCCEsS": Simple, Unexpected, Credible, Concrete, Emotional, Story-Based.

Don't Neglect Your Actual Opening

The Real iPhone Inbox Again



Three Uses of Opening Text

Preview multiple topics within the email

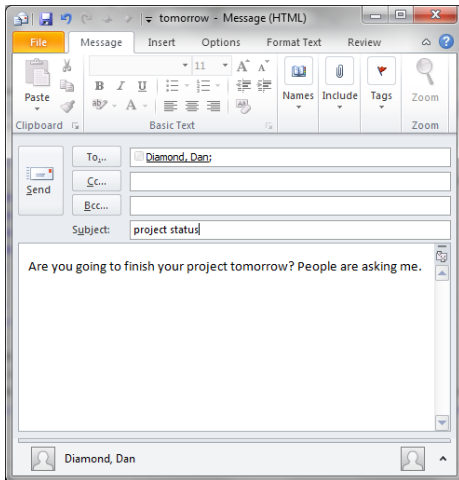
Get the point across quickly

Convey personalization

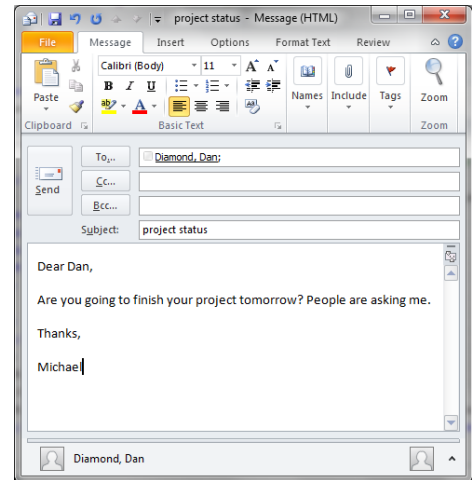
Related Issue: Is an Email a Memo or a Letter?

Answer: Both

Option #1: Memo Style



Option #2: Letter Style



Pick a message style that fits your “opening text” strategy as well as your familiarity with the recipient

An Example of the Importance of Brevity

A Real Work Email I Got Recently

As we've experienced inventory-related concerns at Veritas (especially during the past weeks), I wanted to send along our plan for addressing those concerns.

First of all, one of the major concerns raised — that we have “no way” to know what we have in inventory — appears to have been mostly a miscommunication. Our inventory-checking system (XXX) is based *directly* on Veritas's system (accessible at XXXX, account XXX. The information is updated twice daily, when we receive an updated inventory file from Veritas.

The confusion at hand stems from the notion that the inventory *may* be slightly off before such an update — as orders placed after the prior update will not be reflected immediately. In a meeting, Kathryn indicated to Brian that during that time, they would not have a definitive inventory listing *unt* such time as our account was updated, which was understood (either by Brian or by Amy in his communications to her) that we did not have a reliable way to check inventory *at all*. A possible complicating factor was Brian's unfamiliarity with the inventory-checking system; he wanted a report of *only* the EAB items in inventory, but the inventory system does not track by originating group (other than whatever might be noted in the title field), so reliability of such a report might be

Keep It Short (and Simple)

One of My Favorite Things I Found in the Research

five.sentenc.es

The Problem

E-mail takes too long to respond to, resulting in continuous inbox overflow for those who receive a lot of it.

The Solution

Treat all email responses like SMS text messages, using a set number of letters per response. Since it's too hard to count letters, we count sentences instead.

five.sentenc.es is a personal policy that all email responses regardless of recipient or subject will be five sentences or less. It's that simple.

* See also: two.sentenc.es, three.sentenc.es, and four.sentenc.es.

** To begin using this system, optionally copy this text and paste it into your e-mail signature:

Q: Why is this email five sentences or less?
A: <http://five.sentenc.es>

Remember BLUF: “Bottom Line Up Front”

Original Email

As we've experienced inventory-related concerns at Veritas (especially during the past weeks), I wanted to send along our plan for addressing those concerns.

First of all, one of the major concerns raised — that we have “no way” to know what we have in inventory — appears to have been mostly a miscommunication. Our inventory-checking system (XXX) is based *directly* on Veritas's system (accessible at XXXX, account XXX. The information is updated twice daily, when we receive an updated inventory file from Veritas.

The confusion at hand stems from the notion that the inventory *may* be slightly off before such an update — as orders placed after the prior update will not be reflected immediately. In a meeting, Kathryn indicated to Brian that during that time, they would not have a definitive inventory listing *unt* such time as our account was updated, which was understood (either by Brian or by Amy in his communications to her) that we did not have a reliable way to check inventory *at all*. A possible complicating factor was Brian's unfamiliarity with the inventory-checking system; he wanted a report of *only* the EAB items in inventory, but the inventory system does not track by originating group (other than whatever might be noted in the title field), so reliability of such a report might be compromised if “EAB” were not *explicitly* listed in the title field. This is not an inventory issue per se, but a file management issue.

BLUF Version

Here's an update on our three most important Veritas inventory concerns.

1. Our inventory-checking system seems to be working fine and is accurate—concerns there resulted from miscommunication.
2. We do need to check the Veritas figures against actual in-stock counts—we'll be doing hand counts for the next few months to verify accuracy.
3. We've still got some scattered data entry errors but I'm figuring out how to reduce error rates.

Also, as you know, we're hiring a new inventory specialist to manage this process—I think that will help a lot.

As we've experienced inventory-related concerns at Veritas (especially during the past weeks), I wanted to send along our plan for addressing those concerns.

First of all, one of the major concerns raised — that we have “no way” to know what we have in inventory — appears to have been mostly a miscommunication. Our

Format for Readability

Unformatted Version of Pre-Call Email for This Webconference (Last Time)

Dear Member,

I'm looking forward to joining you this coming Monday for our "Become an Inbox Ninja in 30 Minutes" webconference at 3 p.m. ET. As you probably already know, this session is a follow-up to our recent 'Write Better, Right Now' event, where I did my best to share everything I know about effective written communication in half an hour. In that session, we collected (and tried to address) real-life examples of writing challenges from attendees in advance—and the feedback I got afterward suggested that the actual examples helped make the discussion more effective and relevant. I'd love to try to repeat that experiment. Before Monday, can you send me either a particular email you feel like isn't as effective as it could be, or a particular email-related challenge you struggle with .

Thanks in advance, and I'll see you Monday.

Best regards,

Michael Koppenheffer
Executive Director
The Advisory Board Company

P.S. For a warm-up to Monday's webconference, review the slides or recording of the Write Better, Right Now session—or just download the poster.

Don't Underestimate the Lowly Line Break

Pre-Call Webconference Email, With Breaks

Dear Member,

I'm looking forward to joining you this coming Monday for our "Become an Inbox Ninja in 30 Minutes" webconference at 3 p.m. ET.

As you probably already know, this session is a follow-up to our recent 'Write Better, Right Now' event, where I did my best to share everything I know about effective written communication in half an hour. In that session, we collected (and tried to address) real-life examples of writing challenges from attendees in advance—and the feedback I got afterward suggested that the actual examples helped make the discussion more effective and relevant.

I'd love to try to repeat that experiment. Before Monday, can you send me either:

- a particular email you feel like isn't as effective as it could be, or
- a particular email-related challenge you struggle with .

Thanks in advance, and I'll see you Monday.

Best regards,

Michael Koppenheffer
Executive Director
The Advisory Board Company

P.S. For a warm-up to Monday's webconference, review the slides or recording of the Write Better, Right Now session—or just download the poster.

The Power of the Judicious Bold

Pre-Call Webconference Email, with Bold Type

Dear Member,

I'm looking forward to joining you this coming Monday for our "Become an Inbox Ninja in 30 Minutes" webconference at 3 p.m. ET.

As you probably already know, this session is a follow-up to our recent 'Write Better, Right Now' event, where I did my best to share everything I know about effective written communication in half an hour. In that session, we collected (and tried to address) real-life examples of writing challenges from attendees in advance—and the feedback I got afterward suggested that the actual examples helped make the discussion more effective and relevant.

I'd love to try to repeat that experiment. **Before Monday, can you send me either:**

- a **particular email** you feel like isn't as effective as it could be, or
- a particular **email-related challenge** you struggle with .

Thanks in advance, and I'll see you Monday.

Best regards,

Michael Koppenheffer
Executive Director
The Advisory Board Company

P.S. For a warm-up to Monday's webconference, review the slides or recording of the Write Better, Right Now session—or just download the poster.

Avoid Formatting Abuse

Pre-Call Webconference Email, with Overkill

Dear Member,

I'm looking forward to joining you **this coming Monday** for our "**Become an Inbox Ninja in 30 Minutes**" webconference at **3 p.m. ET**.

As you probably already know, this session is a follow-up to our recent 'Write Better, Right Now' event, where I did my best to share everything I know about effective written communication in half an hour. In that session, we collected (and tried to address) real-life examples of writing challenges from attendees in advance—and the feedback I got afterward suggested that the actual examples helped make the discussion more effective and relevant.

I'd love to try to repeat that experiment. Before Monday, can you send me either:

- **a particular email you feel like isn't as effective as it could be, or**
- **a particular email-related challenge you struggle with .**

Thanks in advance, and I'll see you Monday.

Best regards,

Michael Koppenheffer
Executive Director
The Advisory Board Company

P.S. For a warm-up to Monday's webconference, **review the slides or recording of the Write Better, Right Now session**—or just download the poster.

Name Names Where You Can

Typical Email “Next Step”

“We need to come up with a draft budget model for others to react to.”

Accountability-Focused Email “Next Step”

“**John**, please come up with a draft budget model by **Tuesday**.”

Jane and **Jack**, please reply-all with your reactions by **Thursday**.”

If you want a reader to take an action, particularly on a group email, use their name and tell them they need to do it and when. (Bold formatting doesn't hurt either.)

Know When Not To Email

Four Circumstances When Email Isn't the Right Medium



Difficult message



Complex discussion



Nothing to say



Wouldn't want other people
to see what you wrote

Webconference Survey



Please take a minute to provide your thoughts on today's presentation.

Thank you!

Please note that the survey does not apply to archived webconferences.