Accounting Firm Owners: 5 Simple Strategies to Get Less Email and Get An Hour of Your Life Back Every Day

A step-by-step guide to managing email and making your firm more productive

LEARN HOW TO:

✓ Send better emails (to get less emails)
✓ Manage email while on vacation
✓ Passively track all your email time
✓ Prevent the endless back-and-forth emails

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There is no doubt that email is a great tool. It makes many things possible that we couldn't have even dreamed of 20 years ago. We can work remotely from all over the world and easily work with clients across the country.

The biggest problem with email is that it's become a popular communication tool so quickly that many firms have trouble managing it. Most admit they don't have systems and protocols in place to make answering and checking email efficient. If you don't, think about all the time you waste compulsively checking your email and writing emails back and forth. It's likely you're wasting 5+ hours a week. Multiply that by <u>every person in your firm.</u>

According to one study done by the National Center for Biotechnology Information, the average office worker checks their email 30 times a day and many workers are reporting that email can take up ¼ of the their day. Another study by researchers at UC Irvine monitored interruptions of office workers. They found that workers took an average of 25 minutes to re-engage in a task after interruptions, including answering phone calls or emails. Think about how all those wasted hours translate into $$$.

Having a well-managed inbox helps you stay on top of your work and get focused. It also makes you more productive, by not having to check your email constantly, enabling you to work on your real priorities in your firm.

Firm owners and partners have a vital role in learning to manage their inbox. They can lead by example and develop SOPs for the company once they learn what works and doesn't work. How? Start tackling email management yourself with the ideas and tools below, then when you learn what works, begin implementing training and ideas company-wide (section 5 has some great tips for this).

#1 How to: Write a good email
(so you actually get less emails)

Research shows that for every five emails you send, three require a response. That means if you eliminate just one out of every five outgoing emails, you'll begin to receive ~12% less emails. So how do you decide which emails should not be sent? Ask yourself two questions.

Is the email you want to send:

- Needed?
  and
- Action Oriented?

NEEDED? Does my busy recipient truly need this email to do his or her job?

If you take a moment to visualize your email recipient struggling through a busy day filled with meetings, phone calls and emails, you'll find yourself sending less unnecessary messages. You begin sending only needed messages, emails containing information truly needed by the recipient in order to do his or her job.

Here are some examples of email types you try to cut out:
- FYI Email (no action required, just wanted to keep you in the loop. Think about whether this person really needs to know this information for their job)
- Trivial Thank You Email (nice but often unnecessary in the age of email overload)
- The Redundant Email (are you sending an email containing info that the person will get from another source like a meeting or another team member?)
- The Incomplete Email (are you giving all the relevant info and preventing the recipient from asking follow up questions? See next section on how to fix this.)

- The Email Containing Searchable Info (somewhere there's useful info in the email but it takes 10 minutes to find it because it's so scattered. Again, the next section will explain how to fix this.)

ACTION ORIENTED? Writing emails to minimize questions

By writing clear and concise emails, you'll dramatically cut back on emails with follow up questions. The goal is to write your emails from the mindset of the recipient. Try and think about what questions they might have surrounding the email you're sending and address them in the email.

Here you are also leading by example. Writing clear emails will also encourage your email recipients to write future emails in a similar clear format.

How to write a clear email

1. Start with a clear Subject: write concise subject lines that explain exactly what the email contains. For example, did you complete a task you want to notify the recipient about or require an answer to a question? Write exactly that in the subject line.
Examples would be:

Confirmation needed on the delivery of the _____ file
Notes from the client meeting with _____ on 4/15/14

2. Use brief, warm greetings. Don't get sidetracked after you started with a specific subject line. Try to keep it to one sentence.

Example:

Hi _____,

Nice seeing you at the seminar last last week.

3. The action required/requested in the subject line. Specify in 1 sentence the action step or purpose of your email. You can simply right this on the line below the greeting.

Example:

Let's meet next week (5/26-5/30) to plan out a referral program between our two companies.

4. Key Points: Write out the key points/necessary information that supports the action step in logical order. Make sure that you aren't including unnecessary and distracting background information. Point form is a great way to layout this section so it's easily digestible.

Example:

- Here are 3 dates/times that would work for me: _____ Let me know which would be best for you.
- Here is a link to some ideas for referral programs that could work for us: include link here
- Please have a look at the link and we can discuss which ideas would work best for both of us.

5. Closing and next steps: Here you can include related info and next steps if necessary. This section is better to have at the bottom so it doesn't distract from the main message. You can also include any extra niceties.

Example:

Once we pick a time, I'll go ahead and find a restaurant between our offices.

I look forward to meeting with you. I think our services and businesses really compliment each other.

6. Finish with an auto-signature including your title and contact info.

Example:

Thanks again,
Bob Smith
President, ABC Company

555-555-5555
bob@abccompany.com

#2 How to: Manage email while you're on vacation

The last thing you (or your family) want it to have you checking email your entire vacation. In this section I'll show you how to avoid an overflowing inbox after a relaxing vacation AND get you to stop obsessing about your inbox while you're away.

Schedule time BEFORE you leave to process emails when you get back

Block some time in your schedule right after you get back from vacation to deal with your inbox. Actually block this time off in your calendar so you don't forget about it and prevent other people from scheduling appointments in that slot.

It will put your mind at ease throughout the holiday and you won't feel compelled to constantly stay on top of email. You'll know there's time for it when you get back. Depending on how much email you get, you may need anywhere from 2-6 hours on your first day back.

Set expectations

Start by creating an autoresponder and turn it on when you leave for vacation. Let people know how long you're gone, when you'll be checking email again (you know the specific date and time because you've already set it up in your schedule), and who to contact if they need assistance while you're gone. You can also include a note that says you won't have access to email during that time away so their expectations are set that the message won't be responded to during your time away.

Get less emails

Start by getting less junk mail. Over the years you may have subscribed to many different lists… to the point where you're getting over 20+ promotional emails a day. To remove yourself from these lists, use the software Unroll.me. In 10 minutes it shows you all the

different lists you're on and with one click you can unsubscribe from any you're no longer interested in (you can still stay on the one's you want). This has cut down on a lot of morning emails for me.

You can also get fewer emails when you're gone by sending less in the week before you leave (and less altogether by following the protocol in section 1). Depending on the length of your upcoming holiday, you can start winding down your involvement in short-term projects if you won't be there to see them finalized. You can also delegate as many tasks/follow-ups as possible from emails to other team members.

Once you've confirmed with a team member that they'll take over, you can respond to the email letting the recipient know who will be taking over that task and CC the new responsible team member.

When you get back

Don't stress, you know there's likely going to be a lot of email but you've given yourself enough time to deal with it.

1. To start go through the email as quickly as possible. Scan your inbox, sort by the sender and delete/archive big batches quickly. This could be promotional emails, thank you emails, anything of low importance that you can tell quickly by scanning.
2. Next go through all emails you've been copied on. Likely these are just FYIs and you'll be able to scan them quickly without having to respond.
3. Lastly will be the one's that actually require work. At this point you'll have some momentum and feel pretty good about having removed so many emails so quickly. These will take some time but you've got at least a few hours to read and respond to them.

#3 How to: Use abbreviations to minimize the number of emails you get

A short and simple section, here are three suggested abbreviations you can add to subject lines or at the end of content in an email to cut back on replies:

1. NRN: No reply needed. Good if you need to let someone know information but don't need their response.

2. NTN: No thanks needed. This cuts back on all those emails that would usually just say "Thanks for the info". The higher up in the company you are, the more you tend to get these. People assume they're a mandatory sign of respect but to the receiver, they're just more email to read.

3. EOM: End of message. Can be used at the end of a subject line if there's no message in the main email. It'll save the reader time from having to open the email and it gets straight to the point. It'll save you time because you won't have to repeat the same message in the body of the email or add fluff for no reason.

One note, before you start using these abbreviations ensure your team knows what they mean. This can easily be reviewed in 2 minutes in a meeting.

#4 How to: Easily and passively track all your email time

The average time lost to email in an accounting firm is reported to be AT LEAST 1 hr/week. What does that mean for revenue?

$80/hour x 50 weeks = $4000 per accountant for only 1 lost hour a week. It's likely much more than that for most firms.

So what can you do? You can try out the tool Email Stopwatch. Email Stopwatch is an inexpensive way to track all the time you and your team spend in Outlook. The software sends you a simple report at the end of each day with the total amount of email time categorized by the Outlook contact. It's a great tool for passive time tracking. Email Stopwatch will also show a weekly, monthly or quarterly report so you can easily see which clients/team members spend the most amount of time emailing within your organization. With this information, you can quickly tell which clients are taking up the most amount of email time.

It's a solution your team will also love since one of the main time tracking complaints of accountants is having to re-visit their emails and guess at how much time they spent on each one.

#5 How to: Know when to use other forms of communication

Although email seems like a quicker way to communicate, there are many situations when it's not. The goal here is to avoid the long, drawn out, back and forth emails. When you get a message that needs a lot more info before you can respond, consider another form of communication.

1. Phone calls

Receiving an email that leaves you with a lot of questions can be a huge time sink. Picking up the phone can turn 30+ minutes of checking your inbox, reading their replies and sending a response back into a quick 5-10 minute call where you can quickly collect all the information you need to reply appropriately.

Picking up the phone is also very important if there are any emotional issues being discussed. Emails don't convey tone or emotion very well and can often lead to more frustration if the messages are being misinterpreted. If you sense that a client or colleague is upset or angry in an email, don't reply back. Just pick up the phone so you can clear up the problem as quickly as possible.

If you want to avoid the back and forth emails to find a suitable time to schedule a call, you can use meetme.com. This inexpensive software syncs up with your calendar and only shows times to clients when you're available. Just send over your personalized link and allow them to pick a time that works for them. When they do, you'll get an email notification and the time slot will be automatically added to your calendar.

2. Use IM in the office

Instant Messaging (IM) can be a good way to exchange messages quickly and get an issue resolved within the office. IM is great for quick questions or check ins with minimal effort, while avoiding a back and forth chain of emails, requiring you to check your inbox every 2 minutes while you're in conversation.

It's also great if you're in the middle of a task or meeting and don't want to be interrupted, you can go offline or set your status to "Do Not Disturb".

There are many different IM options and a quick online search of IM software will give you plenty of choices. One example, OM Messenger, http://www.omessenger.com/om/default.aspx is inexpensive and easy to use with Outlook.

3. Meetings
I know you're probably thinking this suggestion is terrible. Who wants to go to more meetings? They are generally thought of as boring, tedious, and not engaging. If that's what you're thinking, change your meetings into WORKSHOPS.

Workshops are different than meetings in that they're meant to engage everyone with a variety of different formats and never involve just the manager talking while everyone else listens.

Workshops are an excellent method to focus your mind and everyone else's on solutions and improvements within your firm. They also help your team bond and create a more united vision for the company.

To hold an effective workshop, all of your staff should work together on a problem, instead of you talking and your staff listening. If you are a medium or small-sized firm, you can invite every employee to participate. You never know from where the big ideas are going to come from. Sometimes receptionists offer excellent solutions because they are the first point of contact with any customer, so they may understand the customers' needs better than the high-level executives.

How to hold a workshop

Start by choosing a problem you want to tackle. For example, if your company is having issues with email management and you know they're spending too much time on email, you would hold a workshop just to fix that. Here's how:

1. Discuss and list all the problems your company is having with email communication. This could include:
- the amount of time spent on email
- the amount of emails they're getting
- if too many people are being copied on emails or abusing 'reply to all'
- which clients/departments are emailing too much/unnecessarily

2. Brainstorm ways to systemize each of the problems. Solutions could be:
- when people should be copied on emails and when they shouldn't
- how often email should be checked/how to batch process email for efficiency
- requiring the use of a clear email format including an action request (see section 1)

3. Designate a person to create a written procedure (or SOP) after the workshop that can be shared with everyone and used to train any new staff.

The master of workshops is Chet Holmes. He discusses how to hold great workshops that can create big changes in your company in the book "Ultimate Sales Machine". You can find it here: http://www.amazon.com/The-Ultimate-Sales-Machine-Turbocharge/dp/1591842158/ref=tmm_pap_title_0?ie=UTF8&qid=14 01205636&sr=8-1

Another way to leverage meetings to save on email time is to hold 5 minute meetings every day with your key team members. This will avoid update emails and questions from them throughout the day. Request that they don't email you and save information for these 5 minute updates. If these meetings are effective, they'll reduce a lot of email and create clarity for your team.

If you want really dive further into email management and the topics discussed in this report, I recommend these books:

The Hamster Revolution by Mike Song
The 15 Minute Inbox by Joost Waters
Control Your Day by Jim McCullen
The Ultimate Sale Machine by Chet Holmes
Getting Things Done: The Art of Stress-Free Productivity by David Allen

Ready to start implementing?

If you have any questions about the content in this report or are interested in trying out Email Stopwatch, send me an email at laura@emailstopwatch.com.