

4 SUCCESS FACTORS FOR EFFECTIVE EMAIL GUIDELINES IN YOUR ORGANISATION

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BRIEF AND TO THE POINT

Each organisation can control the internal and external email traffic by using clear email guidelines. However, the introduction of these guidelines does require a lot of effort until the new culture gains its own dynamics.

- Allow for sufficient time and people to organise and guide the process. Pay attention to the layout AND the execution of the plan.
- Create support from your employers by way of input to the editor.
- Create a “sense of urgency” in the proclamation and repeat the new arrangements continuously.
- Involve the board of directors and the management in the support AND maintain the guidelines.

BY GUNNAR MICHIELSEN

Do email guidelines really help to streamline the growing amount of incoming electronic communications? Is there any use in proclaiming binding agreements or is that a time consuming occupational therapy without any results? This whitepaper describes the possibilities, the risks and the conditions for increasing the chances of success of company guidelines on the basis of experiences of dozens of Dutch and Belgian organisations. A little insight and discipline is all your organisation needs to complete the exercise.

1 EMAIL IS AN ACUTE PROBLEM

How many percent of your working hours do you spend on email? Anyone who wonders about the real cost price of email for its organisation, does not need to look far for answers.

The figures of McKinsey confirm what we have all known all along: we email long and frequently. According to researchers we check our incoming and outgoing emails for approximately 13 hours a week or 650 hours a year. That is approximately 28 percent of the office hours of an average employee. In other words: almost one third of the total gross salary costs is directly spent on electronic communications.

Electronic communications do offer a lot of benefits. However, each intensive emailer will realise that there are quite a lot of costly disadvantages in addition to all the benefits. Organisations wishing to limit the negative consequences of intensive email traffic to the full extent obviously need to proclaim email guidelines.

PERSONALISATION LEADS TO INEFFICIENCY

Are guidelines really necessary? Critics will say that each job is different and that you can therefore not impose general guidelines. Aren't organisations much better off if they allow individual employees to find their own solutions, that best suit them, depending on their own needs?

Practise has shown that doing nothing is not an option. Organisations that count on an invisible hand to guide email traffic in the right way, will fairly quickly encounter the boundaries of their laissez faire policy. The accumulation of all the best solutions for each individual does not automatically result in a more effective organisation.

Personalisation is a phenomenon that involves users unilaterally adjusting a collective facility to suit their personal needs. The choices they make in this respect are purely made from their own perspective. They subconsciously opt for a small benefit for themselves rather than a great disadvantage for the organisation.

EXAMPLES OF PERSONALISATION

- When I cc the manager of my colleague - even though he/she does not really need to be informed - this increases the attention to my email and ensures that I receive a response faster. My behaviour is contra-productive for the organisation (I take up the manager's time for no reason), but I benefit.
- When I get an immediate response to urgent emails, this saves me a time-consuming phone call with the person in question. The fact that the recipient is forced to permanently screen his inbox because of my urgent emails is his/her concern.
- When I don't grant my colleagues access to critical corporate information, I increase my importance. Not handy for my colleagues, but interesting for my own position.
- This email to my colleague is not necessary, but if there is any discussion afterwards, I will at least have proof. That the atmosphere at work might suffer as a result, is not my problem.
- When I bombard my colleague with emails during his holiday, then I might receive an answer to a question, which I would otherwise have to wait a week for. I might put pressure on my colleague to work during his holidays, but that's not my problem.

True story that happened in a big Flemish city ...

In 2011 a service desk employee of a big Flemish city sends an email to 3000 fellow civil servants about a wrongly parked company car. Various recipients send a reply (sometimes to all) that this is not their car. In a couple of minutes this message generated thousands of emails. In his "defence", the sender claims that searching the user would easily have cost an additional half hour. However, the total time loss suffered by the organisation is much higher. Personalisation has meant that the sender did not correctly weigh up his options, resulting in negative consequences.

GUIDELINES ARE LIKE TRAFFIC RULES

The public road is a perfect example of the effect of personalisation in traffic and the necessity of clear agreements. In the beginning of the 20th century, there were no traffic rules. Each road user made his or her decisions autonomously in order to reach his/her destination as soon as possible. The growing number of cars led to increasingly more accidents and congestion in the city, and at busy road intersections. You needed to be assertive in order to be given right of way, and in narrow streets the most assertive driver would force back traffic approaching from the other way.

When the situation became untenable, the government stepped in. Priority rules, traffic lights and one-way streets forced people to wait, drive around the block and give way to others. Although these rules continuously slow down and divert the individual driver, they ultimately result in a better flow of traffic, less accidents and higher average speeds.

3 EMAIL GUIDELINES: WHAT TO INCLUDE?

Email guidelines for the work place are what traffic rules are on the public road. Email guidelines list the basic rules, the dos and don'ts and formalise certain unspoken agreements, such as:

- How fast do I need to respond to an email?
- Am I expected to read my email when I am not in the office?
- What to do with emails in the evenings, weekends or holidays?
- Who do I cc in my email?
- Which messages do I send by email and which not?
- To what extent am I permitted to use email for personal reasons?
- How do I write my subject line?
- Can I forward a message from third parties without their permission?
- Can certain folders with critical corporate information be open/shared with third parties?

PERSONALISATION IN PRACTISE

The operational department of a Belgian telecom company issued an absolute ban on copying in more than two colleagues from the department in their emails. Anyone still wanting to do this, needed to send a new email.

A lot of people responded furiously to these 'absurd' rule and argued that this rule would cost them time rather than save time. After all they 'had to' cc a lot of people in their emails.

The end result? Everyone emailed more consciously, resulting in a spectacular drop in the number cc'd emails, ultimately benefitting everyone.

CORPORATE CULTURE AS STUMBLING BLOCK

It seems obvious that organisations draw up certain rules on the use of certain means of communication. Still the introduction and maintaining thereof are less obvious. Email habits are often deeply engrained in the corporate culture. Excessive use of distribution lists and cc, continuous emailing for the sole purpose of collecting evidence, reply to all, the continuous sending of urgent messages which force everyone to continuously screen their inbox... these are all examples of behaviour that is engrained in the behaviour of the organisation as a whole.

4 HURDLES FOR CHANGING CORPORATE CULTURE

In their worldwide best seller 'Blue Ocean Strategy', the authors describe the four hurdles organisations need to take to steer their culture in the right direction.

- **Hurdle 1: freeing up the necessary resources and means.** Managing the corporate culture is possible provided everyone is really willing to invest in it. You therefore need to free up sufficient resources, draw up a well thought-out plan of attack and keep up your efforts until the end.
- **Hurdle 2: creating understanding and willingness to change.** Change always resisted as the currently used culture is considered the 'only possible' culture. Only when employees understand why the organisation needs to change, will the change process have a chance of succeeding.
- **Hurdle 3: creating and maintaining the employees' motivation.** Knowledge and skills are essential for behavioural change. Only employees who know how to translate the new standards in practise will effectively change their behaviour. A subtle system of rewards and sanctions can help to maintain the new behaviour for the time needed for it to become a new habit.
- **Hurdle 4: the continuous support of the management.** The last and most difficult hurdle involved corporate politics. Some managers can consider the adjusting of the corporate culture as a threat, and could even lead to internal power play and arguments. A clear commitment of the management and board of directors guarantees that the plan will be executed to the end and that the rules are actually implemented.

PRACTICAL CASE

All the employees of a big utility company received an email training with best practices.

In the final hour of the session the participants were divided into groups to review model guidelines. Each group could submit three changes or additions. These changes were discussed and voted on in a joint session.

The result? Guidelines that were not imposed by the management, but rather were agreed by the users themselves.

If you wish your email guidelines to succeed in your organisation, you can take measures during the editing, proclamation, communication and follow-up that will greatly increase your chances of success.

The following four steps increase your chances of effortlessly dealing with the four hurdles of the Blue Ocean Strategy.

1. PROVIDE ENOUGH RESOURCES: ARRANGE A TASKFORCE WITH A PLAN

Often organisations will only assign one employee for the management of the email culture in the organisation as a whole. The efforts required in order to achieve visible results are extremely underestimated.

Setting up a taskforce is the first crucial step in order to achieve change. Create a team of a number of people that really want to make a difference, who are convinced of the importance of change and who have a high level of motivation and perseverance.

The first important assignment of the taskforce is to draw up a detailed script. The script includes a step-by-step plan with measurable goals and timings. The authors must ensure that the highest number of employees possible are reached within the organisation.

The next assignment is to find sponsors in the various departments. These sponsors ensure the buy-in with the colleagues and are contacts during the implementation of the various steps.

2. CREATE UNDERSTANDING: ACHIEVE A BROAD BASIS AND INVOLVEMENT

OBVIOUS?

A small business in Breda did not believe in email guidelines, as they had tried that once before. When asked, the HR assistant explained that they had emailed (!) a PDF once years before, which included a couple of standard rules. Further inquiry showed that practically none of the employees could remember ever having received such guidelines ...

Experience has shown that the impact of email guidelines is the greatest when the employees can also determine the content. This can be achieved via a questionnaire whereby the employees can select from various options. Another approach is suggesting model guidelines in an email workshop and to give them the opportunity to change them. This method offers the benefit of debate and the exchanging of ideas.

3. INFORM AND MOTIVATE THE EMPLOYEES

Clearly explain the email guidelines and explain why they are necessary. If people understand why certain rules are introduced, they will accept the rules faster.

It is even better to create a sense of urgency within the organisation in the proclamation. You can emphasise the importance of the launch of the new guidelines by organising an official kick-off event or an email awareness session. Place roll-up banners in the reception area or in the canteen, hand out flyers or hang posters in the coffee corner. If you link an event to

the proclamation of the guidelines, everyone will know from the start that everyone is expected to follow the rules.

However, this is not enough. Even those who are convinced of the necessity of change, risk falling into their old habits after a couple of days. That is why it is important to regularly bring the guidelines to everyone's attention. A large Flemish pharmaceutical company, for example, included a couple of points of the policy on the info screens of the company. You also need to explicitly communicate the new rules to all new employees during the induction programs.

Storytelling can greatly benefit the spread of best practices. When, for example, the corporate newsletter reports on the experiences of certain employees whose productivity has greatly increased as a result of the new rules, others will be more likely to also follow these rules.

4. INVOLVE BOARD OF DIRECTORS AND MANAGEMENT IN FOLLOW-UP AND COMPLIANCE

Finally, it is crucial to actively involve the board of directors and the complete management in communicating and compliance of the new rules. The French multinational Atos Origin even linked 10% of the bonuses to the extent in which the managers are able to control the email culture within their teams.

Compliance assumes a certain level of control. The managers and team leaders are in the best position to control this. However, a pro-active inspection of emails is impossible without violating the employees' privacy. Permanent screening of their activity is undesirable and unlawful.

Nevertheless, reactive monitoring is possible. This will allow the responsibility in the event of incidents and misunderstandings as a result of incorrect email use to be transferred from the recipient to the sender. Anyone who sends an email and in doing so breaches certain guideline rules, is responsible for the consequences.

- A back office sales employee sends a last-minute change of a client order to the dispatch department via email. This email is intercepted too late. Result: the customer receives an incomplete order. The sales employee cannot defend himself/herself by saying that he sent the email. A phone call or Instant Messaging are better means of sending urgent messages.
- An employee of a logistics company sends an email with a question to two colleagues of the same department. No answer was given, causing the deadline to be missed. Both recipients assumed that the other colleague would answer the email. In the discussion that followed, the sender received the blame as he should have made a clear choice when selecting the recipients.
- An email about a disrespectful remark about a customer was forwarded internally and finds its way to the customer in question. Anyone forwarding an insulting email by accident commits a professional mistake, but the author of the insult bears the bulk of the responsibility.

The Atos logo is displayed in a large, bold, blue font. The letters are stylized, with the 'A' and 'O' having a unique shape. The logo is centered within a white rectangular area.

The French multinational Atos Origin links a part of the manager bonus to their efforts in achieving a healthier email culture. Commitment of the management is the quickest way to achieve success.

The average employee spends hours every day, reading, writing and answering emails. We increasingly consider our inbox the bottleneck keeping us away from our real work. Managing and optimising the current email culture might be the most important step in achieving an efficient and lean corporate culture.

Managing specific aspects of the corporate culture requires discipline and attention, but is certainly not impossible. It is mainly just a question of doing it. If one tackles the issue professionally and completes the full process with attention to detail, will achieve good results surprisingly fast.

More good news: when you respect the rules of the game, an email policy will gain its own dynamic at the end of the process. The more employees get used to the guidelines and experience the benefits, the more work these internal ambassadors will do for you. Although the organisation as a whole will reap the benefits from a healthy email culture, the greatest winners are the employees themselves.

APPENDIX

EXAMPLE OF EMAIL GUIDELINES

1. Never use email for messages for which you expect a response that same day. Use the phone (or other synchronic means of communication) for urgent questions.
2. Limit the professional email use 'after hours'. However, if you do send an email in the evening or in the weekend, never expect the recipient to read your email before the next working day.
3. Direct (face-to-face) communication and phone calls are preferable to sending an email when you need to communicate complex assignments and questions.
4. Use clear, comprehensive subject lines. Limit the email to the subject if possible and end the subject line with 'eom' (end of message).
5. Start each email with your core question or core message. Make sure your paragraphs and sentences are short.
6. Use Out of Office, but never for an absence of less than one working day.
7. Email is exclusively intended as a means of sharing information. Never use an email for one-on-one conversations, discussions, differences of opinion or emotionally charged messages.
8. Avoid emotional emails, jokes, private conversations or sensitive messages. If unavoidable, state 'confidential' in your subject line. Treat confidential emails with care and maintain their confidentiality.
9. Avoid excessive use of distribution lists, mail to all and replay to all. Check before sending an email whether each recipient should really receive the email. Remove any persons who should not be included as a recipient.
10. If you forward an email, check whether the recipient should receive all the enclosed information. Remove any excess text. Forwarding internal emails to an external recipient is not permitted.
11. Only cc people upon their request or if the information really adds value to the recipient. Inform people when you no longer wish to receive an email as a cc-recipient.

PLEASE NOTE: CHANGE IS OBLIGATORY!

There are no ideal email guidelines. Each model needs to be tailor-made to the reality of the company, the sector, the way people work together and the current email culture. Don't use these guidelines as the final product, but consider them a starting point and adjust accordingly.



ABOUT THE AUTHOR

Gunnar Michielssen has been speaking and writing about email use in Dutch and Belgian organisations for 15 years.

Since 2008, over 35,000 participants have attended his successful seminar ‘Kick the email habit’. During his seminar, Gunnar explains the benefits, the risks and dangers of excessive email use to the effectiveness of people and organisations.

Gunnar believes that effective emailing is the way to work and do business successfully. Many employees spend almost one third of their working day on reading, writing and answering emails. Companies wishing to stay ahead in increasingly competitive markets and organisations that wish to remain relevant, will first and foremost need to tame the email monster.

Gunnar gained most of his inspiration for this whitepaper from customers, as dozens of companies are trying different ways of introducing guidelines. The successes and failures are never accidental, but are the result of the same rules.



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