Email and meetings management

Beverley Leckenby
Health care leaders don’t follow best practice

E mail best practice policies rarely used

16% of leaders are trained in e mail management

84% receive unnecessary e mails
What drives you mad about e-mail?

I am not 100% happy, maybe we should look into making the options better.

Thanks
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Superior Software for Windows Building better Microsoft solutions in ASP.NET, VB.NET, C#, SQL Server, Exchange and MS Access
What would you like to see happen?

“I get to the office around 8:45, pour myself a cup of coffee, turn on my computer, delete all the spam, and then it’s time to go home.”
Benefits of managing email more effectively

Reduce the amount of time spent dealing with emails
Reduce unwanted items
Improve quality of emails you send and receive
Reduce the number of emails you receive
Reduce the stress associated with emails
Internal and external influences

My role
My information needs
My management style
My network

The team
The organisation
The wider community
3 key questions when composing an e mail

• Why?

• What?

• Who?
Replying to the e mail
the 2 minute rule

• Do it
• Delegate
• Diarise
• Delete
No. 1: Is it appropriate for you to reply?

The two minute rule
if it takes less than two minutes do it!

If this is not possible you should consider the following options:

• delegate the email to another member of your team
• diarise time to action the email if you cannot take action immediately
• delete the email or file it for reference immediately or once actioned.

Minimise the time spent checking your emails.
Where possible, only handle each email once.
No. 2: Is the subject line clear?

Use action-focused email subject lines.

1. Subject lines could start with the action required
   
   - **action required** = physical action is required, ie complete a form (eg FA)
   - **for information** = there is no action required (FI)
   - **response required** = action is required in the form of a response (FR)

2. Contain a clear description of the email’s **purpose**, eg action required: Invitation to SW Network 29 June 2011

No. 3: Keep emails short, concise and action-focused

Language

• Is your email brief and to the point?
• Have you used appropriate language?
• Have you considered your target audience and their level of understanding of the subject?
• Check your style and tone
• Have you kept abbreviations and jargon to a minimum?
• Have you used CAPITAL letters appropriately?
• Have you read it through before you send it?
Critique an e mail

Institute for Innovation and Improvement
Our good practice tips to personal productivity – email management

1. Ask yourself why - what - who before sending
2. Use clear, concise language
3. Use clear subject lines
4. Does it pass the Daily Mail test?
5. Try the two-minute rule
6. Handle each email only once
7. Don’t use your inbox to file your emails
8. Do you need some IT training?
9. Clarify email roles and responsibilities
10. How can you spread good practice?
Any Questions?
The benefits of managing your meetings more effectively

Your meetings will
  • achieve more
  • start and finish on time
Participants will:
  • attend the most appropriate meetings
  • prepare more effectively
  • follow up on actions
  • participate more fully
The quality of discussion in meetings will improve
My meetings

Complete your meetings matrix
There are four key stages in managing a productive meeting

You have a responsibility to yourself and others to run productive meetings, maximising everyone’s time
Plan – key planning questions

What am I hoping to achieve by holding the meeting?

What is the most appropriate forum for the meeting?

Who needs to attend the meeting?

What are the most appropriate tools and techniques to use?
Prepare - a productive meeting needs an effective agenda

Agenda Template

<table>
<thead>
<tr>
<th>Agenda No</th>
<th>Item description</th>
<th>Objectives/ Desired outcomes</th>
<th>Process</th>
<th>Item presenter</th>
<th>Time allocated per item</th>
<th>% Achieved</th>
</tr>
</thead>
</table>

Schedule breaks for meetings that last over an hour

Order the agenda according to the importance of the objectives

At the end of the meeting review whether the objectives have been achieved

Assign realistic timings for each item
### Participate - everyone at the meeting has a part to play

#### Meeting owner (chair)

- Responsible for the smooth running of the meeting:
  - setting the objectives and providing information
  - agreeing attendees
  - assigning accountabilities
  - ensuring adherence to the agenda and timings
  - ensuring full participation from all members
  - making it ‘safe’ for everyone to participate
  - recording any issues, ideas, decisions and most importantly actions

#### Team members

- A selection of people positively identified as having knowledge to input. They are responsible for:
  - practising good meeting behaviours
  - coming prepared
  - actively listening – contributing ideas, raising concerns constructively, sticking to agenda topics
  - helping the chair ensure the smooth running of the meeting
  - arriving on time.

### Additional roles

Other roles can be assigned if needed. These include timekeeper, scribe, expert, facilitator and decision maker. Allocating roles to meeting attendees can also be an effective way to structure a meeting.
Behaviours to observe in meetings

Meetings are powerful forums where these common behaviours can often be observed

- You need to recognise different types of behaviours in meetings
- You need to know how to deal with them
Bringing meeting behaviours to life - Have you have come across an individual in a meeting like one described below?

<table>
<thead>
<tr>
<th>The comedian – can be helpful or a hindrance</th>
<th>The participant who is quiet and does not contribute ideas</th>
<th>The person who is keen to please others and support ideas</th>
</tr>
</thead>
<tbody>
<tr>
<td>The person who likes to stir up emotions in others, always taking opposite views</td>
<td>The loud person who talks incessantly and goes off on tangents</td>
<td>The person who only has one view and thinks they are the expert</td>
</tr>
<tr>
<td>The person who is full of ideas but lacks attention to detail</td>
<td>The person who is very negative</td>
<td>The person who likes to stay on track &amp; promotes decision making</td>
</tr>
</tbody>
</table>
Pursue – a meeting is only as productive as it outputs

You could capture the meeting’s outputs using this template:

<table>
<thead>
<tr>
<th>No.</th>
<th>Actions captured</th>
<th>Owner</th>
<th>Timescale</th>
<th>Resources required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No.</th>
<th>Decisions captured</th>
<th>Owner</th>
<th>Time</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
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<tr>
<td>3</td>
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</tbody>
</table>
Evaluate the effectiveness of your meeting

1. Someone takes the lead for evaluating the meeting
2. Ask the attendees What Worked Well, and what would be Even More Effective If …
3. Summarise the key points
4. Identify and agree the areas for improvement
5. Include these notes with the meeting actions so that the next meeting is even more effective

What Went Well?  

Even More Effective If?
Think about time and money ...

The meetings calculator
Think about time and money ...

A sample executive team

1 Chief Exec
3 x Very Senior Manager
4 x Band 9
4 x Band 8d

Team meeting once per week based on a 45 week working year

Length of meeting: 180 minutes
Each meeting costs: £1909.59
Reduce by 30 mins: £318.26 non-cashable efficiency
If meeting removed: £14,321.92 saved per year

If meeting removed: £85,931.52
Meeting in action critique
Our good practice tips for personal productivity - meetings management

1. Stop. Think. Is a meeting really necessary?
2. Four Ps of productive meetings
3. Know your responsibilities – as participant/chair
4. Start testing timed agendas in some of your meetings
5. Where appropriate use the action decision template
6. Regularly evaluate your meetings (e.g. WWW, EMEI)
7. Consider how behaviours in meetings might affect both others and outcomes
8. Think about the potential of spreading good practice in your team and beyond
Meetings matrix

• Go back to your meetings matrix you completed at the beginning of the session

• Review your meetings in view of what you have learned/seen
Feedback from a programme participant at South Central SHA

“…it is ‘common sense’ put into practice. For me, personally, it has become a way of life and I shall continue to be an advocate for the Productive Leader as I know it works.”
Thank you

Any Questions?