

Solve Your Email Woes with Lean

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The Lean methodology was developed for and within a manufacturing environment. That does not mean that it cannot be adapted to the office environment. Use the Lean principles to solve your email troubles and be and feel more efficient.

The Rest of the Story

One of my favorite questions to ask when I'm talking with someone about improving business processes is, "What are the top five pains that you have every week?" It's my way of drilling into where the greatest waste is, because in my experience waste often manifests as pain.

Many times the answer varies, depending on the nature of the business and the business culture. There is one answer that shows up more, however, that I'm surprised when it doesn't, "email." Sound familiar? It seems that almost everyone finds that managing email is one of the greatest pains and sources of waste to face each day.

Perhaps you think that I'm wisecracking about using Lean to solve your email problems. I'm dead serious. In fact it makes a great example of how the Lean problem-solving methodology can be applied to identify and eliminate waste.

That being written, if you are already steeped in Lean knowledge, then read on and perhaps you will have one of those forehead-slapping "I should have had a V8" moments like I did a couple of years ago. If you are not a Lean expert, then enjoy

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this voyage into an example of just how simple and effective the Lean methodology can be for solving problems.

If you think about it, email has a great deal in common with manufacturing production. They both have demands and materials that come in; in the case of email we can consider information to be like material. They both have a product or output that we must create and send to a designated recipient. Managing each requires resources and failing to manage each costs a lot.

Before we start solving our email challenges, let's take a very quick look at a handful of Lean terms and principles. Then we can all proceed on the same track.

First, we need to understand that the Lean methodology focuses on eliminating waste. Waste is that which is not "value-added" and is also unnecessary. Value is defined as delivering the correct, quality thing to the customer, on time, with minimal waste, for the correct price. Anything that does not directly contribute to providing that product to the customer is non-value-added. Some non-value-added activities, such as tracking metrics, are non-value-added but necessary for the efficient, effective operation of the business and might not be considered waste.

A simple way to think about value-added is to identify what the customer would pay you to do. A customer would pay you to convert material into a product. A customer would not pay you to make copies of drawings for safekeeping. We do not want to necessarily eliminate everything that is non-value-added, but we absolutely want to eliminate every non-value-added activity that is not necessary - waste.

Typically there are seven to nine definitions of waste. For the sake of keeping our example here concise, let's use the following ones with regard to our email. You may very well identify other types of waste you experience, but this will get us started.

- *Inventory*: material or work that is resting and not being developed or processed.
- *Motion*: is effort or activity that is not producing value -usually associated with unnecessary movement.
- *Waiting*: is people or other assets that do not have the material needed to process work.
- *Defects*: an improper output that usually results in rework (work that you have already done and is therefore waste) or in delivery of poor quality or defective product.
- *Over-processing*: doing more work than is necessary to process material or product.
- *Overproduction*: making too much or delivering too much - which often also turns into inventory or rework.

As I wrote, there are more types, but these are perhaps the most common and damaging with regard to e-mail and examination of these six will get us well under way.

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Lastly, before we begin problem solving, let me quickly outline a common Lean tool called, “5S.” Five S is a tool, which organizes and standardizes a workspace to prevent waste and to make it easier to problem solve and identify other waste-eliminating opportunities. Briefly, the “S’s” are as follows:

1. *Sort* – organize your material, tools, or work and throw away the unnecessary.
2. *Set* – create a specific place for everything that you organized and set limits (this last part will be very important).
3. *Shine* – clean out your workspace so that it is easy to access and find that which you have organized.
4. *Standardize* – ensure that all related or similar operations work the same way; if others play in your space make sure they follow the same rules.
5. *Sustain* – make it a habit, which requires some discipline.

OK, that should be enough preliminaries to get us started.

To start, I’d like to recognize that our email software is our workspace. When we apply the 5S idea, we will be applying it to the way we set-up and utilize our email platform, software, or service.

Next, I’d like to point out that the emails in your in-box are inventory, one of the wastes. Essentially, every one of those messages is some form of work waiting to be processed, or if it’s already processed, is taking up space and your attention unnecessarily. Our goal from here on will be to minimize or eliminate that inventory to the best degree practical.

Schedule a block of time, after normal hours if you must, to go through the process I’m about to describe and get your email under control. Once you have it under control, you can begin improving your efficiency.

The first step on your path to manageable email is to execute the 5S technique. Go through your email and dump everything that isn’t important. That may include cleaning out your archived stuff as well. As you do, make a quick list of folders or queues that you want to have. Personally, I only care to have one in-box, but some like to segregate customers or programs. When you have done that, you have “sorted.”

If you are one of those personalities or in one of those environments such that you are compelled to keep records of every transmission, don’t do so with your in-box. “Set” a special archive for your records. Create folders and organize them so that you can quickly and easily both place your records and find them later. Also, I strongly recommend setting up a prioritized to-do list after a fashion that suits you best. This will be important.

Perhaps the most important part of the “Set” step is to set limits. Do what you need to do, but my preference is to create a window of a certain size for my email and

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leave it that way. A big tool used throughout Lean is a visual trigger. The window for my email is my visual trigger. I set a limit for myself that dictates I am not allowed to have more emails (read or un-read) in my in-box than will fit in the window.

When my window is full, I am to take a few minutes and process them to make more space. Believe me, frequent bursts of a minute or two are much less painful than spending afternoons cleaning everything up because the inventory piled up. It also prevents my internal and external customers from waiting.

The “Set” step can also be used to set your filters to automatically direct incoming messages to those in-boxes you organized. It’s not my preference to do this – in my mind it creates more motion for me, but if it helps you then feel free. Manually moving emails around would be a type of motion and should be avoided unless you feel it prevents some other sort of waste or saves you motion in terms of finding it when you need it.

As you are organizing your email folders, file folders, and in-boxes, keep the waste of motion in mind. The activity of searching for information or e-mails is motion, and it is waste. Do whatever works best for you to ensure you can place and find records and information quickly.

Now, move on to “Shine” your email workspace. Set your color schemes and font preferences, flags, and other settings so that it is easy for you to distinguish your emails in a meaningful way. For example, you might make read and unread emails appear very different. Re-opening an email you have already read is over-processing. So is reading an email you have already processed and for which you have completed your actions. Again, consider meaningful visual triggers to help prevent over-processing.

“Standardize” your folders, in-boxes, and archives so that they all work the same way. If you used the “Shine” step to make them different colors to quickly tell them apart, don’t undo that in the name of standardization. The purpose is to do that which will make utilizing our email easy and quick. If you have an administrator that aids you in processing your email, standardize your method with him/her.

Now that you have organized your system and set up a plan for email management, you must “Sustain” your method with some discipline. Even if you feel like it is painful to follow your own rules, or still too slow for comfort to process your email, stick with your plan and see it through. Most email management plans will work. They fail because the discipline to follow them fails. After a couple of weeks, if you decide that your system or plan needs some adjustment, go ahead.

Continuous improvement is a big part of Lean. Just give it a couple of weeks to work before you go adjusting it or you’ll never get into a routine. Routine is your best friend.

Now that you have your email system under control, let’s discuss how to make it work for us. The primary objective of Lean, and the best friend to eliminating those painful hours spent processing your email is flow. Always think flow when using and

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improving your email system. Keep that inventory in your in-box to a minimum. Letting it build up and then processing it in big batches is not flow. I'll bet you have already realized that it's painful.

The preferred tool to manage flow with Lean is First-In-First-Out (FIFO). FIFO is great when everything you are processing is the same. Unfortunately, your emails are all unique. So, instead, I strongly recommend a prioritized to-do list.

When you read an email, before you close it and read another, you add it to your to-do list and give it the appropriate priority. I like sorting according to Important (value-added) and urgent, to Important and not urgent, to urgent and not important, to not either. Clearly the items in the last category are probably waste. This allows you process your actions from emails in a proper order and prevents you from making someone else wait, and it prevents defects in the form of late or missed opportunities.

Unless you must keep the email for a direct reply or because you need details or instructions, delete it once you have put the action on the to-do list. Having the action or information in both places is just duplicate inventory. With your to-do list, again consider visual aids to help you distinguish priorities. Also, you must set limits again.

Workload leveling and cycle time or TAKT time are important Lean concepts with regard to managing flow. For the sake of your email and to-do list, just set a limit for the amount of time you believe you can typically invest in any given week to process your action items. This should be the time you have that doesn't include recurring meetings, standard duties, and general noise. I usually set my own around 20 hours per work week.

When you add an action to your to-do list, estimate the time it will take to get it done properly. When your total for the week starts to exceed your capacity, you must begin managing your future crisis. Tell someone something won't get done if you have to, but be proactive.

Your to-do list is your best tool for managing your flow. Flow is the key to managing your email. Once an email message is addressed delete it. Archive it if you must.

Routine is the key to successful discipline and flow. Get into a habit of processing your email in-box and your to-do list regularly throughout the day. Make standard times to review and process your email and stick to them.

I find that first thing in the morning my mind isn't really in my work yet. Reviewing my email right away helps get me focused and it is also a time when I am afforded a little attention because others are doing the same or getting coffee, etc. I like the lunch hour for the same reason and I'll try to not leave the day without cleaning up my email inbox. Those few minutes we spend waiting for meetings to start are also a good time to read and prioritize our action items, but not to work them.

So, with the above paragraphs we have outlined a method and a discipline for

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staying ahead of our email, based on Lean principles. Naturally you will need to do some experimenting and customizing to build that system and method that works best for you. Let me give you just a few more Lean ideas to think about as you do.

In addition to treating your email like inventory, we must think about our emails to others as work or product. This means we must prevent defects. Defects can be late responses, unclear responses, or emails to the wrong person, just to name some common ones. Your to-do list should help with the timing. Relaxing to process your emails from a genuine keyboard instead of your smart phone can help with defects and mistaken recipients.

To deal with unclear emails I have a belief to share with you. Email is not an effective form of communication. If you have an idea to communicate, or if you need to explain something, propose something, or otherwise convince your recipient of something, use the phone or walk over to their workspace. Don't email.

Email should only be used to transmit or deliver data, or provide short requests or answers. Anything that is likely to cause another email with someone asking questions, arguing, or otherwise mimicking a conversation, should be a conversation, not an email.

If you get an email that belongs in a conversation, pick up the phone and converse, don't respond in an email unless to set up a time for a meeting or a call. Don't allow that "defect" to perpetuate. Communicate instead.

Defects are a disease. Anything you send that requires added effort to understand to get to the right person, or arrives too late to be of any value results in time and energy spent accomplishing nothing. Consistently focus on preventing defects and stopping their perpetuation.

The last waste to talk about is Overproduction. This happens a-lot with email. After all, it only takes a second to put our boss's name on the cc line so he/she knows we responded to a customer, or to add a whole team to the list so that they also get some piece of information buried somewhere in the email. Also there is the cursed "reply all" option.

Sure it may only take you a second to reply to all, or to add a few more folks to the message. But, how much of their time and energy goes into now managing that additional inventory in their own in-box? What have you just done? Was it really worth the pain caused?

Be very, very judicious with your selection of recipients to your emails. In the greater scheme of things, it probably wastes less time and creates fewer misunderstandings (defects) if you write an email with the specific information your recipients need instead of copying them on your emails to others.

When other people send you their overproduction, communicate with them that you would prefer that they should not do that. Tell them to send you an instant message to say they are done with a task instead of copying you on the delivery or response.

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Train them to use the phone by calling them and asking, "What is this email you sent me all about?" Just stop the cycle.

That covers all six wastes that I listed above. As I sum this up, it's going to appear really simple. Maybe it is, but then, most Lean solutions are. I will warn you that it will take some careful consideration, some practice, and some discipline to follow the thoughts above and get your email pains to go away, but that is also typical of most Lean solutions.

So let's sum up. The goal is to eliminate waste activity in our processing of email and to achieve some flow. Begin by using the 5S technique to clean up your current mess. It is especially important to set limits in your email system and in your to-do list so you can manage your workload and proactively manage the phenomenon of more work than time and energy.

Use visual aids and triggers to minimize the effort to quickly manage your information (motion) and prevent build-up in your inventory or over-processing. Constantly focus on eliminating defects and overproduction. Establish a routine and stick to it.

I did this for myself a few years ago when I decided to apply some of my training to my own e-mail pain. It was surprisingly simple to solve, but it did take some effort and re-training of myself. Lean is powerful and very versatile. Give it a try and put an end to your own email suffering.

Stay wise, friends.

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