Coping with E-mail

E-mail has become an essential lawyer/client communications tool. It allows easy and virtually instant exchanges of information. But we are all trying to cope with too much e-mail, and need to work at being more efficient at handling incoming and outgoing messages. So let’s cover the best tips on coping with e-mail, and we will start with some tips for doing more with Microsoft Outlook.

Using Microsoft Outlook effectively

These five general tips will help you move around and work with items more quickly within Outlook (and some of these tips will also apply to other e-mail programs):

1. **Learn keyboard shortcuts for common tasks.** The essential Outlook keyboard shortcuts include:
1. **Ctrl+Shift+M** to create a new message
2. **Ctrl+Enter** to send a message
3. **Ctrl+Shift+I** to jump to the inbox
4. **Ctrl+Shift+B** to jump to the address book
5. **Ctrl+Shift+K** to create a new task
6. **Ctrl+Shift+N** to create a new note

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**Keyboard shortcut syntax**

If you are not familiar with the syntax for describing keyboard shortcuts, see the sidebar on page 41.

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2. **Use plain English dates.** Outlook understands plain English words in date fields, and will enter the next occurrence of the described date. For example: typing “tomorrow” will enter tomorrow’s date, “Nov 4” will enter the next occurrence of this date, “one week” will enter the date one week from today, and “2 days” will enter a date two days from the current date.

3. **Drag and drop items of one type to create another.** Dragging an e-mail message to the taskbar Calendar icon will open a new appointment. Information from the original item will automatically be transferred to the new item so you don’t have to retype it.

4. **Right click for format and configuration settings.** In Outlook many options or features available with a simple right click on the mouse. Right clicks are context sensitive—in other words, you will be presented with a list of choices that are relevant to the item or text you are right clicking on. For example, right clicking on an e-mail in
your Inbox presents you with Open, Print, Reply, Reply all, Forward etc. Right clicking on a blank spot on your calendar will let you create new appointments, and configure the calendar. You can right click on almost everything—try it!

5. Sort column listings. In e-mail views, dialog boxes, and elsewhere you can sort items listed in any column with a click on column title bars. Clicking a column heading a second time will reverse the order. Note that this column sort feature works the same on column-style information in all Microsoft applications and many others, too.

\[\text{Remember: right clicks and column sorts work in other programs, too}\]

Trying right clicking on things in other programs. A right click in many Windows programs will give you quick and easy access to the features you most want and need. For example, right clicking on text in a Word document will give you all the text and paragraph format and layout options.

The column sort feature works in many other Windows programs as well. For example, in the file open and save dialog boxes.

\[\text{Send fewer e-mails and help save world productivity}\]

We all have a tendency to send and reply to e-mail messages when it is not absolutely necessary. E-mail messages are just so darn easy to create and send. In North
America alone, tens of billions of e-mail messages are sent every day. All those messages end up in someone’s inbox. Time to think globally and act locally. You can help. Before you hit Send, consider these questions and pointers to help you send fewer e-mails:

❖ **Does everyone in the To: line really need to get this message?** If not, delete their names.

❖ **Does every person in the CC: line really need to get this message?** CC is intended to be helpful, but is actually quite dangerous. We all start with good intentions and start adding names for reasons that are totally unrelated to the actual message. Resist the temptation! If they aren’t on the To: line already, it probably means something. Ask yourself: who really needs to be CC’d on this message? Include those names, and leave the rest out.

❖ **When using Reply-to-all,** does everyone that got this message in the first place really need to see a reply to it?

❖ **Use distribution lists or group addresses very sparingly** and only if absolutely necessary. It is certainly more efficient to reach out to a group with a single e-mail address, but only when absolutely necessary.

❖ **Never use the Everyone group address** (unless you smell smoke).

❖ **Meeting RSVPs should usually go to just the sender,** or does everyone need to know if I will or will not be attending the meeting?
Don’t forward virus warnings! 99.99 percent of them are hoaxes. You can check here: symantec.com/avcenter/hoax.html

Don’t forward jokes, SPAM or chain-mail messages. It is unprofessional to send a client e-mails of this nature. Not only does this waste your time, it wastes the recipient’s time and Internet capacity.

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Don’t use e-mail when a face-to-face conversation is more appropriate

E-mail is not the same as a phone call or a face-to-face conversation. At the top of the hierarchy of human communications are face-to-face meetings, then phone calls, then voice mail, and lastly e-mail. Face-to-face meetings have the most impact. Not only can you hear and talk back to the other person, you also have the ability to see gestures and facial expressions, etc. On the phone you don’t see gestures, but you can hear the tone and emotion in the speaker’s voice. E-mail has the narrowest communications bandwidth—it is only words on a screen. Make sure the mode of communication you use fits the circumstance. Pick up the phone, walk down the hall or meet with your client when more personal contact is necessary.

Effective and safe use of e-mail

All of us have more e-mail messages in our inbox than we really want. Here are seven quick, proven, practical tips to help you improve how you manage your e-mail:
1. Capture Your Contacts Quicker: Anagram (Get Anagram.com) is an inexpensive add-on computer utility that can help you quickly capture contact information from e-mail messages and documents. Just two clicks of your computer, and Anagram opens an Outlook contact form, then drops the information into the correct fields; all you have to do is hit Save.

2. Be Careful Communicating with Clients via Their Work E-mail: Your client may lose attorney-client privilege by communicating with you using the e-mail address provided by their employer. Employers have the right to monitor these messages, and many employees have agreed (whether they remember or not) that they will not use their computers for personal purposes. Cautious attorneys advise clients to e-mail only using a personal e-mail address on their own personal computer.

3. Written E-mail Policies Prevent Problems: Draft a written e-mail policy for clients and staff to clarify the use of e-mail in your attorney-client relationships. The written policy is meant to control the client’s expectations and set forth how your firm deals with e-mail. In today’s fast-moving world, clients often expect immediate answers to e-mails. Despite the client’s expectations, such e-mails may require thought and, possibly, research. Such a policy helps clients understand that

A computer lets you make more mistakes faster than any invention in human history—with the possible exceptions of handguns and tequila.

—Mitch Ratcliffe
it may take you a day or longer to respond to an important e-mail, so the client will not become impatient waiting for you to respond.

4. **Use Multiple E-mail Addresses:** Use several different e-mail addresses for different functions and roles. For instance, a G-mail (Google) address can be used for e-mail related to your hobby or your personal interests, or an MSN address can be used for customer notices and offers. Another address can be used for listserv sign ups. This will save your e-mail inbox from the clutter that comes with certain activities.

5. **Don’t be too informal in e-mail messages:** As e-mail becomes the primary form of business communication, we need to maintain the professional appearance of our written communication: include a descriptive subject line; add a personal salutation; use full sentence structure proper grammar; check your spelling; add a proper closing, such as “Warmest regards”; remove old signatures and unnecessary clutter. Taking just a few extra seconds will payoff with improved relations with clients, opposing counsel, new acquaintances, and potential new clients. You’re asking folks to pay serious money for your services; make sure you send e-mail that appear as professional as the letters you send.

6. **Make storing e-mails in subfolders a snap:** When it comes to keeping e-mails, most of us are pack rats. The problem is that it just takes so darn long to drag and drop all those messages into the right subfolder. Rejoice, because salvation is at hand: SimplyFile ([TechHit.com/SimplyFile](#)) comes to your rescue. This remarkable program learns your folders, suggest the right one nine out of 10 times, and lets you slam the message in there with just a few clicks. It is amazing.
Learning more on coping with and managing e-mail

Here are some great resources for learning more managing e-mail:

- Merlin Mann’s Inbox Zero: [http://43folders.com/izero](http://43folders.com/izero): This blog has multiple productivity resources including Mann’s famous strategies for coping with e-mail.
- *The Lawyer’s Guide to Microsoft Outlook 2007* by Ben Schorr (ABA LPM Section, 2008): This is the book for any firm using or upgrading to Outlook 2007.
- Lifehacker ([lifehacker.com](http://lifehacker.com)): A productivity Web site focused on helping you get things done!