

# Improving Outlook Communications and Productivity

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Accountants have long been the “information communicators” for business and have become very dependent on email as an effective method for interacting with clients and firm members, as well as moving files and attachments. Over time, Microsoft Outlook has become the predominant tool used within accounting firms and while many of us had initial training when our firms first converted to Outlook, very few companies have followed up with training to improve productivity beyond highlighting the added features that each new version incorporated. Outlook 2007 is today’s standard for accounting firm email and firm’s should make a conscientious effort to educate personnel on improving individual productivity by implementing Outlook email best practices.

**Limit Interruptions:** One of the biggest drains on personal productivity is constantly being interrupted by email alerts that either “ding” or pop up on your screen to notify the recipient that they have a new email message. This robs the user’s focus on the task they are working on and it can easily take five minutes or more to re-focus their “brain share” back to where they were prior to the interruption. Respond to every email when they pop up and it is no wonder that people can’t get anything done during the normal work day. To counter this, the email refresh rate should be set to at least 30 minutes, or preferably to disable the automatic delivery so that email is delivered manually by the recipient when they choose to hit the manual send/receive tab at their discretion. This allows the recipient to complete whatever project they are working on and then respond to emails in focused “batches” before going to the next client (billable) project to be completed. If the recipient is waiting for a specific email, nothing will stop them from hitting the send/receive tab every few minutes until they get it when necessary. As a habit, I have learned to respond to new email in controlled batches and then hit the send/receive button to send all my responses.

**Organize Inbound Communications:** One of the best features within Outlook is the ability to set rules to forward emails to specific subfolders so that they can be consolidated without having to manually move the email to that folder. Setting up these folders for newsletter, blog or email alerts, as well as for clients and personal emails will make it easier for the recipient to catch up on those items at the appropriate time and is more productive as they are similarly grouped. Outlook will “bold” the header for that folder when there are new emails so the recipient is visually aware that new items have arrived. Sometimes individuals worry about finding specific emails that may be moved by Outlook rules but Outlook 2007 has drastically expanded the search features such that the recipient’s email system can be quickly searched (this feature is native to Windows Vista and available in XP by installing the Windows Desktop Search 3.01 tools).

**Decide Once:** One of the primary reasons that email inboxes get so full is that too many times we hope we will get back to a specific item at a later time and then the email becomes quickly buried. A critical key to reducing the number of items in your email is to immediately decide what action you will take when you open the email the first time. This begins by having uninterrupted time to focus on email, such as the first 30-60 minutes of the day and after lunch. The recipient should then be trained on a standard process to deal with email and one of the most effective methods comes from Sally McGhee’s book “Take Back Your Life” which refers to the Four “D”s of Email Decision Making.

If the email does not require your input or is not an actionable item, just Delete it! This takes some training and usage to become standard but it is the most effective way of clearing the inbox. The second “D” is just Do it if it can be done in a few minutes to completion, which includes filing it in the designated place if that is the appropriate action. The third “D” is Delegate it to the appropriate

person and make sure they have all the information they need within the email to them so they don't bounce back with unnecessary questions that should have been included in the email in the first place.

Finally, if it is something that will require significant action that cannot be completed during your email management time, it is suggested that it be "Deferred." This does not mean just leave it in your inbox with a red flag, but to determine whether it should be moved to a task list with a target deadline within Outlook or placed on your Outlook calendar with reminders for completion at a specific future time. While using Outlook flags can be effective to help recipients locate an important email, it usually requires they open it again and then decide which of the four "Ds" above would apply, which should have been done the first time it was opened.

**Reduce Overall Email:** One simple method to help individuals get through email in their daily allotted time is to implement processes to proactively reduce the overall email they receive in their Inbox. Effective spam filtering applications can block the majority of junk mail, and training users to add spammers to their email block list will reduce future emails from those senders. Next, unsubscribe from any blogs, newsletters or subscriptions that are not absolutely essential for your work, or use Outlook rules to automatically forward them to their own sub-folder so that they can be viewed when needed. Firms can also post links to tax or audit blogs and emails on their intranet so they can be centrally accessed without having to be filtered through each individual's inbox.

One of the easiest ways to reduce the amount of email received is to simply reduce the amount you send. Limit emails to those recipients that are necessary to complete the task. Too often individuals use very broad email distribution lists, CC and BCC multiple personnel, which leads to un-needed responses from people that are wondering if they need to be involved. The flip side of this is many users hit the "reply to all" response, which increases email to everyone. This action can become ridiculous where individual's respond to everyone with "Thanks" or "Me To" instead of targeting useful communication to the sender that is responsible for completing the action.

**Consolidate Communications:** Many accountants also become distracted by the myriad of ways that information is being delivered to them. It is not uncommon for a person to have twenty or more external information resources including voicemail, faxes and personal email. Those external communications that are in a digital format can be integrated to be delivered via Outlook. This process is called unified messaging and allows accountants to listen to voice mail and view faxes within Outlook. Having voice mail delivered as a .wav file to your email is a function of your phone system, but most today integrate natively with Outlook, so the recipient can listen to voicemails and save or forward the message as it is already in a digital format. The same goes for faxes, and many firms have integrated their faxes with their Outlook so they too can be accessed and viewed from within email. Consolidating communications in this fashion allows the user to access them not only from their own workstation, but they can be configured to allow for secure Web-access from any Internet-enabled computer and even today's smart phones so they can schedule their "email time" outside the office if that is the most productive way for them individually. Consolidated communications also help support the firm's disaster recovery efforts as most firms have developed detailed data protection plans for their email servers, but seldom for their phone systems or fax machines.

While most firms do a good job of training their personnel on tax and audit applications, they often assume that their users are proficient in the tools they use for managing and communicating the results of client engagements. We know that this assumption is misplaced and firms can greatly

improve their personnel's individual productivity by educating their personnel on managing email more effectively.

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