Work Is Broken

Here's How We Fix It

BY MARC ORCHANT

Last month, the online community suffered a terrible loss with the death of Marc Orchant. The outpouring of emotion and warm memories shared online captured the effect Marc had on everyone he connected with. My opportunity to work with Marc came on The More Space Project, an effort that proved bloggers are not second class citizens behind the thought leaders of mainstream media. Marc's contribution, titled "Work Is Broken," describes how a few simple ideas can change the way we work for the better. Both Marc's message and his unfortunate passing remind us to make the most of each day, a message of import as we begin 2008.

~Todd Sattersten, publisher, ChangeThis

Let me tell you about Bill.

Years ago, I worked with a charming and ambitious fellow. Let's call him Bill. You probably know a lot of people who have worked with someone just like Bill. Maybe you have.

Bill was always ready with an informed opinion. He had the latest industry information at his fingertips and knew exactly who was in what deal and who was jockeying for which position both in our company and at every competitor.

Bill could rattle off every call and site visit he'd made and comment on every sales proposal we had under consideration. He had the facts . . . he had the figures.

Bill could do a PowerPoint presentation at the drop of a hat. He practiced hard and mastered his script. He was smooth, professional, and polished.

Bill would boast about the number of e-mails he received and how full of important correspondence his Inbox was at all times.

He would proudly show you his schedule on his Palm Pilot to demonstrate how he managed to pack more into every day than most people could ever imagine attempting.

Sounds great, right? Sounds like every organization, even yours, could use a few more Bills, huh?

I wouldn't wish Bill on my worst enemy.

How's that? Excuse, me? What'd you just say?

Isn't Bill a shining example of all that we should try to be? Polished? Smooth? Well-connected? On the ball? A master of efficiency and productivity?

Bill was a train wreck. Bill left a wake of unhappy people behind him wherever he went.

Let me explain.

Bill's ability to reconstruct every call and site visit he'd made was a one-dimensional parlor trick. He could tell you where he'd been and with whom he'd met in perfect detail. But when it came to sharing any substance about the "what"—what was discussed, what next steps were required to close the deal, what our team in the field needed—Bill wasn't nearly as accurate or detailed. He wanted you to be impressed by how much he'd done, not how well he'd done it.

Bill's presentation might have been polished but it was devoid of any real meaning. Despite the opportunity to engage or teach his audience, he instead chose to parrot facts and figures. His job was supposed to be helping prospects and customers understand the challenges and opportunities they could expect if they entered the market we were developing. Instead, he told the same old story over and over about how one company had done something completely unrelated to the audience's business and it was impossible to reproduce. Of course, this carefully scripted one-way mirror was precisely rendered in classic "three bullet points to a slide" style.

Great story—no takeaway.

Sending Bill e-mail was an exercise in frustration. It was like a black hole—everything went in but nothing came out. Bill would process all of his mail in batches every day or two and then reply as he saw fit. Often, he'd call and a leave a hasty voice mail message in response to a request for some detailed information. In the voice mail, he'd usually tell you who else you might want to check with for that information—Bill was busy.

And it was hard to predict what he might respond to, in what order, and when. On a number of occasions, I had requested some time-sensitive information from Bill and the only e-mail I got from him was about industry gossip or forwarded joke-mail. He seemed to have no sense of how to prioritize his mail and no appreciation of business etiquette.

Bill's schedule was a marvel. He'd mastered airline ticketing, airport logistics, and the car rental game. He knew how to get in and out of a city better than anyone I'd ever met. Bill would neatly dovetail meetings to maximize his efficiency but left no room for error and no allowance for opportunity. When it was time to go to his next appointment he just got up and left. Whoever else from our company was in the meeting was left to "finish up," as Bill called it—meaning salvage whatever was possible of the original mission.

To make sure he accomplished what he wanted in these meetings, he'd ignore any agenda or scripting his team tried to prepare and discuss in advance. Bill prided himself on his skill at taking over any meeting and winging it.

Bill was the poster child for just about every symptom of what's broken in the world of work for so many:

- Shallow, superficial communications
- No follow-through on commitments
- Misplaced priorities
- No long-term planning—everything done on the fly, at the last minute

It's Not Just The Corporate World That's Broken

I've spent most of my professional life working for and building small companies. The corporate experience I just wrote about was an aberration in my life. As with most people, my work experience has been primarily in what analysts call "small" business (250 employees or less). And, surely, smaller organizations should be better at weeding out the Bills of this world, right? In a smaller company, people can't get away with that stuff. Everyone knows everyone and there's greater accountability.

Sorry to be the one that bursts your bubble. It turns out that there's a magic number for how many employees a company can have and be confident of providing that utopian work environment. And it's not the analysts' cut-off for "small" business. It's not even fifty people. It's two.

Hear me out.

You have to have two people to have communication. It takes two people to have a phone conversation, a meeting, or to exchange e-mail. You can't delegate a task unless at least one other person is involved. Even doing a little celebratory high-five after receiving some good news ("We got the Wilson contract!") works best if you have someone to slap palms with.

OK . . . so two is the minimum. But it's also the maximum if you want 100 percent certainty that everyone is accountable and on the same page. Because as soon as you add one more, the possibility of two people meeting without the third becomes a reality. And a lot of broken communication arises when we fail to accurately capture and share what transpired in a meeting with those who weren't there.

Look—it's hard enough to get complete agreement between two people on many subjects. Ask anyone who's married or been in a committed relationship (and yes, that does include business partners). The potential for misunderstanding, misinterpretation, misrepresentation, and a host of other "mis-es" rises exponentially as you add more people to the equation.

So just because you work for a small company, nonprofit organization, or educational institution, don't get comfortable. Work is still broken.

Why Work Is Broken

The nature of work has been undergoing profound change, and many of the practices employed by individuals, teams, and companies have not kept up with these changes. Tom Peters's most recent work,"Re-imagine!," is a tour de force of reflection on this very topic. In his own inimitable fashion, Peters rants and raves about many of the changes we're experiencing and suggests that if you fail to acknowledge, prepare for, and react to these changes, you are destined to be left scratching your head wondering "What happened?"

- Outsourcing
- The death of the manufacturing economy (in the West)
- The rise of the Hispanic and women's population in both the consumer market and world of business
- The importance of design and "wow" in creating new markets
- Always-on" communications and real-time information access

Peters is a big thinker and he tackles big issues. I'm concerned here with issues on a smaller scale. But the implications for your work are no less profound and will affect you every bit as much as the megatrends Peters has been discussing of late.

Consider how your work life has been transformed in the last few years. Think about how frequently you use a fax machine these days. A few years back, faxes and overnight packages were the primary means of exchanging documents. Today, ubiquitous and cheap broadband, broad adoption of PDF for document exchange, voice (and video) over IP, and other technologies have fundamentally changed the way we interact with our coworkers, suppliers, partners, and customers. Blogs, podcasts, wikis, and streaming video from the desktop have virtualized meetings, conversations, and other information exchanges in ways we only recently considered in the realm of science fiction.

Question: How different from the Star Trek communicator are the advanced cell phones we use today?

The essential nature of work has undergone similar transformation for many people, especially those of us engaged in “knowledge work.” Back when I worked with Bill, I was part of a well-defined team of people. I knew my role and how and where I fit into the ecosystem. I had a discrete set of responsibilities and a clearly defined area of authority.

Today, by contrast, I’m involved in many projects. My role in each varies and is subject to change over the life of that effort. I may be a manager, a team member, an initiator, or a resource. I lead some projects and play only a bit part in others. I may be involved in a particular initiative from the very first brainstorming session and only asked to help out with another as it nears completion. And all this happens on a daily basis with an ebb and flow that is sometimes as predictable as the tides and at other times as surprising as one of the flash floods we see here in the desert southwest after a mountain storm.

Question: How many different roles do you have in your work today? How does this compare with your work five years ago? Ten years ago?

Because we have so many ways to interact, it has become all too easy to fall prey to a kind of information overload our parents (and even older siblings) could never have imagined. It’s become a cliche that our lives are much more complex and immediate than the way things were in the “good old days.” But, as with most truisms, there’s substance behind those familiar words. This complexity has shattered many of the conventions and techniques we’ve grown accustomed to relying on to do our work.

Things That Have Broken

Meetings, presentations, and e-mails are a part of many people's workday. Used effectively, each can help keep teams aligned, impart important information, and move projects forward. In addition to the paper we've been trained to work with since our earliest school days, we now are bombarded with information from the Web, blogs, wikis, intranets, search engines, and other digital sources. We're challenged to develop and maintain a system for collecting, processing, and acting on all this information we receive as never before. And the classic techniques we've relied on in the past have either ceased to be effective or have simply broken. The current state of affairs in many people's daily existence is a succession of mind-numbing meetings, uninformative presentations, and chaotic (often unmanageable) e-mail and analog Inboxes with hundreds of unread, unprocessed, and unfiled messages, articles, and reports.

Meetings have become the bane of many an office worker's existence. Many people have "serial meeting days" where they seem to do nothing except attend meetings. Almost universally, those days leave people feeling as though they have accomplished little or nothing. How often have you heard someone say, "I got nothing done today; I spent my entire day in meetings."

Too many meetings have little or no structure, poorly formulated agendas, and unclear roles for the participants. With attendees unsure of what goals the meeting is intended to accomplish and lacking a well-articulated structure, meetings often descend into an anarchic free-for-all that tends to be dominated by a few strong personalities. By contrast, a well-designed meeting can be a profoundly productive experience that energizes a project team, produces a coherent vision, and generates concrete actions that move a project forward.

Unfortunately, too many meetings become an excuse to subject attendees to what is often described as "Death by PowerPoint." Few experiences are more depressing than attending a meeting in which you watch the back of someone's head as they read their PowerPoint slides verbatim, as if everyone else in the room has lost the capacity to read. This phenomenon unfortunately extends to conferences, seminars, and training sessions. The art of delivering effective **presentations** may not be dying, but it surely seems to be in increasingly short supply where we work.

The old saying—"It's a poor craftsman who blames his tools"—does apply to those who use PowerPoint presentations as a crutch to support a meeting that lacks a clear purpose or agenda. I've witnessed some absolutely dreadful presentations. But I've also seen masterful use of the tool where it informs, illuminates, and expands on the speaker's verbal presentation. Used appropriately, a PowerPoint presentation can add tremendous value to a meeting.

The final entry on my list of things that have broken is **e-mail**. Many people have become victims of what I call the "incredible exploding Inbox." Between spam, sheer inundation, and poor e-mail etiquette, what was once a vital and near real-time communication tool has become a morass. It's been estimated that as much as 80 percent of what finds its way into most people's e-mail Inboxes ends up being deleted almost immediately. And what's left, once the unreadable foreign-character gibberish and obvious spam has been eliminated, is poorly formatted and difficult to respond to or act on.

Many e-mails these days have a subject line that contains multiple instances of FW:, RE:, and other junk that obscures the meaning behind the message. Have you received a message with a subject line like this lately? FW: FW: RE: Your last message regarding. . . .

Question: What are you supposed to make of that? Is this likely to be the first e-mail you want to read in your crowded Inbox? Even if it's from your boss?

Effective e-mail triage depends on the ability to quickly get the gist of a message so that good decisions can be made about what to read and respond to first. Indecipherable subject lines, as big a problem as they are, represent only the first obstacle in using e-mail effectively. Even when you've opened many of the e-mail messages you receive, you're often faced with hunting your way through quoted message text, sometimes two or three levels deep, before you can find the part of the message that needs your action.

And the problem doesn't even end there. E-mail overload has created a peculiar loss of reason that leads otherwise intelligent and reasonable people to do something completely irrational: They keep everything in their Inbox!

This makes no sense at all. Oh, I do understand the rationale behind this behavior. Here's a little quiz. Answer honestly—only you will know the answers you provide. Have you ever used any of the following excuses to justify having hundreds or thousands of e-mails in your Inbox?

1. If I file this away somewhere, I'll forget about it.
2. There might be something important in this e-mail.
3. I'll get to this as soon as I catch up on some other stuff that's more important.
4. I really need to have this right in front of me.
5. If I keep this marked as unread I'll know it's something I need to act on.

Does this sound familiar? Looking at it objectively, doesn't this sound a little crazy?

E-mail can be an effective tool and it is increasingly the single biggest source of what David Allen, author of *Getting Things Done*, calls "next actions." As I begin discussing solutions, I'll show you how to streamline your e-mail processing, extract the next actions each message contains, and file and store your mail so you will be able to find information when you need it. The ultimate goal, as Allen puts it, is to "get In to empty" (repeat that out loud—you'll get it) and achieve a Zen-like state he refers to as "mind like water."

Note: This phrase comes from an old martial arts teaching. The master asks, "How does the water in a pond respond when a pebble is tossed into it?" After the student shrugs, unable to answer, the master imparts the following wisdom, "Appropriately. The pebble displaces the water, causing ripples which radiate outward. The water then returns to its normal state—smooth as glass, undisturbed and prepared for the next pebble."

The lesson is to respond appropriately to whatever task or event you're currently occupied with—don't overreact or underreact. After you have responded, return to a natural state of ready repose.

Ways To Fix What's Broken

We have three ways to deal with information overload. We can choose to be like my old coworker Bill and slough it off—bouncing from one engagement to the next leaving a wake of destruction behind. That's a lot harder to get away with these days. Because we are responsible to so many people in an interconnected web of projects and because instant communication has become the norm, people like Bill can't really get away with skipping stone-like across the surface for very long. So scratch irresponsibility and a cavalier attitude off the list of successful strategies.

We can scale back. Commit to less. Focus on what's important to us and stop trying to do everything. Bill Jensen, author of *The Simplicity Survival Handbook* and *Work 2.0*, is an authority on how to create less stress by letting go and learning that it's OK to say no a lot more often that you might think. I encourage you to look at some of his ideas and techniques. He's a really smart, funny guy who has put a lot of effort into researching, quantifying, and developing strategies to address what's broken about work. Here are a few choice observations from "Ten Simple Truths," a chapter in *The Simplicity Survival Handbook:*

- In most of today's workplaces, Work=Figuring out what to do with finite time and attention, and infinite information and choices.
- R-E-S-P-E-C-T now includes how well, or poorly, your company, your manager, and your teammates use the finite time you have available every day (and how well, or poorly, you use theirs!).
- Plan and manage change all you want. Just know that execution travels at the speed of sense-making. Create less clutter and more clarity, or help everyone make sense of it faster than the competition, and you win.

Jensen's *Simplicity* approach is a good start. Certainly committing to less makes keeping the commitments you do make easier and more likely to happen. But learning to say no isn't a solution—it's only a strategy. Even if you've managed to cut down on the common practice of taking on too much, you'll still find you have a lot to do and will need an approach to manage and execute on the many tasks you're charged with.

The third strategy is to impose order on chaos. A seemingly endless supply of books, tapes, and analog and electronic tools promise to help us get and stay organized, be more effective and productive, make our whites whiter and our breath fresher. The productivity business is a multimillion-dollar enterprise that enriches the people who sell the stuff a whole lot more than those of us who buy it. It's easy to feel frustrated and to assume that some fundamental flaw in us prevents us from succeeding with these fabulous inventions. Take heart. Despite the old saying, sometimes it is the tools that make the difference. Some processes and tools really can help you get a handle on your information overload.

A New Approach To Fixing What's Broken

Over the last four years, I've been part of a team that has developed a new approach to work. Our approach addresses every one of these broken processes. We've combined elements from a number of productivity gurus' teachings, some bits of low- and high-tech gear, and a participatory process to achieve a level of productivity, ownership, and satisfaction with work I've never experienced before. Stress levels are low, morale is high, and results are measurable and sustained.

One of the reasons our approach to fixing work has succeeded is because everyone has the opportunity to participate in the development, implementation, and constant improvement of the process. Because no one person owns it, everyone can take ownership in it.

I know this sounds pretty far-fetched if you're stuck in a toxic workplace, but it accurately describes the workplace I go to every day. And you can apply every one of these ideas to your work—the only variable is how you will apply them. You may use these techniques personally, within your work group or project team, or introduce them into your entire organization.

FIXING MEETINGS

Imagine looking forward to a meeting with the expectation that you will leave with a clear sense of what you need to do, by when, and for whom, as well as what you can expect to get from your team members. Further, imagine having a clear idea of the role you're expected to play in the meeting, having access to appropriate materials, and a reasonable amount of time to prepare any advance work you might need to bring to the meeting.

There's nothing magic about making meetings like this the norm at your workplace. As Bill Jensen says, it's a question of R-E-S-P-E-C-T. You need a process that is clearly defined, well documented, endorsed by management, and publicly agreed to by all participants. Behold the power of peer pressure!

Here are some of the tools we use to ensure every meeting is a positive and productive experience.

Invitations That Create Anticipation, Not Avoidance

Meeting invitations should make all participants (and stakeholders not in attendance) aware of what the purpose and end product of that gathering will be. Whether you use a paper memo, calendaring program, or a group e-mail, great meetings start with a well-crafted invitation. State a specific objective for the meeting and the activities you will conduct to achieve that objective. Be sure to provide some context for the end product of this meeting. It might read something like this:

In this meeting, we will brainstorm ideas for our next white paper using an affinity session. We will generate a short list of topics (2–3) that will be handed off to marketing to develop into abstracts. With those abstracts, we will reconvene and select our next white paper. Please review our "Paper Products Workflow" guide, available on the intranet, prior to the meeting.

Every meeting invitation should include a brief agenda and identify who will own critical roles like discussion leader, scribe, and timekeeper. If the structure of the meeting is clearly spelled out and the invitation is sent far enough in advance to allow time for preparation, everyone participating will have all the information they need to show up ready to accomplish the meeting's goals. They'll arrive with a clear idea of what they're expected to contribute to and take away from the meeting. The roles I just mentioned are critical to every meeting. Depending on the nature of the meeting, the group may need others.

The agenda need not be overly elaborate—shorter is definitely better. For our brainstorming meeting (a one-hour affair), the invitation would include an agenda and role assignment list like this:

Location: Upstairs Conference Room
Time: 10:00–11:00 A.M.

Agenda: 10:00-10:15 A.M.: Review the objectives for our white papers
10:15-10:45 A.M.: Afffinity brainstorming
10:45-11:00 A.M.: Assign next actions

Roles: Discussion leader: Marc
Scribe: Joan
Timekeeper: Bob
Other attendees: Jim, Casey, Mike, Molly

I'm sure you can appreciate the value in getting a meeting invitation like this, and I hope you can see that it isn't a particularly difficult or time-consuming thing to do. The first person to start issuing invitations like this will undoubtedly hear a few kind words of appreciation from one or more of the attendees—along these lines: "Thanks, Lee. I always appreciate how organized your meetings are. I really feel good about what we accomplished here today."

That's a nice thing and certainly doesn't hurt your reputation among your peers as an efficient, respectful, and well-organized individual. People will be happy to attend your meetings because they will rapidly develop an expectation that your meetings produce results.

When everyone in an organization does this, meetings are transformed from soul-sucking black holes into something people can look forward to.

Contract For Communications

For procedures like this to take hold and become institutionalized, everyone in the organization needs to be on the same page. One of the most powerful tools we've developed is a company-wide "Contract for Communications." This document was drafted by a team of people from every department and at every level of our company. Comments were solicited and changes made until we had broad consensus that we had crafted a clear statement of how we wanted to communicate with each other. Now every employee receives a copy of this contract and signs it.

This contract describes rules of engagement, meeting processes, e-mail etiquette, and even voice mail procedures. I've included a digest of our contract in this chapter's appendix for you to review and potentially use as a starting point for your own work group, department, or organization.

Tips For More Engaging And Effective Meetings

Affinity is a brainstorming technique using standard, inexpensive office supplies that encourages a group of people to generate an amazing quantity of raw ideas, provides a means for them to organize and label them, and uses the "wisdom of crowds" principle to condense the results into a list of the best and most readily implemented ideas. Here's how it works:

1. Every meeting participant gets a Post-it notepad (3" square is a good size) and a broad-tip marker (Sharpies work well) for writing on them.

2. Write a single question on the whiteboard or easel pad in your meeting room. Brainstorm one question at a time. For our white paper brainstorming session, for example, my group would write the following question on our whiteboard: What topics might we develop into our next white paper?

3. Everyone works independently and jots down as many ideas as they can. Emphasize quantity over quality at this stage of the exercise. The more ideas you end up with, the better the next steps will work. Tell everyone how long this part of the exercise will last. Typically, we spend no more than ten minutes generating ideas.

4. At the end of the generation period (remember to assign someone the timekeeper role), everyone gathers their notes and sticks them to the whiteboard or easel pad. After all the notes have been

placed, each participant takes a few minutes (two or three minutes is usually sufficient) to read everyone else's ideas.

5. If someone has written an idea that creates a "light bulb moment," anyone should feel free to jot down another idea or two and add it to the collection. Encourage this—some of the best ideas I've seen generated come from this second round.

6. Everyone now begins a clustering process, picking up related ideas and grouping them together. This is critical: everyone assists with the clustering process. Get people out of their chairs. You will not believe how much of a difference this group activity can make in your meetings. Leave some room around each grouping to add a label for that set of ideas and to jot down additional notes. Duplicates should be stuck on top of each other, not discarded. If two or three people have the same idea, that's often an indication that this is an idea you should look at closely.

7. Discuss the clusters. Jot down the positives and negatives of each cluster of ideas (remember to assign someone the scribe role) as it is discussed by the group. These notes can be written directly on the whiteboard but I've found it's better to create a new note (or two) with this analysis.

8. Depending on the outcome you defined in the agenda, conduct a voteor perform a winnowing process verbally to shorten the list to meet your stated objective. In this example, the goal was to narrow the list down to two or three options.

9. Have the scribe gather all of the ideas and analysis notes for transcription into a report that should be distributed to all meeting attendees (and stakeholders not in attendance). We sometimes use a digital camera to photograph the board before taking down the notes and use that as a reference for creating the meeting report. If your meeting produces actions and assignments, share them with all attendees and stakeholders as soon after the meeting as possible.

Mind Maps

Mind mapping is a dynamic and fluid brainstorming and capture technique that can be used to engage even the most reticent meeting attendee in the process of visualizing ideas and project plans. Mind maps are technology-independent; you can create them on an easel pad, a whiteboard, or on a PC attached to a digital projector. For software, I am a big fan of Mindjet's MindManager X5—but a number of other good applications are available for Windows, Macintosh, and Linux.

The essence of mind mapping as a meeting tool is similar to affinity but is conducted interactively with the entire group. You start with a central element that contains the question you wish to brainstorm. Then begin a discussion of broad topical areas, each of which is added to a branch radiating from the central element. After you've exhausted that level of discussion (set a time limit—it keeps the discussion moving when everyone is on the clock) move to more specific ideas under each broad category.

After the idea generation phase, it's a simple matter to drag ideas from one branch to another as necessary, adding notes and even icons and other graphics. You can also link reference documents and Web pages to branch items.

Mind mapping encourages meeting participants to build on each other's thoughts and suggestions and produces an organic display of the group's creative process that literally grows before everyone's eyes. I've used this technique for years and have never grown tired of it. In our organization, a number of people have MindManager installed on their laptop or desktop PCs. Distributing the map is easy—you can send the native map file or generate a Word outline, PowerPoint slide deck, or PDF file from MindManager. You can even generate HTML pages that can be posted to your intranet.

Six Thinking Hats

Edward de Bono's *Six Thinking Hats* process defines a way to make meetings safe, egoless, and more effective by creating a shared understanding of what voice the group is using at any given point in a meeting. It's a powerful way to give everyone an effective voice in group discussions. Wearing a Green hat means the group is in creative mode, generating ideas but not analyzing them. White hat time is used to define what information is on hand and what is needed. Red hat time allows each participant to share personal thoughts about the idea or project being discussed with no need to justify these feelings or defend them. Black hat time is for exploring the logical negatives associated with an idea or topic, while Yellow hat time focuses on the logical positives. Blue hat time is reserved for meeting logistics and management.

A key element in a *Six Thinking Hats* meeting is sequencing the hats. This can be done in advance (in which case it can be included in the meeting invitation and agenda) or at the beginning of the meeting. There is a real art to sequencing a meeting—it's a lot harder than it sounds. While *Six Thinking Hats* is a great technique, it's only worthwhile if everyone understands how the process works. We sent everyone in our company to a full-day training session with a certified de Bono trainer. A less expensive approach is to buy everyone a copy of the book and develop some internal training and practice sessions. We don't use hats on an everyday basis, but when we do, it's effective. I've found it especially useful for large meetings or those dealing with hot topics where emotions may run high.

Six Thinking Hats has helped with everyday meetings and even conversations, because it has become part of our shared vocabulary. It's not unusual to hear someone say "OK, I'm just green hatting here, but it seems to me—". The context this provides for the points being made during a discussion removes ambiguity and lets the other people involved in the conversation know precisely what perspective the speaker is coming from.

We recently had an engagement with a consultant who was unfamiliar with *Six Thinking Hats*. We provided her with a brief explanation of each hat so she could interact with our team with a clear understanding of how we were talking about what we were talking about. By the end of the second day, she was referencing the hats (especially red and white hats) as comfortably as any of us. Using the Six Thinking Hats helped us cut through a bit of tension early on in the first day of our meetings with the consultant and allowed us to communicate much more effectively.

FIXING PRESENTATIONS: THE POWERPOINT PROBLEM

PowerPoint, when used inappropriately, can actually stupefy meetings, not make them smarter. The constraints of a presentation format make it difficult to create the kind of dynamic environment that meetings should provide but often fail to deliver. Creative strategies for conducting effective meetings may use some of the techniques described in this chapter to engage participants in conversation and an exchange of ideas. A content-heavy PowerPoint presentation, on the other hand, can turn a meeting into a one-sided lecture that generally fails to produce meaningful results or tasks capable of moving a project forward.

Instead of subjecting the attendees at your next meeting to yet another endless litany of bullet points, consider using PowerPoint as a means to display the agenda for the meeting and nothing more. Tom Peters has become famous for one-slide PowerPoint presentations—sometimes with only a single word or question showing for the entire speech. Watch Steve Jobs at MacWorld to see how he uses Keynote to provide title slides that describe in a word or two what he's currently discussing. Adapt those public speaking techniques for your meetings. Never read your PowerPoint slides. They should only provide a summary of the points you plan to talk about.

Move Beyond Bullet Points

Any number of books and an equal or greater number of blogs talk about ways to use PowerPoint more effectively. Many of these resources, while well-intentioned, fail to do more than provide design tips and techniques on how to use transitions and other multimedia features in the program. I don't know about you, but if I sit through another PowerPoint presentation that uses that stupid typewriter sound effect I'll probably lose my mind.

One of the truly original thinkers in the world of PowerPoint and the art of presentations is Cliff Atkinson of Sociable Media. Cliff has a great blog called "Beyond Bullets" and is the author of a new book (out in March 2005) titled *Beyond Bullet Points*. It will help you rethink your approach not just to PowerPoint but to the art of presentation making. What Cliff counsels is a complete revamping of the way you approach putting together a presentation.

Cliff teaches a three-step process for constructing a presentation that reverses what almost everyone does when creating a presentation. Think about how you usually approach creating a new PowerPoint presentation. You probably launch PowerPoint and start typing. Right? According to Cliff, this is exactly backwards from what you should be doing. Instead, think about creating your presentation in much the same way a movie is produced. Start with a script (your story), then develop a storyboard to design the visual flow of your presentation, and then (and only then) start building the presentation.

Consider this quote from the introduction to *Beyond Bullet Points*:

> But although bullet points make it easy for us to create slides, they don't always make it easy for audiences to understand what we want to say. Growing numbers of people are expressing a sense of frustration with the conventional bullet points approach, and they're expressing themselves in a wide range of forums including discussion groups, surveys, books, essays,articles and blog postings. What they're saying, basically, is that slides filled with bullet points create obstacles between presenters and audiences. You might want to be natural and relaxed when

> you present, but people say that bullet points make the atmosphere formal and stiff. You might aim to be clear and concise, but people often walk away from these presentations feeling confused and unclear. And you might intend to display the best of your critical thinking on a screen, but people say that bullet points "dumb down" the important discourse that needs to happen for our society to function well.

The Beyond Bullet Points website offers a number of free downloads I encourage you to look at. You can download a PDF of the table of contents, the introduction (from which this quote was taken), and the first chapter of the book as well as numerous templates to help you generate your script and storyboard your presentation.

FIXING E-MAIL

Fixing e-mail is a complex problem because it's broken in a number of ways. Poorly constructed subject lines are the first problem. Badly formatted messages are the second. And the sheer volume of mail many knowledge workers have to process every day is the third problem. As with meetings, the solutions we've implemented at my company blend the great ideas we've learned from really smart people and some good stuff we've cooked up for ourselves.

Fixing The Subject Line

As we wrestled with the problem of how to make e-mail more effective, it became apparent the first thing we needed was a way to make the subject line more useful. An e-mail subject line should provide some immediate information to help the recipient prioritize new mail. We developed a series of easy-to-remember tags that begin the subject line in all our internal e-mail to accomplish this with just two or three letters.

The change this has made in how we all process and respond to e-mail has been nothing short of miraculous. Response times for urgent requests have been trimmed from hours to minutes for those messages that require immediate attention. Less important items are easy to spot and can easily be filed for reference or action at a later date.

Our company runs on e-mail. With these tags and some of the techniques that follow, empty Inboxes are a regular occurrence, even for those of us who receive hundreds of messages every day. I have three very active e-mail addresses and regularly receive 150–250 messages a day. Yet I have a completely empty Inbox at least three times a week and always leave the office on Friday with every piece of mail processed and acted upon.

Here are the tags we've developed:

RR: Reply requested
RRAL: Reply Requested At Leisure
URG: Urgent
NRN: No Reply Necessary
RAL: Read At Leisure
IMP: Important (but not requiring action)
INT: Internal (generally used for policy or procedure announcements)
SAI: Strategic Awareness Info (industry news—read as time permits)
FYI: For Your Information (no action required)

Some sample e-mail subject lines:

RR: Please review these updated Web pages
RRAL: Follow-up on your research request
URG: This bug may be a show stopper—status?
INT: Our new travel procedure

FYI: Server maintenance scheduled for this evening
SAI: Symantec makes another acquisition

Each of these subject lines contains all the information I need to make a quick decision about what to do. The URG message gets opened right away, of course. The RR message concerning new Web pages will be read promptly as it probably contains a due date for feedback. The other advantage these tags provide is that if I sort my Inbox by Subject, all similarly tagged messages are immediately grouped together. It's a low-tech but very useful solution.

Fixing The Message Body

As e-mail threads grow, formatting issues begin to crop up that can make it difficult to find the fresh information in the latest message in a conversation. Because of the volume of mail we generate, and because a lot of the developers on staff read their mail in a terminal window, we avoid using HTML for internal mail. Text-only mail has a more consistent appearance in different reading environments, is more compact, and is easier to copy and paste. There are a lot of good uses for HTML e-mail. What I'm talking about here is internal business communications at a software company.

More important than the actual file format is what you put into your e-mail . . . or rather, what you don't. Most e-mail clients quote all the previous text in a conversation thread. You can turn this feature off but most people don't. As a result, I (you, we) get messages that are a mile long containing our own message text, everyone else's message text, and quotes and requotes, ad infinitum. It's like walking through a house of mirrors!

Here's a simple solution for internal e-mail: be deliberate about using quoting. And, while you're at it, turn off automatic e-mail signatures too. Use the "reply with quote" feature (or copy and paste) when it is appropriate to quote a previous message but don't do it as a reflex. If you have a well-crafted subject line (see above) and a well-written message body, your coworkers will know what you're writing about. They don't need their own message parroted back to them. And they don't need the clutter of everyone's signature in the message as well—sometimes two or more times.

External e-mail is another thing entirely. I'm certainly not advocating you never use quoting or include the entire message thread. There are obvious cases, like introducing a new person into an ongoing conversation, where providing the narrative for what has already been discussed has enormous value.

Fixing The Inbox—How To Deal With E-mail Overload

This is a big topic. Entire books have been written about how to deal with the insane volumes of e-mail many of us receive. But three techniques really will make an immediate, dramatic, and sustainable change in how you review, process, and dispose of your e-mail.

The goal is simple: empty your Inbox.

Regularly.
At least once a week.
You can do it. Here's how.

Techniques For Getting "In To Empty"

I've studied many personal productivity methods over the years. The one system that has fundamentally changed the way I work is David Allen's *Getting Things Done*, or GTD as it's commonly labeled. GTD has become very popular with the tech and blogging communities in the past couple of years. Of the numerous reasons why David Allen's teachings are so popular with techies, road warriors, and knowledge workers, one jumps right out—we have a bigger e-mail problem than almost anyone else. Developing a way to consistently get our Inboxes empty is a critical skill we need to master.

We get more e-mail than most people. E-mail is an integral tool in our work. As a primary communications channel, e-mail is what we rely on to provide the essential raw material for our work—information. This information often requires action and, as I mentioned earlier, too many people are paralyzed into not processing and disposing of mail based on the fear that they won't be able to find something important at a later time.

So they leave everything in their Inbox! Does this sound familiar? If so, here are my questions for you if you regularly have more than ten or twenty e-mail messages in your Inbox:

> Do you really think it's any easier to find what you're looking for in your Inbox?

If you have to scroll through screen after screen of mangled subject lines looking for something, are you really any better off than if you had dropped that message into another folder after reading it?

> Have you really considered why you continue to do this?

Of course, my answer to these questions is no, no, and no. But let me expand on that third no. I think the principle reason people continue to use their Inbox as a big bucket is simply that it's what you first see when you launch your e-mail program. I'm horrified when I see someone's Inbox and it contains hundreds of unread messages and, in some cases, thousands of unfiled messages.

Thanks to some great ideas from David Allen and a number of other really bright people who have given this a lot of thought, I suggest three things you need to do to every piece of e-mail you receive—and leaving it in your Inbox is not one of them!

Read it.
Extract the action items it contains (if any).
File it.

If that sounds simple, it is. If that sounds overly simplistic . . . well, it is. Let me briefly expand on each step.

Read it: I don't mean read it as in "Your mission, should you decide to accept it, is to pore over every word, committing it to memory because this e-mail will self-destruct in fifteen seconds . . . good luck, Jim." What I mean is skim through the e-mail. If it's a reference e-mail like a newsletter, Web digest, commercial solicitation, or other nonessential communication, file it right away.

Create a folder called "Read & Review" in your e-mail client and put it in there. This only works if you exercise discipline and actually block out regular time out to read and review what you've placed in this folder. I do this twice a day—right after lunch and at the end of the day. It takes about fifteen minutes. If I'm having a really crazy week, I make sure to catch up on processing this folder during my Weekly Review (another key GTD idea) every Friday afternoon.

Important: Do not create new black holes by dumping e-mail into folders you never look at again. That is not processing, it's postponing. If you create a "Read & Review" folder, make a commitment to empty it at least once a week during your weekly review.

Extract tasks: If the e-mail contains an action you must take, create a new task immediately in Outlook or your PIM. This is one of the reasons I swear by Outlook. To create a new task, all I have to do is drag the e-mail message onto the Task icon. This creates a new task with all the information I might need related to that action. Right-click-and-drag provides an even richer set of options.

Edit the subject line of the task (it will initially be identical to the e-mail subject line) and use an action verb like reply or ship or call in the task description. Don't worry about formatting the task—that can be done as a separate activity. Just capture the action stuff and file the e-mail away. Review your task list as a separate activity every day and decide which items require a hard date and which can be done as time permits. I block out the first fifteen minutes of my day for this task review on my calendar—it's a standing appointment I make with myself.

File it: You can file it in a specific folder if that's the way you like to organize or you can simply drop it into a folder labeled "Read Mail." At one time I had a hierarchy in my Outlook message store that was five levels deep with more than two hundred folders. Trust me...you do not want to do this. Today, I have a folder hierarchy that is two levels deep and contains ten or twelve folders, depending on my current project load. Simpler is better.

I know...you're probably freaking out right about now, muttering to yourself something like "What is this guy—some kind of idiot? How will I ever find anything again if I just dump it into a folder like he suggests?" Don't freak out—I have a solution. Use a desktop search tool that indexes all your e-mail. Don't worry about filing everything in a carefully designed maze of folders. That virtually guarantees the one thing you're trying to avoid—losing stuff.

Think about how Google, Yahoo!, and other search engines have changed the way we use the Web. What is the first thing you do (online) when you need information? Why you "Google it," of course. Why not do the same thing on your PC? Up until very recently there was a good reason why most of us didn't trust search on our PCs—it didn't work!

The search tools built into Windows don't work for most people. It's not that they don't work at all, they are just difficult to use and return poor results unless you know a number of arcane tips and tricks. We now have tools that do a terrific job of indexing the information on our PCs. They look and work just like a Web search engine. A number of choices are available and almost all are free (visit www.astroprojects.com/morespace/marc for a list of these desktop search tools).

E-mail is an ideal file type for these search tools. E-mail messages are primarily text and are rich in keywords and metadata (attributes like sender, date sent, and so on). I can find any e-mail in a matter of seconds using my search tool.

You can find a wealth of information about working with information overload in the books I've listed in the "Recommended reading" list at the end of this chapter and online in blogs, discussion forums, and Web site articles. You can find many approaches to managing your Inbox, e-mail, and application files. Some use software. Some are technique-based. Picking the one that is right for you is a personal decision and some experimentation will probably be required before you find your best solution. What I've tried to provide here are some essential tips to get you started.

The "GTD Way"

I've mentioned *Getting Things Done* a number of times. In his book, David Allen describes a deceptively simple approach to productivity management and goal setting that I've been studying, practicing, and refining for four years. It has irrevocably changed the way I approach my work and my personal projects. It's outside my scope here to try to encapsulate the GTD system—and there's no need. Go pick up a copy of the book, visit the GTD Zone at OfficeZealot.com, or do an online search for "Getting Things Done" or "GTD," if you're interested in learning more.

For the purposes of this discussion about fixing e-mail, here's what I think is one of the most important lessons Allen teaches. It directly relates to the issue at hand—getting all the incoming stuff you have to deal with dealt with. Allen defines the following steps as his "Natural Planning Model." You can find an excellent workflow diagram of this process at his website. He has five steps:

1. Collect
2. Process
3. Organize
4. Review
5. Do

Allen concedes that these are things we probably do already. The important lesson he shares—and the one that I had failed to grasp (until a classic, forehead-slapping moment)—is that it is far more productive to focus on each step separately. Sometimes collecting stuff is the right thing to do; at other times, review is what's required.

Do one thing at a time, with focus, and avoid the temptation to mix these steps. For example, I find it all too easy to start "Do-ing" while I'm "Processing." I get a lot more accomplished when I stay on task and focus on processing when I'm in that mode and focus on doing when I'm ready to take action.

THERE'S NOTHING SO BROKEN THAT IT CAN'T BE FIXED.

Fixing a broken, dysfunctional work environment may not be easy, but unlike many of the change initiatives you may have experienced (endured?), the payback for implementing some or all of these techniques is almost immediate, measurable, and self-sustaining. When I've shared some of these techniques through my blog or in consultation with other business people, the most common argument I get is that the person I'm talking with doesn't believe they have the power to make a meaningful change in their organization.

My response: "Nonsense—how will you know if you never try?" In *The Simplicity Survival Handbook,* Bill Jensen teaches a valuable lesson that ought to be obvious but often isn't. As he points out, happy, productive, low-stress people are a lot more fun to be around. People want to work with them, seek them out for their projects and teams, and look to them for advice and counsel. Why? Because deep inside, that's the state we all wish we could be in.

If you're at the bottom of the food chain and answerable to everyone but have authority over no one, focus on changing your own space. If you work in a team or manage a small group, implement these ideas on the small scale you do have control over. The positive environment you create in the space you can influence will be noticed. People will ask what you've been doing and why you (or your team or your department) always seems to be so much better prepared, productive, and pleasant to deal with.

I sometimes think about my old coworker Bill and wonder how he's faring in this new world of work. I'd like to think that he's learned a few things over the years and is now a better contributor to the teams he's involved with. I try to imagine his reaction were he to come to work at my company and the effect it would have on him. I like to think he'd see the value in working with an engaged team of people who have R-E-S-P-E-C-T for each other and a commitment to producing their best work with less stress and more fun.

I'll admit these topics have become something of an obsession for me. I write about them in my blogs, have gotten involved in developing curriculum to teach some of these principles to others, and am continually engaged in refining and reinventing more effective processes at my company. It's all too easy to tell yourself you can't change the way things are. But you can. Make an agreement with yourself that you will invest the time, energy, and discipline to make your life less stressful. How much would that be worth to you? To paraphrase the MasterCard commercial, my answer is "priceless."

info

ABOUT THE AUTHOR

Read more about and by Marc Orchant at The More Space Project, where you will find a collected list of his blogs and sound files of him reading his essay, “Work is Broken.”

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