Assist
CPA ASSISTANCE AND
WELLNESS PROGRAM

About CPA Assist

- Designed to help Alberta and Saskatchewan CPAs, CPA candidates, and their immediate families address issues of mental health, addictive behaviours, substance abuse and other personal or professional issues.

- You can also call CPA Assist for advice on how to support someone who is experiencing difficult times, to learn ways to stay mentally healthy, or to get referrals to long-term resources if needed.

Services Available in the Program

1. Professional Counselling Services
   - Four hours of direct professional counselling per person, free of charge.
   - Immediate assistance is available in crisis situations.
   - Access to the confidential service is not only limited to in-person sessions, but available remotely via telephone or videoconferencing.
2. Health and Wellness Services
   - Choose to use up to two hours per year of the four hour entitlement to access physical fitness consultations and/or dietary consultation.

CAMPEAU LEARNING

enhancing leadership effectiveness

Presents

Tame the Email Monster

Principles & Practices of Optimizing Personal Productivity

Webinar Overview

1. *Webinar Overview & Ground Rules*
2. *Getting to Know You*
1. *The Challenges of the Information Age Workplace*
2. *E-mail Optimization Strategies*
3. *Managing your Inbox – Best Practices*
4. *Sending E-mails – Best Practices*
5. *Moving to Action*

4 Seemingly Subtle Differences that Highly Productive People Seem to Understand

- ✓ ***Simple and Easy***
- ✓ ***Reacting and Responding?***
- ✓ ***Urgency and Importance?***
- ✓ ***Effectiveness and Efficiency?***

My Purposes

1. To get you to ***Reflect & Imagine***

2. To provide a framework for "***Objective Self Analysis***"!!
   - ✓ ***To Reinforce Productive*** Behaviors
   - ✓ ***To Identify Counter-Productive*** Behaviors

3. To Provide ***Practical Strategies*** and ***Techniques***

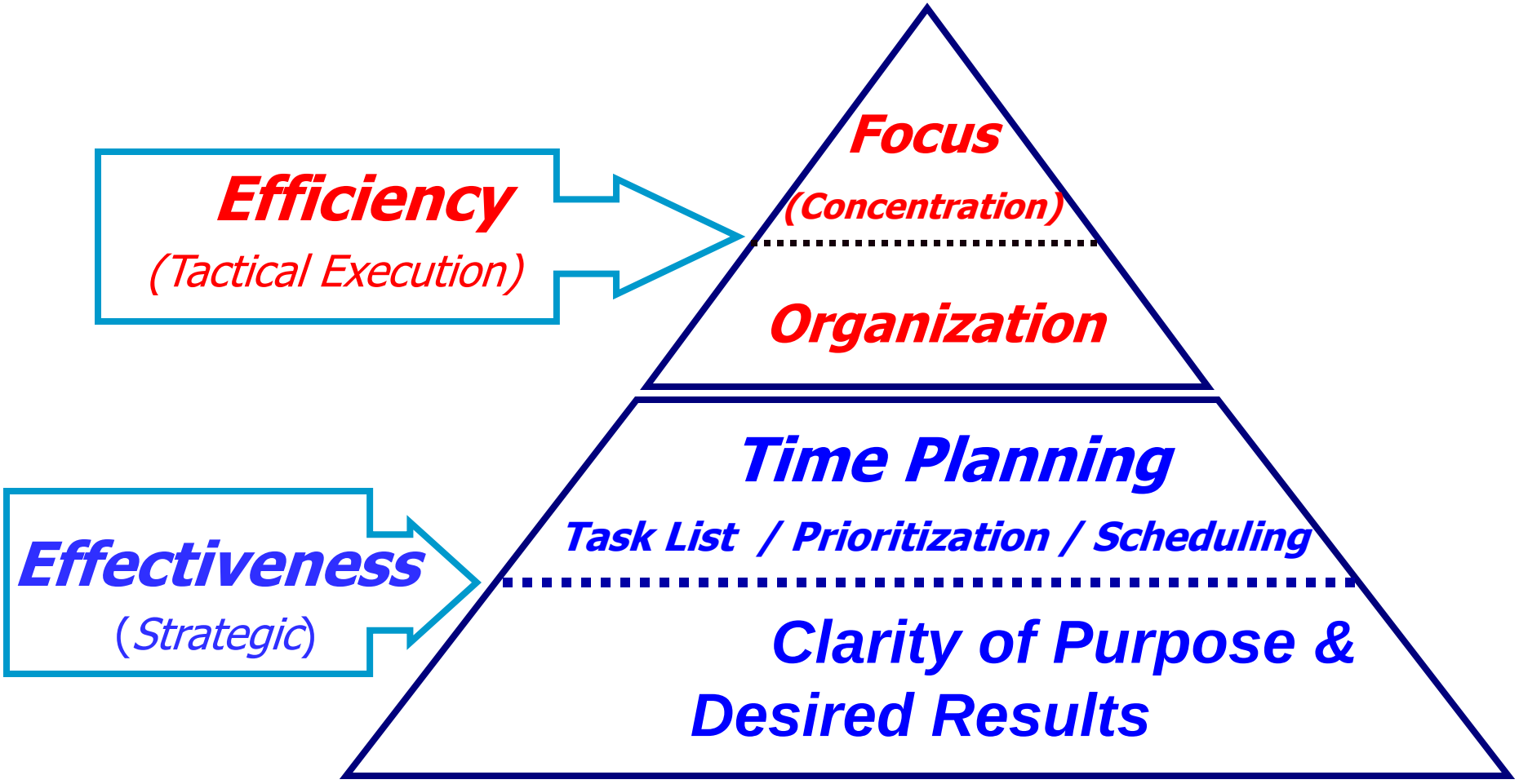
4. To move you to ***Action*** / ***Change*** mode

Part 1

Getting to Know You

Poll Sample

The Anatomy of Personal Productivity



Part 2

The Information Age Workplace

The Challenges of Information Age Workplace

- % of knowledge required to do job stored in your own mind … ***1990 was about 75%*** … by ***2010 drops to about 25%!***
- Average knowledge worker spends ***70 to 80%*** of waking hours **communicating** (Reading, Writing, Speaking, Listening)
- Email ***overtook phone*** as ***primary communication tool*** in Canada in ***2002***
- Average Canadian employee sends and receives an average of ***175 E-communications per day*** (email, voicemail, texts)
- Globe & Mail - Average worker checks email ***174 times a day***
- Fast Company Magazine - average worker ***checks phone 253 times a day***

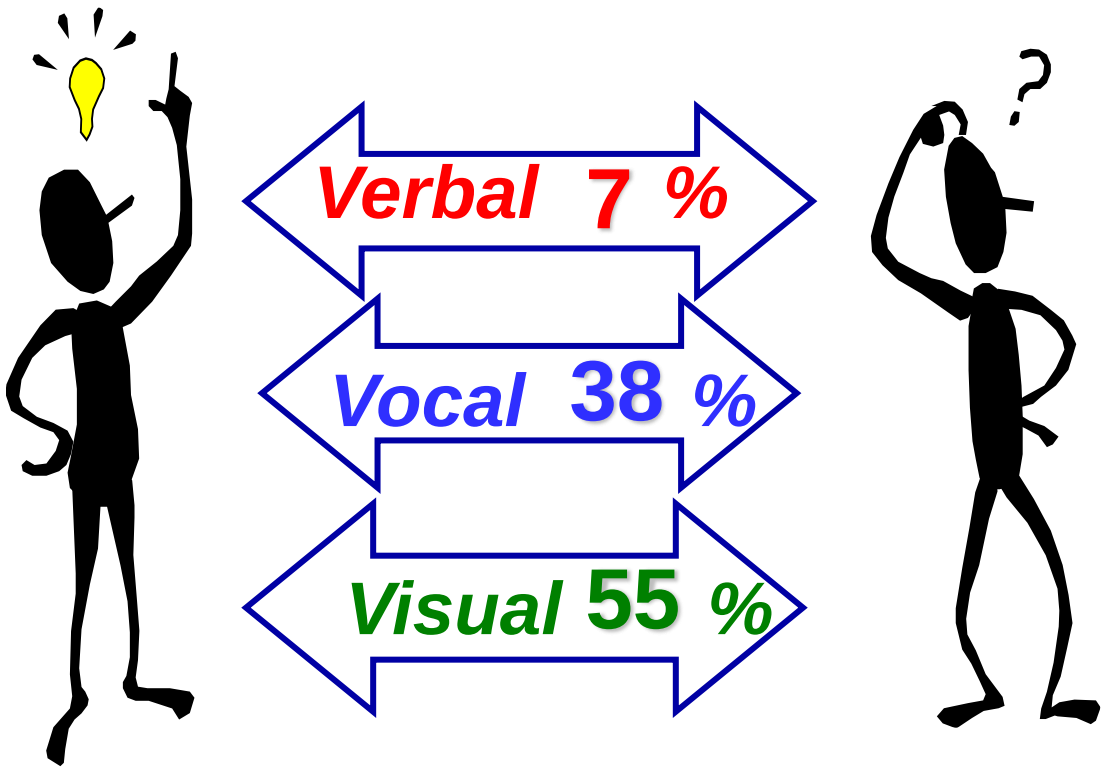
Some Facts about Concentration to Consider

- ***Concentration*** is the ***Cutting-edge*** of the productivity wedge!
- The ideal and ***deepest state*** of concentration is called ***Flow***!
- The Conscious mind can hold only ***ONE*** thought at a time!
- The ***time costs of multitasking increase*** directly proportional to the ***complexity*** of the tasks involved
- When concentration is broken ***Recovery time*** is ***killer*** …Takes ***4*** to ***7*** minutes to "***re-boot***" deep concentration.
- Average knowledge worker ***distracted 2.1 hours per day***
- Knowledge workers ***interrupted every 8 minutes*** on average turnings ***7 hours*** of time into ***3 - 4 hours of real work***

Part 4

E-mail Optimization Strategies

Anatomy of Interpersonal Communications



E-mail Optimization Strategies

- Your relationship with the email is a question of ***Control***
- ***DON'T Send Emails*** or at least ***minimize CC's*** … *Number of emails required to get something done is equal to number of people involved squared … 8 people involved means 64 emails*
- Be ***strategic*** create ***Organizational*** or ***Team*** "***Email Charters***"
- Use ***Stakeholder Map …*** Go to work on key ***RELATIONSHIPS***
- Get Clear on what really ***Matters Most to Self*** and ***all SH***
- Must clarify ***expectations*** with ***all stakeholders … Slow and Short Reponses are not rude or inconsiderate***
- If possible, create office space ***away from email*** to ***work***

Part 5

Managing your Inbox Best Practices

Email – "Managing Inbox" Best Practices

- ***DO NOT begin day*** by ***opening email inbox***
- ***Don't use*** inbox as ***To-Do List - Keep 2 Separate Task Lists***
- ***Don't use*** inbox as a ***catchall folder***
- Use only a ***few*** "***Working File Folders***" … Keep ***Visible***
- Create "***4 Weeks Folder"*** that automatically ***deletes after 4 weeks*** … Repository for messages not sure what to do with
- ***Turn Email*** and all mail ***indicators OFF … Schedule time to open email - maximum 4 or 5 times a day***
- ***Communicate*** your ***Stakeholders … Manage Expectations***

Email – "Managing Inbox" Best Practices

- ***Goal = Clean Inbox 100% every time open your inbox!***
- ***Handle each email ONLY ONCE***! …
  - ***DELETE***
  - ***DO (2 Minute Rule)***
  - ***DEFER (File)***
  - ***DELEGATE (Forward)***
- When attempting to determine how ***Important*** an e-mail really is thinking terms of ***Consequences***
- Use "***Out of Office***" response to manage ***expectations***
- Have ***CC'd emails*** go into ***separate inbox*** in ***different colour***
- ***Get off*** as many internal ***distribution lists*** as possible

Part 6

Sending Emails Best Practices

"Sending Emails" Best Practices

- Limit number of emails you send!… Always ask - "***Is this best method communicate on this issue with this person?***"

- ***Use Face-to-Face*** or ***Phone*** ***conversations when …***
  - ✓ When message requires anymore than ***200 - 250 words***
  - ✓ Issues ***critical*** in nature
  - ✓ Any ***personal***, ***emotional*** or ***sensitive*** issues
  - ✓ To achieve ***consensus Decisions***
  - ✓ Issues of a ***complex*** nature
  - ✓ Issues that require a ***quick response***
  - ✓ ***Confidential*** matters

- ***Perfectionism*** & ***Written Word*** extremely ***dangerous*** mix

- ***Never send*** an email when ***Angry*** or ***Upset***

"Sending Emails" Best Practices

- Read ***entire Email*** before you reply
- Never hit "***reply to all***" unless you know who all is
- ***Conciseness*** and ***Clarity*** are ***Cardinal Rules*** of ***business writing! ….Longer the email the less likely it will be read!***
- ***Reader comprehension is the writers responsibility***
- ***Respect people time … Goal is to minimize required for recipient to process email***
- ***Purposes of Subject Line - Capture attention,*** help reader understand what is ***expected*** and ***degree of importance***
- If possible, put ***entire message in subject line*** … Use (***EOM***)

"Sending Emails" Best Practices

- Use acronyms "***NNTR***" (***No Need To Respond***) and "***AR***" (***Action Required***) and "***TS" (Time Sensitive)***
- ***Plan*** every email starting by clarifying ***Purpose*** and ***Desired Outcomes*** of email - Starting line ***"Purpose of email is*** …"
- Use ***bullet points to organize message into a logical flow***
- ***Use Fewest words possible …*** Keep sentences ***short***, ***crisp*** and ***clear***
- ***Agree with SH*** to ***eliminate all no content messages*** … such as "***Thanks***", "***Your welcome***", "***Great***"
- ***Don't combine*** two unrelated requests in one e-mail

Mastering Change

The best way to deal with change is to

CHANGE!

The best way to change is to

LEARN!

Personal Development Plans

- Difference Between ***Working "IN" & "ON" things***

- As a result of this learning experience I am going to change my behavior in the following ways …

  - ✓ I am going to ***Start*** …
  - ✓ I am going ***Stop*** …
  - ✓ I am going to do ***More*** …
  - ✓ I am going to do ***Less*** …

How to Access CPA Assist

All services are accessed by calling the Confidential Support toll-free support line:

1-855-596-4222

General information is available online:
www.cpa-assist.ca or
email: contact@cpa-assist.ca