

## **BEACON Awards: “Buried Treasure” 13B**

### **Take Control of Your E-mail management training class**

#### **Planning**

*“Why do people ‘reply to all’ instead of replying just to the sender?” “We get too many e-mails, this is information overload. Help.” “At what point is a meeting necessary rather than wading through a string of e-mails?”*

HealthEast Care System managers and employees repeatedly gave Human Resources Development (HRD) and Organizational Communications (Org Comm) feedback like this. The convenience of e-mail can quickly turn into a time drain when not used properly. So HRD approached Org Comm with the idea to develop a lunch-n-learn workshop that would offer tips to controlling e-mail and make it as useful a communication tool as possible instead of a source of frustration. The workshop’s objectives are:

1. To increase the amount of control managers have over their e-mail
2. To strengthen skills on how managers communicate via e-mail
3. To help managers better understand e-mail etiquette at HealthEast.
4. To help managers identify when e-mail is the right communication vehicle

During this first year, our audience is focused on managers. We know all managers have e-mail and are expected to use it on a regular basis, so they need the most training on managing it. As all HealthEast employees gain e-mail access and are expected to check it on a regular basis, we will roll out the class to all employees. Today, if managers encourage their staff to attend, we don’t turn away employees.

#### **Approach**

We hired a consultant to partner with us to design the pre-workshop survey, workshop itself and accompanying collateral. She created a facilitator guide so we could conduct the workshop purely with internal resources. During the pilot group, the consultant facilitated the workshop. During the second workshop, the consultant and one Org Comm manager co-facilitated. For the third workshop, two managers in Org Comm co-facilitated the workshop and now we independently facilitate the workshop with members of the Org Comm team.

We wanted to spend most of the time addressing the receiving end of e-mail, since that’s the toughest to control. We wanted every single person in the workshop to walk away with one tangible tool they could start using that day to become less frustrated and gain more control of their e-mail.

We knew many managers would come to the class wanting to know technical aspects of e-mail, even though we are careful to market the class so they know this is not a technical workshop. So we accessed a Microsoft Outlook expert from HealthEast IT to give us a tutorial handout and contact information about technical classes. In the pre-workshop survey, we ask if employees have any particular technical questions prior to the class, and we triage those questions to the Outlook expert and hand out answers to people's questions at the class.

We began meeting in February 2006, reviewed workshop content in February/March and did a dry run with just the HRD and Org Communications employees involved in the project in April. We made revisions and facilitated the pilot group in May. Since then we've had a session in July, November and February 2007, as well as two special one-hour training for leaders who have asked for the workshop to be facilitated within their own departments.

## **Budget**

Org Comm and HRD agreed to split the cost, not wanting to spend more than \$1,000 each on the start-up cost. The consultant fee was \$1,400 and included the creation of the pre-workshop survey, workshop agenda, handouts and facilitator guide. Org Comm and HRD split the one-time cost (\$700/each). The cost to run a session now (including lunch, handouts and facilitators' time) is about \$275. We hope to offer four classes a year, making the total cost \$1,100 per year. That equals \$550 per year per department.

## **Results**

58 out of the 63 participants have completed evaluations at the four sessions. We are meeting our objectives:

1. 85 percent said the workshop met objectives in helping them identify opportunities to manage the e-mail they receive; 80 percent said the "getting control of e-mail" exercise and discussion was very helpful.
2. 95 percent said it met objectives in strengthening skills in how they communicate via e-mail.
3. 85 percent said it met objectives to help them better understand e-mail etiquette at HealthEast.
4. 100 percent said it met objectives to help them identify when e-mail is the right communication vehicle.

Overall, 88 percent rated the instructors' presentation of the material as excellent. 100 percent rated the overall course as either very helpful (76 percent) or a good general overview (24 percent). 79 percent would recommend the workshop to others.

## **Supporting materials**

1. Pre-workshop survey
2. Course guide
3. E-mail etiquette handout
4. Technical support handout index
5. Workshop evaluation
6. Facilitator guide