



Take on Board

Transcript – Jenni McNamara

Helga Svendsen

Today on the Take On Board Podcast, we're doing something a little bit different. Rather than talking about journey to the boardroom, or issues in the boardroom. I'm speaking to Jenni McNamara about managing the overwhelm of your digital inbox. First, let me tell you about Jenni. Jenni's worked in it in multiple industries for over 30 years in change in training and in transformation projects. She's always been interested in productivity and efficiency and helping others find ways to work smarter rather than harder. So I know you can tell why I got her here today. I should also say that this podcast was on the recommendation of the wonderful Sophie Harris, who recommended a meeting with Jenni. So it's thanks to solve that on both the topic and the speaker. So Jenni, welcome to the Take On Board Podcast.

Jenni McNamara

Thank you so much, very happy to be here.

Helga Svendsen

So Jenni, before we get into managing the overwhelm of your inbox, let's dig a little bit deeper about you. Can you tell me a story about young Jenni that tells us a bit about how you got to where you are today?

Jenni McNamara

Certainly can. I am of a vintage where I left school without computers. So we had one electric typewriter in the classroom. So we were pretty excited by that. And then went into the world and started working. And I actually was, I suppose blessed to work in one of the first organisations in Brisbane that had a personal computer was a very, very small company, that was really run by a gentleman who was fascinated by technology. And I actually started in a very junior role, and ended up being the computer operator. And apparently, my mother used to tell me that I came home terrified with the idea of having to use the computer, because only smart people use the computer and all that sort of thing. And my mother in truform said, wasn't a lot of nonsense, get on there, write down everything, and you'll be fine.

Helga Svendsen

Oh, my goodness.

Jenni McNamara

And it started there. I continued in that vein of working there and ended up working for one of the big eight accounting firms doing data entry, which was pretty basic. And again, watching people across this environment, doing wonderful things with technology. And I had a lot of time in my head on my hands where I had to wait for processing to be done. And I'd sit and read the help screens and learn. Yeah, and find out for myself, I got a bit of a reputation for knowing little bits. And people would start coming to me to go How do you do that? And I'd go, Oh, it's really easy. Do this, do that. And started my career. In training. It's all about, I want you to have that aha moment, I want you to level up. So that's what I love to do.

Helga Svendsen

Well, like I say, I can totally see why. So I've suggested you for this conversation today. Because we are hoping for some fabulous aha moments. And I have no doubt as the go to person on computers, that you're going to be able to help us out with that. So you know, managing the inbox, you know, it is quite overwhelming. Sometimes I am one of those people that very much tries to have a zero inbox. And when I see on people's phones, you know, 3467 emails unread, it makes me feel ill. But that's lots of people. And as directors indeed, just as people, we end up with lots in there. So you've got the magic wand here, Jenni, what are the ways? What should we do? How do we handle this overwhelm? Where should we begin? Look,

Jenni McNamara

I think that you're either in one of the two camps, you're in the camp of, it doesn't worry me that I've got 47,000 unread emails, or you're in the camp of it does worry me. And I think first of all, for those that doesn't worry, great, be happy and Fine, whatever you need. Right? This is not going to be for you. But for those who are overwhelmed or want to get a better handle on things. There are some key principles. All right. First of all, we are often reactionary to email. We see those pop ups come up around and we jump in and we dive and say, oh, I've got to respond to that straightaway. Well, we don't. Yeah, that's a habit. So we can actually set up times of the day where we actually Go and respond to email. So that's one. When we start a day, we often start with the email first, I don't I say, what do I have on today. So I'll start in my calendar, I'll immediately identify what my day currently looks like. Secondly, I'll start to fill in time to prepare for meetings or after meetings, because if I don't block out my time, somebody else will. Okay. And then, once I have my day patted so I can get work done. I'll then look at the things that I didn't get done yesterday, that now need time in my day to day, so I look at any to dues or tasks that I need to block out time for. So I start my day very differently than most. Then I move into my email to say what's come in. Now my email is a bit like my postbox out the front. When I go out to my mailbox, I gather my mail, not as much as I once did. But even in the old days, I'd go out, come back in, and I'd immediately sought it. I throw in the bin, the

junk mail, but I don't want to read I put on the counter this stuff that I've got to do right now. I'd put on the kitchen table the stuff that somebody else needs to do. Why? Or I'd put it in the pile that stuff has to be done later. Yeah. So I do it, delete it, delegate it, or defer it. Mm hmm. But I wouldn't go back out and put it in my letterbox

Helga Svendsen

Ah, to recollect and then work out what to do. Right? Deal with it right then and there on the spot.

Jenni McNamara

Right? So whatever's come in. If it's going to take me less than five minutes to do, respond, delete it, or file it. Yep. Gone. So I do all my dues first. Anything I can delete, gone, gone, gone, gone, gone. Delegate. So if it's not for me, I need to move it on to somebody else. Once I have moved it on to somebody else. Do I need to follow it up? In which case, I will put it somewhere, perhaps a note in my diary to follow up with that person to find out. So I don't forget it. Why? So I've got that reminder. So I don't have to do the item. But I might need to follow it up. Yep. And the defer means it's going to take me longer than five or 10 minutes to do, which means I need time in my diary to do it. Which means block out time. Yes. Why? but it ends up that my inbox is only about the stuff that's coming in. Why? And so it's not the overwhelm. I can put things into folders, and well, that's a conversation in its own right. What's the right folders? The right folders is what works for you. Yeah, yeah. Why? Some people like categories, some people like people, folders, it doesn't matter, as long as you can find it. The other part of B mail overwhelm is not using the search functionality, as well as you could. Why. So in all of the email systems available, there is a search functionality. The default is when you type in something, it will generally find it in the by person by and so on. But there is often and this isn't in all of them. But in most of them, there's a refine option where you can refine that search and so no look in the body, or look in the subject, or look in the sender, or look in multiple this sender would be this person, the subject might be this, and in the body. It might be this Mm hmm.

Helga Svendsen

Yeah. So it allows you to refine that search down to do that. So even if you've filed it somewhere, and you can't find it again, even if your filing systems not even working for you, it shouldn't matter. You should be able to say it's about this and it'll dig up the options for you. Yeah, I've only just started using search a bit more in my email. I'm pretty good at filing, but every now and again, I actually fall it in the wrong box and then I can't find it again. And the search function has been super helpful for that sort of thing.

Jenni McNamara

Absolutely. And I think that we tend to and again, this is probably To the overwhelm, we waste so much time by navigating down through folder lists, to only to find that the rabbit hole is a dead end, instead of coming back to the top and telling it, you go search, and you search everywhere below. And I'll wait here until you come back with the result. Get your people to do it. A little person, think of your little leprechaun going down those stairs and finding everything. Sorry, that was an Irish reference that goes back to my roots.

Helga Svendsen

I love it, I am now going to think of a little leprechaun going and running off and finding that email that I want. I actually love that that visual of how that works. That is fabulous. I want to go back to that very first step that you talked about, which was, you know, you don't have to react to email, you don't have to go to it. First thing, it doesn't have to be on the whole time and your little pop ups on. I'm sure you will have heard these are but what if Bobby emails me and I don't respond? Or, you know, what if something super important comes in? What if What if there's reasons, maybe excuses as to why everybody feels like they're different? and can't do it that way? What helps people to do it? Because it is possible. So what what will help people to do that?

Jenni McNamara

Well, I guess it also depends on the role, there are certain roles that you will be doing that might need an immediate response. Okay. And again, working with your people to say, if you send me an email, and it needs an urgent response, perhaps find another way. Right? Like, don't send me an email, if you need an urgent response, ring me or text me, or I have sent you an email that needs an immediate response text, okay? Otherwise, I have let my people know that I will read my email in the beginning of my day, I will come back around about lunchtime. Think about it like that. And then I will finish off my day, ensure that everything that needed to be responded to on the day. So we're only talking in about a four hour period, turnaround. Just because somebody sends you an email doesn't mean it needs an immediate response. It's there. Urgency doesn't mean it's my priority. Hmm.

Helga Svendsen

Yeah. And it's interesting, I think, on those times that I've done that I don't do it that one all the time, I must say. But this morning, for example, I was facilitating a workshop, so I haven't been checking email. And other times that happens now. What I love is when I come back to my inbox, and there's this long list of reply emails from various people, and by the time I get to it, it's all done. It's all done and fixed. And I didn't have anything to do with it. So sometimes leaving it means it just gets done.

Jenni McNamara

The perfect scenario is that it's go, I agree with all of that fabulous well done. And they can still feel you've had a voice. But you didn't need to be involved in the grassroots. And, again, it's a bit of a personality thing do you need to be there's a fear of missing out. That's another issue completely, really. But you don't need to, as I said, think about the ways you're communicating. Think about is this the best way of communicating. There are lots of communication tools. There is email is only one of them. There is phone calls, there is chat messaging. So for me, my texting or chat functionality is all about that informal, quick response. And in applications that I use chat, I generally have a presence. So again, if I see people that are offline or not available, there's no point in responding in that way. Email should be about I will respond in due course. The other thing I'll point out here is again, when somebody sends me an email, it is because they want me to do something. It is an action item. Please be very, very clear about what the action is. I don't want to have to decipher 15 pages of an email. Don't bury the lead. Put it up top. What do you want Jenny to do? Now if you see see me and if you're old like I am or older like I am, you will remember what cc standard for

Helga Svendsen

Good old carbon actual carbon copy

Jenni McNamara

Perfect

Helga Svendsen

Actual pieces of paper with that beautiful blue anyway, yes

Jenni McNamara

Indeed carbon copy and we sent somebody a carbon Copy for information only. Therefore, if you are cc me, it is for my information only and I am not going to respond. Yeah, right, I will only respond if it is in an action.

Helga Svendsen

I've heard of people who've set up their emails, so that the cc's disappear into a separate folder that may or may not get looked at at some later date.

Jenni McNamara

Because it's at my leisure. When I want to be informed about

Helga Svendsen

Have you got your email set up that way? I okay.

Jenni McNamara

I have to admit, though, I get very little email. Right, maybe 10 emails a day? Well,

Helga Svendsen

Maybe you've trained people well about email. I mean, the other thing is, often, you know, you end up with a lot of just junk mouth, talking about the actual letterbox. So clearing out, you know, unsubscribing, from all of those ridiculous email lists, can also help to mean that you can only get 10 emails a day, because they're probably the 10 that matter.

Jenni McNamara

Absolutely. And it's so important, and do it over a phase. So today, choose to unsubscribe from five emails, groups that you no longer want to know, because you're deleting them anyway. So I know with my personal Gmail, the very first thing I do is I go to edit and swipe, swipe, swipe, swipe, swipe, swipe, swipe all the junk man. So then I'm left with now I've got only the mail that I want to read. Yeah, so stop swiping, and actually take a minute to open it, and subscribe it. And then the next week, it won't come again. And then you unsubscribe another five. Yeah. And over time, it will reduce and we go to another shop and we give out our email again, and we sign up again. And the first time I received their email, I go thank you very much unsubscribe, yes.

Helga Svendsen

I think there's some apps that also do that, that you can get in and I'll do a mass unsubscribe, you know, you just have to tick tick, tick, tick, tick and it'll do a mass unsubscribe. Do you know about any of them? I

Jenni McNamara

don't know, off the top of my head. I have heard of them. But again, I am a little untrusting of sometimes with those sort of things. Like it's just as easy for me to do it myself.

Helga Svendsen

The technology person's a little untrusting of the technology

Jenni McNamara

Absolutely, very, very security conscious have never been hacked. have never had social media hacked because it's locked down. It is private. I have it for a certain purpose. I have networks where I have more open communications, but they are for a specific purpose, man. Yes, my social site Facebook, for instance, is family, is family and friends and I know every single person on there by name by phase of a relationship. I don't have open What can't find me by those sort of things. Because the people I want I've already found.

Helga Svendsen

That's right. Yeah, it does get that way. I love your four D's. Let me see if I get it right, do delete, defer. And what's the fourth delegate.... delegate? Of course, okay, do delete, delegate or defer.

Jenni McNamara

Now they've been around for a really long time, four days is not only email, it's all about the way we run our project management, the way we run our governance, the way we run our programs, and so on. So do it, delete it, delegate it, defer it works across many, many principles, but we need to apply it.

Helga Svendsen

Well, what's your advice to people in applying it? Because yes, you're absolutely right. The theory is that all well and good, what's your advice to people and how to actually put that into action, particularly when often people have got multiple devices as well? So what's your advice in actually helping them to actually do it?

Jenni McNamara

One, I make sure all my devices are synced across each other. So if I deleted off one, it's automatically going to delete it on the other server. I have my Gmail and my work out, look, mail, I love to separate work, and home. So I actually have two accounts. So they are completely separate. I am probably less organized in my personal email because, again, it's a lot of junk and I just need to do it. Anybody who needs to contact me or so on will come back through my work email, which is very managed and so on. Changing a behavior is hard. Because it's often in ground in this way. We've always done it in the

way we're comfortable doing it. But it's not necessarily always the best way to do it. Yeah. Now we've got to actually acknowledge what's going to help me do this, what benefit Am I going to get? By changing the way I do this, the ones I've actually managed to work out, this is going to save me some time, this might make me feel a little bit more in control. This might allow me to find the things that I'm looking for a little bit easier. Once I've got those principles in my head, and I know the benefit, I'm going to be more open to that change. Why once I've accepted, this is worthwhile giving it a go. I've got to stop doing something and start doing something else. And that actually means I have to actually stop, knock habit. Go, oh, there's a pop up. No, that's right. I'm not going there. Now. I'm going to wait. Now at first, that's going to feel really unnatural. But what does it say that it's three weeks to form a habit?

Helga Svendsen

Yes, they do. I think I've seen some other evidence that it's not necessarily true. But let's not worry about that right now. I think the practice of it makes it more habitual,

Jenni McNamara

Absolutely. Whatever it takes, and eventually it will become our norm. Yeah. But you have to accept that it's going to be hard. And it might not be all of it that you want to take on, it's still going to be the way that works for you. Yes, is the best way of doing it.

Helga Svendsen

My email inbox, and I am a file, I keep all sorts of emails, which I shouldn't do. And I need to go through and delete at some stage. And I keep a different folder for each of my boards. So they all go into each of those. But I don't have subfolders for committees or anything like that. And mostly because sometimes an email is about, it's about the committee, but it's also about the board. And it's also about the other committees got a whole bunch of stuffing together. So I just popped them all into that one. And then figure I can find it later with my little friendly leprechaun.

Jenni McNamara

Exactly right. And I think again, the more folders that you create and sub folders that you create, it's more places that the leprechaun has got to go searching, and we don't want to kill the leprechaun, what we want to do is just give you one place where it can find it and say, so. And again, there are all sorts of rules that you can set up to help that so that if you were automatically getting mail from a certain board, for instance, you can say file it here. Yes. before it even I even have to read it. And when I have time, I'll go to that board and read the mail that is relevant for that board.

Helga Svendsen

Yeah, that's interesting, too, because then you get to read them all in context at the moment I jump, chop and change from topic to topic basically. Interesting. Yeah, I haven't done that. That's one way

Jenni McNamara

The other one that a lot of people do when they create the folders they create the C M B folder. Are you familiar with that? CMB?

Helga Svendsen

I'm a second only here at think of in my head a CBF folder and I'm not going to say what that stands for. No, what CMB mean?

Jenni McNamara

Cover My Butt!

Helga Svendsen

The ones that you do want to keep for later just in case a just in case right

Jenni McNamara

Okay, so that you know they can have that CMB folder and you know that no matter what that is my just in case specs

Helga Svendsen

right?

Jenni McNamara

But there's other mail that we might get that I only need it. Maybe for the next three months. Yes. So you I actually used to have another folder. That was a three month folder. And I actually set up properties of that folder that after three months it would automatically archive

Helga Svendsen

That's what I need I needed over my whole inbox. I have things going back. Oh my lord for eons.

Jenni McNamara

We never go back. You never make the time. So is it important? Do you need to keep it will you ever refer to again? Chances are? Yeah. Oh right.

Helga Svendsen

I think I need to tackle my inbox mostly around not the inbox per se I need to tackle my folders and get in and do some pretty hard deleting I think I've been contemplating getting one of those big bins so I can clean out some filing cabinets. I think at the same time I have to claim that hidden filing cabinet that's in my my emails as well.

Jenni McNamara

And it's quite cathartic.

Helga Svendsen

Yes, yes. I think well I know it is with the actual paper so I have no doubt it is for email as well.

Jenni McNamara

And the leprechaun won't have to run as far

Helga Svendsen

But well, I'm quiet Yeah. Okay, I can see I'm giving the leprechaun a workout so I might want to make it easier. Oh, Jenny, so much wonderful golden here. What are the key points you want people to take away from the conversation we've had today? I

Jenni McNamara

Think be open to the change. work out what is is going to work for you put in place some principles if that works for you. And try it for the next three to four weeks and just see how you got, then work out what's really working for you and adjust accordingly. Fabulous advice?

Helga Svendsen

Is there a resource that you would like to share with the take on board community? Look,

Jenni McNamara

I am on LinkedIn. And I have been adding tips and tricks across the Microsoft world of office 365, and on teams and office and outlook in word and a whole range of products. So if anybody would like to connect with me on LinkedIn and follow along, I don't necessarily talk about other products, I stick with the Microsoft suite because that's sort of predominantly my role. But other than that, you know, sort of you are your own resource, and you've got all the information at your fingertips that you can access

Helga Svendsen

right now. Fantastic. It has been such a pleasure to have you on the pod. Thank you so much for suggesting it. And I know that many out there will right now probably like may be feeling a bit nervous, but hopefully also a little bit more empowered to take on that inbox. So thank you for taking the time today.

Jenni McNamara

Thank you so much for letting me be a part of it. Appreciate it.