Delegating The Deluge:

Action Codes For Forwarding Email

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Joshua Stein

If someone else helps you keep up with your email, here's an easy way to make sure they do it right.

WHEN EMAIL FIRST began to overwhelm me, late in the last millennium, I eventually had a brilliant insight: I didn't need to deal with all my email myself. Most of it required only a few fairly straightforward and definable tasks. I could delegate many of these tasks to my assistant, just by forwarding incoming email as it arrived. But each task needed an explanation. And sometimes giving or typing the explanation took longer than doing the task itself.

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Then I had a second brilliant insight: I didn't need to keep giving the same explanation again and again. Instead, I could set up and use a series of "email action codes" to abbreviate the handful of predictable and routine actions that I asked my assistant to take with my email again and again.

Now, whenever I receive an email message that requires one of these actions, I click on "forward," move the cursor to the end of the subject matter line of the email message, type the abbreviated action code right there, and send the message to my assistant for further processing. My assistant then handles that particular piece of my email deluge, so I can spend more time doing legal work and less time doing data entry, file manipulation, and processing.

This technique works well whether I am at my desk or, for example, walking down 54th Street in Manhattan trying to keep up with my email on my Treo device. When this system works as designed, it is poetry in action, the stunning culmination of six decades of computer technology. And I can also use it to streamline instructions for paper-based projects I sometimes leave in my "out" basket.

The table below lists my email action codes and summarizes what each one means, with details. These explanations also include some quick suggestions on how to manage information in computer systems. This summary is for attorneys, not their assistants. Thus, I have left out, for example, an explanation of how to save a new version of an existing document into the Interwoven document management system. (It isn't pretty.) After my action codes, I've included some general comments about using these codes.

Action Codes for Forwarding Email

Code	*Action*	*Comments and Details*
D (Datebook)	Add this appointment to my Outlook datebook (calendar).	Indicate in the Outlook appointment entry the exact starting time and exact ending time of the appointment. Include in the "subject" line a summary of the appointment and where I need to go. Include in "Notes" all other information I might need from the email, such as call-in code for a conference call, host's phone number, flight number, or seat assignment. You can copy the entire email text into "Notes." But don't repeat any detail you already included elsewhere in the Outlook appointment record. If you include any detail twice, then as soon as it changes, we will almost certainly update it in only one place. The second reference to the information will remain untouched and become outdated, incorrect, confusing, or worse. If the email sender requested it, RSVP and make a note in the "Notes" area to confirm you did RSVP. If any appointment (for example, flight information) takes place in a different time zone, use local time there.

Code	*Action*	*Comments and Details*
F (Filing)	File this attachment in my personal electronic filing system.	Save this attachment in the folder you use for my personal electronic filing system (for example, "h:\data\filecabinet"). This is where I keep my nonbillable filing, such as articles, outlines, forms, model documents, cases, and reference items. I have an electronic filing system so I can find documents when I want to look at them. If you name a file something like "scan001.pdf" or "exchange060201 abc.pdf," I will have no idea what it is and will never be able to find it except by opening it and looking at it. Therefore, use a descriptive filename whenever you save an attachment into my electronic filing system. Give it a name based on its contents (for example, "Precedent - Lien Waiver for New York Construction Projects"), or based on the instructions I include in the forwarded email. Use more information, rather than less, in the filename to make it easier to find the file later. Use words that someone looking for the file will probably think of when they look for it. Windows filenames can contain up to 200 characters (sometimes more). Use them.
H (Handle)	Please handle this request without involving me.	If the person sending the email asks for a copy of something, send it to him or her. I've included details and clarifications as appropriate. If you have questions, ask them.
I (Interwoven)	Save incoming attachment as a new Interwoven document. Make a new version for us to edit.	Use the client/matter number that I perhaps remembered to give you at the beginning of the forwarded mail message. Assign the document a name that follows the firm's naming conventions, based on the title of the document, or the title I give you at the beginning of the forwarded email message. Print the document (with its new Interwoven footer) and a copy of the email cover note. Binder clip or staple everything together. Put the printout in my "in" box. If the incoming document isn't a Word file (for example, a PDF file), you're done. If the incoming document is a Word file, we know from experience that the following sequence of events will happen every time: (a) someone in our office will almost certainly want to edit the document;

Code	*Action*	*Comments and Details*
		(b) when they start editing, they will probably just start editing; (c) later, someone will want us to prepare a marked copy, showing the changes we made; but (d) we won't easily be able to do it, because we will not have saved a pristine copy of the document as it existed before we started editing. Therefore, as soon as you add the document to Interwoven, and before anyone starts editing, do this: Update the document name to say who sent this version to us and when (for example, "JST CONSTRUCTION AGREEMENT FIRST DRAFT FROM JONES'S COUNSEL 1/8/06"). This way, when someone inevitably asks us to run a redline, we will know what version to redline "from" without doing any detective work or reconstruction. I call this a "record version" or a "reference version." Create a new version for us to edit (for example, "JST CONSTRUCTION AGREEMENT JOSHUA'S CHANGES AFTER JONES'S FIRST DRAFT"). I call this a "revision version." Create it immediately after any "record version," to protect the record version from editing.
N (Names)	Add this name to my Outlook contacts, or update an existing contact.	Include at least the name, telephone number, and email address. You don't need to include anything else (we practically never need it), unless I give it to you or ask you to track it down. Include "Mr."/"Ms." or "Esq.," but never both. The latter includes attorneys who hold legal positions in companies (e.g., "counsel" or "corporate secretary" in their title), but not attorneys who hold nonlegal positions. Make sure all information you enter is 100 percent correct. Missing information beats misinformation any day.
O (Other)	Other.	See instructions I've added at the beginning of the email message. If you have questions, ask them.
P (Print)	Print this email and its attachments.	If the attachments include both a "clean" and a "marked" copy of the same document, just print the "marked" copy. Don't save any attachments unless I specifically request it (such as with an "I" or "V" code).

Code	*Action*	*Comments and Details*
		Staple or binder-clip the cover note to the printed attachments and put them in my "in" box. See comments after this table about print formats and how to save trees.
T (Timesheet)	Submit timesheets from these time notes.	After the letter T, I indicate the date the time notes cover. I include client/matter number when I remember it; otherwise I might include clues.
U (Urgent)	This project is urgent.	If you won't be able to do this project quickly, let me know ASAP. Feel free to forward this project to another secretary in the office, with an explanation.
V (New Version)	Save incoming attachment as a new version of an existing Interwoven document. Then make a new version for us to edit.	Try to figure out our document number for this document. If you aren't 100 percent sure, ask me. I will try to give you the document number when I forward the email. But check that the document number I give you seems to be the right document (it should look something like the revised document we just received). Ignore any incoming "redline" copy. If changes are marked, "accept" all changes. Save the clean copy into Interwoven as the next version of the existing Interwoven document. Update the document name for your new version to say who sent it and when (for example, "JST CONSTRUCTION AGREEMENT REVISED DRAFT FROM JONES'S COUNSEL 1/10/06"). This becomes our "record version" of what we received. Run a DeltaView comparison to show all changes from (a) the previous most recent version in our system to (b) the new "record version" we just received. Print out the comparison. Don't save it. Print out the emailed cover note. Staple or binder-clip everything together and put it all in my "in" box. Create a new "revision version" for us to edit (for example, "JST CONSTRUCTION AGREEMENT MORE JOSHUA CHANGES AFTER JONES'S REVISIONS"). This will help us redline our next draft and protect the "record version" from being edited. (See "I" action code above.)

Modify To Taste

You can modify my action codes based on your tastes. For example, if you usually like to read incoming documents on the screen, you could modify the "I" code to remove any reference to printing. If you ever wanted your assistant to print any incoming documents, you would then use the "P" code.

Saving Trees

Most of us print everything full size on only one side of the page. This uses a lot of paper. Modern network printers often let you print on two sides of a sheet. Some also let you print multiple pages on each side of a sheet. (In theory, some printers let you print 32 pages on each side of a sheet. You could print an entire loan agreement on the front and back of two sheets. Unfortunately, this would not help much as you could not read the loan agreement.)

To save paper and make documents appear less overwhelming, I usually ask my assistant to print incoming attachments two sheets per page, double-sided. I call this the "P22" format (two pages per sheet, two sides). There is also "P11," "P42," and so on, all communicated as part of the "P" action code. My "default" print format is "P22." ("Default" means the print format I ask my assistant to try to use unless I say otherwise or my assistant doesn't think it's a good idea.) If I plan to read closely or mark up an incoming attachment, I will usually request "P11" format.

There's No Action

Because my most common action code is "P" (which translates into "P22"), and because my search for shortcuts never ends, I've told my assistant that whenever I forward an email without any action code at all, this means "P22."

Multiple Codes

An email can have multiple action codes. For example, I might enter action codes "P" to print the attachments, "N" to update my Outlook contacts to reflect the sender's name and contact information, and "D" to update my datebook to reflect a conference call announced in the email to discuss the draft document.

More Instructions

Sometimes I want ask my assistant to do something with an email in addition to (or instead of) one of my regular action codes. In those cases, I use the action code "O" and type the additional instructions at the beginning of the forwarded email. I ask my assistant to always take a look there anyway, in case I have additional instructions.

Follow-through

After your assistant has dealt with an email, you may want your assistant to save it in a particular folder or just delete it. My assistant has created appropriately labeled folders in Outlook in which to store my emails after processing. If your assistant deletes an old email message, it can be recovered, if necessary, for at least 30 days. Different people, including Bill Gates and Eliot Spitzer, have different views on the merits of saving old email.

CONCLUSION • If you find my email action codes helpful, please feel free to use them. If you see ways to improve them, please let me know. If you think they are more trouble than they are worth or otherwise not a good idea, please ignore them (unless you have a better way to achieve the same end, in which case I'd like to hear about it). But I've found this system works well, saves time, and requires minimal training. And you can adapt it to meet the changing needs of your practice.