Dayana Kibilds: Hi everyone. My name is Dayana Kibilds and I'm the manager of undergraduate recruitment at Western University in London, Canada. Before my job at Western, I worked at Cornell University, in their annual giving programs, as a digital strategist. Before that, I worked at Penn State University as an admissions officer, recruitment marketing CRM specialist. I have about 10 years of higher education experience, primarily communicating with external audiences, so prospective students or alumni.

In thinking about what to talk about at a big conference like this one, it's really hard for somebody like me to come up with a topic that I could consider myself an expert in. I actually consider myself a generalist. It's really hard to think about what I know well enough to teach somebody or what knowledge could I share that could help somebody do their job just a little bit more, maybe effectively.

I was selected and I realized that some of the things that have gotten me to where I am in my career were actually everyday hacks, and I am not at all a project manager. In fact, I deeply admire project managers with certification and tools and techniques to get things done. These are a collection of tools and tactics that have helped me get stuff done. I hope it is useful for you as well. I can't wait to share.

This is what we are going to be looking at today. We're going to be talking about documentation and document versions, and we're going to talk about the best way to schedule meetings and how to take effective meeting notes. Then finally, how to write emails that your colleagues will actually open, read, and do what you want them to do, so let's go. This is you at the very start. Your project is the White Castle, all the way to the end of this board.

Your goal is to get to that project without losing all of your lives. The talk today is going to be about all of the things that we have to do to even get the great projects that we work on off the ground. The levels that we will be tackling are not in any particular order, but some of them are indeed more difficult than others. Let's get started. First step is documentation. How many of you have a folder like this one somewhere in your organization? It's actually pretty common, at least in the higher education sphere.

This is probably one of the most common ways that how-to's and manuals are stored at a university, at least in my experience. Surprisingly, this folder right here actually holds the key to about 80% of Western's first-year class. This folder right here is what tells admission counselors what the criteria is to admit that large proportion of our class. How does this folder come to be? Well, the people that know what they're doing, the experts in admissions, they create documentation.

They write everything they know in a Word document. They save the Word doc in some file somewhere in the shared network but there's no naming convention, there is no template, there is no order. The challenge is that this type of folder is not searchable. It's not intuitive. You don't really know where to start. If you're onboarding new staff or you're training somebody, it's really difficult to show them how to learn this, and because it's not searchable, it's really hard to find the steps to that one particular thing.

One of the other challenges with this type of method is that it's not easily accessible on a mobile device or a tablet, and because it's behind a VPN on a shared drive and thus it is very difficult to find and actually work with anything in this document, although it is incredibly valuable information. One of the suggestions, my first suggestion for documentation, is to use a wiki. I have been lucky in that every university I've worked at has had Confluence.

Confluence is a great wiki tool and it is so intuitive to build and easy to add content contributors to. If you are an institution or a company that doesn't have a wiki service, there are some wikis out there free or for a fee. I believe Office 365 now also has wiki capabilities. One of the most clever project managers I know actually uses Blogger in place of a wiki for this same type of training documentation scenario. Let's talk about why wikis are great.

Wikis are searchable, taggable, browsable, and they're accessible from any device. You can search or browse by category or see all the articles at once. You can structure content in a way that's hierarchical, so vertical, or you can tag things across topics as well. You don't just focus on a folder structure or if the topics are related, even though they might not be about the same thing, you can actually see all of the content by clicking on the tags.

When you do search in a wiki, it doesn't just search the title of the document, it searches through all of the comments and content. You can find anything that relates to your topic very easily. One of the things that I love is that you can actually upload or attach documents. Sometimes as part of the documentation, there might be a form or an image or something that you want to attach to that documentation piece.

In a folder scenario, you have to tell somebody to go and open up a different document, whereas with this scenario, you can easily just download the document. The other great thing if you've ever written documentation in Word, I'm sure you know, if you put a picture in there, it might mess up all of your formatting. For some reason, Word is so petty that it will never come back to the way it was, even if you take the picture away.

Adding pictures in a wiki like this is great because the picture can be relatively small when you're reading through, but if you click on the picture, it actually expands it full-size, so you are able to actually see what the screenshot says. Then finally there are comment sections in these articles. If people have questions about something that you wrote, you can actually answer it right on there.

Of course, edit the content to include or clarify what wasn't clear. The question and your answer is also part of the documentation for any future user looking at it. I really do recommend a wiki solution if you are handling creation of documentation. When you do set up a wiki, these are my tips. Start with growth in mind. If it takes off at your institution or your company, it will grow beyond what you imagined the scope of it was going to be.

For example, I am in the recruitment team at my university, and I created a wiki called Recruitment. Of course, a year later, the office of the registrar, who we report to also

wanted a wiki. Now there's two separate wikis for the same team in the organization. In retrospect, I should have called my wiki Office of the Registrar and then **[unintelligible 00:07:47]** my recruitment team under that. Before you create anything, though, plan your hierarchy, your tree, and your tags.

The hierarchy is the hierarchical relationship between the topics and the tags are the horizontal, the across the topic relationships. It's a good idea for you to have these content buckets in the back of your head, just to think how you're going to structure your first version of the wiki. However, just know that it's so flexible that even if you change your mind after everything is created, you can move content so, so easily that it's not something that you need to have perfect right before you start.

The other really important thing to consider is who can edit, who can view. I tend to be a little bit different than most of my colleagues in that I don't really like to restrict anything. I give everyone on my team edit access. The advantage of that is that the wiki actually grows. They all create content, we all edit each other's content. There is a team size in which that becomes unmanageable.

I do acknowledge that, but I think I would suggest that you err on the side of have as many content creators as you can, maybe have a few people that edit or view content before it's actually published, but for this to grow it has to be organic. The first time I used a wiki, I managed the CRM team at Penn State, and the way that we used it, we were responsible for user support across the institution.

When we received an email with a question, what we would do is instead of reply in the email, we would write an article in the wiki and send the link to the article. Over time we ended up having about 600 articles on our wiki that were the user support articles. The users then were used to checking the wiki before they emailed us. That actually cut down a lot of the user support time, the repetitive answering of the same questions, which of course it helps us get our actual work done.

Then finally, make it pretty, that's one of the really neat advantages of a wiki, and if it looks nice and it's easy to read, and the important call outs are in a different color, if all of that is working harmoniously, people are much more likely to use it and it's one of the great advantages of not being restricted to a Word doc. All right, we have conquered the first level. Now since you've learned that you have powered up, you are a big Mario now, and you are ready to take on the next challenge, which is versions.

How many of you have dealt with a file called something like this? I am willing to bet every single one of you has. Every single one of you. Take a look at this folder right here. How many of you have had files called what I just showed you in folders like this one? It is impossible to know what the actual final version of something is in a structure like this one. When I worked in admissions, in a previous job at Penn State, there was a colleague there that in order to keep track of what the most recent version of something was, what she would do is change the file name and add _APPLE, all capitals, A-P-P-L-E and that's how she knew that that was the most recent file.

Mind you, instead of using a date or something like that, so you can imagine, of course, if anybody else is sharing that file, they have no idea what the APPLE thing means and if she forgets to remove the APPLE or change the APPLE, which is the most current APPLE? It's impossible to know. In this particular screenshot, there are actually just 17 letters, 17 distinct letters, but there are 38 documents to represent those letters. Which one is the most recent? Which one's the approved version?

Which one do I grab and send? It's really hard to tell with this type of setup. What can you do? Use the Cloud. You can avoid all of the problems with the file names and the crazy folders by using the Cloud. There are many options for this. Fortunately, a lot of them were **[unintelligible 00:12:09]** used to. Google Docs, of course, or you can use if you have Office 365, you can use Word on there and if you don't have any of those, Dropbox or Box, those work as well. The key is that everything is in one location.

The versions are saved on top of each other with the same file name. You can actually look through and see different versions of the same document without changing the document name and really the advantage of using the Cloud is that you can actually control access, like who can see this document. People in my organization, just two particular people, whatever you want. If you're not familiar with using the Cloud for versions, this is an example of Office 365.

If you look at the options for this document that I have selected here, you can actually see all of the versions that were created and who modified it. One of the great things about this is that you can actually restore one of those previous versions, which is great if some changes were made by accident, or if decisions change and go back to what they were and because of this functionality, you do not have to change the file name.

You can just upload it right onto itself, and it will create a new version and the folder is neat and tidy and you always know which is the most current version, because that's the version that you can see. The other scenario which we encounter very often with document versions is if you're writing content or copy for something, you write it in a Word document and you send it to your boss and your boss enables track changes and sends you back comments, and then they send that to their boss and they add more track changes and more comments. By the time you get your precious piece of content back, it's nothing like what you wrote. It's a complete disaster because of the track changes.

One of the best ways to address that that I have found is using, once again, the Cloud. This is one of the best methods I have found to address the version issue or the gathering feedback issue when I'm writing content. Depending on how many people have to edit or review, I either give them edit access or comment only access. I like to use the comments. Not just for them to give me feedback, but also for me to tell them why I wrote something the way I wrote it or if I have a question about something in the document, I put that right in the comments so that when they are reviewing it, they know, oh, okay, this was her rationale to write this this way.

It actually has deterred the reviewers from changing the copy based on a word preference, or whatever reasons they have. I have found in my experience, at least that a lot of the changes that come back from supervisors when they're reviewing content, it's just a preference thing, or they want to use a different word because they like that other word better, but it doesn't actually change or improve anything. By justifying what I'm writing, it has really helped.

Instead of sending a version, getting edits back and sending another version, I just put that right up in front of their face, right up front. If they have changes, they can actually write right on the document. I prefer comments, to be honest, because they can tell me, you can change this to this and that, and it doesn't mess up the document as it was. If you have used track changes, it can get so unwieldy and in Word especially because it adds crazy punctuation.

It's hard to read what the actual sentence is so the third or even the second or third person reviewing that document doesn't even see or read what was originally there. I really recommend that you give this a shot. Put your content in a Cloud document, send a link out with comment-only access, justify the things that will be changed or somebody will want to change and see what comes back, and this has actually saved me so many headaches. I used to, I'm not going to lie, I used to cry.

I used to get very upset when these beautiful pieces of content would come back to me completely butchered. I really recommend that if this is something that's part of your job that you give this a shot. One of the great things about this as well is that you can use the outline functionality on the left so if people have to scroll through multiple pieces within the same campaign, that's really easy to do.

Another little hack that has helped is, if there's time for this, and I know time is precious, I actually schedule about a 30 minute meeting with any of the reviewers for them to give me the feedback that they have on the document verbally and the goal at the end of those meetings is, by the end of this half hour, the content on this page is final, period. End of story. That actually, it seems it's hard to do, to schedule 30 minutes to talk about something, but the alternative sometimes is five days of an email loop of track changes documents, so it's actually a little bit more efficient and it helps you get your stuff done.

Give that a shot and let me know how that goes. And if you can't use the Cloud for some reason, and you must use document versions in a folder somewhere, please for the love of everything that is great and holy, use this date format. Year, month, day, underscore and put this at the very top or the very beginning of the file name. If you do that, you can always sort by date and the most recent one will be at the top or bottom.

Don't do month, date, year, don't write the month out in letters, none of those formats actually allow you to sort things in a chronological order. If you must, if you cannot get away from a folder with different versions, I highly recommend that you get your teams trained to do this type of date format. Final tips for using the Cloud, as I said, if you are using a folder in the Cloud, do not rename your file.

I've seen that. If we are using the Cloud, you can upload a file with the same exact file name and it will just replace itself but the version is stored. You can always restore a previous version, nothing gets lost. If you are dealing with content review and content editing, remember you can control the access so you can give comment-only access or edit access or view access to your reviewers, depending on the level of editing you want them to be able to do.

To save you a lot of headache and a lot of emails back and forth about content, I highly recommend that you try the Word document or the Google document in the Cloud with your copy and send that link out with comment-only access to get the feedback. If there's anything contentious that you wrote that you know is going to get edited—we all know our reviewers. We all know what they don't like. Make sure you justify that up front and that might actually change the outcome.

All right, so now that we have conquered document versions, you actually leveled up again, and you now have wings, so you're ready to fly on to the next challenge. Notice that I skipped levels three and four. The lesson here is, don't fight the battles you don't have to fight. Focus on your goal, and only on the fights that you need to fight in order to get to your actual work, to your actual project. We gain nothing from going through levels three and four here, and defeating those enemies.

We gain nothing in terms of the progress that we make toward our goal, which is getting to the White Castle. Another lesson in getting stuff done, do not fight the battles you don't have to fight. Now, if you are a Mario player, you know that the castle, this little underground world, is one of the hardest levels in the entire map. The castle is dark, it's scary, it's confusing, it's filled with enemies in every corner, it's dangerous, and it feels just like scheduling meetings.

This is an actual picture of what scheduling meetings with large groups looks like. You're stuck, you're in a situation that you don't know how you got there, you don't know why you, why do you have to do this and there's actually no way out. You must figure out how to schedule this meeting. I have seen so many people struggle with scheduling large meetings over my career, anyone from new professionals to experienced professionals that have been working for 40 years, so much struggle throughout my career that I've actually decided to create a meeting scheduling flowchart for you.

The goal of using the flowchart is that in order to schedule a meeting, you do not want emails back and forth. You absolutely do not want that. You also don't want to have to reschedule after you've picked a date because you didn't account for everyone's availability, and you want to reach a time that works sooner. You don't want it to take five days to find the time that works for everyone.

Here's the flowchart. There is an accessible version of this flowchart that will be made available if you cannot follow through here, but I will talk through it now. Let's get started.

The first question you need to ask yourself is, do you need to meet with just one person? If yes, then you ask yourself, can you see the availability on their calendar? If yes, then send them a calendar invite, EC. This is the best case scenario.

If you cannot see the availability on their calendar, then I recommend that you send an email with two options that work for you. Ask them if those options work for them, too. If your suggestions do not work, believe me, they will tell you, and hopefully they can offer an alternative, but if they don't, then you offer two more options. Most likely one of the options you offered in the first place will work, and then you have saved yourself at least two emails back and forth by providing options from the start.

If you had just sent an email that said, "Hey, when can you meet?" They would say, "Oh, whenever you want." Then you would say, "Okay, how about Wednesday?" Then they would say, "Oh, yes, Wednesday in the morning works." You say, "Okay, what about Wednesday at 9?" They say, "Actually, no, just Wednesday at 10." Those are all emails. You don't want to do that. If you had started that email conversation with, "Hey, can you meet Wednesday at 9 or Wednesday at 10?" They would have said, "Wednesday at 10 works for me."

Always offer two options. Now, if you need to meet with more than one person, there's another question you need to ask yourself. Does everybody need to meet at the same time? Does this have to be a massive group meeting or is it enough for you to meet with each person one-on-one? For example, every year I have to meet with the associate deans at each faculty or academic college at my university to gather any updates about their recruitment content, so that I can recruit students to their programs.

I don't have to meet with all of them at once, I have to meet with each of them one-on-one. What I do is I find a bunch of times that I am available, about two or twice more times than there are people that I have to meet with, and I block all of those times on my calendar as holds. Then I put all of those times in a spreadsheet, in a shared document on the Cloud, of course, and I send them an email with a link to a table for them to sign up.

After the sign up, I send them a calendar invite as a confirmation. Let me show you what that table looks like. This is what the table looks like. I write specific instructions at the top, the most important being to just choose one spot. When I send this out, the faculty, and contact, and location columns are blank. They're responsible for filling those out. They only need to fill out location if you come to them, otherwise you can just remove this column, and book a room in your own building, and let them know what that room is when you send the calendar invitation as confirmation.

The system has worked really well for me because they can also see what times or if their peers have also picked the time. The peer pressure here to be one of the first to sign up, or at least not the last to sign up actually works really well in these contexts where people are a little competitive. The beauty of this method is that I actually get most of these scheduled within a day or two. I don't have to wait any time to get all of these meetings on the calendar.

Now, if you have used Doodle before, you might be wondering, "Well, why not use something like Doodle?" The issue with Doodle is that if you put all of your availability on Doodle and those don't work for them, or the units pick the same time, or something like that, then you have to pick who to give it to, and that's a little bit challenging. Then they also can't see where the others have signed up that would create the peer pressure. The system works.

It's a little bit open, it's a little bit homegrown. There are better solutions out there. I don't use something like Calendly or these kind of calendar sign-up things for my own day-to-day work, those things that are great for external appointments. Remember, this is all internal stuff, and it's odd to have your colleague book some time with you. These systems have really worked.

Then the whole point of what I'm sharing with you is this is if you don't have the tools, and you don't have the resources or the right infrastructure set up to help you with this. These are the homegrown tips that have really helped me. Hopefully, give this a shot, and see if it actually speeds up the time to schedule these appointments. Now, let's go back to the flow chart. If you do have to meet with everyone at the same time, my next question to ask yourself is, is it less than seven people?

If it is less than seven people, I have found that that's the max that Doodle can handle, that Doodle works well for me. Otherwise, it gets crazy. There's no overlap if you give people too many options, or if there are too many people. I have found that six works really well. If there isn't unanimous agreement on Doodle, what you have to do is pick the one or two key people that do have to be in the conversation, whether it's the expert for that topic, or the owner of that project, or the highest ranking person in the group, or all of those.

Then the rest of the people will somehow miraculously become available. Another tip with Doodle, I know this is obvious, but if you do put times on Doodle that you're available, make sure you block those on your calendar. If you're anything like me, time on my calendar disappears instantly, so if I don't block things then I'm the one that's not available. You definitely don't want to be in that situation. If you're in a meeting with seven or more people, don't bother with the Doodle, don't bother with anything.

Find the two or three people that are key to the project. Again, whether that's the owner, or the expert, or everybody's boss, and if you have access to their calendars pretend you're booking a meeting with just them. Find the time that works for just them. If you have to work with somebody that manages their calendar or however you do that, and then send the calendar invite to the whole group, and say, "I'm so sorry, this is the only time that works for important person A, important person B. You're all important. I really hope you can make it. We just couldn't find the time that worked for everyone," and miraculously that always works.

Most people will suddenly become available if a time is scheduled where they recognize that the key people's availability is the most crucial to the success of the project. One thing that's not in the flowchart is if you do need to coordinate a meeting with more than

one person, but they are all on the same team, and one of them represents them, you can pretend you're scheduling a meeting with just one person, and say, "Okay, let your team know." You don't have to treat them all as individuals in that scenario.

Further tips for scheduling meetings, as I said do not ask for availability, give your availability. You want to absolutely avoid the back and forths. Limit the options. If you give people six different options, that's really hard to choose, and they might come back with four options, and it's actually not very meaningful. I have found two options to be the best, in some cases three, definitely not more than that, and lock yourself, if you do give time or availability or schedule, create a table or send a Doodle, if you do that, make sure that's locked on your calendar so you are not the one that suddenly becomes unavailable.

When you are dealing with large groups, pick the most important **[unintelligible 00:30:22]** these whatever criteria you choose to determine what that is, others will become available after you send a calendar invite, if those key attendees are able to make it. You use that to your advantage. It's a nightmare to try to find a time that works for 30 people. You simply cannot do it, so don't bother. If it's more than seven, don't bother. Find the two or three that absolutely must be there, and everybody else will work with you and make themselves available.

All right, that flow chart, it actually gave you temporary immunity so you actually came out of that unscathed with your wings, you still can fly. Let's continue. Are you ready for the next challenge? Now that we know how to schedule meetings, it's time to talk about how to take effective meeting notes. Meeting notes, some people like to call them minutes. I have never liked that because I don't like the idea of recording everything that was said in the conversation.

I remember my very first job, I missed a meeting once and somebody told me that whatever decision was made was in the minutes, I had to read four pages of paragraphs to find what the decision was, I found that an incredible waste of time, again, stopping me from actually getting stuff done. I don't like to call them that and I don't like taking minutes like that. I like to call them notes because I like to focus on the important things that happened, and more importantly, what should happen next?

How many of you have ever worked someplace with a folder like this? This is what meeting minutes look like in my world. There's a Word document titled with a date that, by the way, it's not how I recommended the dates should be because you can't actually sort this, and there is absolutely no indication anywhere of what was discussed in any of these. You have to open up every single one to figure out when that topic that you were wondering about was discussed and if any decisions were made.

You have to sift through all of the content in there to find it, and then you might not. You can imagine that finding a simple thing in this scenario might take you at least an hour, again, preventing you from getting stuff done. What can you do? No surprise, I'm going to recommend the Cloud. Use a shared document. In a shared document, one shared

document, you can have the agenda and notes all in one place. It's searchable, it's efficient, it keeps continuity and it keeps folks accountable.

I'm going to show you what one of these looks like for one of my teams. This is a Word document on Office 365, this is my recruitment team meeting agenda and notes. **[unintelligible 00:33:08]** document, the hack here, the real cool trick is it's just one massive Word doc that we have been using for years, you put this week's or next week's meeting at the very top, so it's in reverse chronological order.

Anyone throughout the week can go into this document and add agenda items, so I do not send an email doing a call for agenda items and I do not send a Word doc as an agenda right before the meeting, because everybody knows they can just go to this document, add their agenda items or check it to see what the agenda is going to be, what we're going to discuss. Then during the meeting, we pull this up on the meeting room screen and anyone, because we all have our laptops, anyone can take notes throughout the meeting.

There's no designated note taker, we all kind of tag team it so that the person speaking can speak without having to write and we don't have somebody in there just as a designated note taker. When there is an action, we like to write the person's name in red, kind of in a bullet and when that action is complete, you change your name to green. One of the greatest things about keeping a running document like this is that you can actually do control+F to search within the document for whatever keyword you're looking for and you can very easily find what that is in years of agendas and notes.

When a meeting starts, we actually pull up the document and we review previous weeks' notes to see how the action items have progressed. Again, this is not proper project management, there are so many robust and amazing tools to handle that type of work, the project based work. This is what happens around the projects, before the projects. This is the day-to-day work and how you manage the day-to-day responsibilities.

I am by no means trying to say that this is better than some of those project management tools, but this definitely helps you if you don't have those resources, if you don't have the project managers, and for all of that work that doesn't get structured as a project. The system has worked really well for my team and I really, really recommend that you use it if you have a team meeting or some sort of internal continuous meeting like this that requires meeting notes to be taken.

Just as a recap, have a running document and encourage everyone to add items to it and take notes during the discussion. The way that I do this is there is obviously a recurring calendar invite in all of our calendars for our team meeting, in that calendar is a link to this document so everyone on my team knows that if they have something to discuss at the team meeting, they click on that link and they add it to the agenda. Do not send Word document agendas, do not send a call for agenda items, save yourself the back and forth, save yourself the trouble so you can get your stuff done.

Organize it so that the most recent or the future date is at the top so when you open it up you're seeing the most relevant thing. You don't want to scroll through 40 pages to get to today's date, and then no action items, and by using the person's name in red, and then when they complete that action item, they can go back in and change it to green. All right, we have defeated meeting notes and now we are powerful because we have fireballs, which will come in very handy in this next level, which is my favorite, writing effective emails. I'm going to show you an email that is real.

This email here was sent to staff volunteering at one of our largest open house events on our campus. This email was written and sent by our very brilliant event coordinator. He is a logistics and planning genius, absolutely genius, but every year he's incredibly frustrated because people don't do what he very clearly said what they should do in this email or people ask him questions that were very clearly outlined in this email, so he gets very frustrated at that.

I wonder why? If you hit print on this email, it's five pages long. If the email is this long, it should not be an email. It should be a training session. I'm going to show you how you can actually avoid a situation like this and make your emails scannable and memorable and actionable, and actually get people to read them and do what you want them to do. Formatting goes a very, very, very long way. I'm going to actually change the slide but before I do, I want you to try something.

I'm going to change the slide, and then I'm going to change it back, and you have to think, you have to try to remember what you saw and what the email wants you to do. You will have two seconds to look at the next slide and then try to think to yourself, "Okay, what does this email want me to do?" Are you ready? Here we go. What was it? I really hope that it was choose a date for your faculty or unit. The thing that you should have seen first in the first two seconds was the thing that I want you to do when I wrote this email.

If you've been paying attention, this is actually the email that I sent together with that table that we talked about in the meeting flowchart. Even if the associate deans are so busy that they can't read the whole email, they don't have to, they only have to read the words that I put in caps, and bold and blue, that are a link. This is formatting doing its magic right here. Most people, this is how they will read this email, they will look at the blue text first, and then they will see the bold date right below.

Great, I need to do this action by this date, and then they may look at the first few words of each of the bullet items so, portal show and tell, available stats, analysis, Q&A, and then they might maybe look at the underlined text. Then, and only then at the end, they might look at the very first sentence you wrote and the very last sentence you wrote. Be sure to position the text that is important, the things that you want them to do in a way that they actually read it. It cannot be the first thing you write, because everybody skips the first sentence.

It cannot be the last thing you write because everybody skips the last sentence. I think the first kind of third of the page, right after the first third of the page is where the most

important action should be. It should be obvious. It should be big and in a different color. It should be a link if you can make it a link. The link should not say, click here. The link should say the action you want them to take.

One of the things you'll notice if you've been reading this as I have been talking is that there isn't a lot of flowery language. There's not a lot of polite language in here. You have to cut down on those padding words and the padding language. This makes my Canadian colleagues really, really cringe because, of course, Canadians are very nice, but it's not so much about being rude, it's about being direct and making sure that if people only look at this for two seconds, which is actually how people read emails, that they see what you want them to do.

Sentences like, "If you wouldn't mind, would you please choose a date for your faculty or unit," by the time they get to the “choose a date for your faculty or unit,” you've lost them. Make sure that if you have to write the polite language that you write at the top and you write at the bottom, and that it's not diluting the action you want them to take. I actually learned a lesson about this very recently.

As a result of the pandemic, I wrote an email requesting volunteers to do faculty Q&As and participate in this massive texting campaign that I'm actually running right now. In the email, I was very direct because I'm emailing professors across the institution when they had to very quickly put their courses online. Everyone is very busy. They have no time to read an email from me, but I need them, right? I need them to volunteer. How do I do it?

I wrote a very direct email with two giant blue links with the two actions I wanted them to take and not very much else. I got a response from a very angry professor that said that my email was tone-deaf and inappropriate and because of that, it seemed it was almost sociopathic because it didn't have the flowery language that he was expecting. I didn't write, "In these unprecedented times, thank you for your help."

Sometimes you actually do have to write that language. You have to be nice at the beginning, be nice at the end, but just make sure that you do not put that language right where your actions should be. One last thing, before I go to the summary of this topic, what do you think the subject line for this email should be? Now that you've thought about it, I will tell you. The subject line for this email is exactly what is on that blue text. It's “choose a date for your faculty or unit.”

They saw it when the email popped up, and they saw it when they opened the email, and they know exactly what you want them to do without having to read a single word. Final tips for that: make sure that what you want people to do is obvious. Use formatting. Use white space around that action. Do not put any flowery language around that action. Add dates and deadlines, as obvious as you can, write short sentences, add space between paragraphs. Bold all the dates and action items.

Use bullet points if you need to explain something in detail, but make sure the bullet points are written in a way that the most important content is at the very beginning, the

first three or four words. Trust me, you can be less polite throughout your email, but you do want to add the niceties at the top and at the bottom so you avoid the angry replies. Now, if you can't keep it short, unfortunately, that happens, like the scenario that I showed you when I started this topic, that very long email from my event planner.

If you can't do that, make sure that at the very top you have a summary of action items and then they can read through if they have time or if they want to, but again, within that first third of the page, they can see, okay, this is what you want from me. It's in a different color. It's in bold. The first thing I will look at here are those two action words and I will know that this is something that's expected of me.

Unfortunately though, if you do have to write an email this long, you will take a hit and you will lose your fireballs, so now we are back to just being a regular Mario, and that's okay because we've made it to the end. You avoided all the feedback loop nightmares and the crazy documentation versions. You've scheduled all of the meetings that you need to get yourself ready for your project. You took great notes at those meetings, so everyone's on the same page.

Now you're finally, finally ready to tackle that big project that you've been trying to tackle all along. You're finally ready to get your stuff done. It's time to get started working on those amazing projects. I really hope these tips help you get all the other work out of the way so that you can focus on the things that really make you happy and are the meaningful work that you like to do. Good luck to you. If you try any of these tips, please let me know.

I would love to see the results. All right. If you want to chat with me, if you want to tell me how things went, you can reach out to me via email. Just for fun, I included a picture of me at Confab two years ago with my boy Romeo inside my belly. I was about five months pregnant on the big stage. Now he is a 20-month-old toddler that really loves the fact that we are working from home. All right. Thank you very much. You can also reach out to me on Twitter, happy to make new friends, and let me know how things go.

[00:45:57] [END OF AUDIO]