MANAGING INFORMATION OVERLOAD

WHAT TO DO WHEN THE INFORMATION AGE HAS YOU OVERWHELMED

By Irwin D. Karp

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Several weeks ago a friend, the executive director of an organization, confessed that his office is a disaster. Professional journals pile up, phone messages are unanswered. Projects remain half completed. The in-box has become a storage box. Every meeting ends with additional paper and tasks to complete. E-mails arrive fast and furious begging for immediate response. He stated that he used to be very organized and had a handle on everything. Now, things seem to be overwhelming, spinning out of control. He wonders, "Is this just me?" and asks if I have seen this before with other professionals whom I coach.

My friend is suffering from information overload—a combined result of the information age, the speed of communication, more paper, technology, and the expectations of instantaneous response demanded by clients and colleagues. Other frequently used terms for this state of affairs are "data smog" and "info glut." A psychologist has begun treating what he calls "information fatigue syndrome."

One of the definitions of overload is "fill to excess so that function is impaired." Sounds like the executive director is there. How about you? You probably have more to do than you can possibly accomplish and there is always more information out there than you can possibly know. Some warning signs of information overload are missed deadlines because you cannot find a due date, misplaced documents, unanswered e-mails, ideas from meetings gathering dust or just a generalized state of anxiety that you are missing something.

Daily, we are inundated with information received via e-mail, telephone, voice mail, the Internet, fax, express mail, cell phone and reams of paper (pleadings, cases, documents, memos, correspondence, journals, newsletters, magazines, etc.). We gather other pieces of information through research, in meetings and in casual conversations. If all of these information sources require attention, when do you get any work done? You need to be able to manage the flow of incoming information by developing a clear idea of how you plan to use it, and by having a systematic place to put it. If you feel like you're drowning in this sea of information, you need to learn how to swim. Let me toss you a life jacket or at least a safety line.

In order to determine how organized you need to be, what you need to do and what information you need, you must be clear about your job functions and caseload. This provides the context for all of your efforts. It allows you to filter out the unimportant and retain only the most important information. It helps determine your priorities, how you schedule your time and, most important in the context of overload, what incoming information you need to deal with and what you can ignore.

Information comes from so many sources, with so many attendant interruptions, that it is critical to your productivity and competent practice to have a system in place for managing all of this information by organizing the process into four discrete steps: collecting, filtering, processing and retrieving.

I. Collecting

The standard places for receiving incoming information are your physical in-box (hard copy), your e-mail in-box (in cyberspace), and your telephone (voice mail). Add to that various notes from meetings, discussions, research and random thoughts and you need places to collect this information.

Try to avoid using post-it notes as a vehicle for collecting information. Have you ever been on a phone call, jotted down some information on a sticky note and then searched for it several days letter? If you ring your computer screen with these little yellow missives, they soon become part of the background and aren't even noticed anymore.

We will discuss processing the information later, now we are just collecting it. I suggest using your in-box as the receiving point for all paper that comes your way (I'm just guessing that your office has not achieved the "paperless" state). This includes mail, faxes, printouts, pleadings, professional journals, memos, etc. In addition, unless you are making a note in a specific file that is open on your desk, you need a place to capture all of the other written materials that you generate, such as notes from phone conversations, documents from meetings, or legal research.

When you return from a meeting, deposition or appearance, empty your briefcase and either return the information to its appropriate file cabinet (or pile) immediately or place the documents in your in-box for later processing. Now, at least you know that everything is in one place before you begin the processing and sorting discussed in the third step in our personal information management system.

One caveat is that this system will not work unless you review the information in your in-box on a regular basis (at least once a day), lest it revert to a storage pile. The same holds true for periodic checking of incoming e-mail and voice mail (several times a day at regular intervals).

II. Filtering

E-mail programs contain filters that allow you to pre-screen incoming e-mail. These filters can automatically delete certain e-mails, highlight e-mails from important clients & colleagues, or automatically move e-mail to folders that you have set up for different matters. The idea is to eliminate unwanted or unnecessary information and to manage that which you need for your work.

We can apply filtering principles to paper and voice mail as well. An example of filtering for paper would be pre-screening of information before it is placed into your in-box. Your secretary could review the incoming documents, delegate or discard where appropriate, and sort the rest into folders for your review when you process your in-box. For voice mail, you can play through the recordings (or have your secretary pre-screen) and prioritize your responses.

Try to develop content filters so you can determine whether you truly need to know the information coming into your system. The idea is to create efficient filters to let in only the information that matches the needs of your practice. The best way to filter hard copy is to stop some information from ever seeing the inside of your office. If you review mail together with your secretary at his or her desk (outside of your office), you will be able to make decisions on certain documents (i.e., whether to refer it to another, respond immediately, file it, toss it or hold for action) before they add to any clutter in your office.

Another means of filtering would be to cancel publications that just pile up unread. Don't worry about missing some important information. You will be able to get that information should you need it some day.

III. Processing

Consider processing your incoming information to be a task in itself. Set time aside to manage this inflow, rather than having it manage you. I recognize that there are times when situations call for immediate response and you drop everything. But, if your practice functions that way on a regular basis, you need to take a deeper look at issues beyond just managing information. Ongoing management of your practice by dealing with the latest crisis is a sign of a different problem.

Responding to all of these sources of information when they arrive will only distract your attention, steal your focus, and increase the feeling of stuff coming at you from all sides. I'm always amazed when I receive a response to an e-mail within minutes of sending it, or when someone I call answers the phone only to say, "I'm in the middle of something; can I get back to you?" If focus is the greatest personal productivity tool, interruptions by e-mail or telephone while you are in the office can only interfere with your productivity and contribute to the overload. Remember, one way to ease the feeling of overload is to assume control over when you will receive, review and respond.

Clutter (paper or electronic) is the result of postponed decisions (those times when you revisit the same piece of paper or e-mail message many times before deciding what to do with it). You have enough to do as it is, so why waste time searching for messages or shuffling paper and looking for misplaced documents? Failure to properly manage workload, workflow and information may

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result in missed deadlines or failure to adequately communicate with clients, leading to adverse consequences such as malpractice claims or disciplinary actions.

Learn how to respond on your own time. Go through your e-mail, voice mail and in-box when you have a period of time to focus on how to handle the information. Processing the incoming means making decisions on what you will do with that information. Ask yourself the following questions:

1. Does it require some action on my part? When, now or in the future?
2. Is it something best sent to another? Would that be for information only or does it require action on their part?
3. Will I need this information later and therefore need to save it in my system?
4. Can it go in the trash?

The processing stage of managing information includes sorting: where you will put it for future reference. Sort your information with retrieval in mind. Find a home for the information. This requires some thought as to how you intend to use the material. For items that require action in the future, note the action item in your calendar (along with the location of the document for easy retrieval when you are ready to do your work). Items to be delegated or forwarded to others should be moved to your outbox. If you need to follow up, include that information with a corresponding date in a delegation log or calendar.

For items that you may need for future reference, resist the temptation to put them in a random pile on your desk. Make sure that they are filed in a physical file, a case management program, an e-mail folder and so on. When you are on the road, bring some file folders so you can pre-sort some of the information acquired on your trip. Finally, if you don't need it, find the trash can.

Learn your e-mail program. Become comfortable with its features so you don't necessarily need to print every incoming e-mail. Case management programs allow you to collect all information relevant to a case (e-mails, outgoing documents, incoming—if scanned into the system, notes, memos of phone conversations, etc.) in one place. These programs are a powerful information management tool and should be explored if you are not already using one of the programs on the market.

A key to your information storage and retrieval system is a written index. This is the road map for getting to your information. The index to all your information has a dual purpose. It helps you to decide where to place the information for future use once it has passed through the filter and been processed. Things tend to pile up and create distracting clutter when you don't know where to put them. It also helps you to find it again by referring to the index when you need to retrieve the information. To the extent possible, the topical indices for paper files, computer files and e-mail folders should be parallel.

IV. Retrieval

In this final stage of the process of managing all of your information, you must know how to access your system. Your information does you no good if you cannot find it again. It is only a valuable asset if it is readily accessible. In other words, can you find what you need when you need it? I've worked with many attorneys who have abdicated responsibility for understanding their own filing system and don't know how to use search functions of their various computer programs to retrieve information. Time spent searching for misplaced information is time wasted. Key to this is the index to your information management system. While many large firms are moving toward knowledge management systems, with an ability to access the collective knowledge in the firm, this could be prohibitively costly and time-consuming for solo and small firms. So, do the best you can with the tools at hand.

These steps should help you to tread water in the rising tide of information. Search for the process that works best for you and experiment until it matches your individual work style. Daily practice on your "strokes," collecting, filtering, processing and retrieval, will make swimming through the sea of information come naturally and help you overcome information overload.

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