

# EMAIL ETIQUETTE AND PROCEDURES



# MAKE EMAIL WORK FOR YOU

Email is a huge productivity saver and boosts your effectiveness but ONLY IF USED APPROPRIATELY. The improvised back-and-forth pattern used in social media conversations differs greatly from the pre-planned, more self-contained messages expected in a professional workplace. Just because the person you are talking to can't use email properly, doesn't mean you should copy them!



## BEFORE YOU WRITE

### 1. DECIDE IF EMAIL IS BEST

- » Email is a permanent record that can be forwarded without your knowledge
- » Always follow up an important phone call with an email confirmation of main points
- » Email gives people time to think things over and respond at their leisure
- » Using an email to precede a call can help
- » Email is insufficient for lengthy conversations
- » Phone calls and meetings are often better for relationship building

### 2. SELECT THE RIGHT RECIPIENTS

- » Use the correct field
- » To – the intended recipient from whom you expect a response
- » CC – individuals who should stay in the loop
- » BCC – individuals you need to anonymously include
- » Reply All shouldn't be an automatic selection. Make sure your message is relevant to all recipients before selecting this option.

### 3. ADDRESS AND SIGN EMAILS APPROPRIATELY

- » "Hi" and "Hello" are both fine in most contexts
- » Address recipients by their first name unless otherwise instructed
- » Signature should have a closing, your name, contact information, and company logo

## COMPOSITION

### 1. CRAFT A STRONG SUBJECT LINE

- » Each email should cover one topic
- » Multiple emails should be sent if there is more than one topic to be discussed
- » Subject lines are very important; keep things short and direct
- » Most people scan emails on their phones so the first 4 words are key

## 2. REPLIES

- » Do not reply to an email with a subject line irrelevant to the topic now being discussed
  - » Start a new email and change the subject line
- » Don't change topics within an email chain
- » Don't assume someone has received your email if you don't receive a reply
- » Don't be afraid to send a follow-up



## 3. BE PROFESSIONAL

- » Tone can be difficult to discern in text formats
- » Odd fonts, backgrounds, or color schemes are distracting and may not be recognized by the recipient's computer
- » Don't email in anger or frustration
- » Don't write something you would be uncomfortable sharing
- » Always respond professionally, even if the recipient is not

## 4. ESTABLISH COHESIVENESS AND CLEAR OBJECTIVES

- » Stick to a single topic
- » If replying, respond point by point
- » Use if/then statements to make the expected response clear
- » Ex. If this is completed, please let me know. If not, please send me a summary of current progress.
- » Don't send a load of attachments without telling the recipient why they should open any of them; attachments rarely get opened unless the recipient is told to
  - » Example: "The provider can reimburse through a BYOD program. See attached."

## 5. USE PROPER SPELLING AND GRAMMAR



- » Spelling and grammatical mistakes will leave a negative impression
  - » Use spellcheck, but don't rely on it to catch everything
  - » Re-read emails before sending
  - » Ensure names, titles, and contact information are correct
  - » Do not write emails like you are writing text messages
  - » Sentence Structure is Important
    - » Short sentences are easier to understand
  - » Full stops, commas, semi-colons, and colons exist for a purpose - use them!
  - » Use bullets or paragraphs to separate issues
  - » Don't write like you are doing stream of consciousness
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# ORGANIZATION AND OTHER POLICIES

## 1. USE THE OUT OF OFFICE PROPERLY

- » Include dates you will be gone or date you are returning, depending on how long you will be gone and your role
- » Leave an Out of Office contact
  - » Make sure your Out of Office contact is available in the office
- » Example:
  - » Thank you for contacting \_\_\_\_\_. I am currently out of the office and will be returning on DATE. For immediate assistance, please contact \_\_\_\_\_@email.com or call 555-555-5555. Thank you!



## 2. ORGANIZE EMAILS FOR OPTIMUM PRODUCTIVITY

- » It is efficient to create dedicated blocks of time to go through your inbox, rather than checking constantly.
- » Use folders, flags, or tags to sort emails without cluttering your inbox
- » Respond in a timely manner (one working day)
- » If you can't, acknowledge email and send a revised time frame

## 3. EMAIL TRAPS & BLOCKERS

- » Don't get dragged into email wars with a single person. They may misrepresent your information to others
  - » If you feel uncomfortable with the way an email chain is developing, options are:
    - » Email the person in charge with your concerns
    - » Call the person to see if you can unravel issues
    - » Discuss with your Supervisor before taking further action
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