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Using E-mail More Effectively

E-mail has many advantages as a means of organizational communication. But e-mail differs from both written and spoken communication. Senders and receivers are not always satisfied with their e-mail and the impact it has on their work life. In continuing research on how individuals in organizations use and respond to e-mail, Cavanagh has examined which e-mail habits and practices create the greatest concern and what types of e-mails create the most difficulty in the workplace. Respondents in the research disliked receiving e-mails that were irrelevant, unnecessary, or unclear, and e-mails that should have been a different form of communication. This Innovation Insight shares some information about when and how to use e-mail so recipients recognize your e-mail as an effective means of communication and respond appropriately.

When to Use and When Not to Use E-mail

The first issue to address is whether or not e-mail is the appropriate medium for the communication. Compared to other forms of communication, such as postal mail or telephone calls, e-mail is faster and cheaper, and reduces time spent on telephone tag. Time and geography have little impact on e-mail; it can be reviewed at the recipient's convenience, almost anywhere and anytime. E-mail provides a permanent record of communication. E-mail can also lead to more sharing of and access to information within an organization.

Remember that:

- E-mail is not private and can be forwarded to others.
- E-mail is saved in recipient files, backups, and archives.
- E-mail does not contain normal nonverbal cues like tone of voice or facial expression.
- E-mail is delivered quickly, but may not be read or replied to as quickly.

Consequently, for items that are controversial, com-

plex, confidential, time critical, emotional, or harshly negative in tone, speaking face to face or by telephone may be the most effective means of communication.

For items where written communication is more fitting, use either distribution via a surface mail system, or electronic distribution. To avoid confusion on the part of the recipient, don't distribute the same document by both means.

Writing an E-mail

Content

Once you have decided that e-mail is the appropriate way to communicate, take some time to think about what you want to communicate.

McGee Productivity Systems and Microsoft provide a four step PASS model to draft an e-mail. Identify the:

Purpose of the e-mail – the outcome you would like to see

Action requested or required by the e-mail

- Do something – if so, who, what, and when

- Respond to the e-mail – for example, confirm availability for a meeting
- Read the e-mail – so you are familiar with the information for a future meeting or other event
- File the e-mail – for possible future reference

Supporting documents needed with the e-mail – an attachment or Web site to provide background information or a sample format

Subject line – write the subject of the e-mail after you have drafted the e-mail, to summarize the e-mail

Start the e-mail with its purpose, and what is expected of the reader – the who, what, when, how, and where. Put the most important information at the beginning of the e-mail. A reader can always request more detail. Make it clear to the reader whether a response is needed or desired.

Limit each e-mail to one topic or issue. This will make it easier for the recipient to read and respond to the e-mail, and also simplify filing and forwarding.

With its focus on only one topic, an e-mail should also be short, if possible no more than 25 lines, so that the complete e-mail is visible at once on the computer screen. If it is over 100 lines, you may want to inform recipients at the start that it is a ‘long’ e-mail.

Also for ease of reading on screen, make paragraphs short and leave a blank line between paragraphs. If an e-mail contains several key items or questions related to the topic, put them in a numbered list and leave blank space following each item so respondents can type in their answers or comments.

In short, make it easy for the recipient to skim the e-mail for its key points.

On the continuum from formal to informal writing, determine what is appropriate for your topic and recipients. When in doubt, err on the side of formality. With little context or nonverbal indicators, it is difficult to interpret humor in e-mail, so think seriously

before including it. There are traditions within e-mail of using emoticons (combinations of symbols, such as :) for a smiling face) and symbols to indicate tone (asterisks to *emphasize*). Know whether this is considered appropriate in your organization – if used, they indicate less formal communication. Whether your e-mail is very formal, or more informal, follow the basic guidelines for grammar and writing. Use upper and lower case and traditional punctuation. Begin with the name of the person or group, so they know the e-mail is for them specifically, and an appropriate salutation. End with an appropriate closing and a thank you when it fits. If you use acronyms with which your recipients may not be familiar, define them when first used.

Remember that an e-mail is a public, legal document. When a lawsuit is filed, relevant e-mails must be saved and can be used as evidence by either side in a case. E-mails can be forwarded without your knowledge, and will be archived and available far into the future. How would your e-mail look on the front page of your local paper or enlarged on a screen in front of a jury? Would you make the comments in your e-mail to the recipient if you were on the phone or face to face? If there are emotional or controversial items in your e-mail, put it aside for 24 hours, and reconsider before you send it.

Format

Subject line

When you do write the subject line (after you have written the body of your e-mail), make it scannable – specific and concise. The subject line sets the context for the rest of the e-mail and the subject and sender are the first indications of the content of the e-mail. Consider including key words or abbreviations, such as REQ (request), FYI (for your information), or a course name, number, code or other identification, in the e-mail subject to give more information quickly. Readers may be scanning subject lines and/or senders to determine which e-mails they will read, or the order in which they will read them.

Signature line

Your signature block adds context and credibility to

your e-mail. It should contain your:

- Name
- Organization
- Title
- Phone number
- Web site address

It may also contain a physical mailing address, a fax phone number, and your e-mail address. Your signature block should not be more than 4 or 5 lines – it takes up space in transmission, printing, and storage.

Remember that it isn't necessary to include your signature block on each e-mail you send, especially when there are multiple replies in the same thread. You may also want to have different signature blocks for different types of e-mails. Some individuals include philosophical or humorous sayings. Consider how these will be viewed by your recipients. If you do include a saying, consider including it only selectively to reduce its repetition to people you e-mail frequently.

Attachments

Since your e-mail should be short, you may need to send additional information as an attachment or refer recipients to a Web page. If there is a lot of information involved, it will probably be easier for the recipient to go to a Web site than to download many long attachments.

In the text of your e-mail, tell the recipient what is in the attachment or at the Web site. Without that information, they may be hesitant, for security reasons, to open it or go there. If you do send attachments, ensure that they contain identifying information and page numbers, so the recipient can assemble them correctly. A complete attachment should be able to stand on its own, without the accompanying e-mail.

Address lines

Enter all addresses last, just before you are ready to send the e-mail. This way you will ensure that the e-mail is not sent with errors, or before it is complete. Use your system's address book to minimize errors when typing addresses. Also consider using group mailing lists to simplify addressing, as long as you en-

sure that all on the list really need to receive the e-mail.

Think carefully about to whom the e-mail is sent, who will receive a carbon copy (Cc:), and who, if any, will receive a blind copy (Bcc:).

- Direct (To:) recipients are expected to take action with regard to the e-mail.
- Carbon copy (Cc:) recipients are provided the e-mail for information, not action. Do all Cc: recipients really need to receive the information in this specific e-mail?
- Blind copy (Bcc:) recipients receive the e-mail for information, but other recipients are not aware 'blind' recipients were included in the mailing. Know how your e-mail system manages blind copies. Is the blind copy list just not visible, or is it actually not sent out with the original e-mail? If a Bcc: recipient uses "Reply All" to respond to recipients of the e-mail, the other recipients may learn there were blind copies. As an alternative to using Bcc:, consider forwarding a copy of the original e-mail to those you did not want to include in the original carbon copy.

A few other items to consider:

- Use the "Return Receipt" only when you really need to confirm someone got the e-mail. Some recipients find this option offensive.
- Use the "High Priority/Urgent" indicator sparingly and remember that what you consider urgent may not be urgent to your reader. If the topic is really urgent, perhaps this issue warrants a phone call rather than an e-mail.
- Plan on an alternate medium for those who do not have access to e-mail.
- If there are some standard or similar e-mails you write repeatedly, create a template for them.
- A watermark or wallpaper background on e-mail can be distracting, can make the e-mail slower to transmit and display, and can take increased storage space.

Before hitting the “Send” button, use your spelling and grammar checker. Don’t automatically accept all of the changes the checker may want to make. Look at each one to be sure it is what you intended.

Managing Your E-mail

Underlying the guidelines for managing your e-mail is the idea of proactively managing your e-mail rather than letting it control you.

The first guideline is to actively determine when you read and respond to your e-mail. Check your mail on a planned, regular basis, rather than letting it continuously interrupt your other work. Do you really need to have the audio indicator on and respond when it tells you that a new e-mail has arrived? Do you only need to be notified about the arrival of an e-mail from one or a few specific individuals?

Second, establish a prioritized approach to reading your e-mail. Use your e-mail application to sort your e-mail by sender, date, topic, and/or subject, or set up and use filters. Delete junk mail – urban legends, most requests for financial assistance, chain letters, unbelievable offers – without opening it. You should be able to identify junk e-mail by its sender or subject. Then work through the rest of your mail in an organized manner.

- For security, don’t open attachments to e-mails from senders you don’t know or topics with which you are not familiar.
- Read all of the mail on a particular topic or subject before you start replying. One of the other recipients may have already taken care of the action or answered the question. The electronic discussion may have progressed, or there may be no further action needed.
- If an e-mail isn’t clear, read it again. If it still isn’t clear, call the sender to resolve the confusion in real time.
- If an e-mail is emotional or strikes an emotional chord in you, reread it. If the emotional response is still there, put it aside for a while before you respond.

Keep what’s in your In Box to a minimum – those e-mails that are unread or require a response or some other action. Set up directories or folders to make it easier to find the e-mails you send and those you receive and save. Only save those that you think you will need at a later date. Only print an e-mail when it is absolutely necessary.

Responding to an E-mail

Once you have reviewed all of your new, non-junk e-mail, determine how you will deal with each one. Not all e-mail will need a response, and you may want to think twice before sending another e-mail that only indicates receipt or thanks.

Arnold provides a checklist of options for each e-mail, to make it possible to ‘handle’ most e-mails only once:

- Delete the e-mail – without opening it, based on sender or subject if it is junk or irrelevant; after reading it if it does not require any action and there is no reason to save it
- Reply to the e-mail – within the agreed upon time frame
- Act on the e-mail – immediately if you can do it in a few minutes; or leave it in your In Box or place it in an Action folder to do it later
- Forward the e-mail – for information, to delegate action, or, with explanatory comments, if it was misdirected to you
- Save the e-mail – if you will need it at a later date, to a specific directory, or to a Temporary folder for later sorting

If the e-mail requires some type of response, the guidelines for writing e-mail apply. In addition to the preceding pointers on content and format, consider the following:

- Do you need to reply to the sender, or to all recipients? Do all need to know? Will this create an unnecessary e-mail for some or all of those on the To: or Cc: lines?
- How soon is the sender expecting a reply? In many cases, if a response date is not indicated, people expect a response within 24 or 48 hours during the work week. If drafting the response

or gathering needed information will take longer, consider sending an interim response with a date when you expect to be able to provide the complete response.

- What should be included in your response to ensure that the recipient knows what you were responding to and understands your response:
 - o the whole original message, generally following your response, possibly leading to a thread of a discussion through an exchange of e-mails with several iterations;
 - o excerpts from the original message; or
 - o no information from the original email.

Be aware of how your e-mail application is set up and whether it will automatically include all of the original e-mail or none.

- Do you need to return any original attachments? In that case you may need to “Forward” the e-mail back to the sender rather than using “Reply”. Do you need to include any new or revised attachments, or references to Web sites?
- Review the subject line and, if needed, change it to be consistent with the topic of the response.
- If including your responses within the text of the original e-mail, use a different font or color to make your items identifiable.
- Use proper names or nouns when referring to individuals, groups or organizations in your response, rather than pronouns. It can become difficult to distinguish multiple references to she, he and they.
- In addition to checking spelling and grammar before you hit “Send,” make sure you address all needed items in your response.

A few other items to consider:

- Be sure you have some type of approval from the sender (either through specifically asking, or based on the history of the discussion) before forwarding their e-mail on to another person.
- If you receive a misdirected e-mail, forward it to the correct recipient, if known, with a brief

explanation, and Cc: the original sender, or just return it to the sender with a brief explanation.

- If you are away, set up an auto response indicating you are away and how/when your mail will be handled, or have your mail automatically forwarded to another address/individual.
- If you’ve had two or three exchanges of e-mail with an individual and you still haven’t resolved the discussion, a phone call is probably a more effective means of communication for that issue.

A Final E-mail Checklist

The following checklist will help you use e-mail more effectively.

Is e-mail the most effective communication medium for your message?

If you are sending an e-mail:

- Is the purpose clear?
- Are expectations for recipient responses clear?
- Is all needed information included, attached, or referenced on the Web?
- Is the e-mail readable on a computer screen?
- Is the subject brief and clear?
- Is the e-mail being sent to the right people for action or information?

If you are responding to an e-mail:

- Have you responded to everything?
- Is your response clear, both in content and format?
- Are you responding to the right people?

The e-mail functions and tools mentioned in this Innovation Insight may be implemented differently in different e-mail systems. If you need assistance locating or using any of them, check with your own internal information technology services specialist to see how they work in your system.

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