Email Manners & Management

Tips to leverage email without having it run your day or ruin your relationships.

SANDRA LANE

Have you ever received an email that offended you, seemed abrasive, ambiguous or was riddled with grammar errors?

Have you ever hit the 'send' button and a split second later you regret it because you forgot an attachment, wished you could add one more thought or missed an error even though you read it through 12 times?

We all make mistakes. However, when it comes to communication, in the workplace, electronic mail is critical and we may not have a second chance to rectify an inappropriate message.

This e-book will provide you with 10 strategies for extending respectful and effective email communication which will elevate your personal and professional brand.
As well as, 10 strategies to improve your email habits and inbox management to maximize your productivity.

Email Etiquette

Why is email etiquette important?

The content and style of your message **conveys your professional personal image along with your company's image.**

When you frame your message succinctly and tactfully it can save time and **avoid miscommunication** for you and the recipient(s).

Sending an email that is grammatically correct **demonstrates respect** to your colleagues, email community and clients.

Sandra's Top 10
Email Etiquette Tips

Tip #1 Salutations and Closings

If you offend someone in your initial greeting you could immediately lose their attention in the first sentence of your email.

Begin with a professional greeting such as:
Hello _______,
Hi _______,
Good Morning ________,
Good Afternoon _________,
Greetings _________,

Your greeting should be followed by the name of the person receiving your email. While every circumstance is different, a good rule of thumb, when you are writing to an individual for the first time, is to be conservative when addressing the recipient.

Conservative greetings include the use titles such as:

Mr.
Mrs.
Ms.
Professor
Dr.

If the recipient replies with their first name or personally invites you to use their first name, then you can drop the formal titles in future messages.

What's in a name?

Unless you are invited to do so, please do not take liberties to shorten or create a nickname for a co-worker, client or colleague.

-Your colleague, Julia may take offense to being referred to as 'Jules'.

-Your client, is Michael until he tells you to call him 'Mike'.

-If your relationship with an individual is becoming more familiar, you can certainly pose the question to and ask, " Would you prefer Greg or Gregory?"

Consider your current relationship with the recipient when you close your email.

An email to a new client, job prospect or someone of higher rank than you will have a more formal closing than an email to a friend, long time business associate or co-worker in your department.

No matter the relationship status, these closings are all appropriate:

Kind regards,
Looking forward to hearing from you,
Regards,
Sincerely,
Thank you,
Thanks again,
With appreciation,
With gratitude,
Yours sincerely,
Best,
Best Regards,

Tip#2 Content is King

On average, 200 billion emails are sent daily. Most people complain of an overflowing inbox. Therefore, it's very unlikely any email you send is read word for word but rather it is **skimmed.**

If you have something important to say, a Call-to-Action or a time sensitive directive, it is up to you, as the sender, to craft an email that is succinct and as easy-to-read as possible.

Long, verbose paragraphs with a request buried in the body of the email will **be overlooked.**

Be concise and clear with your message and structure the email so it's easy on the eyes.

- **Use bullets or numbers** to make the content more organized.
- Use **headings, underline and bold face** type to help items stand out.
- Call -to-action items will surely be noticed in a **different font color.**

Using all of these tools in one email could be distracting, please use with discretion.

Tip#2 Content Illustration -A Tale of Two Emails

In the email below, can you find the timely request from the sender?

Hello Mike,
I wanted to check in and see how the budget analysis is coming. I know it's been a couple of years since we've instituted these budget policies but I think it will be for the betterment of the company and each individual department. In addition to helping us with the future forecasting, this analysis will assist with the funding plans, purchase opportunities, inventory control, debt control and financial planning. Just as a reminder, please secure a meeting with your department within the next week or two and gather the data you need to complete the attached spreadsheet. I know there may be some time invested on the front end with meetings, calls and data entry but it will be worth it on the back end. We'll have this data at our fingertips and I plan to see us make good use of it for years to come. I appreciate your time and hope to receive the completed documents no later than 2 weeks from today. Please call is you have any questions.

The same content from the email above is restructured below, providing the recipient with an easy-to-read format.

Hello Mike,
I wanted to check in and see how the **Budget Analysis** is coming along.
The benefits of this work by you and your department include:

- future forecasting
- funding plans
- inventory control
- debt control
- purchase opportunities
- financial planning

I suggest planning dates with your department **no later than November 10.**

This will give you enough time to **submit your spreadsheets to me by November 15.**

Please **share your plans in a reply to this email.**

Tip#3 Subject Lines

If you want your email to be opened promptly, the subject line window will reveal 2-3 words, **choose your words with care.**

If there is a time sensitive response required- be sure to say so in the subject line.
For example:
Reply by _____ date
Ideas needed by _____ date

Please refrain from:

- use of all CAPITAL letters
- excessive use of exclamation points
- abrasive commands such as: 'Open Now'

If you were referred by someone include that person's name in the subject line:
Referred by Mike Campbell
Potential collaboration (Name)
Inquiring about (Name)
Project Meet (Name)

Bonus tip- Subject Lines

When an email subject starts to change in content, start a new email thread or amend the subject line.

For example:
If an email thread began with the topic of **Budget Analysis and shifts to Forecasting** for next year then, hit reply and amend the subject line to reflect the subject change or start a completely new email thread.

Ideally, it is best to **keep the email subject to one topic** only rather than overwhelm your recipient with too much information in one email.

Tip#4 Be Professional

Email communication is **not texting**.

Email communication is the modern day version of writing letters and should be treated with similar niceties.

Proper grammar counts here. Punctuation, spelling, overuse of capitals or exclamation points, use of emoticons, acronyms and slang writing common in texting does not have a place in professional emails.

Today, we have a multi-generational work culture. Your email recipient could be a Baby Boomer, GenY, GenX or a Millennial. Don't assume your recipient will understand your language.

Be conscientious, courteous and business-like to avoid miscommunication or misinterpretation.

Tip#5 Email Signature

An email signature is a representation of your professionalism and company image. Within your email settings you can create a signature that will automatically appear in each email you send.

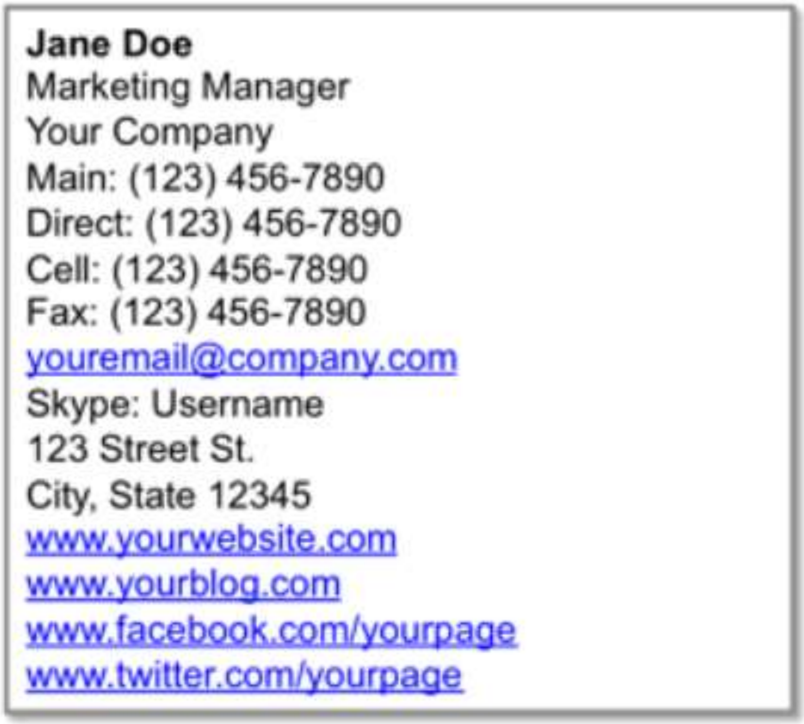
A basic signature should include: Name, job title, direct phone line and company name.

Some other considerations you may see in email signatures. Use with discretion.

Company Website link
Personal headshot
Company logo
Quotes
Links to Social Media
Legal disclaimers
Call to Action links

Tip #5 Signature Illustration

Going a little overboard here....



Jane Doe
Marketing Manager
Your Company
Main: (123) 456-7890
Direct: (123) 456-7890
Cell: (123) 456-7890
Fax: (123) 456-7890
youremail@company.com
Skype: Username
123 Street St.
City, State 12345
www.yourwebsite.com
www.yourblog.com
www.facebook.com/yourpage
www.twitter.com/yourpage

Tip #6 Respond within 24 hours

Professional business etiquette dictates a
response to an email should be within 24 hours.

It is possible a request in the email is in a
holding pattern, you are waiting to hear
from someone else or need additional time
to compose your reply.
Don't wait for all answers to come in.

Show respect to the sender by
letting them know the email has been
received and read by you and provide them
with any information you can.

For example:
"*Message received. Waiting for Mary to get back to
me and I will follow up with the details shortly".*

If an email contains a request for information
and goes unanswered for any longer than
24 hours- the sender is wondering...
Did you get it? Why haven't I heard back?
Are you ignoring me?
And will likely send another email or call you.

Tip #7 Full Proof Email Construction

Have you ever sent or received an email without an attachment, missed including a thought or contained a misspelling?

While we are not perfect individuals oftentimes you only have **one chance to make a good impression.**

Here is your step-by-step guide to the fool proof construction of any email.

Consistent repetition of this order of operations will make it stick.

1. **Add your Attachment(s)**
2. **Compose the Content of Email**
3. **Type in your Subject line**
4. **Review everything. Don't rely entirely on spell check.**
5. **Add Recipient in Address box**

Tip #8 Use 'Reply All' sparingly

Think twice before using 'Reply All.' This is a helpful tool to keep others informed however, do not loop colleagues into the conversation when it’s not necessary.

We should all be advocates for less email distribution so refrain from hitting 'Reply All' when it's only necessary to respond to the sender.

Bonus Tip: Use of CC and BCC

Use the CC (carbon copy) address box when you want to be transparent and make others aware of the email you are sending and to whom.

Use the BCC (blind-carbon copy) address box to:

- Send emails with a **large list** of recipients.
- **Protect the privacy** of recipients especially when they do not know each other.
- **Secretly include another** recipient. Please observe ethical discretion when using for this purpose.

Tip #9 Respect your Address List

Do not abuse the use of your business email list.

Refrain from sending out information for your children's fundraisers, personal party invitations, jokes or any content unrelated to business.

If want to send personal information or invites to a business colleague or co-worker, I suggest you ask for their permission to do so and request their personal email address.

My recommendations are general rules, please use your discretion based on the nuances of your business and co-working relationships.

Tip #10 Don't send an email if…

1. You are **emotionally charged, angry, anxious or sad.** These feelings will impact the tone and content of your email. You may later regret what you write and send. I recommend you take a night and sleep on it and then consider your response in the morning.

2. You are **in conflict with someone.** Email communication is one dimensional and flat. Your recipient cannot hear your voice inflections, sincerity or tone. It's best to resolve conflict with a phone call or in-person meeting.

3. You have anything **personal or confidential** to share. Nothing is ever private in email. Avoid sharing negative or confidential information electronically.

Email Management

With over 200 billion emails sent world wide, there is no doubt email is a preferred mode of business communication.

Here are my top 10 strategies to set boundaries and set up systems for leveraging email communication to maximize your daily productivity.

Tip #1 Don't let Email Distract You

We have come to expect constant accessibility of others and with that expectation comes constant reaction. It is commonplace to stop what we're doing in order to look or respond to each ring, ping or ding we receive.

This responsive work style is not productive and prevents you from doing any **deep work.**

I suggest you **turn off the notifications** for limited periods throughout the day, allowing you to fully focus on your primary task.

Add email processing to your list of daily tasks and integrate it into your schedule.

Tip#2 Don't just Check Email, Process It

Designate 3-4 times/day to
to open, read and process your email.
This may take
15- 60 minutes depending on how
much you receive.

Scheduled time to process email is
productive and strategic in two ways:

1. It prevents you from interrupting your intended tasks to react to every email ping.
2. It provides you with a designated window to focus on processing your email in order to maintain a less cluttered inbox.

Processing steps after reading an email are:
Delete
Reply
Forward
File it

Tip#3 Clean up your Inbox

An email inbox should not be used as file storage for all emails. When an email inbox is overflowing with everything from junk mail to important documents it is similar to papers piled on a desk. It is difficult to see what's important and we become distracted by the excess.

Once you've processed an email (read, reply, delete or forward) and need to retain it for reference, I recommend you create labeled folders for storage.

Choose what suits you:

- Date, client name, project name, or a combination.
- Use **sub-folders** nested under a broad label. For example: Administration (accounting, sales, operations)
- Label folders **by Action.** For example: (Read Later, Reply by End of Day, Prospect Calls)

Tip#4 Divert less important Emails

Product offers, newsletters,
blogs and unwanted deals can
clutter your inbox and become a visual
distraction. Use your email provider's
filter options to divert emails
from landing in your inbox.

Tip#5 Unsubscribe

Use free apps such as **Unroll.me** and **Unlistr**
to quickly unsubscribe from unwanted emails
which can also clutter your inbox.

Tip#6 Create Templates

If you find a pattern of repeat inquiries in your inbox, the use of general templates can save you writing time.

Basic questions about your business or services will often have a similar response.

Create different reply templates specific to those repetitive requests. Carefully cut and paste your response.
Be mindful to change/add specific details to design an email which includes your personal touch and not one that seems formulaic.

Tip#7 Make the Call

Here are circumstances that warrant
a **call rather than an email**:

1. A written response is demanding more of your time to compose due to it's delicate subject matter.
2. The message will contain confidential content.
3. You anticipate a flurry of back and forth email exchanges.

A 5-minute phone call can spare you 5 emails in your inbox, several minutes of processing time and avoid any misinterpretation of your intent.

Tip#8 Use your 'Out of Office' Reply

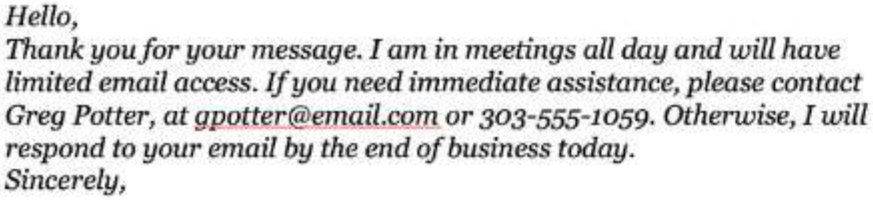
The 'Out of Office' Reply feature is typically used when we are literally out of the office and/or away on vacation.

However, in order to cultivate change in your email response habits and adjust the expectations of those within your communication circle this is a helpful tool.

The 'Out of Office' Reply can inform your colleagues their email has been received and you have every intention of responding but not within 10 minutes of landing in your inbox. Why do we do this?

Using this feature will also provide you with the opportunity to perform focused work without the guilt of temporarily turning off your email notifications.

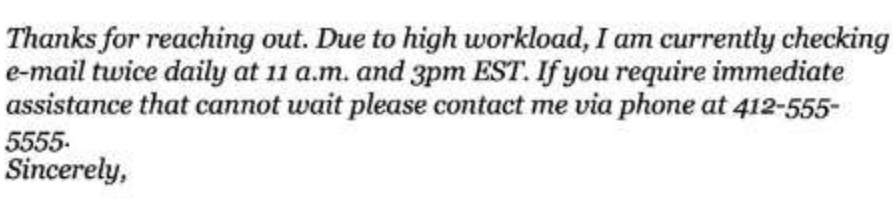
Tip #8 'Out of Office' Reply Illustrations



Hello,

Thank you for your message. I am in meetings all day and will have limited email access. If you need immediate assistance, please contact Greg Potter, at gpotter@email.com or 303-555-1059. Otherwise, I will respond to your email by the end of business today.

Sincerely,



Thanks for reaching out. Due to high workload, I am currently checking e-mail twice daily at 11 a.m. and 3pm EST. If you require immediate assistance that cannot wait please contact me via phone at 412-555-5555.

Sincerely,

Tip#9 Go to Zero

If you have an overwhelming backlog of emails in your inbox and cannot find the time to sort, organize and clear them up, here is your cheat move to begin at zero.

Create a folder labeled with the date of the oldest email in your inbox to the most recent email, i.e January 2018- recent date. Click, drag and drop all the emails from your inbox into the dated folder. Whalah!! You are starting with a clean inbox.

Moving forward, I strongly encourage you implement the tips I've shared to keep your inbox lean and clutter free.

Tip#10 Disconnect

Where Americans Check Email

While Driving	18%
In Bed	50%
In the Bathroom	40%
On Vacation	79%

Source: Radcati 2021

So many of us are tethered to our devices to a degree that should alarm us all.

I suggest taking steps to purposefully disconnect from devices periodically.
This disconnect will give your brain and body a chance to recharge creatively, be more present in the company of others, relax and decompress from the constant stimulation.

Your email will still be waiting for you. Trust me.

Here's how you can steps take towards
that intentional disconnect:

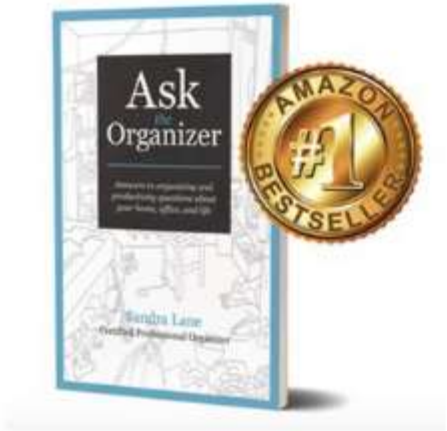
- Leave your phone **docked** on your charging station in the evenings and weekends.
- Be bored. See what it feels like to just **be still**.
- Use your **'Do not Disturb'** setting.
- Build your **screen time awareness.** How much time and what apps are drawing your attention? Check your 'Settings' to view your screen activity.
- Wean yourself from those above mentioned apps by **removing them from your phone.**
- Spend time with people who already have established habits of disconnecting.

When used with good judgement, electronic mail
is a powerful and priceless tool.
I hope you find this e-book to be a resource for
healthy and respectful connections.

ORGANIZATION LANE

Getting you on the Road to Productivity!

Let's stay connected...
Facebook
Linked In
organizationlane.com


Ask
the
Organizer
Sandra Lane
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