

Email Etiquette Checklist 226



Introduction

Email is integral to both business life and personal communication. It is also, however, an easy tool to misuse. Ineffective use can lead to unintended confusion, create a bad impression of the sender's employing organisation or even result in legal penalties. Poor email etiquette and practice can also contribute to more general major stressors for managers, including time pressures, poor communications, information overload and frequent interruptions.

As regular users and receivers of email, most people at some point experience or send emails in haste that:

- are poorly written or nonsensical
- have words missing or incomplete sentences
- are either extremely abrupt or ramble endlessly
- are unclear in their meaning
- make us feel the sender is being flippant, rude or even abusive.

Few individuals send emails like this intentionally, but the speed of the medium means it is all too easy to give recipients a wrong impression about what we mean by sending over-brief, over-long, mistyped or poorly-considered messages.

This checklist aims to give managers some guidance to help ensure that email messages within their teams make good sense, contribute to good communications, give a good impression of individual employees and their organisation, and cause no unintended problems such as the potential for defamation or loss of business reputation. There have been many well documented instances of emails being forwarded unwisely.

Definition

Email etiquette is the observance and communication of generally accepted standards of sense, grammar and politeness when sending email messages.

Action checklist

1. Presentation and formality

A careful approach is advisable for business communications. Email may seem to be very private and impermanent, but company policies usually advise employees of possible monitoring, and messages are often retained and traceable for a long time. Unlike personal emails, those linked to work represent your organisation, so reasonably formal presentation and language is advisable.

Your manner of address will depend on context, and on knowledge of the person contacted. It is common practice to start simply with the person's name. This can be first name, if you know the person, or title and surname if the communication is more formal. Some people can find this a little abrupt. The less formal 'Hi' or 'Hello' with those you know or who have contacted you initially may be more appropriate. Sign off formally or less formally, in accordance with your manner of address (e.g., 'Yours Faithfully' for formally addressed recipients whose names you don't know; 'Yours Sincerely, for formally addressed recipients whose names

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you do know, and 'Regards' or a similar casual sign-off for recipients addressed less formally). Include a telephone number, email and postal address in your signature line, for the convenience of all external recipients. This has been a legal requirement of The Companies (Registrar, Languages and Trading Disclosure) Regulations 2006 (more commonly known as The Companies Act 2006) since 1st January 2007.

Most organisations have policies and guidelines on email use and presentation, so ensure that you know and abide by the contents of these documents.

2. Use good practice for written business communication

As with all effective written business correspondence:

- be brief and succinct, but warm and polite
- keep things simple and clear, focusing on one subject per message
- avoid jargon, 'smiley'-style symbols, unexplained acronyms or abbreviations
- write in full sentences
- don't use capitals as this is electronic 'shouting'
- avoid using flashing text or other special formats
- don't use text language
- use good grammar and punctuation, and check your spelling
- explain what your email is about – never assume recipients already know
- avoid demands for urgent or immediate replies – just suggest an early reply would be appreciated, where this is the case.

Communicate only those things you would commit to paper, or want seen by colleagues or outside contacts.

3. Structure your message in a logical way

Use a logical structure to present and support the sense of your message. The three-part format below is frequently advised:

- clarify your reason for sending an email
- give the facts
- conclude with appropriate, related actions, proposals or comment, as necessary.

4. Avoid strings of messages, where possible

A 'history' of previous linked messages in a string of communications may be helpful in some contexts (for a long-running, email discussion, for example, or in some group communications). But for new subjects, or if a new communication does not relate back to previous messages, avoid sending a history string, especially using the same heading text. When forwarding messages, it is easy to end up with a long list of headers and signatures which make messages needlessly large, often obscuring their meaning. Remove extraneous information before forwarding a message, including only that which is relevant to the immediate recipient.

5. Think before sending and accessing emails

Email is a blunt and immediate form of communication. When face-to-face with others, or using the telephone, we naturally use various non-verbal means and cues, such as facial expression or voice tone, to convey our full meaning, and interpret that of others. Emails, however, contain only words and thus can be very quickly written, and are easy to send unthinkingly.

Re-read and think about each message before sending it. Think about who will be reading the message and how it will be received. If you are feeling angry or upset, draft the message, but don't send it. Re-read it later, considering your words and meaning more carefully, when you are feeling more rational. If the message reads negatively, consider using a different means of response.

It is also tempting to read every email as soon as it arrives, regardless of how unimportant or low priority it may be. Disciplining yourself to using email only at appropriate times of the day is important for time management and allows managers to concentrate on the task before them, not a PC or their Blackberry.

6. Make good use of the 'subject' line

Always use the subject line. Most people receive lots of emails, and prioritising them can be hard (especially after a period away from work). Save recipients' time by wording subject lines to give a good sense of the nature, purpose and relevance of the message. However, keep subject lines short.

7. Group messages

When using group messages, retain the thread by ensuring that you keep the same subject message for all replies to the group, or to individuals within it. Do not, however, reveal the email addresses of all members in the message header, unless group members know each other well enough to accept this (for internal use) or have given explicit consent for their email addresses to be revealed (for external recipients). This is important as email addresses can be used both deliberately and inadvertently for unintended use by marketing agencies or by automated spam mailers. It is a breach of data protection legislation to pass on e-mail addresses to people without permission. Avoid this by sending yourself a message and put all the recipients in the bcc: field to protect their privacy. Never re-use someone else's cc: field to send a message, especially one that comments adversely on someone else – they may just be on the cc: list or their friends are.

8. Use of 'urgent' markers or other email facilities

'Urgency' flagging is useful to draw attention to messages that need to be read quickly, or are important, but should not be used too casually. If a message really is very important, use the telephone or see the recipient personally, as emails are not always dealt with at once, and 'out of office' is not always used when people are away. In a similar vein, avoid the routine and unnecessary use of both 'delivery receipt' and 'read receipt' facilities or copying in of others using either cc: or bcc: facilities.

9. Avoid humour, irony or sarcasm

People you know may understand your character well enough not to misread or misunderstand your message, but within a business context, humour and irony are best avoided, while sarcasm should not be used at all.

10. Sending large attachments

Large attachments can cause problems, so check with recipients before sending these, or send a link to access the file rather than attaching the document itself.

Don't forward chain letters, messages about "hoaxes", or attachments that you haven't safely opened. Inform others at once if you discover that you have a virus, because it has probably opened your email address book and sent itself to everyone there.

11. Clarity of ownership and legality

It is important to avoid plagiarism or confusion about the authorship of messages. If you use someone else's text in a message, acknowledge this, and make clear any changes you have made when you send it on. You should never send emails in someone else's name, use another person's email account, or allow others to use your email account.

As well as copyright, email is subject to all the other laws covering written communications. These include the legislation on:

- wrongful discrimination
- obscenity
- display of registered company name and other details
- data protection
- freedom of information
- defamation of character
- fraudulent misrepresentation

Messages should be treated as 'instant letters' that could become public. Email etiquette and legal responsibility go hand in hand. It's easy to cross a line without trying, possibly just by using Reply-all and Send. So do be mindful of any risks before communicating in this way.

12. Keep your email in order

Respond promptly to messages, and delete or file all messages received, after reading them. Create subject folders to hold messages you need to retain, with a separate file for attachments sent and/or received. When sending and receiving emails with attachments, it is good practice to file these separately from the email itself (or delete them once read) to relieve the burden on your email program and save storage space in your inbox.

Managers should avoid:

- replying too quickly to messages that make them angry or upset
- sending irrelevant or over-expansive messages
- making personal comments about others in email messages
- underlining in emails (indicates hypertext in web-linked environments)
- using capitals as signifies shouting
- copying people in to messages unnecessarily
- using email for sending classified or otherwise sensitive material
- using email instead of personal contact for personnel management issues
- ignoring the inherent legal implications of poor email use.

National Occupational Standards for Management and Leadership

This checklist has relevance to the following standards:

E: Using Resources, unit 4

Additional resources

Books

The magic blackberry how to upgrade your relationships at work: a personal fable, David Thompson
London: Marshall Cavendish, 2010

The fine art of confident conversation: how to improve your communication and build stronger relationships, Debra Fine
London: Piatkus, 2008

The hamster revolution: how to manage your email before it manages you, Mike Song, Vicki Halsey and Tim Burress
San Francisco, Calif: Berrett Koehler, 2007

This book is available for loan to members from CMI's library. More information at:

www.managers.org.uk/library

Internet resources

The Companies Act 2006 www.companieshouse.gov.uk/companiesAct/companiesAct.shtml

Related checklists

Email and internet policy (165)
Complying with the Data Protection Act (220)

This is one of many checklists available to all CMI members. For more information please contact

t: 01536 204222 **e:** enquiries@managers.org.uk **w:** www.managers.org.uk

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