Metro | *Making a great place*

Effective Email

Instructor

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Effective E-mail – Course Overview

- **Why Is E-mail Usage Still a Problem?**

  - 30 years of practice – same old problems
  - Communications Tool (i.e. "Social Media") used to create and deliver Business Documents
  - It *feels* conversational, but it's not
  - Messages are *published*

- **Importance of Proper E-mail and Internet Use**

  - Legal Restrictions and Implications
  - Company Policy
  - Special Issues for Public Sector
  - Professionalism
  - Effective Communication
  - Functionality

- **Etiquette: Expectations, Problems and Solutions**

  - Common E-mail Mistakes
  - Problems and Solutions for E-mail Senders:
    - Header Info
    - Content
    - Sending, Replying, Forwarding
  - Summary of Etiquette Guidelines

- **Strategies for Success**

  - Composing (Planning and Writing)
  - Proofreading/Editing
  - Managing Messages

- **Additional Resources for Effective E-mail:**
  http://puck.topcities.com/workshop/metro/

Importance of Proper E-mail Use

- **Legal Restrictions & Implications**

  - *Spam/Harassment* – E-mail falls under various federal and state laws.
  - *Liability* (Technical, Marketing, Financial) – What is written in an e-mail may have contractual implications regardless of intent or source.
  - *Copyright/Ownership* – Generally, all e-mail content is "owned" by the employer, not the worker, for company hosted e-mail. This includes occasional, permitted personal use.
  - *Appropriate Use* – Companies have the right to set appropriate use policies and related procedures.

- **Special Issues for the Public Sector**

  - *Public Domain/Public Access*
    - Most documents created by public sector employees are "owned" by the public.
    - Public records laws govern how access is granted.
    - Exceptions included some personnel and financial documents (unless court grants access).
    - Privacy rights of staff, contractors or citizens may conflict with public access rights.
  - *Archiving rules* apply to most public records (including e-mails).
  - *Image and Reputation*
    - All documents created by public sector employees should be considered "published" for public review.
    - Regardless of rules or laws, perceived lapses of professionalism or ethics will reflect on the agency or service.

- **Metro Policies**

  - *Guidelines to E-mail Management* (Available through Intranet via Information Services Management)
  - Public records policies governed by E.O. 69, E.O. 76, E.O. 91
  - Code of Conduct?

- **Effective Communication/Functionality/ Professionalism**

  All business documents, including e-mails, should strive for a clear message with appropriate tone in a deliverable form.

E-mail Etiquette & Strategies

- **Common E-mail Problems**

  - Address errors
  - Long messages or attachments
  - Misleading or vague subject lines
  - Inappropriate content
  - Lack of discretion in responses
  - Inappropriate copying and forwarding

    *Source: John Edwards, "The Six Most Common Mistakes in Sending E-mail," **Bottom Line Business**, October 1997.*

- **Summary of Etiquette Guidelines**

  - Keep e-mail messages concise, professional and relevant.
  - Proof your message before sending.
  - Revise and edit as needed.
  - Do not e-mail complex, sensitive or confidential messages.
  - Quote sparingly.
  - Confirm recipients' interest, involvement, and addresses.
  - Use a clear Subject line.
  - Send attachments only when necessary.
  - Use discretion when replying to e-mail.
  - Do not flame.
  - Do not send/forward inappropriate material.

- **Strategies for Successful E-mail**

  - Use **P**(urpose) – **A**(udience)-**T**(echnique) process.
  - Compose off-line.
  - Take time to proofread and edit.

Remember: Poorly written and/or managed electronic communication reflects on you and your company's reputation. Well executed e-communication works better to get your message across quickly and effectively.

Tips for Electronic File Management

- **Decide when to "Store," "Archive" and "Backup"**
  - Storage: Saving files to be used again, Ready/local access
  - Archiving: Record retention, "Permanent" storage, May be compliance driven, Usually centrally located
  - Backup: Data storage for emergency use, Periodically updated, May be local or centralized

- **Develop a system for naming documents and folders**
  - Consistent naming strategies ensure quick and easy retrieval.
  - Standardized naming allows for shared document development, use and editing.
  - Customize folder names for clarity if desired (e.g., "My Documents").

- **Use file format options to view, search and share documents**
  - Use common file types when possible.
  - Use "rich text format" (.rtf), text only (.txt) and web pages (.html) for universal compliance.
  - Sort/search documents by format.

- **View and search using document details**
  - Utilize "properties" details to view, sort and search for documents.
  - Customize properties to include author name, title, subject, etc.
  - Use standardized properties for shared documents.
  - In Windows, use Explorer, Search and Integrated File. Management (Outlook) to view, sort and search.

- **Use search tool to find files or e-mail messages**
  - Search using common or customized criteria.
  - Target by content, location and type.
  - Use AND/OR logic carefully.
  - Utilize wildcards (?, *) when uncertain of spelling or phrasing.

- **Integrate e-mail into local file management**
  - Store messages and/or attachments in custom folders (separate from e-mail server and/or e-mail local folders).
  - Use filters and auto/manual message receiving to sort and block messages and attachments.
  - Some e-mail tools (e.g., Outlook) allow for direct application integration. Use them!