E-mail Best Practices

By Ingrid Sapona, BSJ, JD

People often complain that others do not respect the rules of e-mail etiquette. But etiquette relates to social convention, which means it is subjective. So why not shift the conversation to e-mail best practices that can be supported by rational explanations? This should help make people more willing to buy into them.

E-mail best practices fall into two categories:

1. The basics – threshold practices that apply across the board; and

2. E-mail efficiency – practices and ways to promote efficiency.

The Basics

E-mails require a degree of formality

E-mail is a hybrid communication method: it facilitates quick exchanges of information, like voice mail; but it creates a permanent record. So it is especially important that you avoid e-mailing anything that might be – or that might be perceived as being – libelous, defamatory, or offensive.

Though e-mails do not require the same formality as letters, you should use standard spelling, grammar, and punctuation both to avoid confusion and to convey a professional image.

- **Best practice:** Messages should be as concise as possible. Using simple language and short sentences will increase the likelihood of receiving a quick response. Avoid using abbreviations (especially those popular in text messaging) because the recipient may not be familiar with them. Do not use emoticons in business e-mails.

Use “reply” and “reply all” appropriately

First, I must admit these functions are pretty handy. The problem is that using them is habit-forming, so people use them mindlessly. The bottom line is that some e-mails simply do not warrant a reply. Before you hit “reply” – even if you are just sending back a quick “thanks!” – remember that for every e-mail, the recipient must do at least two things: read it and delete it!

The single biggest complaint people have about e-mail is that they get too many, even from colleagues and clients. It turns out that indiscriminate use of “reply all” is the biggest contributor to excessive business e-mail.

Use of “reply all” presents a couple of unique issues to keep in mind. First, people are sometimes included in e-mail groups for reasons they may not understand or appreciate. Unfortunately, there is little they can do about having been so included. When someone in the group uses “reply all”, each person ends up with an e-mail they probably do not want. The second unique problem is that if you get a message from someone who used “reply all”, you may waste a couple more minutes trying to figure out who the sender is and why you received the message.

- **Best Practice:** Before replying to any e-mail, you must be vigilant and always ask yourself whether the message truly requires a reply. Before you use “reply all”, ask yourself whether everyone on the list wants, or needs, to see your reply.
- **Tips:** If you are working with a group, establish parameters at the outset regarding e-mailings. Some may always want to be “in the loop”, but some may prefer only to be included at certain critical stages. Another step your office can take is to reconfigure your e-mail program to force users to go through additional steps to use the “reply all” function. (This is an option, for example, using Information Rights Management tools available with certain versions of Microsoft Outlook.)

Protect others’ privacy by using “bcc”

When you address an e-mail to more than one person in either the “to” or “cc” (carbon copy) field, every recipient sees who received the e-mail and they can determine each recipient’s e-mail address. Because business e-mail addresses can be considered private information, making someone’s address available could be a breach of privacy. Using only the “bcc” (blind carbon copy) function avoids privacy issues because the recipients remain anonymous.

- **Best Practice:** Use the “bcc” function unless you have permission to reveal someone else’s e-mail address. If you anticipate exchanging e-mail among people in a group, seek agreement at the outset regarding “cc’ing” or “bcc’ing”.

E-mail Efficiency

Let people know when you are out of the office

“Out-of-office” automatic responses help set peoples’ expectations regarding when they can expect your reply.

- Best Practice: Customize your “out-of-office” message instead of relying on default wording. Include useful information, like: whether you will be checking e-mail periodically; the date you expect to be able to reply; and the name of an alternative contact for prompt attention.

Let people know when you are e-mailing from a Blackberry or other PDA

If people know you are using a PDA, they know the screen you are working with is small so they are more likely to keep their messages brief and will accept shorter, more direct messages from you. As well, most people will appreciate that if you are communicating via PDA, your ability to access attachments may be limited.

- **Best Practice:** Adding a line to your message that reads, “this is from my Blackberry”, is a simple way of letting people know you are communicating via a PDA.

Use meaningful subject lines

The subject line should give the recipient useful information about the subject of the e-mail and its importance. Meaningful subject lines are especially useful when sorting e-mails or when going back to find specific information.

- **Best Practice:** The subject line should be meaningful to the recipient, not just the sender.
- **Tip:** Avoid use of words or terms in the subject line that are commonly blocked by Spam filters. (For example, if you are working on a matter involving Viagra, you might have to come up with another way to refer to it in the subject because many Spam filters will block that word.)

E-mail threads

Threads are e-mail "conversations" where the recipients respond using the reply function, rather than by starting a new e-mail. Some believe you should always continue a thread so the recipient can reread what you are replying to. Proponents argue that the few extra seconds it may take to download increasingly long messages is outweighed by the ability to quickly review previous messages.

Others believe threads should be cut off periodically because the more back-and-forth there is, the more likely different subjects will be discussed. When the subject line is not changed, the topics become buried in the thread.

- **Best Practice:** Create e-mail threads and keep them going so long as the discussion continues to relate to the stated subject. The minute you include information that is off-topic, start a new thread with a new subject line. If some of the information in the new e-mail relates to the previous topic, you can always include both topics in the new subject line. The key is to alert the recipient to the new topic and to make it easier to categorize the e-mail later.

Use headings and blank lines between paragraphs

Ideally, e-mails should be short and to the point. But, if you write a longer e-mail, add headings, as you would in a document. Meaningful headings allow the reader to skim to get the gist of the information. Headings are also useful when going back through an e-mail to find particular information.

Always insert a blank line (a hard return) between paragraphs. Besides signalling the start of a new paragraph, and therefore a new thought, the blank line gives the reader's eyes a break, which is especially important when reading text on a screen.

- **Best Practice:** Inserting headings is preferable to using special formatting or tabs because not every e-mail program reads formatting the same way.

Conclusion

Adopting even a few of these best practices – and encouraging those with whom you exchange e-mail to do so too – will help minimize some of your frustration and will make you a better e-mail user.

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