



Email Best Practice

'All our communications should be like a conversation with a friend'.

Join us for a free seminar

GBC Learning runs a range of breakfast seminars throughout the year. They are called *Magic Dust* and each one focuses on a specific topic. Seminars take place in Guildford and London and our web site has full details of forthcoming events.



Doors open at 8:30 for light refreshments and the seminars run from 9:00 – 10:00. They are interesting, interactive and instructive and they are FREE. Email us on: magicdust@gbclearning.co.uk to secure your place on a forthcoming event.

Recent topics have included: Crystal Clear Communication, Speedwriting, Event Management and Minute Taking.

Email Best Practice

What is it?

This brief guide is designed to help make your emails more effective. It is not a set of rules but guidelines focusing on getting your emails read and urging your reader to take the action needed. This email guide follows on from the GBC Style Guide. Further copies of both can be obtained by emailing: enquiries@gbclearning.co.uk.

What's in it?

- Sending emails: subject line, replying, urgency, signatures, forwarding and redirecting, confidentiality and copies
- Attachments
- Receiving emails
- General hints and tips
- Structuring your message
- Getting the most from MS Outlook™, including: colour coding, using flags, keyboard shortcuts and automatic spell check.

Email Essentials

Sending Emails

Subject Line

This is the most important part of the email and probably the most misused. It's important because:

- it allows the recipient to gauge the priority of the message when it first arrives
- it helps you find old messages that you want to retrieve.

Subject Line Good Practice

DO

- Write the subject line *after* you have written the email.
- Make sure it is concise and that it sums up the content of your email.
- When responding to an email sequence, change the subject line to reflect the up-to-date position. For example 'Project Update 25 June '08' instead of repeating 'Project Update' from a previous email.

DON'T

- Use a vague or misleading subject line.
- Include a salutation in the subject.
- Use flippant language in a subject line.



CC and BCC

Although we don't use carbon paper any more, we still use 'CC' which means 'Carbon Copy'. This allows you to send a copy to a contact or list of contacts - all recipients can see who else has had a copy. 'BCC' means 'Blind Carbon Copy' and this is used to send a copy to one or more contacts but only the sender knows who has received a copy. Handle with care.

Urgent Messages

Urgent messages should be just that URGENT! Don't misuse this important word as people will stop believing that anything you say is really urgent. You know the story of the boy who cried "wolf"!

DO

- Begin the subject line with the word 'URGENT'.
- Only send messages marked as urgent to the recipients who are required to act.



- Do not use the cc and bcc facilities in this case.
- If you wish to make other people aware of the situation, mark their copy as FYI (for your information).
- List everyone who receives a copy in the body of the message to the original recipient – just as you would with a letter.
- If there is an 'action by' date, include this in the subject line eg 'Urgent GBC Report needed by June 29'.

Confidentiality

Email is not naturally a confidential way to communicate. If the document or information is highly confidential, then find another way to send it.

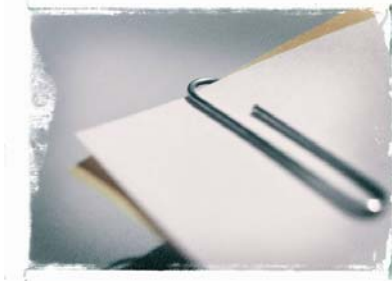
When you want to send an email that is confidential:



- Mark the subject line 'Confidential' followed by a relevant statement eg Monthly Sales Report
- Decide if the content is best delivered via an attachment or within the body of the email
- If it is an attachment, consider adding a password thus preventing the document being opened by anyone without the password
- Word, Excel and PowerPoint Files can be password protected by selecting the 'Tools' button, then 'Options', then 'Security' where you will find the password options.

Sometimes, when the content of an email is confidential, using a vague subject line is the right thing to do. In this situation it is important that a casual observer is unable to draw any conclusions from simply seeing a list of subject lines in your in/sent box.

Attachments



Wherever possible keep the whole communication within the body of an email. You can't always do this but avoid attachments whenever you can. It saves lots of time for the recipient (they don't have to open the relevant application).

Emails have all but replaced the office memo so keeping it simple is the key idea.

If you do use an attachment, summarise what it's about within the body of the email. The recipient can more easily decide if and when to open it.

If your organisation stores documents on a server or intranet, consider including a link to that source, rather than attaching the document.

Signatures

Signatures are messages that appear at the bottom of each email you send. Typically they will include your name, phone number and your web site – you might even include a logo (consider BlackBerrys before doing this –see page 10). You can have more than one signature as well.



To add a signature go to 'Tools', 'Options', 'Mail Format' then signatures. Type in what you want and then give it a name – you can then decide when to use this particular one.

Receiving Emails

Suspicious looking emails: If you are suspicious for any reason, don't open it. If you have an IT department check with them, if you don't then delete it.

Phishing: This is a name given to emails that request personal security information. They appear to come from genuine web sites, often banks or building societies, and will have a bogus alert that requires you to confirm some important piece of information. Genuine organisations NEVER ask for this sort of information so delete the message. Don't be tempted to provide this information.



Replying to an Email Message

Reply promptly

When replying, always reply with the history.

- Most of us handle a large volume of email so won't remember the history linked to each message in our inbox. Without the history, we may have to waste time revisiting our Sent Box to remind ourselves what it's all about.
- Your computer should be set to make sure it does not include the sent attachments with the reply.

Use 'Reply to All' only when absolutely necessary!

There's enough junk email slipping through the net so don't add to the problem! So much time is wasted by people checking and deleting emails that they really didn't need to get - help them out, only 'Reply to All' when you must.

Some General Points

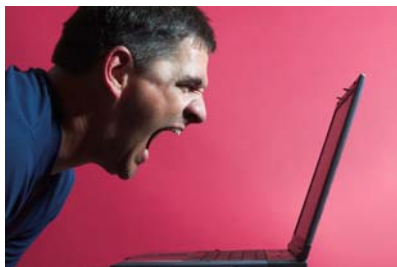
Don't forget the phone! Sometimes it's much better, quicker and more productive to pick up the telephone. Email is a great way to communicate, use it at the wrong time and it becomes a real barrier.



Think about the reader: re-read your email before sending it. Does it make sense? Is it in a format that makes it easy to read? Does it convey the right tone?

BlackBerry: More and more people are accessing their email via hand held devices like a BlackBerry. Keep your messages short, to the point and avoid using graphics – they just slow the whole process down and don't always transfer properly.

Don't Shout! Only use capital letters when you have to.



Don't get caught up in an email spat: despite our best intentions sometimes messages get sent that are more heat than light, more emotion than reason. When you receive an email like this, take some time out to think about your next step.

You may decide it's better not to respond – maybe you'll call, maybe you'll go and see the person or maybe you'll do nothing.



Protect email addresses: Email addresses are valuable so don't divulge your colleagues' email addresses to people outside the organisation without their agreement. There are some simple ways to help you do this:

- Use BCC for emails to external organisations, unless you know it's OK to include your colleagues' address
- Delete addresses from messages you forward – it doesn't take long.

Don't send jokes, rude or potentially embarrassing messages. Just don't! You could be breaking the law and you might upset a colleague or client. Not much to gain and lots to lose.

Don't forward or send 'chain letters'.

There is no place for these at work.



Hoax Emails: you haven't won a lottery you didn't enter, there isn't someone who wants to deposit \$20m into your account and there is no prize worth having that an unknown person is going to email you about. Just delete them.

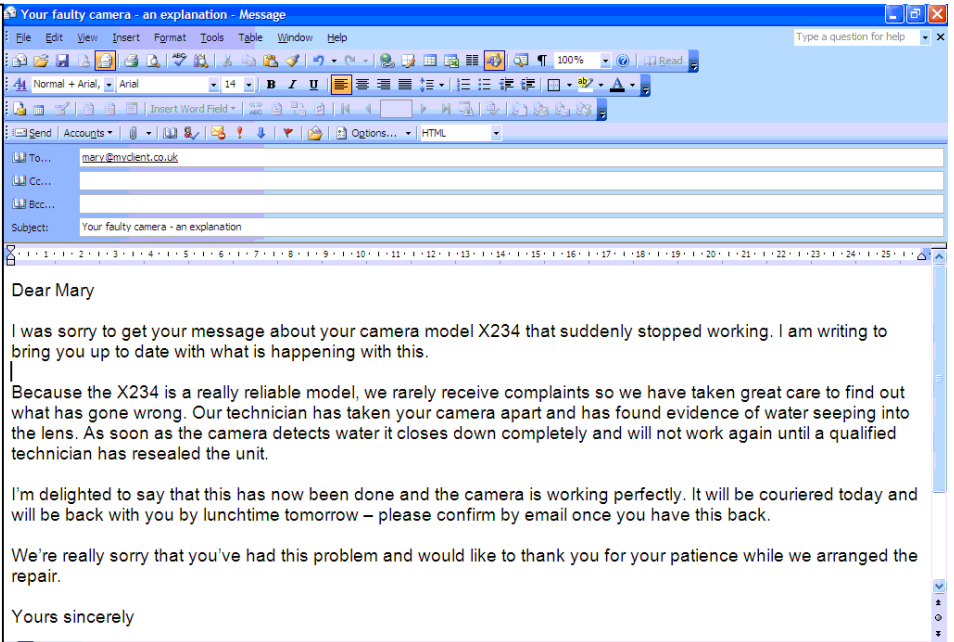
Structuring your message

Here's a great formula to speed up the process of drafting or writing an email. You won't need this for the really short ones but it's great when you have a longer one to send. The structure of your emails (or your letters for that matter) should follow this format:

- S** subject line and salutation. Make the subject line mean something and use the correct salutation. Should it be 'Hi John', 'Dear John', 'Dear Mr Smith' or something else? You decide but take a lead from how the sender addresses you and if you're not sure – be formal.
- P** purpose or reason for sending the email.
- E** explanation of what happened and why.
- A** action. What's going to happen, what needs to happen, what they need to do etc. In other words 'what's the next step'?
- K** conclusion (sorry, poetic licence....). Depending on the situation, it could be a restatement of an apology or a reminder of action to be taken or a social comment – you decide.

On the next page is an example of an email response to a complaint from a customer.

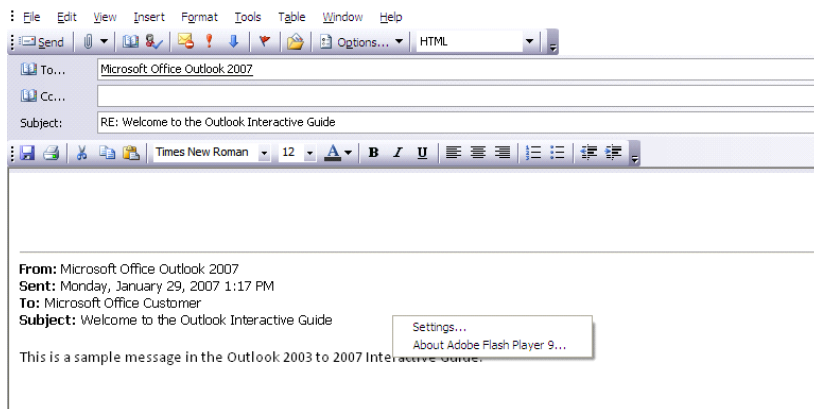
**S
P
E
A
K**



The above email is a simple example of how the SPeAK format works in practise. It helps you plan your email and get the first draft done very quickly and accurately.

Try it for yourself – you'll be delighted with how effective it is.

Getting the most from MS Outlook™



Microsoft Outlook™ has lots of additional features that many of us don't know about. We have chosen some of the ones we think are particularly useful and time saving with details of how to use them. Of course, your version of Outlook™ may affect if and how you can add these features.

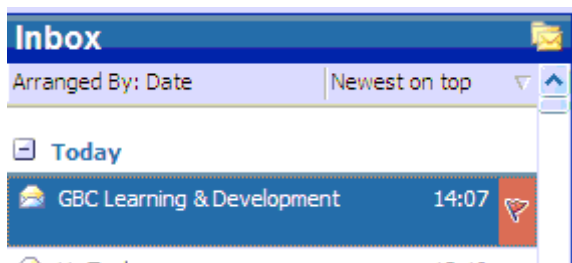
Organising Your Inbox

Colour code your messages:

It can be helpful to identify messages from certain individuals by seeing them in a different colour, for example an **important client** or a **senior manager**. To set this up, select an email from that person, then:

- Go to **Tools** and then click **Organize** to show the Organize pane
- In that pane, click **Using Colours**, you will see the word 'From' and then the name of the person who sent you a message. You will also see the word 'In' and a drop down list
- Click the box to select a colour then click **Apply Colour**
- You can turn this feature off via **Tools** and **Organize** and return to the default position.

Using MS Outlook™ 'Flags'



Incoming Mail

A flag in Outlook™ can help you to prioritise your emails and remind you to follow up wherever and whenever necessary. In your Inbox, you will see a list of messages and on the right hand side is a column called 'Flag Status'. By right clicking on the flag next to a message, you can choose a colour and use that colour for any purpose you specify.

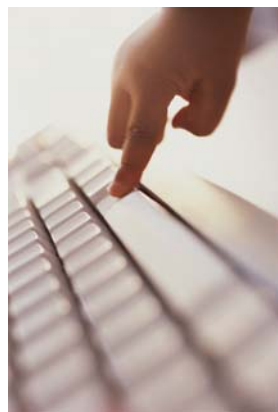
A simple way to use flags is to remind you to follow up or to action certain emails. When you right click on the flag, choose your colour - it will become visible next to the message. A copy is automatically put in a folder called 'Follow Up'. Once you have performed the necessary action, click on the flag next to the message and a tick will appear. That message is then deleted from the 'Follow Up' file.

Right click on the 'Follow Up' folder and select 'Add to Favourites' – it then becomes easy to find and look at whenever you need it.

Speed up the process

We're all obsessed with using our mouse so we forget that there are quicker ways to get things done. Keyboard shortcuts provide a great way to do lots of things much faster.

Here are just a few for Outlook™ that you can try to get you started. Remember that all MS Office applications have keyboard shortcuts.



- ctrl-n - Open 'Compose New Mail' form
- alt-s - Send mail
- escape - Close window
- ctrl-r - Reply to a message
- ctrl-R - Reply-all to a message
- ctrl-v - paste

Once you get used to them, you'll wonder how you ever lived without them.

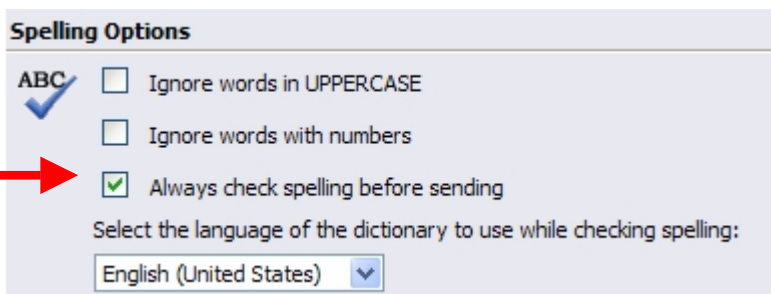


Spell check every email before you send it automatically

Business emails are your shop window. It is important to use correct spelling and grammar otherwise it could cost you valuable customers or lose you personal credibility. Even with the spell check switched on and the squiggly red lines showing words that are wrong, errors can slip through.

Outlook™ has a 'life-saver' that makes sure that any possible spelling errors are drawn to your attention before you send an email.

To switch it on, go to Tools, Options, Spelling then click on 'Always check spelling before sending' (see below).



And finally.....

One of the best free (at the time of writing) downloads we have found is called XOBNI (that's inbox spelt backwards). Go to www.xobni.com and find out more. It helps you find people and information in a fraction of the normal time and lots more.



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| Conflict Management | Negotiation Skills |
| Credit Control | Newly Appointed Manager |
| Crystal Clear Communication | Persuading & Influencing People |
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We hope this guide is helpful. Like all good communications, it should be like a conversation with a friend.

You can communicate with us in a number of ways:

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