

24. Email Guidelines

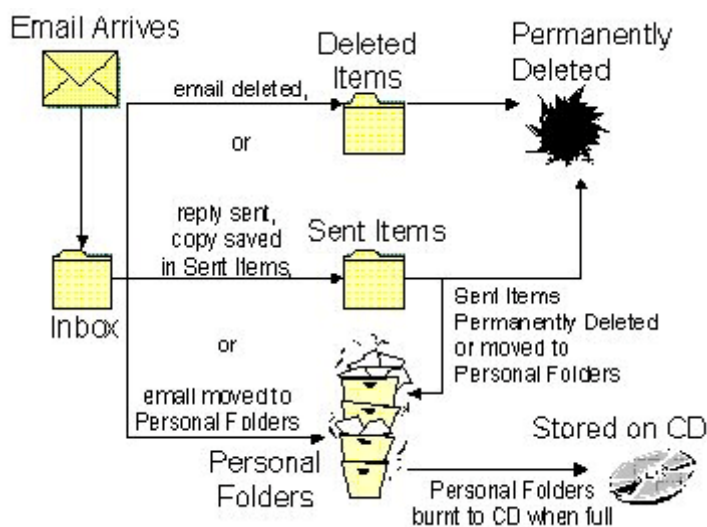
Introduction

Electronic mail, or **Email**, is one of the most commonly used communication tools in the modern business environment, increasing the speed and ease with which information can be shared by users across the globe. Although an essential business tool for many, the explosion in the use of email has led to 'email overload', as many people are unable to deal effectively with the volume of emails that they receive. This section of the toolkit gives some ideas on how to control the volume of emails that you receive, as well as how to make the most out of email as a communication tool.

Detailed description of the process

Check your emails regularly and, once you have read them, replying or actioning as required, you should either delete them or store them in mail folders. Check through these folders occasionally to remove any stored messages that are no longer required. If you are not going to be checking your emails for any length of time, an automatic response message can be a good way of informing correspondents that their mail will not be read immediately. An example of a procedure for dealing with emails is given below (see: www.usq.edu.au/users/hoeyw/email_best_practice.htm).

Figure 15: Procedure for dealing with email



It can be helpful to set up an email policy across your organisation. There is a range of administration tools available through various Email software packages, such as Outlook, Pegasus, Eudora and Groupwise; these help users to administer their accounts. The guidelines should be accompanied by training on the range of tools that your organisation's software includes.

As part of the guidelines, consider a company-wide policy on bulk unsolicited or 'spam' emails, including appropriate anti-spam software such as 'block lists' or 'Bayesian filters'(which calculate the probability of a message being spam based on its contents), together with a policy of deleting spam emails without responding. For guidance on the best software to protect your systems, refer to an organisation such as BestPrac.org. Include staff training alongside your guidelines, and back this up with the latest anti-virus software.

Key points/practical tips

Before you compose an email, consider if there is a more appropriate way of communicating. If email is the most appropriate, it is important make the purpose of the email clear and ensure that you are sending it to the relevant people. Ask yourself:

- **Why do I need to send this email?**
 - State the purpose of the email concisely in the 'subject' field so that readers do not have to open the email to know what it is about.
 - Use a layout that is easy to understand, including bullet lists, one idea per paragraph, etc. Use simple language wherever possible.
 - If there are many action points, summarise these at the end in a numbered list, showing who needs to take which actions by when.
 - If your organisation has a high volume of email traffic, agree on guidelines and alternatives to the use of emails (such as staff notice boards in a shared office space, newsletters, etc).
- **Who needs to receive this email? What actions (if any) do they need to take on reading this email?**
 - If actions are required from the readers, include them in the 'to' mail header; if you are sending the email for their reference, include them in the 'cc' (carbon copy) mail header but make it clear why they should see the email; if you want to copy someone in but do not want the other recipients to know that they are copied, use the 'bc' (blind copy) mail header. You can also use the 'bc' header if you want to send yourself copies of messages so that you can store them in appropriate folders later.
- **What attachments do I need to add to this email? Do all of the recipients need to read these?**
 - Only add attachments that cannot be circulated more effectively through other means: consider putting them on the internet and sending the URL by email, for example.
 - If there are multiple attachments, provide a sentence on each which says who needs to read it and which order they should read them.
 - Do not send attachments that your recipients will not have the software to open.
 - Beware of sending large attachments to those with limited server capacity.
- **Is this a priority email?**
 - Avoid overusing the 'priority' email option. If the information contained in the email is urgently required, make sure the 'subject' reflects the content of the email.
 - If a response or immediate action needs to be taken then include 'response required by ...' or 'action required' in the subject field. If the email is for reference only, mark this either in the subject field or at the start of the email.
 - Be cautious in the use of 'read receipts': if you want to know if someone has read your email, ask them to confirm receipt.

Sources and further reading

- Hovland, I. (2005) *Successful Communication: A Toolkit for Researchers and Civil Society Organisations*, ODI Working Paper 227, London: ODI.
- Plain English campaign, see: www.plainenglish.co.uk.
- Waterford Technologies Best Practice Email Management Guide, downloaded from www.waterfordtechnologies.com/pdf/BestPractices.pdf on 11 May 2005.
- Essential Email Filing Practices, downloaded from www.usq.edu.au/users/hoeyw/email_best_practice.htm on 12 May 2005.