

Accidental Techie Email Best Practices and Etiquette

I've sent and received more emails than I care to count. I'm sure you have, too. My career has put me in businesses big and small. But the one constant I've observed is that every business culture carries its own style of email communication.

With every job change I swore I would stand up and teach a class on email etiquette and best practices, only to figure out later that it was me who needed to adjust to the culture into which my new job had immersed me.

But, over the years I found myself making a mental list of things I did in emails that simply worked, and that others found useful as well. Leveraging content from Americanbar.org, along with some of my own thoughts, I want to share with you what I think helps to improve communications and email productivity within most business cultures.

I use Outlook for most of my email handling, so I will be referencing its features. But I've used other email clients as well. Almost all email clients share the same set of features and options. Be sure to search online for the how-to's associated with your email client.

Managing Emails

- *Use your junk email filter*

This is the number one reason I like to use Outlook. Although I'm sure other advanced email clients have some sort of filtering, Microsoft does a good job keeping the Outlook junk filter in good working order. The junk filter works automatically after installing Outlook. Be sure to check your junk filter folder before deleting the contents – occasionally, some legitimate emails get flagged as junk. On the flip-side, some emails get through that you think should be junk. The Outlook junk filter has many options to permanently flag certain emails as junk, so you don't see them again. Here's more info about using the junk email filter:

<http://office.microsoft.com/en-us/outlook-help/overview-of-the-junk-email-filter-HP010355048.aspx>

- *Want to meet with others? Send an invitation.*

If you need to call a meeting, or schedule a recurring meeting, send an invitation. Do not send a regular email. If your inbox is as big as mine (and I bet it is 😊) messages get lost very quickly. If you use an email message to invite people to meetings, don't be surprised if no one shows up. Using a meeting invitation does so much more for you than an email:

1. You'll get an response when they accept or decline your invitation,
2. The time and date will be put on the recipients' calendars and their auto-reminders will notify them, and
3. If you have meeting rooms, projectors, or other items listed as email resources, you can invite them as well. This acts like a reservation system for those resources. This can be very handy to avoid double-bookings.

Also, please provide as much pertinent information as you can into the invitation: agendas, maps, reconfirmations from previous meetings, etc. Here's how you do it:

http://office.microsoft.com/en-us/outlook-help/basic-tasks-in-outlook-2010-HA101829999.aspx#_Toc260824055

- ***Make it easy to navigate your emails. Use sorting, grouping, and searching***

I can't live without these 3 tools. They help to navigate the years of emails I have stored on my computer. I usually associate past emails with the time and date they were sent, so I normally leave my inbox sorted by date with the latest on top (in many cases, this is the default). Additionally, I will group the emails so I can better navigate my inbox, if I know when I received the email. Experiment with sorting by sender's name or subject, then turn on grouping as well. If you use the search box in conjunction with your sorting method, you'll be amazed how quickly you can find emails. Here's more info on grouping emails: <http://office.microsoft.com/en-us/outlook-help/group-or-ungroup-email-messages-in-your-inbox-HA010355075.aspx>

- ***Email size limitations***

You might get a bounce-back in your inbox if the message you're sending is too big for the recipient. By default, most email providers set a 20MB size limit. In many cases it could be smaller. If you're sending multiple files, consider sending a couple at a time. You might also consider compressing the files into one relatively smaller file. You can do this with a program called Win-Zip or 7-zip. The problem may also be a large picture(s). Consider resizing it or reducing its resolution so that the size is deliverable. If you still don't succeed, you may have to use a download service like Dropbox.

If a sender has problems getting a large file to you, you might have more options. If you manage your email service (or your I/T person does) you might be able to temporarily increase the limit to allow the email to come through. Outlook sets its own limit at 20MB, but it can be adjusted on your own machine. If you connect to an Exchange server, the size limit is managed there. In most cases, it's still easier to ask the sender to break up the email into smaller parts, resize/compress the files, or use a download service.

Here's more info on adjusting Outlook's default size limits: <http://support.microsoft.com/kb/2222370>

- ***Inbox Size limitations***

This is not the same as email size. Here we're talking about the size of the file that Outlook uses to store your inbox, calendar, tasks, notes, and everything else associated with your email account. Consider this – Outlook is just a customized database. Database performance is based largely on how well its contents are managed with the database file. If the contents get out of order, or some 1's & 0's get scrambled, you can experience a significant slowdown or even crash the application. Most folks never experience this issue with their email. But when it happens (and it's happened to me a number of times) it can be nearly catastrophic.

In Outlook 2010, the operational limit is 50GB. What this means is any size beyond that may cause your email to slowdown. The best method is to reduce the number of emails kept in your inbox. You can use Outlook's archive process. It is automated and easy to use. I prefer to use my own method archiving – based on date received. I will open a new folder for the previous year and create subfolders for each month of the year. Each month will contain an Inbox and a Sent Items folder. Then I'll move the emails into their appropriate folder and close the file. I will keep everything through the last 6 months of the prior year and archive everything before that. When I'm done moving emails, I'll usually burn the file to a DVD (if it'll fit ☺) and store the disk away for safe keeping. At my previous job, I had 8 years of emails spanned across 12 disks – I save everything!

Here's more info on archiving methods and recovery tools for Outlook:

<http://www.msoutlook.info/question/852>

The following topics on email etiquette come from

<http://apps.americanbar.org/buslaw/newsletter/0007/materials/internet.pdf>

Email Content Tips

- ***Writing Effective Messages***

E-mail is ideal for corresponding with colleagues in different parts of the world, across time zones, and even in the same office. Using e-mail can save money (e.g., postage, telephone charges, travel), but it cannot always substitute for face-to-face meetings or telephone calls. Interpersonal communication should generally be your first choice whenever possible. In addition, e-mail should not be used to resolve conflict or to say things that would not be said in person.

E-mail messages may be considered part of the Company's official records and may be subject to disclosure to third parties. Compose e-mail messages in the same manner and with the same good judgment that you would employ for any other Company communication.

- ***Use a Descriptive Subject Line***

Never leave a subject line blank. It may determine whether or not your message gets read. Use a short descriptive statement to help the recipient decide when he or she should read the message. Take care not to overstate the urgency of the message simply to get attention.

- ***Use Courtesy and Respect***

As with any other form of business correspondence, e-mail messages should be written using courtesy and respect for the recipient. Don't employ rude or facetious remarks that could be seen as unethical or defamatory.

- ***Don't Use All Caps***

Using ALL CAPS in e-mail is equivalent to SHOUTING. In addition, all caps make your text difficult to read, as does all lower case.

- ***Use a Signature***

Include useful information such as your telephone number, position in the Company, location and e-mail address. Different signatures for different recipients may be appropriate. For example, shorter signatures may suffice for e-mail to Company coworkers.

- ***Sending Urgent Messages***

Don't rely on e-mail alone for sending urgent messages. The recipient may be out of the office and not checking e-mail frequently. Follow up with a telephone call or fax.

- ***Avoid Sending "Heat of the Moment" Messages***

When responding to a "hostile" message, don't hit the SEND button until you have had a chance to cool off (use the "overnight rule"--sleep on it, re-read your message, and revise it before sending). E-mail messages that are sent in the heat of the moment are often regretted. Once sent, they cannot be retrieved.

- ***Avoid Sending Unnecessarily Wordy Messages***

Remember that some people have to pay for each byte of data they receive. Keep messages succinct without being so terse as to be rude.

- ***Include the Original Email When Replying***

This is a matter of both courtesy and efficiency. It avoids making the sender search for his or her original message and may help to avoid confusion. Use the reply feature to return automatically the original message and to insert the return address. However, where the original message is lengthy, include only enough of it to

jog the sender's memory--sending too-long messages can be burdensome on those using dial-up connections. Also, where your reply is relevant to only a portion of the original message, consider excerpting and including in your reply only the relevant portion(s).

CC/BCC and Replying to Responses

- *Using cc*

A cc: (which used to mean carbon copy) suggests that the message is for information only--no action is necessary on the part of the cc-recipients. Send carbon copies only to those who really need a copy. Sending unnecessary copies wastes everyone's time (see Sending Unsolicited Messages).

- *Using bcc*

Blind carbon copies should be used with caution, if at all. They may give the appearance that you're going behind someone's back. If you can't copy the person directly, consider not sending the message at all.

Writer's note: One positive use for BCC is when you wish to send to a large group, but for security reasons they shouldn't see each other's email addresses. Sending to a list of people through BCC keeps everyone's addresses hidden.

- *Delayed Responses*

Don't leave the sender hanging. If you cannot respond to an e-mail request in a timely manner, consider sending a quick reply stating that you have received the message and giving an estimate of the time it will take you to provide a full response.

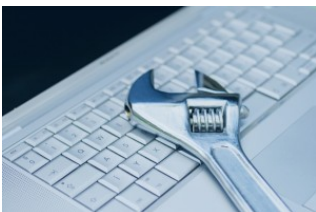
- *Replying to Messages*

Be careful to use "Reply-to-All" only when appropriate. Typically, you should address a reply only to a single person and not to all those who received the original message.

Likewise, be careful when replying to a message that was sent by a Bulletin Board (BB) or automatic re-mailer--if you're not careful, your reply may be sent to the entire audience subscribing to the BB rather than only to the individual who wrote the original message.

- *To Send an Attachment or Not?*

Don't send an attached file when a text message is sufficient. A few lines or even paragraphs of text do not warrant a file attachment. Receiving attachments can be time consuming (especially when the recipient is using a dial-up connection) and requires the recipient to take extra steps to open and read the file. Send attachments for long messages or when special formatting is necessary. When you send attachments, take the time to make sure that the attachment does not contain unnecessary graphics (like letterhead or logos) or embedded



About the author

John Pence is the Technical Services Manager at Austin Free-Net. He has more than 15 years of experience troubleshooting computer hardware and software, working with customers and their issues with computers, and providing low-cost solutions using readily available software and hardware. John builds his own computers and has a knack for

turning an old system from a door stop into a useful device.