Effective Emails

Session Leader's Notes

About this Power Hour Session

The Power Hour series has been developed to allow line managers or trainers to deliver short, sharp, effective training sessions to their teams or small groups with minimal disruption to normal every-day operations.

Experience of delivering training is not essential, as each Power Hour session comes with detailed notes for the leader, and two useful take-aways for those attending: A short workbook to accompany the session, and a 2-sided 'key points' sheet, that can be laminated and kept handy at work. There are no supporting slides, as managers do not always have the facility to run PowerPoint presentations. All important information is provided in the delegates' workbook.

Designed to be run in 60 minutes, Power Hour sessions can be run in place of an ordinary team meeting, or as part of a longer meeting. If you have longer than an hour, optional additional material is provided to stretch the sessions to 90 minutes or even 2 hours. You can also combine a number of Power Hour sessions on similar themes to create a half or full-day workshop if desired. Suggestions about which topics go well together are provided in the Session Leader's Notes.

Extra supporting materials are minimal, and clearly identified in the Session Leader's Notes so that everything can be prepared in advance.

To ensure that your team gets the most out this Power Hour, it is vital that they put their learning into practice. To enable them to do this, at least 4 measurable activities are suggested at the end of the Session Leader's Notes and delegate workbook. Of course, other similar actions that are more specific to your business or function may be set by you, or agreed with individuals instead.

Power Hour sessions are designed to be interactive and 6-8 delegates are ideal although it is possible to run them with only 2 people, or for larger groups. Just bear in mind, small groups make some activities more difficult and large groups result in more discussion, and this could make it difficult to complete the session in just 60 minutes.

This Power Hour Session includes extra optional activities that can turn this 60 minute session into a session lasting 1 hour and 40 minutes.

Preparation for the Session Leader

To run this Power Hour Session, you will need:

To run this Power Hour Session, you will need:

- A flipchart/whiteboard and pens
- A workbook for each delegate
- 1 set of COMMUNICATE cards (Optional. Cut and prepare the cards in advance – they are printed 4 to a page)
- Handout – Case Studies (Optional)

Before running the session:

- Write the objectives on the flipchart/whiteboard
- Read through the workbook and highlight key points you want to refer to
- Put out a copy of the workbook for each delegate – don't distribute them at the end

How to use this guide

These Session Leader's Notes provide a step-by-step guide to running a Power Hour Session. It is not intended as a script so you should not read it when delivering the session. It is important that you are able to inject your own style and personality into the session, as well as tailor the content to your own environment and issues. Therefore, the Session Leader's Notes describe:

- What you should explain and when (supporting, more detailed information is provided in the delegates' workbook)
- How to run discussions and activities
- How long you should assign to each part
- Key points to highlight/look for in discussions and activity debriefs
- What supporting material you should refer to

Other topics that may be useful

If you wish to create a longer training session, or put together a short development programme visit our website see all of our current titles www.power-hour.co.uk

How to Run this Power Hour Session

Time	Activity	Reference or Supporting Material
5 mins	**Welcome and Overview**	
	Welcome delegates to the Power Hour Session and ask everyone to switch off their mobile phones etc.	
	Explain the topic to be covered and run through the objectives of the session. (Write these on the flipchart/whiteboard in advance).	
	Ask each person to introduce themselves (if necessary). And explain what they use e-mails for i.e. the different reasons for sending (or receiving) an e-mail. Write these examples down on the flipchart.	*Flipchart*
	Highlight that in 20 years, e-mails have gone from being (almost) non-existent to one of the most common channels of communication. We simply could not do business without e-mail.	
	Ask delegates to identify one thing that they want to achieve as a result of the session, and write it in the space provided in their workbook (page 2).	*Workbook page 2*
10 mins	**Friend or Foe?**	
	Explain that e-mails have become so much a part of our normal day, that we rarely give thought to how and when they should be used. This means they can hinder as much as they can help.	
	Split delegates into 2 groups. Give each group a piece of flipchart paper and a pen if you wish.	
	Ask one group to think of all the times/examples of when e-mails are useful, and the most appropriate form of communication.	
	Ask the other group to identify when e-mails are not appropriate.	
	Allow 5 minutes, and then discuss both groups' suggestions.	
	State that sometimes, we do use e-mail when we shouldn't. It is important to choose the correct communication method	*Workbook page 3-4*

Time	Activity	Reference or Supporting Material
	for each situation. When choosing a communication method, it is important to make a deliberate choice, and consider: • **The content of the message** – is it routine, unusual, complex or sensitive information? (e-mail should NOT be used for sensitive or unusual content. It should be used for complex messages in conjunction with other methods e.g. meetings/telephone conversations). • **The 'audience'** – what is their location, current understanding, access to computers/phones? (Generally, we shouldn't e-mail people in the same office as us, unless it is to forward information). • **The desired outcome** – do people need to do something as a result of the communication or not? (e-mail is passive and is easily ignored). • **The importance of feedback** – do you need a response? (if so, maybe a conversation would work better). • **The urgency of the message** – is the information 'need to know' or 'nice to know'? When do they need to know it? (Urgent messages shouldn't be left to e-mail alone. Telephone or meet with people face to face for urgent issues).	
20 mins	<u>If you have more than an hour...</u> Give the group a set of 'Communicate' cards. Ask them to consider each of the situations provided on the cards, and decide whether: • Telephone • Meeting/Teleconference • e-mail • Face-to-face would be the best communication method. Note: some situations can be handled effectively by more than one method, and the suggestions at the back of these notes (page 10) are intended as a guide only. The point of the exercise is to get delegates talking about the different situations, and how they would handle them.	*'Communicate!' Cards*

Time	Activity	Reference or Supporting Material
	Debrief in full group, and see what conclusions the group has reached. Check that there is a good spread of responses between the 4 different methods. Ensure that delegates agree that e-mail can be inappropriate (and more time consuming) if communicating with someone in the same office, or even with a colleague in your team who is based elsewhere. A long e-mail 'conversation' can take much longer, and not be as efficient and thorough as having a face to face (real or virtual) or telephone conversation. *NOTE: many delegates will say that they have to send e-mails or copy people in as a back up, and to prove that they are doing things/cover their own backs.* *Challenge this by asking if your organisation has the type of culture where people get into trouble for one mistake?* *Also, highlight that e-mails sent and received are stored on the system. If they needed to prove their actions to a manager in the event of something going wrong, they probably could without having to copy their manager in.*	
10 mins	**Structuring e-mails** Ask delegates how they write an e-mail. Most people will not know how to answer this! E-mail has emerged and developed over time, and is generally considered an informal way of communicating. If we write a business letter, there are rules and conventions to follow such as where to put the address, date, how to start the letter to someone you know/don't know etc. There are fewer 'hard and fast' rules for e-mails. State that we will now look at agreeing a standard approach to e-mails, before moving on to look at some best practice tips. Explore the key points through discussion using the following questions as a starting point, and referring to the workbook page 5 for more information. 1. To, CC and BCC: Ask delegates what they understand about each term, and how they decide who should be included in each category.	*Workbook page 5*

Time	Activity	Reference or Supporting Material
	2. Subject Line: What should be in the subject line? Is it ever OK to leave it blank? 3. Priority: How do you assign a priority to an e-mail? 4. Opening: How do you open an e-mail? What phrases do you use? 5. Main body: What do you include and why? 6. Closing: How do you close an e-mail? Should you use a signature? 7. Attachments: When should you send attachments? Are there any circumstances when you shouldn't?	
20 mins	**Best Practice** Explain that we will now examine best practice when writing e-mails in more detail. EITHER: Split delegates into 2 groups. Ask one group to consider good practice when writing e-mails, and the other to consider poor practice. Allow each group 15 minutes to think of their ideas, write them on a flipchart, and then present them to the other group. OR: Stick flipchart pages around the room labelled: • Rude • Careless • Unprofessional • Tactless/Upsetting And ask delegates to work in pairs/small groups to visit each flipchart, and write down how you could appear to be those things when using e-mail. Allow 15 minutes for group work, and then discuss the ideas in full group. In both cases, select some suggestions and probe deeper by asking 'why?'. Summarise by drawing out key points, and referring to the information provided on page 6-7 of the workbook, and the checklist on page 8. Highlight any additional points that you	*Flipchart* *Workbook page 6-8*

Time	Activity	Reference or Supporting Material
	want to draw attention to, that are relevant to your organisation/situation.	
20 mins	<u>If you have more than an hour...</u> Split delegates into pairs or threes. Give all delegates all of the case studies, but ask each group to focus on a different one and identify: • What is wrong with the e-mail • How they would re-write it, and why Allow groups 5 minutes to work on their case study and then spend 15 minutes discussing each in full group. Tips for debriefing: Case study 1 – Too long, lacking structure, inappropriate subject line, covers too many topics. Case study 2 – Typed in capitals. Wording could be seen as aggressive. Lots of people copied in. Why? Case study 3 – Too informal. Meaningless subject line. Use of smileys and 'text-talk'. Making personal comments about other people, which is inappropriate. No signature. Case study 4 – Appears to be an e-mail to a senior person, but tone does not reflect this throughout. Too many spelling mistakes. Fancy font, which makes it difficult to read.	*Case Studies*
10 mins	**Receiving and managing e-mails** Generate a quick group discussion to share tips for receiving, forwarding and managing e-mails and write them on the flipchart. Provide your own suggestions to get the discussion started if necessary, based on your ideas of good practice e.g. setting up out-of-office messages when they are away, and the need to include dates and alternative contacts. Then, summarise with the points laid out on page 9 of the workbook. Try to agree some standards that everyone will stick to.	*Flipchart* *Workbook page 9*
5 Mins	**Make it work at work**	

Stress that completing the Power Hour Session will have little or no value to individuals unless they apply what they have learned to their every-day work. <u>Either:</u> 1. Ask delegates to select one of the measurable activities suggested at the end of their workbook (on page 10) to complete, and to share why they have selected that one. 2. Ask delegates to identify their own actions to put into place and the benefits they will bring. They should write their actions down in the space provided on page 10 of their workbook. 3. Set the team one measurable activity that everyone should complete (Note: This is only useful for teams consisting of like roles). Agree a date when the actions will be reviewed. Thank the delegates for their participation, and motivate them to apply their selected actions.	*Workbook page 10*

Suggested Measurable Activities to Apply the Learning

1. Stop yourself from sending one e-mail each day – find an alternative method instead.

2. Review 5 different e-mails that you have sent in the last month. Identify one or two things that you could do differently to make your e-mails more effective.

3. Use the checklist provided on page 8 of the workbook to quality check each of your e-mails before you send them.

4. Set up a filing system to store and manage your e-mails. Make sure that you organise your inbox every week.

Suggested answers for the 'Communication Methods' Card Sort Exercise

Note: these are suggestions only. Use your own knowledge and experience to decide the best answers for your organisation.

Telephone	Meeting or Teleconference	e-mail	Face-to-face
Quick, simple enquiries Confirm arrangements Clarify facts Check assumptions Gain a better understanding of requirements 'Nip problems in the bud' Pass on a message	Discuss issues that affect lots of people Solve a problem Ensure everyone gets the same information at the same time Group decision making Generate/share ideas	Confirm decisions already made Provide factual information Provide non-urgent information to someone remotely Provide documents Supply routine information Pass on information to colleagues	Discuss complex issues Discuss personal/ sensitive issues Check your understanding of a situation Develop knowledge and understanding Give feedback Raise a problem Gain agreement Influence someone Raise issues with someone in the same team

POWER HOUR

Effective Emails

Effective Emails

By the end of the Power Hour you will be able to:

- Identify the benefits and pitfalls of e-mails, and when they are an appropriate communication method to choose
- Structure and write effective e-mails
- Manage e-mails appropriately

When to use email

- Straightforward
- Not time-critical
- Intended for someone at a different location
- Intended for multiple people
- Not requiring immediate feedback
- Not sensitive
- Supported by documents or data
- 'Nice to know' rather than 'Need to know'

Planning and Structuring your email

To, CC and BCC	• How do you decide who should be included in each category?
Subject Line	• What should be in the subject line? Is it ever OK to leave it blank?
Priority	• How do you assign a priority to an e-mail?
Opening	• How do you open an e-mail? What phrases do you use?
Main body	• What do you include and why?
Closing	• How do you close an e-mail? Should you use a signature?
Attachments	• When should you send attachments? Are there any circumstances when you shouldn't?

Best Practice Tips

- Keep your e-mails short.
- Use simple, straightforward language.
- Proof-read your e-mail for spelling and grammar errors before you send it.
- Ask a colleague to read your e-mail before you send it if it is complex, important or open to misinterpretation.
- Give a context for your message to help the recipient to understand its purpose.
- Keep formatting simple.

Best Practice Tips

- Include a proper signature with your job title and contact details on it.
- Explain (in the main body of the e-mail) what any attachments are and why they are relevant.
- Be personable without swamping the e-mail with necessary information and ‘waffling’.
- Use bullet points or tables to make your information easy to read.
- Edit your own e-mails. Cut out unnecessary words and sentences as long as they don’t affect the meaning.

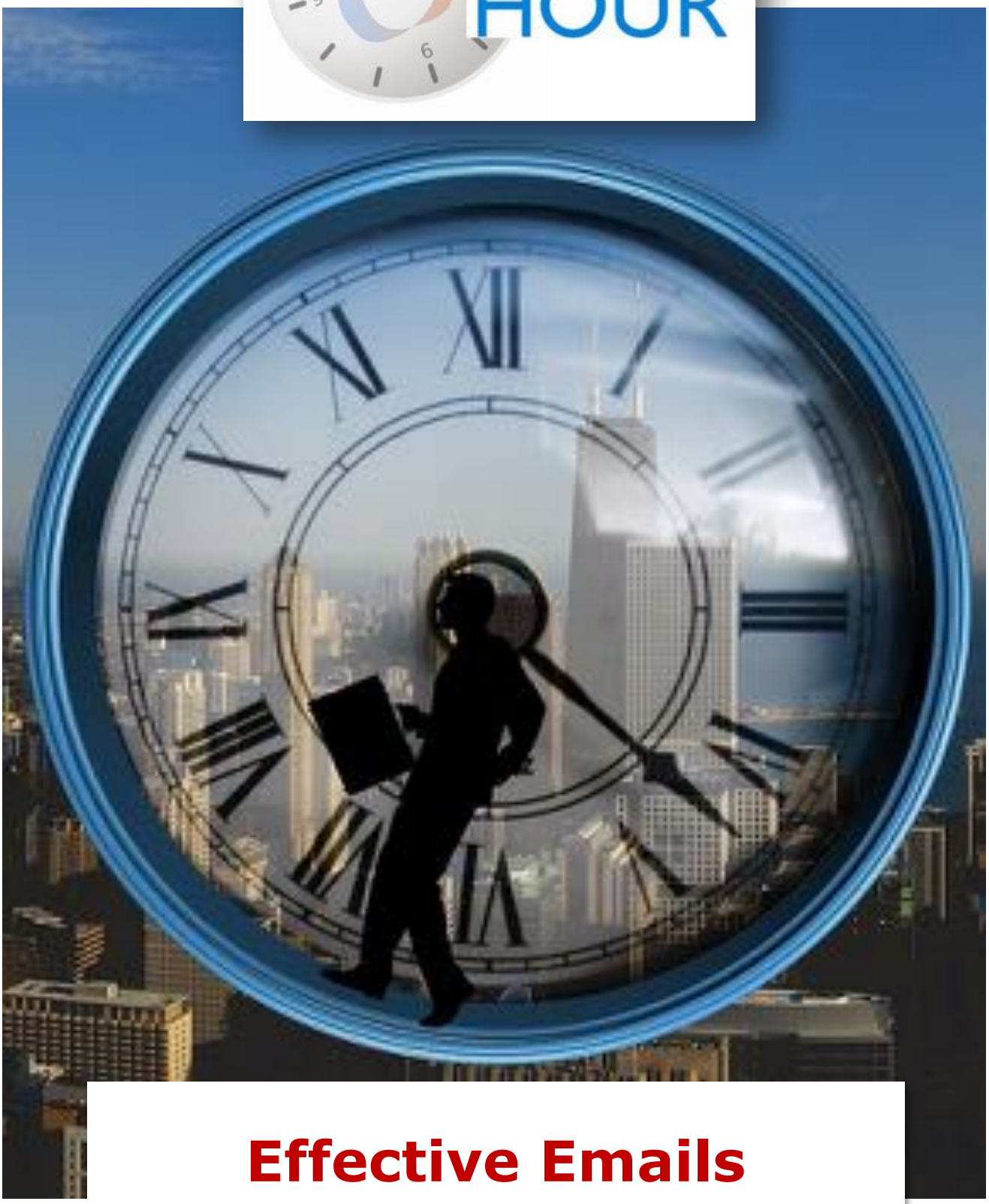
Managing your email

Make it Work at Work

What are you going to **DO** as a result of this Power Hour Session?

POWER HOUR

Thank You
&
Good Luck



Effective Emails

About this Power Hour Session

The Power Hour series has been developed to allow you to receive practical and effective training with minimal disruption to your normal every-day operations. Each session is focussed on one specific skill, rather than a complete topic area. Although a lot can be achieved in an hour, real benefit will only be gained if learning is put into practice. To help you to do this, at least 4 measurable activities are suggested at the end of this workbook. You should select at least one of them, or agree similar actions with your session leader so that you can bring about a real change in the way you do things as a result of attending your Power Hour session.

Objectives of this Session

This session on effective e-mails examines the importance of e-mail as a business communication tool, and also its limitations. E-mails have only been in common use for about 20 years, and in that time, they have become a necessity. However, because they are now so commonplace, we don't always think about how we use them. This session examines when we should use e-mails, how to write them and how to manage them.

In particular, by the end of the Power Hour you will be able to:

- Identify the benefits and pitfalls of e-mails, and when they are an appropriate communication method to choose
- Structure and write effective e-mails
- Manage e-mails appropriately

What do you hope to achieve from this Power Hour?

Communication Methods

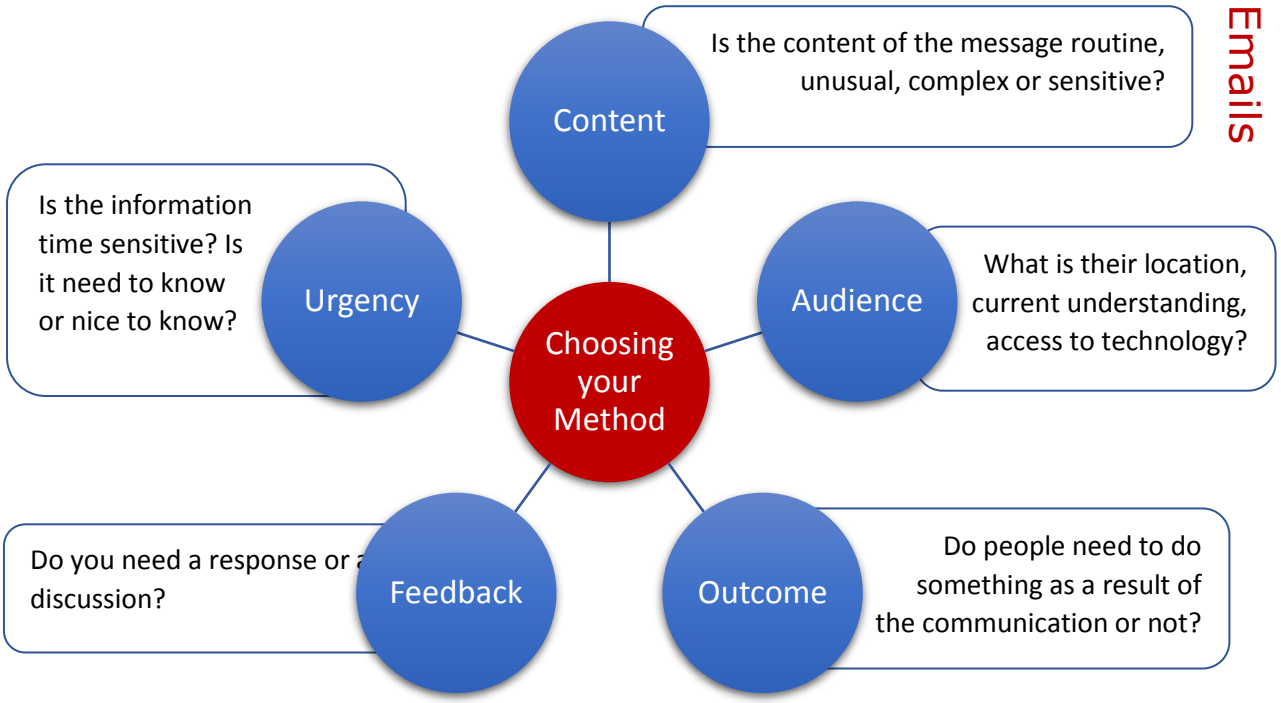
In any working environment, you can choose from a range of ways to communicate with customers and colleagues, e.g. talking directly to a person, or sending an e-mail, holding a meeting or placing a memo on the notice board. Different methods have different uses, such as:

Method	Useful for...
Face to Face private discussion (in person or virtually)	Giving feedback, information gathering, problem-solving, discussing sensitive matters
Telephone	Discussing a routine matter with someone who is remote or clarifying information
E-mail	Passing on objective information, e.g. statistics, confirming agreed actions. Communicating something straightforward to someone who is not there at the time, or to multiple people simultaneously
Team meetings	Sending out company messages or solving problems
Formal presentations	Explaining complex plans or making major announcements
Letter	Providing information formally to people
Notice Board	Providing routine information to many people
Virtual meetings	Making group decisions with remote colleagues and communicating with and training colleagues remotely

Which method when?

Because we have such a range of communication options available to us, we often don't think about them all, or simply select the wrong one. Perhaps we are more comfortable with one form (such as e-mail) than others (such as face-to-face).

When choosing a communication method, it is important to make a deliberate choice, and consider:



The Benefits and Pitfalls of E-mails

E-mail is a conversation that does not require an immediate response (like a telephone). If someone calls you on the telephone, you pick it up and an interactive conversation begins.

With e-mail you send a message and then wait for a response. The response may come in five minutes or the response may come in five days. Either way it's not an interactive conversation.

E-mail allows you to avoid all the unnecessary small-talk and diversions. You only deal with the person's message, and you deal with them in your own time.

Of course, the converse is also true. Too many people assume that the minute someone receives an e-mail, the person will read it. This is not necessarily the case. The person may be in a meeting, busy with another task or even away from the office.

Remember, e-mail is not designed for immediacy (that's why you have a telephone), it's designed for convenience.

As a general rule, if you can see the person, or get to them in a minute or two, you should speak to them directly. This gives you the benefit of e-mail (convenience), and the benefits of the telephone/face-to face (immediacy).

Writing E-Mails: Structure

E-mail has emerged and developed over time, and is generally considered an informal way of communicating. If we write a business letter there are rules and conventions to follow such as where to put the address, date, how to start the letter to someone you know/don't know etc. There are fewer 'hard and fast' rules for e-mails.

Here are some tips and suggestions for writing effective e-mails.

1. To, CC and BCC: It is not necessary to 'CC' lots of people in to each e-mail you send – this just clogs up inboxes, and often people don't know whether or not they need to respond. 'BCC' should be used sparingly e.g. if you are sending a routine reminder e-mail to a number of customers. It would be inappropriate to allow them to see each other's contact details.

2. Subject Line: You should always complete the subject line, and subjects should be clear and specific, as they help the receiver to decide (at a glance) how important the e-mail is. Blank subject lines are unprofessional.

3. Priority: Most e-mails should be sent as 'normal' priority. If someone has requested information urgently, then mark it as such. If you are initiating the contact and need an urgent response, speak to the person.

4. Opening: There is no standard way to open an e-mail, as long as there is one. 'Hi John' or 'Good morning' or 'Dear Mr Jones' are all acceptable. The important thing is to make sure that your opening is appropriate to who the recipient is, the nature of the message and your relationship with them.

5. Main body: Each e-mail should have one topic and the main body should be kept short. Many people do not open e-mails, but read them in their 'reading pane'. If your message cannot be read on one screen, people are likely to get bored and not give it proper attention.

6. Closing: E-mails should be properly closed, and often informal phrases such as 'kind regards' 'take care' or 'thanks' are used. Signatures look professional, especially on e-mails that are being sent outside of your company. Any specific actions or next steps that you want the recipient to take must be clear.

7. Attachments: If you need to send a lot of information, it is better to send it as an attachment, rather than writing it all in the e-mail. If you are sending a large attachment however, it is a good idea to warn the recipient that it is on its way as some servers do not allow messages above a certain size.

Writing E-Mails: Best Practice

Here are few things for you to consider before you even begin to type your e-mail...

Is an e-mail the best method? Should you instead be having a face-to-face conversation or picking up the telephone? If you are likely to get engaged in a lengthy e-mail 'conversation' or if the subject is sensitive or confidential, you are better speaking to the person. Similarly, if you can actually see the person, take the time to speak to them instead of sending an e-mail. Not only does this help to reduce the size of our inboxes, it also helps to build relationships with colleagues.

Make your e-mail attractive. Recipients scan the subject line in order to decide whether to open, forward, file, or delete a message. Remember -- your message is not the only one in your their inbox. Write a subject line that accurately describes the content. Think of your subject lines as a headline. The headline in a newspaper does two things: It grabs your attention and informs you what the article is about so you can decide whether you want to read further. E-mail subject lines need to do the same thing.

Write a separate e-mail for each subject you want to discuss. That way your recipient can reply to each one separately if necessary. One topic might only require a short reply that he or she can make straight away. Another topic might require more research. By writing separate e-mails, you get clearer answers.

Decide on the response you want from your e-mail. Is it purely for information or do you want your recipient to do something as a result? Deciding the purpose will help you to structure and word your e-mail appropriately.

Finally, make sure that you are not going to send or respond to an e-mail when you are emotional, or don't have sufficient time to think through what you want to say. Hurried or emotional e-mails will almost certainly be worded inappropriately, and result in an unwanted response.

Writing your e-mail

Here are some do's and don'ts to bear in mind when writing an e-mail.

DO	DON'T
✓ Keep your e-mails short – make sure that they can easily be read on half a screen (typical 'reading pane' size) or on mobile without too much scrolling. ✓ Use simple, straightforward language. ✓ Proof-read your e-mail for spelling and grammar errors before you send it. Use the spelling and grammar checker function, but also 'sense check it' yourself. Technology doesn't pick up everything. ✓ Ask a colleague to read your e-mail before you send it if it is complex, important or open to misinterpretation. ✓ Give a context for your message to help the recipient to understand its purpose. ✓ Keep formatting simple – you don't know what type of device the recipient will be using to read the email, so any formatting you have applied may be lost. ✓ Include a proper signature with your job title and contact details on it. This makes it easy for your recipient to contact you via e-mail or telephone, or speak to a relevant colleague if you are not available. ✓ Explain (in the main body of the e-mail) what any attachments are and why they are relevant. ✓ Be personable without swamping the e-mail with necessary information and 'waffling'. ✓ Use bullet points or tables to make your information easy to read. ✓ Edit your own e-mails. Cut out unnecessary words and sentences as long as they don't affect the meaning.	× Include anything in an e-mail that you would not want other people to see – remember that e-mails aren't necessarily private. × Use humour, sarcasm and irony, particularly if the message is to someone who doesn't know you. E-mails can easily be misinterpreted. × Type a whole message in capital letters – this looks unprofessional. Using capitals as emphasis can come across as shouting. × Copy someone in on an e-mail that doesn't apply to them. People receive more and more e-mails every day, so limiting your e-mail to those who absolutely need it is a good way to help keep e-mail manageable within the business. × Use fancy typefaces and graphics. They don't always get through (especially on different kinds of devices), and even if they do, they can be distracting and often look unprofessional. × Use jargon or abbreviations unless you are sure that everyone who receives the e-mail will fully understand them. Avoid using them in external e-mails. × Use emojis and gifs. It looks unprofessional. Remember, if you send an e-mail from work, it is a work e-mail. You can do what you like from your own laptop out of office hours.

Checklist for effective e-mails

Use this checklist to review your e-mails before you send them.

- Does your e-mail have a clear subject line? ☐
- Have you minimised the number of people included in the 'CC' box? ☐
- Have you opened your e-mail appropriately? ☐
- Does your e-mail have just one main topic? ☐
- Is it presented clearly i.e. in paragraphs, using bullets or tables? ☐
- Are all attachments explained? ☐
- Have you checked the e-mail for spelling and grammar? ☐
- Have you read the e-mail, and reworded anything that is unclear or may be open to misinterpretation? ☐
- Have you eliminated all unnecessary words and phrases? ☐
- If the e-mail is complex or important, have you asked a colleague to check it? ☐
- Have you made it clear what you want the recipient to do now? ☐
- Have you closed your e-mail using a signature that includes alternative contact information? ☐

Receiving and Managing E-mails

Here are some tips for receiving, forwarding and managing your e-mails...

If you receive a message of which you are suspicious then DON'T OPEN IT - it might be a virus. In particular, don't open attachments unless you are sure they are from a reliable source. If you suspect an e-mail as being bogus, contact your IT department if you have one.

Organise e-mails you want to keep in folders otherwise you may not be able to find messages when you need to.

Set up rules to automatically respond to, or sort your emails.

'Flag' or 'mark as unread' e-mails that you need to respond to.

Set aside time for dealing with emails rather than responding to them as they come in. Remember, emails are rarely urgent, so spending time at the start, middle and end of the day should be sufficient and help you to manage your time.

Delete unimportant e-mails or messages that you have dealt with, or no longer need. Be ruthless.

Regularly 'spring clean' your inbox. Once your inbox reaches its size limit, it will stop receiving e-mails. Pay particular attention to those messages with attachments. Save the attachment if it is relevant, and then delete the message.

Never respond to e-mails that request personal security information. A type of spam which has been nicknamed 'phishing' is common, where you receive a spoofed e-mail that appears to come from a legitimate website that you have dealings with, such as a financial institution or Ebay. It may ask you to verify your account details by going to a link in the e-mail, but a legitimate organisation would never ask you for this type of information.

A forwarded or re-directed message will generally comprise of sections by different authors. Forwarded messages can grow in size, particularly if several different people have forwarded it and added comments - be careful if you edit the message, and check that you aren't sharing information you shouldn't.

Never forward a message on without explanation (this can be verbal!).

Before forwarding messages consider notifying the sender of the message (if you are unsure).

Suggested Measurable Activities to Apply the Learning

1. Stop yourself from sending one e-mail each day – find an alternative method instead.

2. Review 5 different e-mails that you have sent in the last month. Identify one or two things that you could do differently to make your e-mails more effective.

3. Use the checklist provided on page 8 of the workbook to quality check each of your e-mails before you send them.

4. Set up a filing system to store and manage your e-mails. Make sure that you organise your inbox every week.

What will you do as a result of this Power Hour Session?

What benefits will it bring?

KEY POINTS

Effective Emails

E-mail is a good communication method when the message is…

Straightforward	Not time-critical	Intended for someone at a different location	Intended for multiple people
Not requiring immediate feedback	Not sensitive	Supported by documents or data	'Nice to know' rather than 'Need to know'

Things to Consider

1. To, CC and BCC	•It is not necessary to 'CC' lots of people in to each e-mail you send – this just clogs up inboxes. 'BCC' should be used sparingly e.g. if you want to keep recipients details confidential.
2. Subject Line	•You should always complete the subject line, and subjects should be clear and specific. Blank subject lines are unprofessional.
3. Priority:	•Most e-mails should be sent as 'normal' priority unless someone has requested information urgently.
4. Opening	•There is no standard way to open an e-mail, but make sure that your opening is appropriate to who the recipient is, the nature of the message and your relationship with them.
5. Main body	•Each e-mail should have one topic and the main body should be kept short. If your message cannot be read on one screen, people are likely to get bored and not give it proper attention.
6. Closing	•E-mails should be properly closed, usually with informal phrases. Signatures look professional, and should be used on external e-mails. Any specific actions or next steps required must be clear.
7. Attachments	•If you need to send a lot of information, send it as an attachment or place on a shared drive.

Useful Hints and Tips for Effective e-mails

DO	DON'T
✓ Keep your e-mails short – make sure that they can easily be read on half a screen (typical 'reading pane' size). ✓ Use simple, straightforward language. ✓ Proof-read your e-mail for spelling and grammar errors before you send it. Use the spelling and grammar checker on your pc, but also 'sense check it' yourself. Your computer doesn't pick up everything. ✓ Ask a colleague to read your e-mail before you send it if it is complex, important or open to misinterpretation. ✓ Give a context for your message to help the recipient to understand its purpose. ✓ Keep formatting simple – older computers or those overseas may have different settings to yours, so any formatting you have applied may be lost. ✓ Include a proper signature with your job title and contact details on it. This makes it easy for your recipient to contact you via e-mail or telephone, or speak to a relevant colleague if you are not available. ✓ Explain (in the main body of the e-mail) what any attachments are and why they are relevant. ✓ Be personable without swamping the e-mail with necessary information and 'waffling'. ✓ Use bullet points or tables to make your information easy to read. ✓ Edit your own e-mails. Cut out unnecessary words and sentences as long as they don't affect the meaning.	× Include anything in an e-mail that you would not want other people to see – remember that e-mails aren't necessarily private. × Use humour, sarcasm and irony, particularly if the message is to someone who doesn't know you. E-mails can easily be misinterpreted. × Type a whole message in capital letters – this looks unprofessional. Using capitals as emphasis can come across as shouting. × Copy someone in on an e-mail that doesn't apply to them. People receive more and more e-mails every day, so limiting your e-mail to those who absolutely need it is a good way to help keep e-mail manageable within the business. × Use fancy typefaces and graphics. They don't always get through, and even if they do, they can be distracting and often look unprofessional. × Use jargon or abbreviations unless you are sure that everyone who receives the e-mail will fully understand them. Avoid using them in external e-mails. × Use text-talk or smileys. It looks unprofessional. Remember, if you send an e-mail from work, it is a work e-mail. You can do what you like from your home pc out of office hours.

Case Study 1

Send | To... | James.thomas@anycompany.com
Account | Cc...
Subject: Hi!

James,

Good to talk to you on the call today. Seem's like you had a great week off. I'm very jealous. I've always wanted to do something exciting like that, but somehow never get around to it.

Anyway, Jaana said I should send you some info on the way that we run our team meetings. I don't know what you need, as it's all just standard stuff really. We have an agenda, and that usually covers things like key stats, who's attending, minutes from the last meeting, what's gone well, what problems we've had and what our targets are for the next month.

That reminds me, what happened with the figures for last month? It looks like there was a bit of a problem. I heard Gerard muttering something about a key client falling through, but no more. Sebastian has been like a bear with a sore head all week. Can you fill me in?

We chat about things like that in our meetings, but I suppose the key thing is that we give each topic a time frame, and assign someone to talk about it. Of course, everyone CAN talk about it, its a team meeting after all, but we get someone to sort of look after that bit. Sometimes, it does get to be a bit of a free for all, but in many ways that's good. We get to discuss lots of ideas and at least it means that we all know what's going on. No surprises! We always round up by checking that everyone has got the actions. Oh, and we never cancel the meeting.

Hope this is helpful. I'll send you a copy of our last agenda if you think it will help.

Whilst I think, how have you guys coped with the introduction of the new VAT classification system? I'm not sure that we're getting it right, but everything seems to be going through. Any tips?

Tracey Miller
Credit Controller
Financial Services Centre
Tel: 05639 322760

Case Study 2

Send

Account

To... Andrew.green@anycompany.com

Cc... Julie.hepworth@anycompany.com; andrea.griffiths@anycompany.com; graeme.reynolds@anycompany.com; charles.fielding@anycompany.com

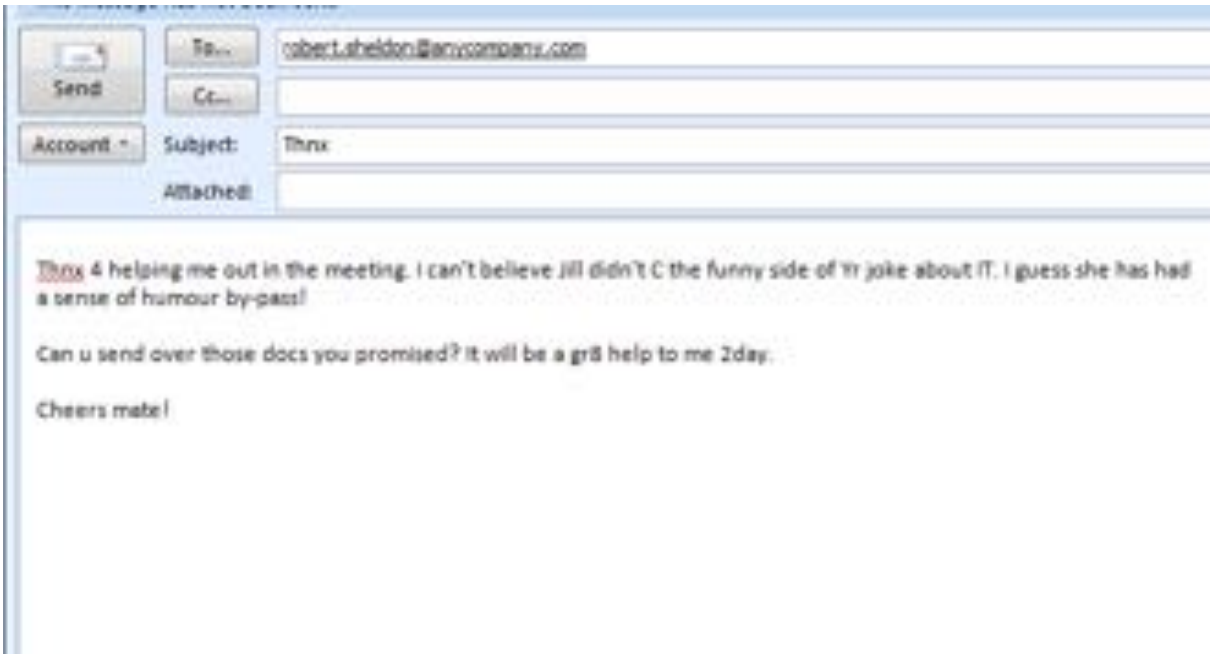
Subject: FIGURES

Attached: Information.docx (11 KB)

HERE IS THE INFORMATION YOU REQUESTED. SORRY ITS LATE, BUT I WAS COVERING FOR LORRAINE AND COULDN'T DO BOTH THINGS AT ONCE.
IN FUTURE ASK CHARLIE IF YOU NEED ANYTHING URGENTLY AND I CAN'T HELP.
BY THE WAY, DID YOU KNOW THAT MOST OF THIS INFORMATION IS ON THE INTRANET, SO YOU CAN ALWAYS GET IT DIRECTLY IF YOU JUST KNOW WHERE TO LOOK.

Conrad Ashford
Systems Analyst
Information Services
Tel: 05639 326774

Case Study 3



Send | To... robert.sheldon@anycompany.com
Account | Cc...
Subject: Thnx
Attached:

Thnx 4 helping me out in the meeting. I can't believe Jill didn't C the funny side of Yr joke about IT. I guess she has had a sense of humour by-pass!

Can u send over those docs you promised? It will be a grß help to me 2day.

Cheers mate!

Case Study 4

Send | To... operations.director@anycompany.com

Account | Cc... flavio.DiRossi@anycompany.com

Subject: Project Update

Attached:

Flavio asked me to send you an update about our progress with project zero. I'm pleased to say that everyting is on track and (so far) within budget. We are little behind in terms of timescales (about a month) but Flavio says it is nothing to worry about, and I think it is probably normal with thing like this.

Phase one went well, and most people were quite positive about the introduction of Interceptor. Their were a few technical queries (as you would expect) and these have been passed back to systems development. We are expecting a response to these at the end of next week, and we will keep you advised of the outcome.

We have started to look for specialist training companys who can help to retrain everyone on the new system, and we have got a couple of quotes in already. We are expecting a few more by the end of this week, and will short-list by the end of the month. Would you like to get involved in choosing the supplier?

If you need any further information, please do not hesitate to contact me, and I will do my best to help you.

Kind regards,

Kerrie Wilson

Project Administrator

Tel: 05539 321951

Communicate! Cards

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FACE-TO-FACE

Quick, simple enquiries

Discuss issues that affect lots of people

Confirm decisions already made

Discuss complex issues

www.power-hour.co.uk

Confirm arrangements

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Solve a problem

www.power-hour.co.uk

Provide factual information

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Discuss personal/ sensitive issues

www.power-hour.co.uk

Clarify facts

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Ensure everyone gets the same information at the same time

www.power-hour.co.uk

Provide non-urgent information to someone remotely

www.power-hour.co.uk

Check your understanding of a situation

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Check assumptions

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Group decision making

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Provide documents

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Develop knowledge and understanding

Gain a better understanding of requirements

Supply routine information

Give feedback

Raise a problem

www.power-hour.co.uk

Gain agreement

www.power-hour.co.uk

Pass on information to colleagues

www.power-hour.co.uk

‘Nip problems in the bud’

www.power-hour.co.uk

Pass on a message

www.power-hour.co.uk

Influence someone

www.power-hour.co.uk

Generate/share ideas

www.power-hour.co.uk

Raise issues with someone in the same team

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