EFFICIENT & EFFECTIVE EMAIL

THINK
- Could I phone?

If email is best:
- Choose a good subject line
- Limit your word count
- Have a clear call-to-action

CONSIDER
- Who is the recipient?
- Will they need any background?
- Is it their priority too?

DOUBLE CHECK
- Who are you sending this to?
- Do you have their correct email address?
- How big is this mailing list?
- Do they all need to read this?
- Do you really need to “reply all”?
- How much are you forwarding?

RESPECT
- Choose your words wisely
- Don’t waste their time
- Don’t expect a response immediately
- Don’t expect a response out of hours

Download email guidelines from uod.ac.uk/eee
Too much email – that was one of the results of the University’s Structures and Culture Review. Consider these guidelines when you need to communicate, to help reduce the amount of email, and make sure your message gets through.

Think

- Do I need to email, or will a quick telephone call/meeting suffice?

If email is best:

- Consider your subject line to encourage opening.
- Limit your word count to ensure your message is simple to read and easy to understand.
- Have a clear call-to-action (if required).

Consider

- Who is the recipient?
- Will they know the background or is this the first time they’ve heard about it?
- Is it their priority too?
- Are they even at their desk?

Double check

- Do you have the correct email address?
- Will your mailing list target the exact group you want to reach?
- Do you really need to ‘reply all’?
- How much are you forwarding?

Respect

- Don’t expect a response immediately, particularly during out-of-hours.
- Consider your tone and choose your words wisely.

For more detailed email guidelines, see below.

We’d like your feedback, after which email guidelines will form part of an overall internal communication strategy.

Please send your feedback to the Internal Communications Team internal-comms@dundee.ac.uk
EFFICIENT & EFFECTIVE USE OF EMAIL

Too much email – that was one of the results of the University’s Structures and Culture Review.

These guidelines are proposed to help us use email more efficiently and effectively, to help reduce the amount of email, and to make sure your message gets through.

1. Think before you send

1.1. Do you need to send an email message at all? Consider face to face or phone.

- Avoid using email if a conversation or a face to face interaction could be more effective – phone or go to see the person if you can.
- Rather than spending time composing multi-paragraph emails, which others have to spend time interpreting, and more time composing their own multi-paragraph response to, consider phoning or arrange a meeting.
- Don’t forget that email should not be used for communicating sensitive information.
- It may be helpful to introduce others to a new topic via a meeting or presentation rather than an email out of the blue.
- It is appreciated that it can be difficult to schedule meetings with larger groups of people, and that diaries are often busy. Email may indeed be the most effective way to convey your message.

1.2. Do I need to respond?

You don’t need to reply to every email message, similarly, don’t always expect one, people are not being rude by not responding. A message saying “Thanks for your message, I’ll do that” doesn’t need a response.

Most people are busy and, if a response is needed, they will respond when they can. Use an “Out of Office” message to indicate you are away or in meetings all day.

See section 5 “Call to action” to make it clear when a response is needed.

2. Who is sending the message?

Many people decide which email messages to open based on the sender.

Decide whether a message should come from an individual named email account, a PA/secretary or a generic mailbox. Will the sender be known by the recipient? If not, then some explanation may be needed in the message.
2.1. Who is receiving the message?

Our Outlook email system attempts to help you to find the correct recipient by prompting you as you type. Before sending your message, double check that the recipient is really the person you wanted:

- Are there two people with the same name?
- Many people have two accounts – a staff one and a student one, check you have the correct one.
- Are you sending to an old email address or a personal email address, which is in your contact list?

2.2. Distribution lists & groups

If your message is going to multiple recipients, ensure that you use the most appropriate distribution list or Outlook group.

You may have your own lists set up for colleagues, teams etc., and there are also University-wide lists which are automatically maintained. However, please note there are some old ones still on the system which may be out of date.

You can check the membership of a list or group from within Outlook before you send the message, to ensure that you are indeed using the correct one, and that it does include or exclude the people you expect.

2.3. Do they need my message?

Don't send messages to people who don't need to see them; they won't appreciate you filling up their inbox and may be more inclined to ignore important messages from you in the future.

2.4. To: / CC: / BCC:

- Anyone who needs to act on an email should be included in the top line distribution list “To:”.
- Send copies to individuals who need the content of the message for information.
- Only use “CC:” when it is important and appropriate for all recipients to see that each other have received it.
- If you are emailing a large number of recipients, or a smaller group who don’t need to see who else is receiving your message, it is essential to use “BCC:” for the list of recipients. This hides their details from each other, and prevents people replying to the whole group.
- When replying to a message with multiple recipients, think before choosing “Reply All”, it is often more appropriate to reply to the sender only, or to carefully select the individuals who need to see your reply.

Then double check:

- who is receiving it,
- if they see who else is receiving it,
- if you have selected “Reply” or “Reply All”?
3. The subject line

Use the subject line of your message to help the recipient decide quickly whether or not to open your message.

- Be clear, relevant and concise, which helps people to manage their inbox and to find messages at a later date. If you are replying to a message, but changing the topic, then change the subject line, or start a new message.
- Remember that people are using a range of devices to read email, and in some cases (e.g. mobile phones) the subject line is heavily truncated. The start of the subject line is important.
- If the email is genuinely urgent, mark it as such.
- If action is required, consider starting the subject field with “Action required:”.
- Consider other prefixes to help recipients, such as [Info], [Low Priority] etc

4. Email content

4.1. Make your message as easy to read as possible

Unless your message is very short, use a clear statement at the start to identify the audience, for example “If you use the Heathfield car park, please note that ….”

If you have used “BCC:” to hide the individual recipients, it is helpful to start the message with an indication of the group who have received it. For example “To all those attending the training course …”

Sometimes a lengthy email message is the quickest, simplest way to convey the information. This can be made more digestible with a summary or outline at the start, in the same way academic papers start with an abstract. Then break up the text into short paragraphs, including headings and bulleted or numbered points.

4.2. Use respectful and appropriate language

Anything written in an email message may be passed on to someone else, and could end up in the public domain. Only write things about other people which you would be happy saying to them in person. Only write information which you are happy to have disclosed and made public.

Make sure you are aware of the size and membership of your recipient list when composing your message, so you pitch the language (including acronyms and abbreviations) appropriately. For example, do they all know the context or background to your message?

Work-related emails should not be written in text speak, try to avoid chat acronyms and text shorthand, and avoid displaying over familiarity by using emoticons and ‘x’, except for close friends/family.

Avoid using capital letters for your subject line, or for an entire sentence, which is perceived as shouting.

The tone of an email is easy to misinterpret, re-read your message before you send it. Think about how you would perceive the message if you received it from a colleague. If you have to use humour and sarcasm, use it very carefully, and only if you really know how it will be received by the recipient.
If a message you receive makes you angry or upset – pause before hitting “reply”. Don’t reply straight away, sleep on your first draft, and consider whether email really is the best form of response.

If you do receive an email which you consider to be rude or discourteous, don’t respond in a similar way, but attempt to speak to the person concerned, and/or raise it with your own line manager.

4.3. Check before you forward

Sometimes email messages are forwarded on from sender to sender, and the entire message thread is vital to ensure that recipients have the whole context.

However, this can lead to confidential information being forwarded far wider than the original audience.

Before forwarding an email thread to a new recipient, remove any irrelevant content, or information that they should not see. Or consider making a phone call or arranging a meeting instead.

Check if there are any attachments which you may be forwarding without realising.

4.4. Do you need an attachment?

Before sending a message stating: “Please read the following attachment” look at the attachment, and decide if you can easily extract the information from the document and paste it into the body of the email.

If the attachment contains formatted information, for example a spreadsheet which you need to edit, or an image, then you cannot avoid sending it as an attachment. In this situation, a helpful statement in the email should summarise the facts, so the reader knows whether or not they need to open the attachment. With spreadsheet attachments particularly, it is helpful for the recipient if you check the formatting before sending, e.g. if the spreadsheet requires printing in landscape format, is it set up correctly.

If you are dealing with confidential data, you should almost always use the system of record. Where information must be sent by email, there are processes around checking, labelling confidential and, if appropriate, encrypting, the data.

If you require people to edit and comment on a document, hosting the document on Box may be more appropriate, so everyone is working on the same version.

If your attachment is a form to be completed (as a Word document), it may be more appropriate to create an online form, which may be easier for the user to supply the information you need. Contact the UoD IT Help Desk to do this.

4.5. Web links for more information

It is often useful to include a web link in an email message. This means you can keep your email message short, and provide more, and up to date, information online.

As with attachments, provide enough information within the email message to encourage readers to click on the link. Ideally have the web link at the end of the message, or certainly after any important information, as someone may click on the link and never return to read the rest of your message.
5. Call to action

Make sure the reader of your message knows how to respond to your message:

- If you are promoting a talk, seminar or other event, provide the date/time/location, as well as the title of the event, details of who the intended audience is, and any other details to whet the appetite. Make it clear whether or not booking is required, with a direct weblink to the online booking (not a departmental or University home page).
- If a response is expected in the form of providing further information, again make it clear. “Please reply to this message with the name of your representative by Friday 12th at 10am”.
- If your message is an update about an ongoing project, then provide information about what is going to happen next, and/or when you will next report.
- See below regarding meetings and appointments.

5.1. Arranging a meeting

If you are trying to arrange a meeting, the most efficient way to find a mutually convenient appointment is to use the Outlook calendar – use the Scheduling Assistant see if others are free/busy (or the details of what they are doing if they have given you that permission). You can then send a meeting request to the group with details of why you are meeting, and with links to relevant papers or other information.

Try to make it as easy as possible for the sender, if you can’t do it that way. If there is a choice of meeting slots and you want them to indicate which are or aren’t convenient, write these out in the body of the message, to allow them to quickly respond, e.g.

Mon 1st 9-10
Mon 1st 10-11
Mon 1st 11-12
Tue 2nd 9-10

Those responding can then annotate or delete those unsuitable.

6. Use Outlook tools

Outlook is a very powerful piece of software, here are some tools which you may find useful:

- You can use Automatic Rules within Outlook to sort messages into folders, based on the sender or the topic.
- Delay Delivery allows you can to choose when a message is actually sent. You may wish to compose a message during the evening, but only send it at 9am the next morning.
- You should use Automatic Replies to create “Out of Office” messages, with start & end dates/times, to indicate periods of time when you are away or busy, and therefore no reply will be received.
- Use Automatic Replies on generic mailboxes to tell people what will happen to their message, for example, “Thank you for contacting XXXX, the team will respond within 2 working days”.

There is a wealth of information online about Outlook – you may wish to start with the UoD IT email webpage: http://uod.ac.uk/it-email
7. Finally – hours of work

Across the University, staff have a wide range of working patterns, including part-time and flexible working hours. This means messages might be sent in the evening, very early in the morning or over the weekend.

This is the choice of the sender, but there should be no expectation that you need to reply outside your working hours.

Thanks

*With thanks to the School of Health & Life Sciences at Glasgow Caledonian University for their Email Charter and the University of Portsmouth for their Staff Essentials Effective Email webpage, which were drawn on in the preparation of this document.*