



Effective Email Rules and Formatting

Email – it's everywhere

Whether you're at work or home, computing has become part of our daily lives. Email applications are among the most common used by computer users.

Email is an efficient and effective tool for communicating with others. Used correctly, you can correspond with others and help ensure that your message is received, read, and understood as you intended.

The following tips that will make your email communications more effective:

When should you stop replying to emails?

There are times when email threads become lengthy and confusion sets in. Also, there seems to be no end in site or if action will eventually be taken.

Situations such as this call for just that- "a phone call" or a meeting. This will allow for parties to clarify points and make sure everyone is on the same page.

Should you ignore emails?

Some people do ignore e-mail correspondence- that is until you get a phone call from a co-worker, the boss, or family member outraged by your lack of care and attention.

Some people believe the philosophy of "if it's important, they will call." The other belief might be "if it's important, they will resend the email." But before you subscribe to that theory, make sure everyone else knows that is how you operate.

All too often, email correspondence is sent once and only once. With today's software capabilities (especially the ability to notify the sender that you read the email or it was returned because of an invalid email address), you will be held accountable for having received the email and thus responsible for taking action if such was requested.

Make One Point per Email

A very common problem with emails is that they address multiple topics within a single correspondence. This leads to confusion (from the recipient's standpoint) and causes emails to be either deleted or filed with no further action taken).

If you need to communicate with someone regarding several topics or issues, use a separate email on each subject. This allows for the following:

- The email will be easy to read and understood
- The recipient can take clear action based on your request
- The email can be filed into an appropriate folder (and thus it will contain only information on that topic)
- Separate emails can lead to situations where simple topics can be replied to immediately while complex topics.

By writing separate emails, you get clearer answers.

Addressing your emails

If you are sending email to an individual, use a greeting such as “Dear (and their first name.)”

If you are sending an email to a list of people, use a greeting that addresses the group. Examples can include “Dear Friends,” “To my workgroup,” etc...

If you send a message to multiple recipients and you don't want the recipients to know who else received the message, use the bcc (blind carbon copy) function in your email program. In this case, you can send the original to yourself and bcc everyone else.

Subject Line Descriptions

Think of subject lines as headline in a newspaper. The words used must do the following:

- Be brief, as some programs truncate long subject line descriptions
- Capture the reader's attention
- Give the reader an idea of what the subject matter will contain
- Help triage email and take action for the most important correspondence
- Personalize the subject so as to avoid SPAM appearances
- If the message is urgent, use the email “Importance” flag or include the word “Urgent” at the beginning of the subject line.

If your subject line is weak, chances are the reader will delay (or perhaps not open) your message. Never leave the subject line blank.

Remember that spam and anti-spam software can prevent an email from being delivered because of a weak or inappropriate subject line.

Body Text – Be short, clear, and concise

Remember that people are busy and may not have time to read long-winded or poorly constructed emails. Can you recall receiving an email that was a solid page of mumbo-jumbo and you gave up trying to read it? At some point in time, you simply said “no way” and either deleted or never opened that email again?

It's important to remember the following when it comes to delivering your message:

- Limit your emails to one page (if possible).
- Use multiple paragraphs to separate your points. The rules of writing should be similar to constructing a short essay.
- Consider using bulleted points to clearly express your thoughts.
- Outline the points you're trying to get across in an easy to understand format.
- Use upper and lower case letters. It's easier on the eyes and considered proper formatting.

Remember that your email should be used to communicate, educate, inform, persuade, and ensure that your points/intentions are being understood.

Abbreviations and acronyms

Never assume that the reader (especially a first time reader) understands your short cuts, abbreviations, and acronyms. Make sure that you spell things out. For example, your email might read “I am a member of the Project Management Institute (PMI®).”

Short cuts can often lead to embarrassing situations if the writer becomes complacent and has poor proof reading skills.

Also remember that emails can be forwarded to others. So be very careful in your usage of abbreviations.

Including important points from the original email

When replying to email, there are times when the original contents will be attached at the end of an email. Other times, email programs may not include the original text. In either case, if you are asked to reply to key points or action items, it is recommended that you copy the item, highlight it in a different color, and then reply right below.

For example, the items in green are from an original email and the items in black bold are the reply:

You wrote - “Make sure you contact the vendor before Friday.”

Tom’s reply- Yes I called her today and the appointment is set up for Friday.

You wrote – “Make sure you have a check ready.”

Tom’s reply- Yes, accounting has prepared a check and I will sign it on Friday.

You wrote – “Make sure the work is performed correctly.”

Tom’s reply – Yes, I will have John inspect the work to make sure it is done correctly.

It’s frustrating when an email contains a specific answer, but no one can remember the original issue. So avoid this problem by copying a portion of the original message, add the “You wrote” text then answer the issue.

Proof reading your email

Proofing seems to be a lost art. There is nothing more embarrassing than to send an email that has spelling errors. Do not become complacent. Use the following tips:

- Take your time, read your reply carefully
- Do not rely on spell checking features. Remember that the word “ass” may not be flagged as a spelling error (where you intended to type “add”).
- Yes, grammar counts!!
- Make sure you carefully read long email threads and scrub them if necessary
- Make sure you covered the items intended
- Make sure you attached files to the email.
- Double check the distribution list

Do not write or reply to emails if you are upset or emotional

This is the worst time to be hitting the keys. Stay away from email if you're angry or emotional. Chances are that our emotions will overtake our logic and good sense and thus cause you to write something you'll later regret. And remember, your email program may not have an **"UNSEND EMAIL"** option. So the rule of thumb is once you hit the "Send" button, it's gone and cannot be retrieved.

Take some time, calm down, go back and read the original email, and make sure you clearly understand what was being communicated to you. Only then should you write a response. Even then, you might consider parking the reply and sleeping on it for a day or so. You may find that delaying a reply will work to your benefit.

If your emotions are warranted, then your issue carefully worded reply will still remain valid the next day. But in most cases, you'll thank yourself for invoking a waiting period.

Be careful of what you put in writing.

This goes without saying. Remember the following:

- Emails can be forwarded. This allows practically "anyone" to read what you wrote.
- Your email administrator (and thus your boss) can access to your email
- Double check the "recipients" and make sure the email does not go to unintended persons
- Stick to the facts and stay away from opinions or personal attacks
- Stay away from jokes or other material that can be misconstrued or taken as offensive

Seeking A Response? Specify What You Want

If your email requests that a specific recipient reply and take some type of action, make sure that you clearly communicate that. Do not assume they will read your email and know what to do. Tell them exactly what needs to be done and provide whatever information they need. The easier you make it for someone else to respond the higher the likely they will do so. There are several ways to accomplish this.

Method 1 – In the subject line, add the following [Action Required] or [Request Reply]. This will alert the reader that they must respond to your email.

Method 2 – Insert an action item table in the email. (Remember, this works best if you use HTML formatting).

Name	Item	Action	Due Date
TC	Approve Project Plan	Sign Plan and return to me	5/16/07
MP	Funding	Verify that funds are available for this project	5/10/07
VF	Requirements	Have the manager sign the requirements doc and return it to me	5/12/07

Method 3 – Use text to ask for responses - At the end of a message, make a title called Action Items and create a listing of people's names and spell out what you expect. For example:

TC: DECISION NEEDED. Approve the Project Plan by signing and returning it to me.

MP: PLEASE VERIFY. Do we have sufficient funds for this project?

VF: FYI, Make sure requirements have been finalized. Have the manager sign the requirements document.

Proper email (text) formatting

Send your emails in plain text. Many people have problems using HTML formatted email. Yes it's true that HTML/rich-text-formatted emails are more attractive. However, the recipient's computer (and software) may not be set up to properly interpret the email and thus cannot open or see the contents. In addition, anti-spam filters may intercept emails and cause them to be undelivered or block some of the content.

Remember that while email applications have many similarities, they also have architectural differences. So do not assume that the features you enjoy are available to others (on their systems).

Email attachments

Make sure that your recipients can download and open your attachments. Do not assume that your recipients either have the source application (the program the file was created in) or the proper version. The following list (of file types) are the most common used.

.doc (Microsoft Word/WordPad document)
.xls (Excel spreadsheet)
.txt (plain-text)
.jpg (picture)
.gif (pictures)
.pdf (Adobe Acrobat Reader)

And what about the America Online Users?

- AOL, among others, sets a size limit on the attachments you can send with email.
- AOL may compress and zip multiple file attachments into a single file. If the recipient has no idea what this is, chances are they will not view your attachment.

If the file size is prohibitively large for email systems to handle, your email can include web a link to an article or document. This saves disk space (from not having to attach the file) and thus makes it easier for the recipient to view an online document. It also helps eliminate multiple instances of a file on server if being sent to several people in an organization.

Signatures

Most email programs allow you to add a "signature" to your emails. Your signature should be short and should provide the recipient with multiple methods of contacting you. Depending on your email application (and whether you are using HTML formatted email), your signature can include a digital scan of your autograph. Remember, the digital signature may not appear on some email systems. The signature should appear like this:



Tom Carlos, PMP
tom@carlosconsulting.com
Home Office (916) 783-3086
Cell (916) 521-2520
www.carlosconsulting.com

Forwarding emails

Often, we receive and forward emails. But what happens if you receive an email that was ill-prepared and has an unacceptable appearance? Should you forward it with or without edits? There are many views on this. Some people insist that you not alter the contents of someone's email and that it should be forwarded "as-is." In this case, you can leave the original email as is. However, if you wish to address key portions of that email, you may copy and paste small portions into your reply, indent that portion, use italics and quote marks, and then add your comments.

Others suggest that you edit the entire email. However, if you do edit the email, you must alert the new recipients that you have changed the contents of the original document.

Test the email (and attachments)

If you're sending an important message, send it to yourself first- and preferably to a different computer and email account that uses different email software. This will give you a chance to see how the email appears on a different system. You can also make sure the attachment comes through and can be opened (thus avoiding sending corrupt files).

On your way to better emails

By using these rules and tips, you should improve your email writing skills. And perhaps your recipients will also catch on and improve theirs!! You're the expert now- train them!!!

About the author

Tom Carlos has over 20 years of cumulative experience in business, technical, and training environments. He is a Certified Project Management Professional (PMP) and member of the Sacramento Valley PMI Chapter. For other articles on similar subjects, you can visit www.carlosconsulting.com or contact him at tom@carlosconsulting.com.