Email Etiquette and Management

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Lecture Outline

- Basics
- Columbia University Policies
- Email Etiquette
  - How to write emails
  - How to present a professional image
- How to manage your email
- FATAL FLAWS
Basics

- Email is written communication
- Determine why you are writing this email
  - Is this an appropriate medium?
- Email is like a letter...
  and even more like a postcard.
Email is the wrong medium for:

- Sensitive Topics
  - These deserve face-to-face conversation
- Anything funny or possibly inappropriate
- Complex Information
  - Send this as an attachment
  - Or make a phone call
Basics, continued…

- Email is public information
- ?? …Ask yourself the test question…??
Columbia University Policies

- Each user is responsible for his or her account
- No sharing of passwords or accounts
- Reading others’ e-mail is forbidden
- For business purposes only
- Gratuitous files (large photo files) are not acceptable
- Nuisances (chain letters), obscene, harassing or unwelcome emails are prohibited and prosecutable
- Emails are almost never truly deleted from CU system
Columbia University Policies, continued…

- Do not use for private commercial purposes
- No computer games
- Unlawful use can be a criminal offense
- Violators will have accounts suspended
  - Can be revoked
  - Penalties include termination of employment
Columbia University Policies, continued...

- Go to: http://www.columbia.edu/cu/policy/index.html
How to Present a Professional Image

- Don’t be sloppy:
  - Use abbrvs only w/clrs frnds and cllgues
  - Always profread an spell checkk
  - Use correct punctuation!

- Keep messages brief and to the point:
  - Do not double space between paragraphs

- Do not use ALL CAPS
  - **Bold** important words

- Summarize long emails at the front end

- Always put explicit info in the subject line
Professional Image Salutations

- **Formal:** Dear Mr. XX,
  Dear Bob,
- **Informal:** Hi Bob,
  Hello Bob,
  Bob,
- **To a Group:** Dear All,
  Dear Team,
  To Team Members,
  Dear Faculty,
Professional Image Closings

- Every email deserves a closing:
  Thank you,
  Sincerely,
  Warm Regards,
  Thanks,
  Best,

- Make sure you complete the signature line
  – Add all contact info– including websites
Professional Image Closings, continued…

Signatures should have contact info:

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Fax: 212-305-8284  
http://www.mailman.hs.columbia.edu/faculty-staff/research-resources-r2-office
Professional Image, continued…

- Never forward chain letters, junk mail, or jokes
- Don’t send virus warnings
  – Check with CUIT first before sending out an alarm
  – Alarm should come from them
- Leave out smiley faces…
  except for friends :)
- Know when to let go
  – (e.g., Thank You, You’re Welcome, Good Bye)
Professional Image, continued…

- **Copy (cc):**
  - Only when absolutely necessary

- **Blind Copy (bcc):**
  - Only when you have a long list of names

- **Use caution when sending group emails:**
  - Almost no reason to “Reply All”
  - Only for something of high importance needing collective input
  - Not for: “Me too!”
How to Write Emails

- Determine the purpose
  - Answer or ask a question
  - Verify information
  - Send a document
  - Get action
  - Schedule a meeting

- Put purpose in the subject line
  - Quick query
  - Schedule a Meeting
  - Did you get Info I sent?
Use Journalistic Triangle

- Main Point
- Details
I am writing a grant on injury rates and need your help.

The grant is going to NIH and is due on June 12th
We need to improve email skills among faculty.

The date of training is May 28th.
Email Etiquette

- Make it easy on your reader; get to the point
- Keep it brief
- Use short paragraphs (1 sentence is fine)
  - blank line between them
- Use lists where possible
  - Bullet them
- Use alerts to save time
How to Write Emails

- Be careful of tone
  - Abrupt → Rude
  - Casual → Unprofessional
  - Polite → Professional
Setting High Importance

Only use when messages are actually of high priority!
Abrupt

I need the budget. Get it to me by June 12th.

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Get me the budget by June 12th.

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Really Rude

GET ME THE BUDGET BY JUNE 12TH.

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Can you please get me the budget ASAP? Thanks!

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Unprofessional

I'm drowning in work... HELP!!! Send me the budget...

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Dear Dr. Smith,

I would be very grateful if you would kindly send me the budget by June 12th.

Very Best Regards,

Robyn

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Polite and Professional

Dear Dr. Smith,

Thanking you for inviting me to collaborate. Unfortunately, I am busy with other commitments at the moment and will be unable to take on another project. Please think of me in the future, and please let me know if I can assist in any other way.

Sincerely Yours,

Robyn

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Email Management

- Power Emailers: > 50+ emails per day
  - Approximately 2 hours a day

- Super Power: > 100 + emails per day
  - Approximately 4 hours a day
Email Management, continued…

- Designated Times to handle email:

<table>
<thead>
<tr>
<th>Schedule A</th>
<th>Schedule B</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 AM</td>
<td>8 AM</td>
</tr>
<tr>
<td>4 PM</td>
<td>Noon</td>
</tr>
<tr>
<td>8 PM</td>
<td>4 PM</td>
</tr>
</tbody>
</table>

- Power emailer– can add early AM and late PM times
Email Management, continued…

- Set designated times
- Keep email alarm off
- Process emails daily
- Every Friday, clean out inbox and empty trash
- Clean out Folders/Trash/Junk/ Sent Files monthly
- Add junk mail to block sender list
- Clean out address books and update weekly or monthly
Email Triage

- Newest on top, no skipping around
- Sort by name for quick clean-up
- Does it have any value?

If Yes:

If No:

Delete
To Eliminate “No’s”

- Unsubscribe- BUT ONLY FOR TRUSTED SOURCES-otherwise it can actually be used for spam
- Block sender
- Set up personal email account
- Gmail is virtually unlimited
  - BUT– having more than 1 email address is NOT recommended
Triage of “Yes” Email

- **4 D’s**
  - **Do it** (2 minutes or less)
  - **Delegate it** (forward function)
  - **Defer it** (Flag it, e.g., all scheduling requests)
  - **Deposit it** (Into a file folder)
Flagging Email

Flag as a reminder to follow up
File Folders/Categories

- Examples:
  - To Do Today
  - Follow Up: Short Term
  - Follow Up: Long Term
  - Important
  - Project X
  - Budget-Related
  - Travel-Related
  - Reviews
  - Students
  - Teaching
  - Personal
FATAL FLAWS

- Anything illegal
- Hitting “Reply All”
- Sending to the wrong person
- Writing “in passion” of the moment… and sending
- Prevent-- using the 10 second delay
- If in doubt, don’t send it out.
References

- Chan, Janis Fisher. 2008. E-mail, A Write It Well Guide: How to Write and Manage E-mail in the Workplace. Oakland, CA: Write it Well.

