



B E T T E R P R A C T I C E S F O R E M A I L

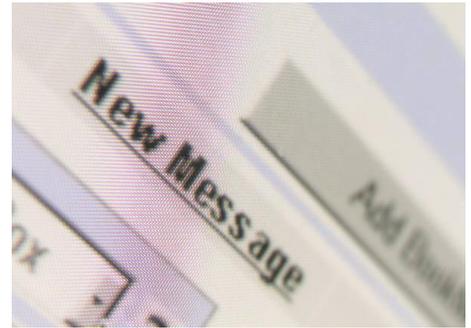
December 2007

Colleagues across campus have expressed concern about email. To help address these worries we have collected some better practices for email use. The intent of these practices is to create reasonable expectations within the UVic community about how to deal with burgeoning email demands.

It is time to approach email use in a new way. With increased stress and workload created by email we have an opportunity to be more respectful of every individual's time and availability. The University already has an Acceptable Use Policy that applies to email, and the province has legislation treating emails as university records. This document is not a policy statement or legal document, but a list of suggestions and ideas.

Email, like any technology, has good and bad qualities. A benefit of email is that it can be used anywhere, anytime, anyplace. But should it be used everywhere, everytime, and everyplace? The answer we hear across campus is no. The purpose of this document is to look for a balance between the value of the technology and intrusive nature of the technology.

These better practices are split into three parts: how to write improved email, how to use email tools properly, and how to manage your email efficiently.



How to write email:

1. **Keep your email absurdly brief.**

Three sentences are enough to explain:

- Why are you sending the message?
- What action do you want?
- Who should perform the action?

It is much harder to write a short email than a long one. No one has time to read every message so don't waste their time.

2. **Use one email per topic.**

Recipients can respond easily with one message and the exchange of ideas is easier to track. One message with multiple topics creates confusion in the responses and often the lower priority topics get overlooked.

3. **Always include a specific subject line.**

Make it easy for your reader to know what your message is about. You will save them time so you are more likely to elicit the response you want. Better yet – if it is possible, make your subject line the message. For example, "Subject: Account 1234 has \$999."

4. **Include alternative contact methods.**

Consider putting your work cell and office phone numbers in your signature line to allow the recipient to respond quickly.

5. **Summarize email threads.**

If you are forwarding a series of email on to someone new, write a concise summary. The reader doesn't want to read a long list of emails in reverse order, so make it easy for them with a simple explanation of the discussion thread.

6. Stick to the facts.

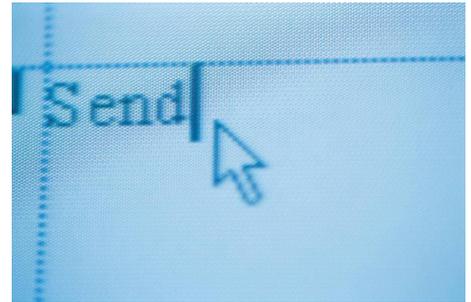
Avoid trying to convey any emotions in email because it never really works. Just communicate the information clearly and simply.

7. Put yourself in the recipient's shoes.

Would they be interested in your message? If not, re-write it or don't send it.

8. Play nice.

Anything you send by email may be forwarded to someone else. Be polite and professional in all your messages. Your reputation and the reputation of UVic are affected by poor grammar, spelling, or punctuation.



How to use email:

- 1. Email is less urgent than other mediums of communications.**

If you want an immediate response, talk to the person. Don't expect any response to any email right away unless you mark it as high priority.
- 2. Keep a separate account for personal messages.**

Do your best to use the University email system for University business. Create a Hotmail or Gmail account for the personal stuff.
- 3. Use cc: and distribution lists sparingly.**

Make sure everyone on your distribution list really needs to see the message. Otherwise, you are wasting their time and yours. The same approach applies to "Reply All" – only use that button when you really need it.
- 4. Use email sparingly.**

Personal contact can communicate messages more accurately and can build better relationships. And a little exercise never hurt anyone. If it is practical, get up from behind your computer screen and walk over to the person you need to talk to.
- 5. Blind copies are sneaky.**

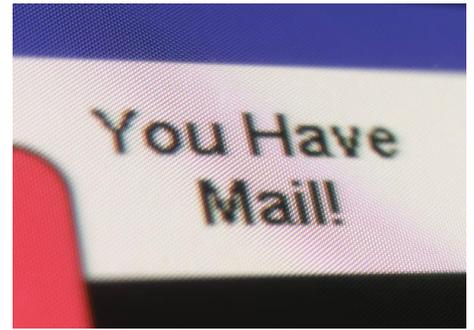
If you want folks to trust you, don't use blind copy.
- 6. Don't be an automatic responder.**

Take time to think about how you should react to an email. Maybe sending another email is a bad idea – could you pick up the phone or go visit the sender?

7. Eliminate the middleman.

Send your message directly to the recipient – don't ask someone else to forward it to them. People are busy and you can't expect them to route your email. Spend the time understanding who needs to see the message and send it to them. Don't be lazy about creating the right distribution list.

How to manage the email you receive:



- 1. Check your email at a few regularly scheduled times.**

Don't let email be an interruption. If appropriate, plan a block of time to process messages. Email is not an urgent form of communication, so don't treat it that way.
- 2. Set expectations.**

It is okay to tell folks how frequently they can expect you to respond to their email. For example, if you teach, a syllabus is a good place to set response time expectations for a course.
- 3. Don't write a reply if you don't need to.**

Only respond if you must. You don't have time to respond to every message and senders must accept the fact that you are not being rude. They can only expect a reply if they explicitly ask for one.
- 4. Start at the top and work your way down.**

If you skip around your inbox responding to messages in random order, you will read the same message more than once. Be sequential and be disciplined so that you touch each message one time.
- 5. Make your out-of-the-office message useful.**

Don't just tell everyone you are out of the office. Let them know who can help them while you are away.
- 6. Keep your filing system insanely simple.**

If you have too many folders, you spend too much time figuring out where to put something and too much time remembering where you put anything. Use only a few broad folder categories to make filing easy. You file many more messages than you retrieve, so keep the filing system basic. When you have to retrieve something, use email's find function to keep the job simple.

7. Five things to do with an email: delete, do, delegate, defer, or document.

You should handle email in the following order. These actions are sorted in order from least to most effort.

a. Delete

If you don't need it, don't keep it. Just make sure you don't delete legal documentation.

b. Do

If you can't delete, then determine if you can respond quickly. Most messages that require a response can be responded to in 2 minutes. So do it now and move on.

c. Delegate

If you can't delete and you are not the expert, delegate the message to someone who should deal with the issue.

d. Defer

If you can't delete, do, or delegate, then defer the message. Put it in a follow-up folder and add it to your task list.

e. Document

Emails that document decisions about people need to be kept. Staff have the right to access this documentation under the provincial Freedom of Information Act.