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Project Soar

Project to Strengthen Organizations Assisting Refugees

Contact Project SOAR at soar@theIRC.org or 212.551.3142

IRC partners with the Nationalities Services Center (www.nationalitiesservice.org) and Pan-African Association of Chicago (www.panafricanassociation.org) on this project.

When should you...

email,
send a fax,
make a phone call,
show up in person



What is the best way to write an email that will get your point across to your...

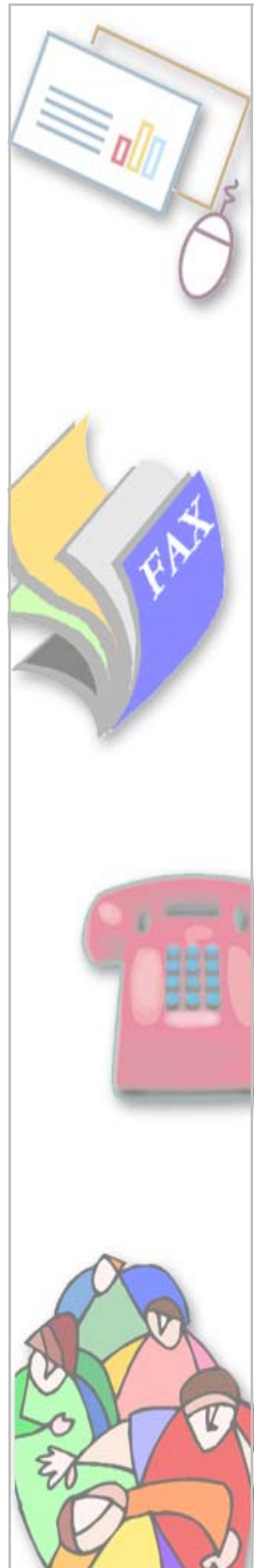
donors,
staff,
board members,
clients,
media contacts



If you have ever asked yourself these questions, this resource is for you.

After reading this booklet, you will be able to:

- Choose how to complete your "to," "cc," and "bcc" lines
- Compose effective subject lines
- Write a useful signature tag
- Recognize when it makes sense to send email, and when it makes sense to use phones, face-to-face meetings, or other communication methods
- Identify strategies for cutting down the amount of time you spend writing and reading email



Email is a relatively new way of sharing information and making requests. Not long ago, most of us communicated via mail, fax, face-to-face meetings, and the phone, with no email at all. Today, many of us are getting between 50 and 300 emails per day, or tens of thousands of emails each year.



Given the demands on our time, many of us email under pressure – in the 5 minutes before or after a meeting or while we are listening in on a conference call – or when a client or staff member is waiting to seek our advice or support. As a result, we sometimes email too often, too quickly, or unclearly. By understanding the pitfalls of email and considering a few simple steps before we send an email, we can drastically reduce conflict and confusion in the workplace.

Part I: Writing Email

There are five steps to writing an email:

1. Choosing the recipients
2. Writing a subject line
3. Composing the text of the email
4. Closing your signature block
5. Reviewing your entire message.

By following the guidelines below, you will get faster responses to your messages, increase the chances that your recipients respond to your requests, and reduce the volume of e-mails in your inbox.

Step 1: Choose Your Recipients

The “To” Line:



Effective emails generally have one person in the “to” line (and everyone else in the cc: line). If you put too multiple people in a “to” line, you diffuse responsibility across all of them. Chances are high that no one will do anything.

- If you must address your email to two or more people, make sure that you specify what part of the email is relevant to each person.

- If you are sending an informational email to many people, tell people why they are in the “to” field. You can do this in your greeting line and in the first paragraph of your email.

Dear fellow staff members,

Last week the Board of Directors approved our budget for fiscal year 2008. As I did last year, I am providing all of you - our staff members and most dedicated volunteers - with summaries of our strategic plan and budget, so that you will understand our priorities for the year ahead. Please contact the finance administrator me with specific questions. Sincerely, Mary

If you are sending an “asking” email, break apart the tasks in the body of the email. For example:

Mary - would you please draft the agenda and send it to me for review?

Vivien - could you please reserve the conference room and send a “save the date” to the other MAAs?

The courtesy copy (cc:) line:



When we “cc” liberally, our colleagues can end up with cluttered inboxes. That said, when you send emails, use the cc: line sparingly. Copy only people who are directly involved with the task or topic that is under discussion.

TIP: In many professional settings, it's also appropriate to use the cc: if you are writing to someone who you do not supervise. In this case, by cc'ing your colleague's supervisor, you alert him or her to what you are asking of or communicating to their staff and give him or her the opportunity to weigh in.



See part II, Responding to Email, for tips on how to respond to emails that have many people in the cc: line.

The blind copy (Bcc:) line:

 A screenshot of an email client's 'Bcc...' field, showing a text input box with the label 'Bcc...' and a blue border.

Bcc works best when you are sending an email to a large distribution list – it keeps readers from having to scroll through a long list of names, and, because the list of recipients is not visible to the recipients themselves, it helps your recipients retain their privacy – and eliminates the risk that someone on the distribution list will add their names to other lists without permission.

Bcc is also a good tool when you want to let someone know that you have accomplished a task, or when they provided information that allowed you to complete a task. You can put them in the Bcc line, as a means of keeping them informed and of showing them how you used their input. Using the “bcc” line under these circumstances is a way to convey appreciation.

When using bcc, you can put your own name in the “To” box, if your mail editor won’t let you send a message with a blank “To” space.

TIP: When writing to a project team, consider creating a distribution list in your email manager that includes all team members. This way, you avoid the possibility of inadvertently excluding members of the team from key emails.

Step 2: Write Your Subject Line

 A screenshot of an email client's 'Subject:' field, showing a text input box with the label 'Subject:' and a blue border.

In their book *Send*, Will Schwalbe and David Shipley suggest that the subject line is the most important – and the most overlooked – line in an email, because readers scan subject lines to decide whether to open, forward, file, or delete your message. Your subject line should summarize your email’s content and purpose. It should state the “main point” of your correspondence.



Distinctive subject lines put the most meaningful words first, because handheld devices and blackberries (and the viewing screens on many email programs) often truncate long subject lines. To make sure that your subject line gets read, but the important words first.

Examples:

Less Helpful

Subject: Important – Read Immediately!

More Helpful

Subject: Review quarterly report to ORR by October 22

Less Helpful

Subject: Meeting

More Helpful

Subject: Should I reserve a room for next Friday’s coalition meeting?

Less Helpful

Subject: Weekly Newsletter

More Helpful

Subject: 7 Steps To Improved Search Engine Positioning – Network for Good Weekly Newsletter

Less Helpful

Subject: Re: Re: Re:

More Helpful

Subject: Pls. add 3 items to the workshop survey



If you’re having a hard time thinking of the “main point” to put in your subject line, think about not sending the email, or consider breaking the subject matter apart into two or more succinct emails.

TIP: Before you send email, look at your subject line and refresh or update it as necessary, to reflect the main point current conversation.

Step 3: Compose the Text of Your Email

After reading your email, your reader should know what you want and when you expect it by. To achieve this goal, consider incorporating the following elements into the body of each of your emails:

- An opening/salutation. When addressing someone you don’t know, and especially if you are asking for a favor, be more (rather than less) formal in your salutation line. For example, avoid using first names, until the person to whom you are writing to addresses you by first name. “Dear

Mr.” or “Dear Ms.” usually works well, if you are writing to a media representative, donor, or community partner for the first time. If you are writing to someone you know well, “Dear,” “Hi,” or “Greetings” work well.



If you are writing to a foundation, newspaper, or community partner, and you don't know the name of the person you should with whom you want to connect, you will increase the likelihood that your email reaches the right person if you address the email to “the person in charge of publicity” or “the person in charge of hiring and recruiting,” instead of to “To Whom It May Concern.”

- A pleasantry, designed to build rapport. “I hope you had a nice weekend,” “I hope you are well,” “It was nice to see you at last week’s conference in San Diego, and “I hope you had an easy trip back to Texas” are all statements that will build rapport.
- A statement, early in the email, of what you want from the reader.
- Instructions – if you are asking your reader or readers to do something, and if you want confirmation when the task is complete – for letting you know when the task is complete.

For example:

- Could you kindly confirm receipt of this email?
- Please let me know when you have sent the report by replying to this email or bcc’ing me on the correspondence.
- A cordial close (“best,” “best wishes,” “sincerely yours,” “thanks,” etc.)

TIP: Consider using the same closing for the majority of your emails. If you always use “Yours Truly,” or “All best,” and then you start using “Best” or “Sincerely,” your reader might wonder if he or she has done something to upset you.

- Your name, as you’d like to be addressed on a phone call or in a letter (i.e. not your initials, unless you are writing to a colleague you know very well).

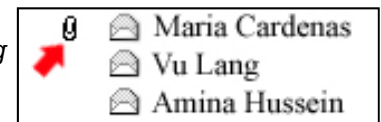
Formatting Your Email

A readable email will have lots of white space, bullets, numbered lists, and no more than a 1-3 screens of text. Skip lines between your paragraphs, and if your e-mail contains multiple points, consider numbering your points to ensure they are all read. (Alternatively, you might consider sending a separate message for each point you are trying to make. This will make it easier for your reader to delete, respond, file, or forward each point individually, and it may increase the chances that your reader remembers the points you are trying to make).

Most readable emails use bolding, italics, and underlining minimally and do not make use of ALL CAPITALS (which can lead your readers to believe that you are shouting) or all small case lettering (which suggests that you have invested minimal energy in the email).

If you are including attachments, explain what they include somewhere in the body of the message, and make sure that you attach them before pressing send!

TIP: You can double-check that your attachments have been sent by looking in your sent mail folder. If you've sent attachments, your email manager will usually display a paperclip icon near the message.



Step 4: Write the Signature Block

A signature block is automatically included as the last item of an e-mail message (or the bottom of a post to a discussion board or forum). Most email programs and servers, including Microsoft Outlook, Yahoo, Hotmail, and Eudora, can be configured to automatically add an email signature to each email you send. (In Yahoo, for example, you can add a signature by clicking on "Mail Options" and then "Signature.")

When you are writing to clients, coworkers, volunteers, board members, donors, media, or most of your other professional contacts, your signature blocks should include your complete contact information – including your full name and title, your organization's name and mailing address, your email, Skype address, and phone and FAX numbers, and your organization's website, if you have one.

You should also include a signature block when you are posting to listservs or on web-based discussion boards and forums. As with email, a signature block in these contexts tells people who you are, and makes it easy for

people with whom you have something in common to contact you. (For public mailing lists and newsgroups, however, include only information that you want the list members to have. For example, if you would not want someone on the mailing list to call or FAX you, do not include these details in the signature block).

Keep your signature line as short as possible. People sometimes get annoyed when signatures are longer than the messages that proceed them.

We suggest you include this information in your signature block:

- Name
- Title
- Street Address
- City, State ZIP
- Phone | FAX | Skype Address
- Email | <http://www.yourWebsite>

If you put web pages in your signature (or anywhere in your messages), include the "http://" part, since some mail programs won't create hyperlinks them without it.

Signatures are often separated from the body of the message by a separator line. Some mail programs will automatically insert the separator line above whatever signature you tell it to insert. Others require you to type it yourself. Test how your mail program works by sending yourself a "test" message with your signature block.

If you email internationally, consider including the U.S. country code with phone and fax numbers, as a polite gesture and time saving measure for those who might not know U.S. codes by heart.

Should I include a quotation with my signature block?

We recommend you avoid including quotations or artwork at the bottom of your email, because you could upset readers who do not agree with your choice of content. Moreover, some email programs cannot download graphics, or can only download them very slowly.



Step 5: Review the Entire Email

Before you send your email, spell check and proofread – especially if you are asking your reader to do something for you! If the email contains very important information, if you are writing to someone you don't know (or to an important member of your community), or if you are making large requests, ask a colleague to review a draft, before you send the email, just like you would for a grant application, press release, or other important document.



And before you press "send," ask yourself:

- Does my e-mail have a clear purpose? Is this purpose reflected in the subject line and first paragraph?
- Are the actions that I'm requesting clear, and are they attached to specific individuals? Do they have due dates?
- Is the message well-written? Is it concise, spell-checked, and grammatically correct?
- Do the links in the message and signature block work? Are my attachments referenced in the email and attached?
- Are the recipients appropriate (ie. not too many and not too few)?

Is there anyway to cancel an email after you've sent it?

Not really. According to the research documented in *Send*, unless you and your reader use America Online as your email server or unless you are both on the same office server AND unless your reader has not yet read the email, it is impossible to retrieve email.

To avoid sending an email before it is complete, write your entire email, then write the subject line (to summarize the main point of your email), and then complete the to: and cc: fields.

Part II: Responding to Email



Even though we are receiving more and more email, and even though we have more and more demands on our time, many email senders expect quick responses to their emails.

What is a suitable timeframe for replying to emails?

In short, you can set other people's expectations of you, based on how quickly you typically respond. If you always write back within 24 hours, your email correspondents may become nervous if you take a week to reply to an email. Alternatively, if you always write back within 20 minutes, your email correspondents may become anxious if they do not hear from you over the course of a business day. To be professional and courteous, set personal goals for how quickly you will respond to emails, and meet them consistently.

As a general rule, if you're not going to be able to reply to an email within a few days – either because you are working under deadline or because the information requested in the email will take some time to gather, or for some other reason – you can show professionalism and courteousness by writing a brief transitional email. For example, if you receive an email like this:

Dear Jane,
I was hoping that you could give me some feedback on my most recent monthly program report, and that you could give me authorization to attend next month's training at the University. I look forward to your response. Thanks, Albert

You might reply by saying:

Hi Albert,
I cannot reply at length right now, but I found your report to be informative and thoughtful. I will respond in more detail next week. Jane

What if I don't understand what the sender is asking for?

If you find an email to be unclear, quote the unclear portion of the email back to the sender, with a polite comment such as, "I'm not sure how to interpret this. Could you elaborate?" Make sure to hit the "reply" button, and

not the “reply all” button when you send these kinds of emails, so that you don’t cause the sender unnecessary embarrassment.

If you send an email and do not hear back for several weeks or days, consider calling the reader on the phone or, if you work in the same location, stopping by the reader’s work station. If you regularly email with someone who is not responsive, you might also consider asking for feedback from them on how to “improve” your email subject lines or writing style, so that your emails are easier to read.

How do I reply to emails, when there are people in the cc: line?

If an email is addressed to you, and you don’t know the people who are in the cc: line, reply only to the sender – or to the sender and the people on the cc line with whom you work closely. Alternatively, if you want to reply to everyone on the email, you could ask the sender for clarification about the recipients:

Hi Van, Thanks so much for your email. Could you please explain to me the roles of each of the people who are on the cc line in this project?

Finally, be patient with the people who send you email, recognizing that, like you, they are trying to balance heavy workloads.

Email v. Phone v. Face-to-Face Meetings

Do not use email to lay off an employee, give a negative performance review, or share other kinds of bad news. If an issue is serious, it is probably worth a face-to-face meeting or, if this is not possible, at least a phone call.

Similarly, if you have very good news to convey, or if you want to recognize someone in a meaningful way, phone calls or face-to-face visits are often good approaches, because they signal an extra effort on your part.

If you have been going back and forth over email for some time and have reached no resolution, pick up the phone.

How can we cut down on the amount of time that we spend on email?

Studies show that most emails that we receive come from others who work in our organizations. That said, as email senders, we can reduce email traffic by only sending email that is necessary and productive. Here are some tips for cutting email volume:

- When your email is only for informational purposes, include the words “no reply necessary” at the bottom of your email.
- Use the cc function judiciously. Do not put a colleague, client or friend in the cc: line unless the individual will be able to do his/her job better in some way, as a result of the information that your email provides.
- When writing to many people, include the words “please don’t reply to all” on your email.
- If you are a manager, communicate guidelines to others in your organization about what is appropriate email etiquette, especially when it comes to jokes and other forwarded messages.
- If you absolutely do not want to reply to email for several hours or days, Send author Will Schwalbe suggests that you make use of your out of office assistant, setting it to say:

Hi. Thanks for writing. However, I am at work on a complicated project and will get reply to your email before the end of the week.

or

Sorry, I am currently in the office, but I am in meetings and won't be checking email until Friday, October 12th. I will get back to you then.

When your emails are still stacking up – either because you have been out of the office for some time, or because you have been working on other, more urgent projects – resort your emails according to the sender (By default, email is sorted according to the date that it arrives in your inbox). You can do this by clicking on the “from” tab in your email program. By sorting your email in this way, you might find that the bulk of your emails are coming from a small number of people. You may be able to address all of your emails from a single person through a meeting or phone call.

References and Additional Resources

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Acknowledgments

This resource was researched, written, and designed by Kristy Gladfelter in San Diego and Danya Pastuszek in New York and reviewed by Ken Briggs in Tucson, Rich Koch in San Diego, and Leslie Peterson in San Francisco.

