Email Protocol: Avoiding abuse of Email
By Bruce McTague

Emails are tricky in business. Mostly because those of us already in business learned writing rules of the road in written correspondence and the generation most comfortable using email learned it as a social tool. With that in mind I am providing some thoughts for email protocol to help avoid some of the issues we often see pop up.

The Basics.

Subject line:
- Client name or company name so people can identify who it is about
- Topic following the company identifier (what is the subject? A point of view, update, etc.)

Forwarding and email "strings":
- General rule. **NEVER** forward an internal email externally.
- And certainly eliminate "strings" of emails (particularly externally although internally is nice etiquette). No one wants to scan down to put together the logic or "what happened"
- Summarize. Summarize. Summarize. I don't care if you cut & paste (although there are risks involved in doing so and you need to be very careful with regard to tenses and such) but every email should be able to be printed out and stand alone like a letter would have in the "old" days.

Replying, reply all, replying to new people:
- General rule. Assume if someone sent you, and only you, a message they most likely elected to NOT include anyone else, therefore, your reply to their email should only be to them. If you elect to copy new people on your response your tendency should be to build a new email from scratch. Always assume the original email sender would have worded things differently if they knew it was going to be seen by someone else.
- Reply to all. Tricky one with a variety of aspects. Rule #1. If it is a mass email most likely "reply all" with your response is not necessary. Rule #2. Email is not a chat room (in the business world), therefore, send your response to sender. Rule #3. No humor in a "reply all" message. I can guarantee you someone will not find it funny.
- The 3 time rule. If you have replied to the same email topic 3 times … something is wrong .. pick up the phone. Anything more than 3 responses to the original request becomes a "string" and string emails spell trouble (they end up in your client's bosses email box at some point most likely with something in the subject line that starts with "help")

Avoid exclamation marks and such:
- Assume your email WILL be forwarded once it leaves the company.
- No CEO or President of one of our clients (or any larger company) wants to see some smiley face or exclamation point... they want to know that business is being taken care of... in addition... it may be the only exposure you get to client senior management and it

creates an impression about you so that when you do meet them you want an underlying respect even before you step through the door. Call it the "pre-sell" if you will but keep in mind what you write to your day to day contact will most likely end up in some senior person's inbox at some point.

- Question. Have you ever seen a CEO or President end a message with Thanks! … point made.

Some Overall Guidelines.

Call to action:
The number one thing that separates a memo, report, or PowerPoint from *The DaVinci Code* is a call to action. A novel is to be enjoyed. Business writing is intended to get the audience to do something: invest in a popcorn factory, fill out a kidney donor form, or flee the building in an orderly manner.
Questions to ask: Does my email ask the reader to do anything? If not, why am I sending it?

Assume nothing:
Does the reader need to know that the project won't succeed if the Postal Service strike, that everything depends on a category 5 hurricane not happening in the next 100 years, or that if Latin America goes under the entire firm will implode? Let the reader know what thinking has gone on behind the scenes. And when following up, don't assume everyone remembers everything you've said. If you've got any worries that an acronym, term, or reference is going to elicit a confused moment, just explain it.
Questions to ask: Am I relying on what the audience knows or what I think they ought to know? Am I hiding anything from the reader unintentionally? If so, why do I want to surprise them later on?

Do the thinking:
How many times have you gotten an email that says, "What are your thoughts?" followed by a forwarded chain of messages. That's the writer saying, "I can't be bothered to explain my reasoning or what I want you to focus on." When you write, make sure you've explained what you're thinking and what you want the reader to spend time on.
Questions to ask: Is my email giving my opinion and options for the reader to respond to? If not, why am I making them try to read my mind?

Simply state why you are sending this document in the body of the email:
Say it up front. Francis Coppola is paid to surprise folks. We are paid to not surprise our boss. Whatever the purpose of your missive, say it in the first line. Mystery and stories are great ways to entertain and teach so unless you're looking for a job doing that, spit out why you're writing up front.
Questions to ask: Can the reader tell from the subject line and first sentence what I'm writing about without going further? If not, why are you insisting that they guess?

(dating myself on this one) In the old days when you crafted a letter you gave the person the opportunity to read the first paragraph and make a decision whether they agreed (and did not read any further) or read on to see the rationale and steps taken to get to the action item. That logic appears to be consistent with what should take place in an email. Not suggesting everything has to be a novelette, but, think about how often you need to send follow-up emails to explain additional things and how often that would be eliminated if you had taken the time upfront to clearly outline everything necessary for someone to "read and act.

The power of "the call" (when emailing is not right):
Their favorite person is leaving the company. Call.
(email doesn't show enough respect or importance to someone they respected and thought was important)

You, or the company, made a mistake (even a small one). Call.
(no reason to trust your written communication skills to effective communication. Plus. You may learn something that can end up in written document)

You want to debate a decision a Client or someone made. Call.
(this eliminates any possible misunderstanding of tone. Plus. You owe it to a client to talk with them in a debate)

The company loses a major piece of business. Call.
(never hide from communication. Rumors are worse.)

About Bruce McTague:

In a career spanning over 20 years, I've been involved with a wide range of industries including packaged goods, restaurant, pharmaceutical, retail, business-to-business and tourism. I won't bore you with all the details, but the bottom line is I have touched so many businesses across so many categories the headline for my career should probably be "Collector of experiences and knowledge."

If you would like some additional work experience details and see what a number of people have said about me, visit my LinkedIn Profile my blog, Enlightened Conflict or contact me directly by email at bruce@brucemctague.com.