

Email Etiquette

Using email wisely and professionally



Email Etiquette - Introduction

- Email messages are communication tools
- Use special features such as Spellcheck and Signatures
- Proper email etiquette helps you be **professional**
- Use email wisely
- Be respectful of the recipients' time
- Email is a tool so you can be efficient
- Email is not a substitute for a phone call



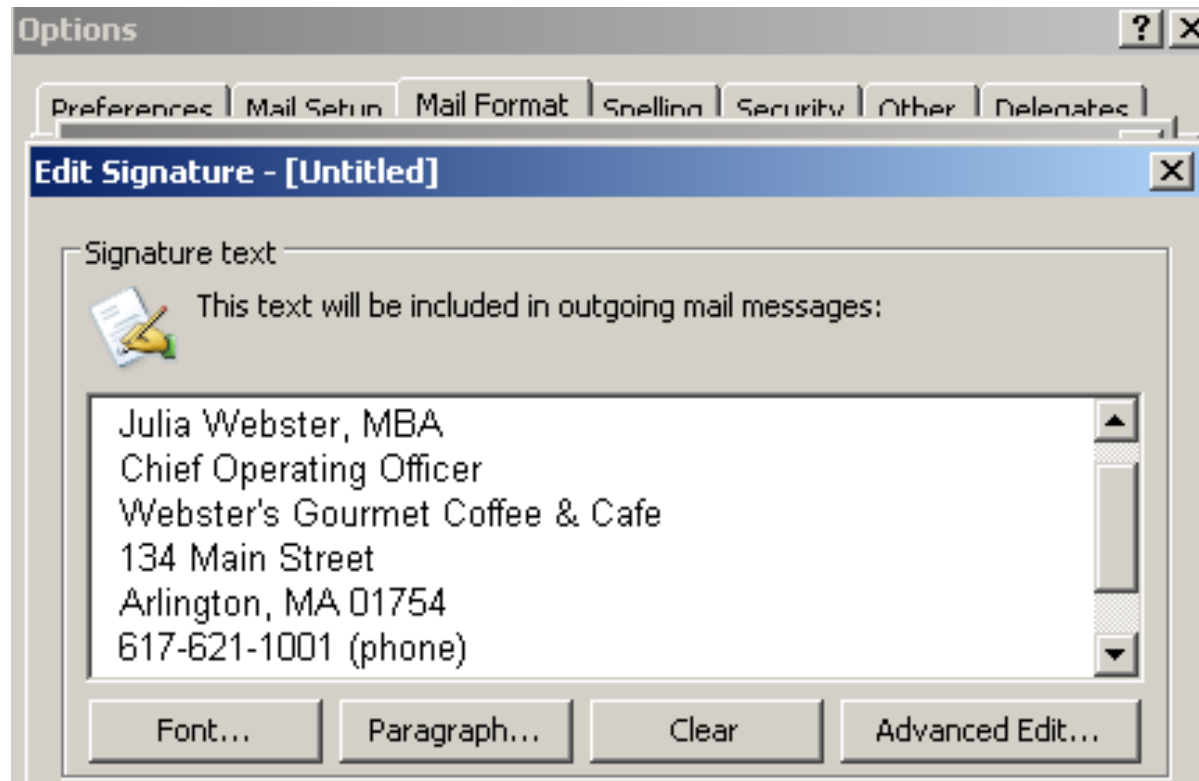
**1: Always use a
Signature at the
bottom of each
message**



1: Always use a Signature at the bottom of each message

1: By using a Signature at the bottom of each message, be sure to include your **entire** address and phone number, it helps the recipient with the correct contact information.

Tools > Options > Mail Format > Signature > New



**2: Never use
all CAPS**



2: Never use
all CAPS

Don't use all Caps in the message; it's difficult to read and it connotes "SHOUTING."



From... SMYTHE, ARNOLD
To... WEBSTER, JULIA
Cc...
Bcc...
Subject: HELP!

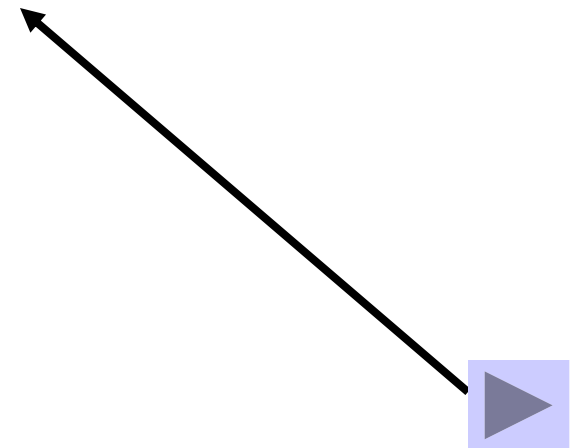
Arial 10

JULIA:

PLEASE SEND THE INCOME STATEMENT FOR THE YEAR 2006 SO THAT OUR REGIONAL ACCOUNTANTS CAN REVIEW THE EXPENSES THOROUGHLY. WE NEED TO ACCOUNT FOR THE PROJECTED INCOME FOR NEXT YEAR.

THANK YOU.

ARNOLD SYMTHE, CPA
ACCOUNTING DEPARTMENT
1-999-121-3399
ACCOUNTING@CPA.COM



3: Address the recipients in TO: but use the CC: to copy

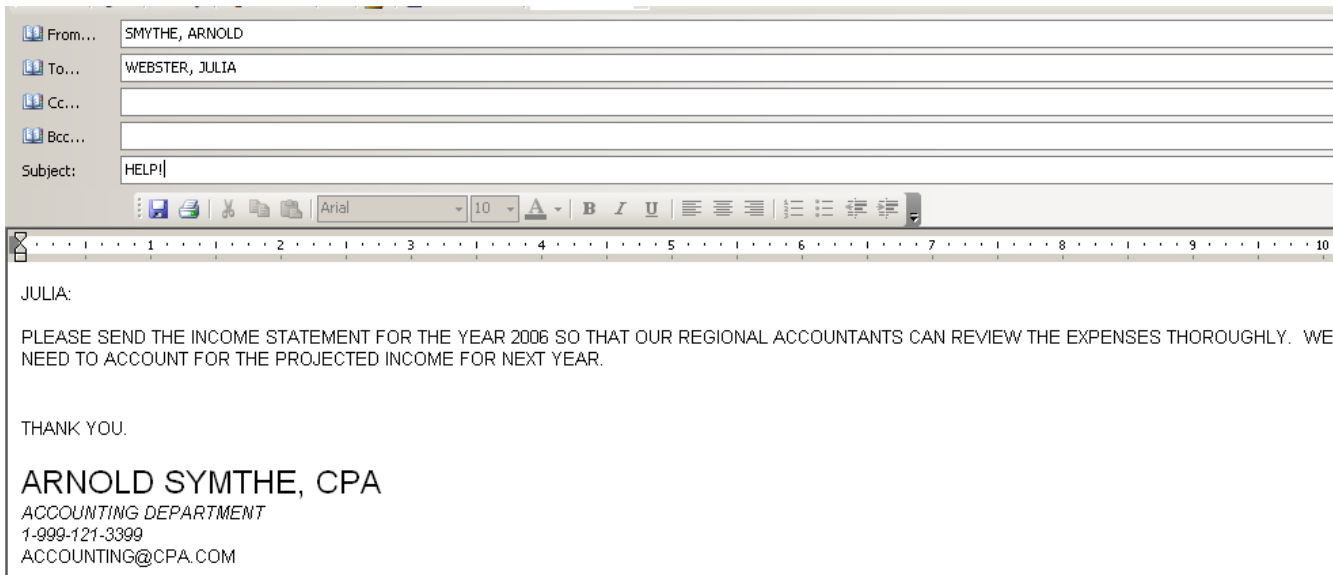


3: Address the recipients in TO: but use the CC: to copy

An action is required by the TO: Julia , however, copies are sent if necessary

Insert the recipient's name in the BODY of the message. This will relay that the message is addressed to Julia.

If you are listed on the cc: you do NOT have to respond. Cc: messages are for your information as a copy.



From... SMYTHE, ARNOLD

To... WEBSTER, JULIA

Cc...

Bcc...

Subject: HELP!

JULIA:

PLEASE SEND THE INCOME STATEMENT FOR THE YEAR 2006 SO THAT OUR REGIONAL ACCOUNTANTS CAN REVIEW THE EXPENSES THOROUGHLY. WE NEED TO ACCOUNT FOR THE PROJECTED INCOME FOR NEXT YEAR.

THANK YOU.

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ACCOUNTING@CPA.COM



3: Don't cc everyone

Don't reply all –
Everyone



To: Nadia Rodberg; Jane Joiner; Greta Taitelbaum; Vinay Kumar; Li-Ming Hu; Howard Sussman; Peggy Bunker; Matthias Nurnberger; Kimberly Buckman; Zahra Ayub; Elizabeth Ascher; Donald Love; Christian Correia; Eileen Winston; Alla Bolkhovskiy; Mohammad Siddiqui; Michael Bean; Bipin Mistry; Shahnaz Montague; Lawrence Epstein; Jorge Fleisher; George Dickstein; Sandra Horowitz; Michael Gottlieb; Tammy Harris; Richard Goldman; James Alderman; Harvey Goldfine; Patrick Blomberg; Justin Dorfman; Richard Blumenthal; Rohit Jangji; Shelley Kramer; Sergei Aish; Joseph D'Alton; Arthur Safran; Ralph Sherman; Meredith Martin; Kedar Deshpande; James Howe; Robert Sumner; Kelly Sopko; George Kinzfogel; Elizabeth Westphal; Rodrigo Rocha;

The important factor about emailing is that the **TO:** recipient is the person who needs to take action.

The **cc:** person is the notified person.

Does everyone need to weigh in?

Don't **Reply ALL** if you are replying to the sender.



**4: Always
delete your
Trash**



4: Always delete your Trash

“Mailbox Full” is an error message resulting from too many messages. Check the Deleted Items and empty the Trash.

Tools > Empty Deleted Items

The screenshot shows an email client interface with a mailbox full error. The left sidebar shows the folder structure, with 'Deleted Items (12)' highlighted. The main pane displays a list of undeliverable messages. The bottom pane shows a 'HELP!' message from 'SMYTHE, ARNOLD' regarding an income statement for 2006.

To	Subject	Received
[icon]	Undeliverable:Undelivered Mail Returned to Se...	Tue 6/12/2007 :
[icon]	Undeliverable:Undelivered Mail Returne...	Tue 6/12/200
[icon]	Undeliverable:Undelivered Mail Returne...	Tue 6/12/200
[icon]	Undeliverable:Undelivered Mail Returned to Se...	Tue 6/12/2007 :
[icon]	Undeliverable:Undelivered Mail Returne...	Tue 6/12/200
[icon]	Undeliverable:Undelivered Mail Returned to Se...	Tue 6/12/2007 :
[icon]	Undeliverable:Today @ MWMC - A Messa...	Tue 6/12/200
[icon]	Undeliverable:Undelivered Mail Returne...	Tue 6/12/200
[icon]	Undeliverable:Today @ MWMC - A Message fro...	Tue 6/12/2007 :
[icon]	Undeliverable:Today @ MWMC - A Message fro...	Tue 6/12/2007 :
[icon]	Undeliverable:Undelivered Mail Returned to Se...	Tue 6/12/2007 :

HELP!
SMYTHE, ARNOLD

This message has not been sent.

To: WEBSTER, JULIA
Cc:

JULIA:

PLEASE SEND THE INCOME STATEMENT FOR THE YEAR 2006 SO THAT OUR REGIONAL REVIEW THE EXPENSES THOROUGHLY. WE NEED TO ACCOUNT FOR THE PROJECTED YEAR.



**5: Always run
Spellcheck
before sending**



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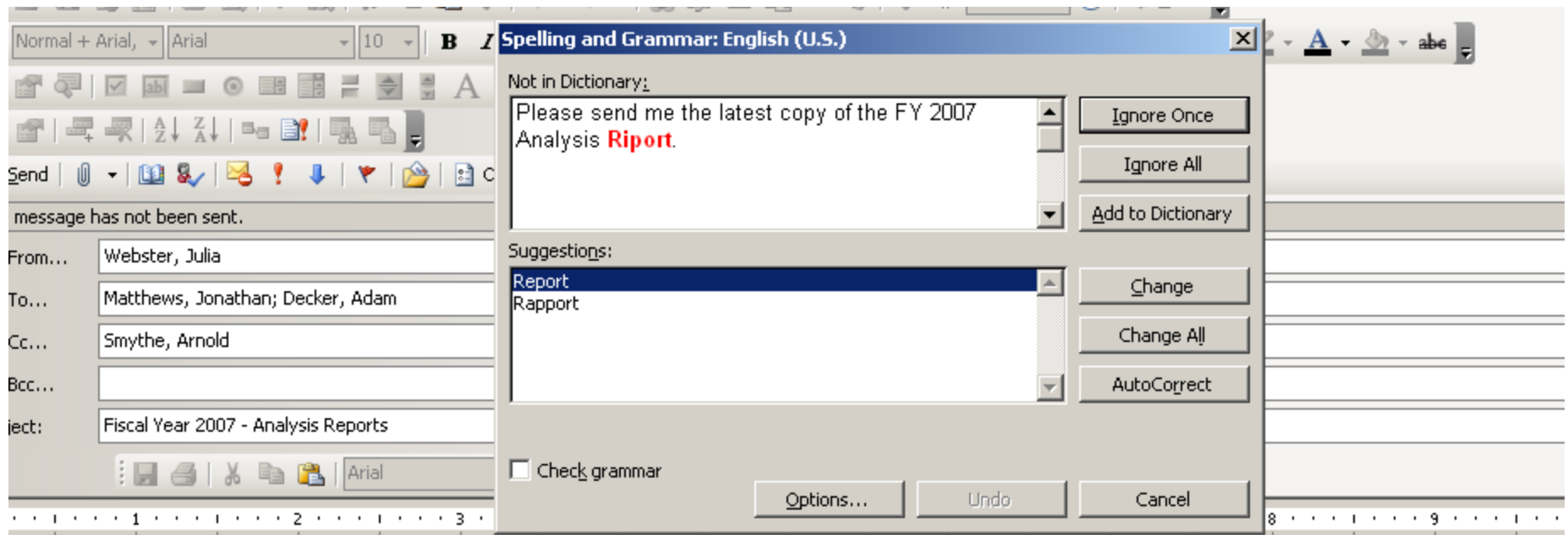
Running Spellcheck can be done automatically or manually, but should be done *before* you send your message.

•To run manually:

Tools > Spellcheck

•To run automatically:

Tools > Options > Spellcheck > Run before Sending



Please send me the latest copy of the FY 2007 Analysis **Riport**. We want to include this in the Conference presentation for Small Business in Santa Monica, CA on 10/13/07.



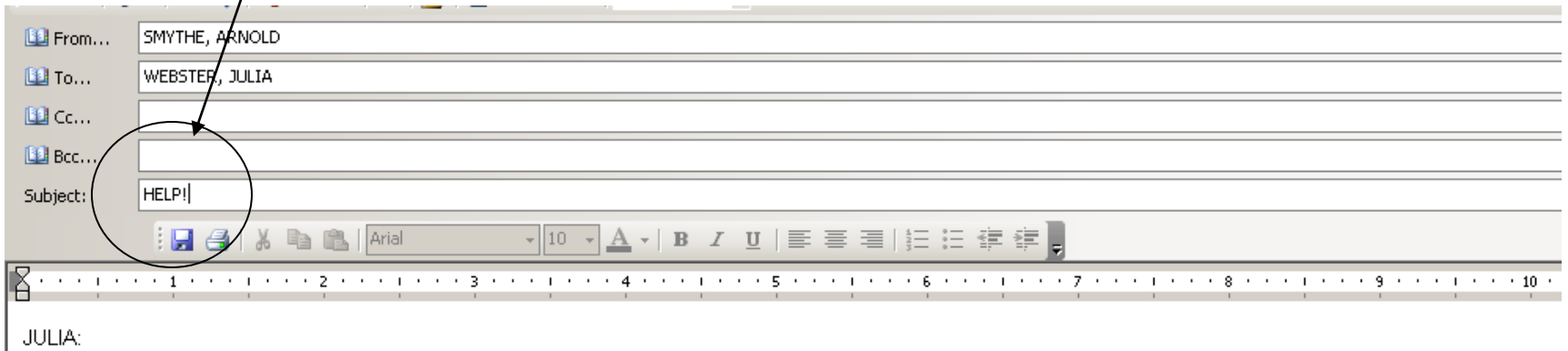
**6: Always
include a
subject**



6: Always include a subject

This subject is meaningless and does not help the recipient know the subject matter.

Some people like to move messages to folders by SUBJECT. It's difficult to find messages which have subjects that are innocuous.



**7: Use Out of
Office when on
vacation**



Use “Out of Office” Auto Reply when on vacation. To turn this option on:

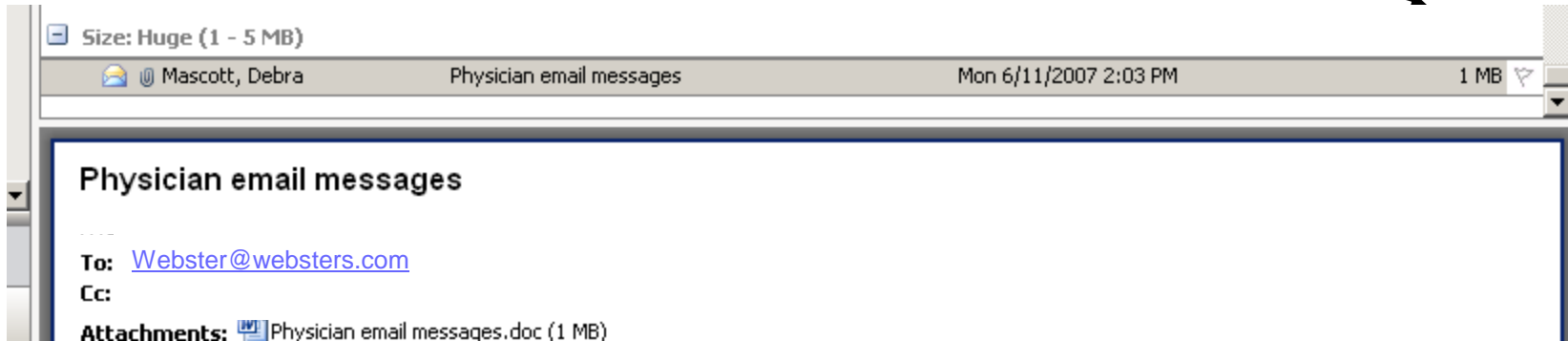
Tools > Out of Office Assistant > Out of Office > *type your message* > OK



7: Use Out of Office when on vacation



Careful when sending messages greater than 1 MB in size – It slows down the system and fills Mailboxes!



8: Careful when sending attachments

Check your attachments *before* you send them. It's important to make sure you are attaching the correct document (Word, PowerPoint, Excel).





Send a return receipt only when you want to track who reads the message, but not every message is worthy of a return receipt.

**9: Not every
message is
worth a
RETURN
Receipt**





Can you bring the report to the meeting?

Which report do you mean?



10: Don't substitute an email for a phone call

Rather than send three or four messages to clarify something – call the person if you need specific instructions.



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Some tips to remember...

- If you send it from the office, it comes from the office...
- Keep your personal messages at home
- Privacy starts with you
- Read your messages frequently to stay informed
- Use discretion when using Return Receipt – do not use it as a default
- Always check your attachment *before* sending
- Don't use exclamations every time
- Call the person if you know they may not be at their PC (*not everyone responds within minutes*)



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