



INCLEN Leadership & Management Program

Module 5
Version 1 (July 2003)

Efficient Email

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Efficient Email

Introduction

Email has rapidly become a widely-used means of communication, for both personal and professional use. Indeed, in the professional sphere, email is now as indispensable as the telephone for conducting business and is quickly replacing regular mail and even the fax machine as the primary means of sending documents. It is fast, saves money, and can help you manage your time better. Being an efficient email user is now an essential professional skill. Your email habits will say as much about you as your other work habits. The importance of developing good email habits can, therefore, not be overemphasized.

Learning Objectives

If you are an email beginner, this mini-module will help you to see what email can and can not do for you. It will indirectly introduce you to the basic features of email programs ("mailers"). Its focus, however, is on improving email skills in the following areas: (i) composing messages, (ii) taming your Inbox and (iii) managing folders. It also offers tips on safeguarding your computer and email communications, email etiquette, sharing an email address and accessing your mail while away from your office. It will not provide you with instructions on how to use your mailer. For this, you will need to turn to your program's user documentation or to one of the growing number of popular user guides produced by commercial publishers (see Box 1 for two examples). If you are an experienced email user, this mini-module will help you to become an even more efficient one.

Box 1: Email Software Guides

Milner, A. 2000. [Em@il](#). [Guide to Using Microsoft Outlook Express] Brighton, UK: Dorling Kindersley. Available at www.dk.com. Price: £4.99.

Hoffman, P.E. 1998. Netscape Communicator 4.5 For Dummies. Foster City, CA, USA: IDG Books Worldwide. Available at www.amazon.com. Price: US \$ 13.99 (new) or US \$5.08 (used).

What Can Email Do For Me?

Email is a fast, efficient (and, in most cases, reliable and cost-effective) way of communicating anytime and anywhere with colleagues in the next department or around the globe. Boxes 2 and 3 highlight the power of email and some of its pitfalls.

Box 2: The Power of Email

(Source: Tunstall, J. 2000. *Easy Email*. St. Leonards, Australia: Allen & Unwin. Pages: 2-6.)

Email is warm and personal. The informal chatty nature of email messages makes them an efficient though still friendly substitute for time-consuming telephone conversations.

It's fast. Most messages are delivered within minutes, even to people thousands of miles away, and involve much less fuss than sending a letter or fax.

You can think through the issues. You don't have to respond immediately. Like a letter, you can type your reply, look it over and change things so that you're sure they are right. (However, not everyone takes time and care when replying, as you'll see in the pitfalls below.)

The two parties don't have to be working at the same time. Email avoids telephone tag, thus overcoming a common problem where you and the other person keep missing each other. When you work in a different time zone to the person you want to contact, you don't have to get up in the middle of the night to make telephone calls.

Email helps you to manage your time better. You can handle your messages in a block of time, rather than taking them as interruptions, which is a much better way to organise your day.

You can keep better records with it. The messages provide an instant record without writing diary notes as you do with voice conversations. The messages are easy to file and faster to find than searching through paper files.

Email messages are easy to pass on. You can keep a copy for yourself, add comments, and pass it to another person for their action. Delegation was never faster.

You can reach a lot of people at once. One of your most valuable email tools is your address book, which puts addresses and distribution lists at your fingertips.

Other documents can be sent too. You can send much more than simple text. It takes no effort to send a snapshot, a complex diagram or a long report.

You can work with other people more easily. You can send documents for review, get comments and forward them to the next person without leaving your desk. It doesn't matter where the collaborators are located – at home, in a different organization or in a city on the far side of the world.

You can be anywhere. With a computer and Internet connection you can send and receive messages from any location.

It's a great way to contact others when you need help. Email allows you to reach beyond the walls of your organisation to like-minded people throughout the world.

It can be a powerful integrated tool. Email can be associated with other office systems such as task list management, calendars and document management systems.

Box 3: The Pitfalls of Email

(Source: Tunstall, J. 2000. Easy Email. St. Leonards, Australia: Allen & Unwin. Pages: 6-9.)

To be efficient with email you need to write well. Many people are not happy with their writing skills. This slows them down. Email is so important to business today. It's essential for you to learn how to write well and quickly. Even small improvements will make your life easier.

There are too many messages. People are getting more messages than they can handle in a day.

A lot of junk messages are being sent. This is an increasingly annoying problem so try not to add to the burden of others by sending unnecessary messages.

Some messages are hard to read. Messages are read on a screen and people have limited time to process them so they just cast aside the hard-to-read messages.

It's very easy to misinterpret messages. Email messages don't have voice inflections, tone or hand gestures to give the reader hints about their true meaning. This can lead to misunderstandings, especially as people tend to dash off replies without taking the care they do with a letter.

An angry exchange can turn into a big fight. When someone sends something hurtful, the natural response is to rebuke the hurt immediately. Unlike a heated verbal exchange, angry words in an email message remain to be mulled over, read by others and possibly used against you, causing their hurt over and over.

Email messages fly like office gossip. People pass on messages readily. You should assume that any message could end up in the inbox of the person you would least like to receive it. If you wouldn't like that person to get it, then don't send it.

An old message may come back to haunt you. All email messages can be saved, printed and sent on. Think of them as having the same permanence as a letter, even though their informality may tempt you to think otherwise. So don't use your office email to badmouth the boss or conduct a steamy love affair.

Weaklings can hide behind email. It can be tempting to use email instead of facing people when you have something difficult or unpleasant to say. When you are in this situation, go and talk to the person – don't use email.

Composing Messages

Most of the time you devote to email is spent composing new mail or replying to messages in your Inbox. Learning how to write effective messages quickly is key to improving your email efficiency.

1. Learn to "touch type" – that is, learn to type using all ten fingers and with eyes on the screen rather than the keyboard. Nothing slows down work at a keyboard as

much as two-finger pecking. Consider taking a short training course or purchasing a self-instruction typing tutorial that you can run on your computer to improve your keyboarding skills. Doing so will improve the speed and accuracy of all work that you do at a keyboard.

2. Think before you write. Pause for a few moments to organize your thoughts before you begin writing. If necessary, jot down your main points on screen (not on a piece of paper). Arrange them (cut and paste using the Edit feature) in logical order, beginning with the most salient one. Now flesh out each of the points.
3. Keep your message short. Provide only what context is necessary. It is acceptable for replies to be only one line or even one word, such as "Agreed".
4. Write the way you speak. Use short sentences and simple words.
5. Stick to the point. Avoid unnecessary explanations and background information.
6. Don't fuss over wording. While we all like to sound our best, it is, after all, only an email message you are composing! Do, however, quickly re-read your messages to check for clarity and completeness and to ensure that there are no glaring typos or spelling errors. Your mailer's Spell Check tool can help with the latter task.
7. Reply within longer messages containing multiple items. At the top of your reply, cue the recipient by typing "See my responses in boldface/italic/CAPS below." Next, respond item by item within the original message text, typing your comments in bold face or ALL CAPS or italics. In this way, your comments stand out from the original text. Note that older "mailers" can have trouble "reading" text typed in bold, italic or underscored font, so ALL CAPS may still be best for this purpose. In this circumstance, use of ALL CAPS is not considered an angry response. (See section on "Email Etiquette".)
8. Enhance your concentration. If possible, hold telephone calls and avoid other interruptions while composing messages. If your email system is always connected, avoid the temptation to look at new messages as they arrive in your Inbox.
9. Keep personal chit-chat within messages to a happy minimum. Exchanging pleasantries, especially with colleagues who one is not in touch with on a regular basis is important and fun. But, be respectful of others' time pressures as much as your own.
10. Build your Address Book and use it to automatically insert the names of message recipients. Newer mailers will automatically add the name and email address of a new contact to your address book, when you create a reply to their message. Other mailers allow you to click on the email address of a new contact in the From: line of their message to automatically add that person to your address book. Create group addresses for teams of people with whom you communicate regularly. Most mailers allow you to create group email addresses within your Address Book, by typing the email addresses (or selecting their names from your Address Book) and giving the list a name. To address a message to the group, you simply type the name of the list.

11. Add an automatic signature. Most mailers allow you to create a signature file with your name, title, organization name and contact information. You needn't type your signature each time. Your mailer will automatically insert it at the end of outgoing messages.
12. When "working offline" (See Box 4) save all out-going messages to the folder that temporarily holds out-going mail. Connect to your ISP only when you have finished an email session and send all messages together.
13. Make it a habit to attach documents after completing the To:, Cc: and Subject fields of a message and before typing the body of your message. This way they are less likely to be forgotten. Forgetting means frustration to the recipient, mild embarrassment to you as sender, but more importantly, loss of valuable turn around time.

Box 4: Working Offline

Reading, composing and replying to messages can all be done without being connected to the Internet (that is, they can be done "offline"). Working offline reduces the actual time you need to be connected to the Internet to only the few minutes it takes to send or receive mail. This is important if your service provider charges by how long you spend online, service provider charges are high or you live in a country where you must pay telephone charges every time you connect to the Internet. Some email software programs require you to manually connect and disconnect in the usual way. Others such as Microsoft Outlook Express can be set up to automatically disconnect from your service provider after getting or sending mail.

On the other hand, the frustrations of connecting to some ISPs – particularly in developing countries – can override cost considerations and motivate users to stay online during an entire email session. In this case, users should be aware whether their ISP "times out" idle connections (that is, disconnects them after a period of time in which there is no activity over the connection). Users may then wish to periodically check for new mail or send messages one at a time rather than in batches to keep their connection active during a session.

Taming Your Inbox

Do you usually receive ten or more messages per day? Do messages go unanswered in your Inbox for more than two days? At any given time, are there more than 30 read messages sitting in your Inbox? Does your Inbox remind you of the overflowing closet or drawer in your home that you're afraid to open? Here are some ideas for keeping on top of the clutter:

1. Schedule uninterrupted time each day to deal with email correspondence. Plan to clear your Inbox every day.

2. Set your View options to sort messages by date, in descending order (most recent message at the top of the screen).
3. Scan the list of new messages, taking stock of what is there in much the same way as you would flip through a stack of regular mail. Delete junk mail as you scan without reading it. It is easily identified by the subject or the sender. Take note of the sender and subject of the new messages. This will give you a good sense, before you start reading messages, which ones are likely to require your urgent attention and which ones are of lower priority.
4. In general, begin reading new mail from the most recent, moving down the screen to older messages. You will find that some more recent messages are copies of reactions/actions to an older message. Or, what was an issue yesterday, may no longer be one today. You may wish to skip up and down the list and deal with all messages related to one project, issue or task together and then move on to another cluster of related messages. Most mailers flag unread mail by listing it in boldface, so it is easy to identify which messages you have read or not read when jumping about. Leave personal messages and messages from mailing lists until last.
5. Limit the number of mailing lists to which you subscribe. Request removal from lists that are not relevant to you.
6. Set up a separate email account for personal mail. Web-based email providers such as Yahoo and Hotmail let you set up an account at no charge. Having such an account will also allow you to access email (including your work email account) at home or while traveling. (See section below on “Accessing Your Mail from Home or While Traveling”). Confine personal communication to messages sent to and from this account.
7. Discipline yourself to “handle” each piece of mail only once. Use the RAFT system described in the Time Management module: Refer, Act, File or Trash it.

Refer: If you are not the right person to act on a message or the action/response to the message can be delegated, forward it to the appropriate person with a quick note or simply FYA (For Your Action) at the front of the message.

Act: If you can act on a message with a quick reply, do so at the time you read it. If the message requires a longer reply, handle it in line with other priorities. If you have insufficient time to respond during the current email session, file it in an “Action Pending” folder or, if your mailer permits, flag it in your Inbox (with a symbol or coloured font). At times, you will need time to review a lengthy attachment or multiple attachments, reflect on your response, or consult others. File these messages as well or flag them for pending action.

File: File low priority messages in your Action Pending folder or flag them in some way. It is good email etiquette, to acknowledge receipt of any messages that you must put off replying to for longer than 2-3 days. If the message is for your information rather than action, decide whether it should be filed for future reference or delete it.

Trash it: Keep only what you think you might need later such as messages that contain important information or record decisions. Delete the rest.

8. Reply only to those message that you need to. If you are on the message's Cc: list, the message is for your information rather than action. You needn't respond. By the same token, when composing a message, list only the people who need to act on your message in the To: line. When replying to a message with multiple recipients, reply to the sender only unless it is important for the other recipients to also see your response. Move anyone for whom your response is "Information Only" and who are not expected to act on it, to the Cc: list. This prevents duplicate messages and saves everyone's time.
9. Recheck the address of undelivered mail and resend immediately.
10. Schedule additional time every 2-3 days to clear your Action Pending folder/flagged mail in your Inbox. Again, use the RAFT system. If you are unable to delegate the action or follow through, acknowledge this to the sender with a quick note and delete the item.
11. Avoid treating email like paper mail by printing it out and dictating a reply to a secretary or jotting one out on paper first. Doing so kills the inherent efficiencies of mail that is in an electronic format (see Box 2). It is much faster to click the Reply button and fire off a response.

Box 5: Sharing an Email Address

This is a useful option in resource poor countries. A single email account is less costly than multiple accounts. "Polling" (connecting to the ISP to send and receive mail) may be done only twice a day (usually during early morning and late evening off-peak hours) to save additional money. Some mailers can be set up to automatically sort mail to individual folders that are then accessed with passwords and individual user IDs. With other mailers, someone must be designated to poll and sort mail manually to folders set up for each user. This system, however, can bleach confidentiality: the person who polls and sorts may need to scan the message to identify the recipient, or he/she can view the content of messages simply if interested, as can any of the other account users.

If you are not sure what sort of system is in place when sending mail to a shared address, it can be helpful to put "Attn: Name of Person Concerned" in the subject line as well as the topic.

Email Etiquette

1. Answer mail as soon as possible. As with telephone calls, there is an expectation that email will be responded to promptly – usually within 24 hours.
2. If a secretary or someone else sorts and previews your email or if you share an email address with someone, make sure your email contacts are aware of this and take necessary precautions to ensure the confidentiality of documents and messages intended “for your eyes only.”
3. Be considerate of others’ time pressures. Identify the subject of your message clearly in the subject line. Make it easier for people to reply to your message by numbering items/questions. State clearly what action is needed (and by whom, if the message has multiple recipients.)
4. Only flag as “Urgent” those messages that genuinely are.
5. Avoid the use of ALL CAPS. Typing in ALL CAPS means you are shouting.
6. Avoid fancy formatting and the use of bold, italic and underlined typefaces. Some older mailers can’t “read” these.

For more “Netiquette” (common courtesy and “rules of the road” online), check out: www.albion.com/netiquette. Take the Netiquette Quiz.

Saving Messages to Folders

Imagine leaving every piece of paper mail you receive and a copy of every reply sitting on your desk. Locating a particular piece of correspondence would be frustrating. Leaving email in your Inbox and Sent mail folder is equally inefficient. Instead, create a logical system of folders in which to place messages. If you already have folders, and can’t remember in which one you placed a message or if one folder is bulging with messages and another has only a few, it may be time to redesign your filing system.

On a weekly basis, clear out your Sent mailbox by filing correspondence to your email folders or deleting it. Schedule time to periodically review and clean up all folders. For folders related to projects that are short-lived you might do this at the time a project ends. For longer-term projects or files related to on-going, day-to-day work, you should do this on a regular basis – every 1-6 months depending on the volume of messages a folder or set of folders usually contains.

When you delete mail, it is moved to a Trash or Deleted Mail folder. Empty this folder once every two weeks or once it reaches a set number of messages (e.g., 50, 100) in order to free up space. Avoid the temptation to retrieve things from this folder before emptying it, but remember that once its contents are deleted they are now gone for good.

Box 6: Steps for Designing a Better Filing System

(Source: Tunstall, J. 2000. Easy Email. St. Leonards, Australia: Allen & Unwin. Pages: 28-30.)

1. Describe your messages.
 - What topics do they cover?
 - Do some have to be kept longer than others?
 - Are some personal?
2. Plan your system.
 - Choose your filing method.
 - Select names for the folders. You don't want too few folders or too many.
 - Your mailer may allow you to use subfolders within folders if you need them.
 - Consider extra folders like 'Action Pending' or 'Awaiting Reply' to help you to be more organised.
3. Implement your system.
 - Spend a few hours reorganising your folders.
 - While you are at it, delete messages that are no longer needed.
4. Evaluate how your filing system is working.
 - Is it easy to decide where a message belongs?
 - Can you find a message when you need it?
 - Can you identify messages that have action outstanding from those that are complete?
 - Do your folders make it easier for you to empty your Inbox each day?
5. Schedule periodic clean up of your files.

Most email messages have a very short half-life – that is to say, the value of the content decays rapidly. The vast majority of them are not worth saving over the long term. What to archive and what to delete? Here are a few suggestions:

Keep:

- Messages that record a decision.
- Messages in which a team member has “signed off” on a task.
- Messages that define terms of reference.
- Messages in an exchange that record important process-related items such as points of view, lines of argument, or plans and ideas debated.
- Messages that record financial transactions.

Delete:

- Announcements not of interest/relevance.
- Reminders of appointments, deadlines, once the date has passed.

- Duplicate messages. Replies often contain a copy of the original message. You now have two copies of your original message: one in your sent mail folder and one in your Inbox. If you reply to the reply, yet another copy is generated.
- Messages with attachments. Save the attachment to your hard drive and delete the message (unless the message itself is important to keep). Messages with file attachments take up a lot space in your mailer.
- Undelivered mail (check reason and rectify before deleting).

An Ounce of Prevention...

By now, we have all learned (some of us the hard way!) the importance of backing up files. System failures, computer theft, vandalism and accidental damage can leave us “electronic amnesiacs” with no way of retrieving information stored in our computer’s memory. While paper copies can ease some of the pain and frustration when such misadventure happens, countless hours must be spent re-keying information and text so that they can be readily manipulated or shared in their electronic format.

How many of us think to make a back up (even with a printout) of our email address book or the contents of our email folders? One of the authors didn’t, until recent misadventure struck her computer. Fortunately, she did have a current printout of her email address book along with paper copies of messages of high importance, but she otherwise lost all her messages archived to email folders, including a library of folders that she had set up hold messages from mailing lists describing current publications on particular research topics. What she’s learned, aside from the importance of regularly backing up such files, in addition to her document and data files, is a deeper appreciation for the importance of her email folders and address book in her personal knowledge management system.

Consult your mailer’s Help tool for instructions on compacting email folders and backing them up onto a diskette, CD-ROM, or network drive. Remember to periodically back up your address book as well. Email folders and your address book will have a recognizable file extension. For example, Microsoft Outlook Express email folders have a .dbx extension (e.g., “Sent Items.dbx”).

Email and Viruses

Computer viruses can disrupt or change data files, display an irrelevant or unwanted message, or cause your computer’s operating system to malfunction.

Like their communicable-disease counterparts, computer viruses are spread by specific paths of transmission. Email is a principle pathway. Installing a virus checker will safeguard your computer against the harm caused by viruses and will ensure that you do not cause harm to your email contacts’ computer. Infecting someone else’s computer is a serious breach of email etiquette, to say the least! There are many virus checkers on the market and they are well worth their cost. Some programs can be downloaded from the Internet at no cost or for a trial period with no charge. New viruses, however, are

always emerging so it is important to ensure that you regularly update your virus checker.

Accessing Email from Home or While Traveling

If your office or organization permits dial-up access to its email system, this is the simplest way of accessing your email if you live or are traveling within the local calling distance. If you live outside this area, however, or are traveling farther afield, this method can be quite costly – as long distance telephone charges apply each time you connect to your office’s email system and for the length of time you stay connected.

If your organization doesn’t provide dial-up access or dial-up access is unfeasible, you can still access your email when you are away from your office by setting up a personal email account. Your office mailer can be set up to forward messages to your personal account or your personal mailer can be configured to fetch them from your office account.

A personal email account can be set up through a local ISP. Your dial-up connection to the ISP also gives you access to the World Wide Web from home. This may be an additional reason for establishing an account with an ISP. If you travel a great deal and at great distances, you may again be confronted with the problem of long-distance dialing charges. In choosing your ISP, investigate whether it can provide local call access across the country or throughout the world.

Web-based email accounts, (such as Hotmail and Yahoo) can provide an easy and low-cost solution¹ to many of the problems associated with traveling and accessing your email (see Box 7). Web-based email doesn’t require that you have email software installed on your computer. For that matter, it doesn’t even require that you have your computer with you when traveling. All you need is access at your destination to a web-enabled computer (one with a web browser and a connection to the Internet) such as can be found at local libraries, Internet cafés or the business centre of larger hotels. Anticipating the email needs of participants, many conferences now offer their own Internet cafés. Your web-based email account can be configured to pick up mail sent to your office email account.

Box 7: Set Up a Web-based Email Account

Go to www.hotmail.com or www.yahoo.com and follow the instructions. It’s easy and you can begin using your account right away! On the hotmail.com home page look for “New to Hotmail?” at the top right of your screen. Click on “Sign up now”. At the yahoo.com home page, click on the mail (envelope) icon at the top of the screen and follow the sign up instructions.

The latest high-tech solution is to access email through your mobile phone.

¹ At the time Version 1 of this module was being prepared (June 2002), Hotmail and Yahoo announced that they will begin charging an annual fee for services such as accessing mail from outside accounts and mail forwarding. For more information, check out The End of Free at www.theendoffree.com, a website that chronicles the free-to-fee trend on the Internet.

Glossary

Address Book: A data base you create, which contains the email addresses and other contact information for individuals who you communicate with by email.

Attachment: A file sent with an email by “attaching” it to the message. Many types of files (documents, spreadsheets, diagrams, photos and even music) can be sent as attachments to messages. In some cases, you may not want someone to be able to manipulate the text of a document – send documents formatted as “read-only” or .pdf files.

Inbox: The name of the folder where incoming messages are automatically stored.

Internet: A network of computers connected by telephone lines or some other communication path (satellites, radio transmitters) and that communicate using the same protocol (set of rules).

Internet Service Provider (ISP): A business that provides a connection to the Internet.

Mailer: A software program used to send and receive email.

Mailing List: A list of email users who have subscribed to a service that distributes announcements, notices, news items and other information and/or provides a forum for discussion related to a particular topic.

Modem: Computer hardware that takes signals (digital) from your computer and converts them to ones (analogue) that can be sent over your telephone line.

Offline: Not connected to the Internet.

Online: Connected to the Internet.

Outbox: A folder in which outgoing messages can be queued when working offline and later sent once a connection to the server is made.

Sent Mail: Folder in which a copy of all sent mail (new messages and replies) is saved.

Virus checker: A software program that searches your computer files for viruses.