

Organization & Staff Development's Suggested Email/Calendar Guidelines & Etiquette



1. Is this really a situation where you should use email?

Generally face to face contact is better to address any issues that are confidential or have an emotional or potential conflict component to them. Email is also not recommended for achieving consensus between individuals. It can be faster just walking down the hall to talk to someone rather than taking the time to compose an email message.

2. Use a meaningful subject line that summarizes the content of the email and highlights action taken or required (used within OSD)

If action is required or the message is for your information our recommendation is to include the following acronyms in brackets at the end of the subject line:

<AR> Action Required <NB INF> For your info – important that you read <FYI> For your info – read when convenient

3. Generally reply to an email within 2 working days

If the email is complicated or you need time to research information, just send an email back saying that you have received it and approximately when you will get back to them.

4. Discern what information really needs to be forwarded on

Sometimes there can be many emails going back and forth leading up to a final decision. If someone only needs to see the final decision and not all the details leading up to it just forward the necessary information onward.

5. When to use 'Reply to All'

Only use **Reply to All** if you really need your message to be seen by each person who received the original message (use sparingly). Don't unnecessarily flood other people's inboxes. If someone sends you and others a meeting request only reply to the organizer.

If there is an action to be taken in the Reply to All message you are sending indicate in the email, who is responsible, what the action is, and if possible the due date.

5. Email sent to multiple people with various actions required

Indicate who is responsible, what the action is, and if possible the due date.

6. Use the 'TO' and 'CC' fields for their intended use

Individuals addressed in the 'TO' field are the primary recipients as they are the ones who will take action on the email. Individuals addressed in the 'CC' field are getting the email for their information only. When you cc people ensure you communicate why they have been included.

7. Be purposeful when including Admin Staff in CC's

Do NOT cc admin staff in a string of preliminary discussions about something that is upcoming but not definite. Once the plan of action is made DO use an email to summarize what is happening and what action is needed. The exception is when a future plan/project will have significant admin impact. Then, give them a "heads up" message and include them in discussions.

8. Schedule all of your appointments into Outlook so people get accurate results when they do a busy search

9. When making appointments and/or meeting requests use the accurate response in the 'Show Time as' field

Free Tentative Busy Out of Office

10. Do not attach unnecessary files

If it is important for someone to read or make edits to your document attach it in your email. If you do attach a file but require someone to review only a portion of an attachment cut and paste just the section they need to review.

11. Use the high priority option sparingly

Only use the high priority flag or High Importance exclamation mark if your email is urgent and you need action.

12. Insert the recipient's address last – just before you are ready to send the message

This will prevent you from accidentally launching an incomplete (or incorrect) message.