

## COMMUNICATION GUIDELINES

1. **Your email is a reflection of you.** Every email you send adds to or detracts from your reputation. If your email is scattered, disorganized, and filled with mistakes, the recipient will be inclined to think of you as a scattered, careless, and disorganized businessperson.
2. **Pick up the phone.** When a topic has lots of parameters that need to be explained or negotiated and will generate too many questions and confusion, don't handle it via email. Also, email should not be used for last minute cancellations of meetings, lunches, interviews, and never for devastating news. If you have an employee or a friend you need to deliver bad news to, a phone call is preferable. If it's news you have to deliver to a large group, email is more practical.
3. **Respond in a timely fashion.** Unless you work in some type of emergency capacity, it's not necessary to be available the instant an email arrives. Depending on the nature of the email and the sender, responding within 24 to 48 hours is acceptable.
4. **Use an autoresponder when out of the office.** Notify those trying to get a hold of you that you may not return their email until a certain date. This allows them to contact someone else for an immediate response.

## CONTENT

5. **Minimize typos and grammatical errors.** Use spell check, re-read, and consider having someone else edit important emails.
6. **Only discuss public matters.** Be cautious about putting confidential or sensitive material in an email. Consider a phone call or a meeting behind closed doors instead.
7. **Don't email angry.** Emailing with bad news, firing a client or vendor, expressing anger, reprimanding someone, disparaging other people in emails are all to be avoided.
8. **Keep it short and get to the point.** Write concisely, with lots of white space, so as to not overwhelm the recipient. Make sure when you look at what you're sending it doesn't look like a burden to read – consider using bullet points.
9. **Summarize links or forwarded emails.** If you're passing along a link or forwarding an email, summarize the content so the recipient understands the context and purpose.
10. **Use exclamation points sparingly.** Generally, use no more than one exclamation point in an email. More than that can come across as unprofessional.

11. **Avoid using shortcuts to real words, emoticons, jargon, or slang.** Words using shortcuts such as "4 u" (instead of "for you"), "Gr8" (for great) in business-related email is not professional.

### "TO:", "CC:", AND "BCC:" FIELDS

12. **Understand the "To:" and "CC:" fields.** The recipients listed in the "To:" field are the direct addressees of your email. These are the people to whom you are writing directly. "CC:" is for anyone you want to keep in the loop but are not addressing directly in the email. The person(s) in the "CC:" field is being sent a copy of your email as an FYI. The general rule of thumb is that recipients in the "To:" field are expected to reply or follow up to the email, while those in the "CC:" field do not.
13. **Call out additions to the "To:" or "CC:" fields.** If you're replying to an email and you add recipients to the thread (either in the "To:" or "CC:" field), be sure to call this out at the beginning of your email reply, e.g., "I am copying Susan for her input as well." This is a courteous alert to your recipient(s) that additional people have been added to the conversation.
14. **Use the "BCC:" field sparingly.** Use it primarily for sending an email to multiple recipients who don't know one another (note: if you are introducing recipients to one another, then use the "To:" field so everybody's email is visible). Avoid using the "BCC:" field to secretly loop in additional, unknown recipients.
15. **Send or copy others only on a need-to-know basis.** Before you click Reply All or put names on the "CC:" or "BCC:" lines, ask yourself if all the recipients need the information in your message. If they don't, why send it? Take time to send your messages to the right people.
16. **Beware of the "reply all."** Do not hit "reply all" unless every member on the email chain needs to know. You want to make sure that you are not sending everyone on a list your answer— whether they needed to know or not.

### SUBJECT LINE

17. **Be clear in your subject line.** Your subject line should be reasonably simple and descriptive of what you have written about. Proof your subject line as carefully as you would proof the rest of the email as spell check does not function within the subject line.

18. **Your subject line must match the message.** Avoid opening an old email, hitting Reply, and sending a message that has nothing to do with the previous one. Do not hesitate to change the subject as soon as the thread or content of the email chain changes.
19. **Evaluate the importance of your email.** Do not overuse the high priority option. If you overuse this feature, few people will take it seriously. A better solution is to use descriptive subject lines that explain exactly what a message is about.

## ATTACHMENTS

20. **Provide a warning when sending large attachments.** Sending unannounced large attachments can clog the receiver's inbox and cause other important emails to bounce. If you are sending something that is over 500KB, senders should ask, 'Would you mind if I sent you an attachment?  
When would be the best time for you?'
21. **Zip up and reference attachments.** If you're sending attachments over 5MBs, use compression tools to decrease the size of the files. Also, remember to reference the attachment(s) in the body of your email so readers know to download the file(s). You can also use [attachments.pepperdine.edu](http://attachments.pepperdine.edu) for large files sent internally.
22. **No more than two attachments and provide a logical name.** Unless it's been specifically requested, refrain from sending a message with more than two attachments. Also, give the attached file(s) a logical name so the recipient knows at a glance the subject and the sender.

## GREETING AND SIGN-OFF

23. **Briefly introduce yourself.** Do not assume the person receiving your email knows who you are or remembers meeting you. If you are uncertain whether the recipient recognizes your email address or name, include a simple reminder of who you are in relation to the person you are reaching out to; a formal and extensive biography of yourself is not necessary.
24. **Know your audience.** Your email greeting and sign-off should be consistent with the level of respect and formality of the person you're communicating with. Also, write for the person who will be reading it – if they tend to be very polite and formal, write in that language. The same goes for a receiver who tends to be more informal and relaxed. If in doubt, polite and formal is the way to go.

25. **Always include a signature.** You never want someone to have to look up how to get in touch with you. Consider adding your title, organization, phone number, and any other information you would like to be easily accessible.

# Effective Email Quick Guide

## Make sure email is the right channel

Face-to-face is often better for



Interactive dialogues



Complicated explanations



Difficult conversations

5

Messages longer than 5 sentences



Sensitive topics



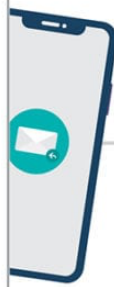
## Send to the right people

Don't reply all by default

Try thinking beyond your go-to list of collaborators

Don't copy people who don't need to take a specific action

Consider explaining who has been copied and why



## Send email at the right time



1 Don't send email outside of core business hours

2 Most email tools will let you schedule an email to send at a different time

3 Instead of checking email every few minutes, consider processing it in batches every few hours



## Include the right content

### KEEP

Answer the essential questions: Who? What? When? Where? Why? How?

TOSS

Lengthy background details that don't contribute to your main point

### KEEP

A concrete and descriptive subject line

TOSS

Vague subject lines that could mean anything

### KEEP

Highlight your main point or the names of people who need to take action

TOSS

Jargon that some recipients might not know



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## REFERENCES

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