



# EMAIL & PHONE ETIQUETTE

ADVISOR TRAINING & DEVELOPMENT



## THE IMPORTANCE OF BEING PROFESSIONAL IN YOUR COMMUNICATION

- What is “being professional”?
- Boundaries are important they help define the relationship
  - Make sure that your role and expectations are clear
- Maintain clear communication between yourself and your mentee



EMAIL



## BASIC ETIQUETTE

- Subject line
  - Helps to clarify your message and helps the reader prioritize (OWL Purdue, January 10, 2013).
- Your email should have a pleasant greeting like “Hello Jane/Dane,”
- Using ALL CAPS is not professional
- Using slang is not professional
- Acronyms
- Be friendly but not too friendly.
- To Smile or not to Smile that is the question
- After the relationship has been built



- Respond in a “reasonable time frame”
  - what is reasonable
- Answering a lot of questions
- Can embed answers in the list of questions using a different color font

CONTINUING  
EMAIL  
CONVERSATIONS



- Make sure that if you are responding to an email sent to a group make sure that if your response is being sent to the right people or person.
- Ask yourself does it need to go to the whole group?
- If not make sure to double check that your “To:” field is going to the right individuals.

## RESPONDING TO A GROUP EMAIL



PHONE





## BASIC ETIQUETTE



- Smile — it shows, over the phone  
(<http://www.apu.edu/imt/telecommunications/etiquette/>, January 10, 2013)
- Answer the phone in a reasonable amount of time
- Be pleasant say good afternoon and make sure that you introduce yourself even if it isn't necessary
  - Good afternoon, this is Rachael how can I help you?

FIRST  
IMPRESSIONS

- Speak clearly and slowly
  - Don't talk with your mouth full
- Allow for lag

“All phone calls involve latency, which means there's a delay between when you speak and when the other person hears it.” (Huffington Post, 2010)



- Ask if it is ok to put the person on hold before you do
- Assess the situation it may not be appropriate to interrupt the call
- If you do put them on hold make sure to thank them after (apu.edu,2013)

HOLDING THE  
CALL



## TRANSFERRING A CALL

- Make sure to tell the person that you are going to put them on hold to transfer them
- Make sure to give them the person's name and phone number before you transfer the call in case the call gets dropped. Make sure that you get there information as well
- Before you complete the transfer introduce the call to the person you are transferring it to by given them the caller's name and a brief background they will know what to expect

## ENDING THE CALL

- Before you hang up make sure that you have answered all the caller's questions
- Keep smiling and make sure to end with a positive expression like "have a good afternoon."
- Let them hang up first. This lets the caller know that you are not in a hurry to get off of the phone.
- If the conversation goes too long
- Be polite. Smile. Let the person know that you have a prior appointment. Let them know you will call them back and give a time frame.
- Life gets busy everyone knows that, however it is important to follow through.





## CELL PHONE ETIQUETTE

- Make sure that you are in the conversation not surfing the net or texting other people.
- Remember this person is looking to you for support and you can't support them with only half of your attention you will miss crucial information and could close the relationship you have built
- Because you are in a supporting role you need to make sure to remain professional and to do that you need to make sure that if you sync your profile pictures with your smart phone that they are appropriate and not offensive
- Don't play the blame game with dropped calls acknowledge that they happen and call them back.



QUESTIONS?