EMAIL ETIQUETTE

SENDING EMAIL

☐ Everyone is busy – be respectful of recipients' time by investing your own time in writing and reviewing emails before you send.

☐ Format your email for the reader's convenience – organize it by request/action, background, or other appropriate sections.

☐ Use clear and succinct bullets.

☐ Summarize the purpose of your email at the top with clarifying information & specifics below.

☐ Identify what is necessary for the reader to look at – highlight it, format it in bold, or otherwise call it out. Need the entire message read? Request that the individual read the full message trail. Call out the required action in the subject line.

☐ Use @*Individual* or bold names to call out ownership of actions or information.

☐ Use "Urgent" tags with thoughtful discretion. Priorities or deadlines can be designated in the subject line such as "Response required today" or another subject line that clarifies your email "ask" without needing to read the full email.

☐ Informational only? Not urgent? FYI? Include a "low priority" tag or denote that in the subject line.

☐ Don't use stationary or background – it may be difficult for some to read, including those with vision impairments, and can be challenging to reply to or forward.

☐ Informational only? CC the person and leave only those who have specific actions required on the *To* line.

☐ Have an attachment? Consider its size, and whenever possible, include links rather than attachments.

☐ Be sure questions or action items are not "lost" in a paragraph or the message body.

☐ Don't overuse "high priority" (!), Read Receipt, Receipt Delivery, and don't send an angry message. Be sensitive to when it's best to pick up the phone – including if a trail has circled around a few responses, or it would otherwise be faster to have a conversation.

REPLYING TO EMAIL

☐ It can be helpful to keep attachments on emails when replying – use *Forward* and readdress the email or use *Reply All* and attach the original file.
  • From the email containing the attachment, right click on the attachment and then click on 'Select All'.
  • Once the attachment(s) are highlighted, select 'Copy'.
  • In the reply email message body, right click and select 'Paste', to re-attach the file(s) to the reply email.
  • Even easier? Use *drag and drop* to drag the original attachment from the original email over to the reply email, then "drop" the attachment on the reply email.

☐ Replying to a distribution list message? In most cases, it's appropriate to reply only to the original sender, and not the full distribution list. Consider whether to Reply All or Reply direct to sender.

☐ Ask yourself- have I answered all the necessary questions? Are there any *other* questions I can anticipate my reader may have, and perhaps address them now?

☐ Adding or removing recipients from the trail? Include a +/- and their names at the top, as well as a quick note of why the add or deletion, such as "+Mary Ellen for her approval of the final design" or "- Bill Jones until details are finalized."

☐ Indicate if you're commenting inline and use a different color font to denote your response.

☐ It's usually best not to change the subject line since the thread may become disjointed then. If you do change the subject line, note that in your email body.

☐ Did the thread become disjointed? For instance, if various responses were received simultaneously, part of the trail could be missing If helpful to the message, pull the pieces back together in your response, and note that ("Below trail consolidated to reflect all responses received.").

ORGANIZING EMAIL

☐ Use Folders effectively in Outlook. Too many can cause confusion, not organization.

☐ Need to respond but don't have time in the moment? Acknowledge receipt of the message and provide a timeline for a more thorough response.

☐ Avoid a cluttered inbox by minimizing "touches" to a message – read it and move it to the appropriate folder if no further action is required, move it to *Tasks*, or otherwise flag it for follow up if needed.

☐ Email organization and productivity is a balancing act – find out what works for you, but don't become obsessed with finding or reworking the system.

☐ Urgent and Important? Can it wait? Is someone else likely to take ownership for this and respond meanwhile? Take 30 second to scan your email and pick out at least one message you can respond and finish. Try "scheduling" email time so it doesn't bleed through your day.

☐ Use Signatures and Out of Office to position important messaging and information for your audience – program and initiative reminders can be communicated in your signature (including with logos or other artwork), an Out of Office can point to some self-service links addressing the most common questions, and such.

☐ Have a common FAQ or response that you share? Rather than copying and pasting each time, build it as a Signature to facilitate a quicker response.

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UNH Technology Transfer Center (UNH T2)
33 Academic Way Durham, NH 03824
https://t2.unh.edu/
T2.Center@unh.edu

New Hampshire
Technology Transfer Center

University of
New Hampshire