

Email: How to Write and Manage It in the Workplace

Presented by
Division of Library Services
Ky Dept for Libraries & Archives
2015

Goals for Today's Training

- Discuss strategies for writing effective email messages
- Consider ways to better manage email in Outlook

Strategies for Writing Effective Email Messages

Before you begin to write:

- What are you trying to communicate?
 - Information, question, response...
- Who are you communicating with?
 - Peer, Boss, Customer...
- What do you want to happen?
 - Respond, take action, nothing...
- Is email the correct choice?

Goals for Writing Email

- To be read
- To be understood; make your point
- To be responded to appropriately

How to get your email read

- Subject line:
 - Use it
 - Make it meaningful
 - Make it understandable
 - Be specific

How to make sure your email is understood

- Be concise
- Most important point first
- Attach documents for reference
- Remember this is business writing
- Grammar and spelling count
- Make 1 point per email
- Start new thread for new topic
- Delete unneeded threads
- Provide context when needed
- Watch your jargon

Set Automatic Spelling & Grammar Check in Outlook

- Click on "File" ribbon/tab in Outlook
- Select "Options" and then "Mail"
 - Check "Always check spelling before sending"
- Click on "Spelling and Autocorrect..." button
 - Set words to "ignore" & "check grammar"
- Click on "AutoCorrect Options..." button
 - Choose capitalization options

How to make sure your email is responded to appropriately

- Ask for a response
 - ex. "Please respond by COB Friday."
- Make it clear what you want or don't want
 - ex. "FYI – no response needed"
- Provide contact information

Set Automatic Signature in Outlook

1. Click on "File" ribbon/tab in Outlook
 2. Select "Options" and then "Mail"
 - Click on "Signatures..." button
 3. Click on "New" button
 - Create and name signature
 - Set defaults
- Tips:
 - Set up alternate signatures for different correspondents.

Email Pitfalls

- Don't assume confidentiality
- Don't send email when you are mad or upset
- Don't use email to avoid face-to-face or phone contact
- Don't use ALL CAPS or all lowercase
- Don't overuse formatting
- Don't overuse CC and BCC
- Don't misuse "Reply to all"
- Don't overuse humor in your messages
- Don't forward jokes, chain letters...

Ways to Better Manage Email in Outlook

Information Overload

- Too many email messages
- Constant monitoring
- Pressure to reply...immediately
- Reading and re-reading
- Overloaded Inbox & Sent Items files
- CC'd constantly
- Mailing lists
- Junk mail

What you can do about information overload

- Send less email
- Set times to read incoming mail
- Take action when you read an email the first time
- Delete aggressively
- Get off mailing lists

What Outlook Can Do About Information Overload

- Deleting Messages
- Filing Messages
- Junk Mail Filter
- Search

Deleting Messages

- Delete before you open*
- Take action then delete*
- Delete beginnings of threads*
- Use Junk Mail Filter then delete*
- *Some messages must be saved.
 - See Official & General correspondence
<http://kdla.ky.gov/records/retentionschedules/Documents/State%20Records%20Schedules/kystateagency.pdf> (pg. 7)

Filing Messages

- Inbox = Mailbox
 - Sort
 - Immediate action
 - Future action
 - Keep for future reference
 - Discard/delete

Source: Hoffman, Lynn & Valentine, Michael. *Slay the E-mail Monster*. (2010) Published by authors, Charleston, SC.

Filing Messages

- Set up meaningful files/sub-files
 - By actions (under Inbox)
 - *Action
 - *Follow-up (check periodically)
 - *Reading (reference)
 - Old Email (just to clear your inbox & sent mail)

Source: Hoffman, Lynn & Valentine, Michael. *Slay the E-mail Monster*. (2010). Published by authors, Charleston, SC.

Filing Messages

- Set up meaningful files/sub-files
 - By topic
 - Start broad with sub-topics
 - By correspondent
 - Name, relationship...

Using Junk Mail Filter to Move Messages Out of Inbox Automatically

- To move from Inbox to Junk Mail folder
 - Highlight the email you want to move
 - Open "Junk" menu
 - Select "Block Sender"
 - Click on "OK" (*maybe twice*)
 - Delete contents of junk folder periodically

Search

- Searching email files
 - Inbox
 - Sent items
 - Files
 - Attachments

Tips for Managing Email

- Re-sort to speed filing, deleting, finding...
- File last entry in email string
- Don't forget your Sent Items file
- Empty your Deleted Items file(s)

Goals for Today's Training

- Discuss strategies for writing effective email messages
 - Subject, concise, signature, grammar & spelling...
- Consider ways to better manage email
 - Deleting, filing, junk mail filter, sorting & searching

Resources on Email

- Baake, David. "8 Rules for Effective Email Communication". (2013) on *PRNews*. <<http://www.prnewsonline.com/topics/pr-insiders/2013/06/13/8-rules-for-effective-email-communication/>> retrieved 19 February 2014.
- Chan, Janis Fisher. *E-Mail a Write It Well Guide: How to Write and Manage E-Mail in the Workplace*. (2005) Write It Well: Oakland, CA.
- Egan, Marsha. *Inbox Detox and the Habit of E-mail Excellence*. (2008) Published by author.
- Gallo, Amy. "Stop Email Overload". (2012) on *HBR Blog Network*. <<http://blogs.hbr.org/2012/02/stop-email-overload-1/>> retrieved 19 February 2014.
- Hoffman, Lynn & Valentine, Michael. *Slay the E-mail Monster*. (2010) Published by authors, Charleston, SC.
- Linenberger, Michael. *Total Workday Control: Using Microsoft Outlook*. 3rd ed. (2011). New Academy: San Ramon, CA.

Resources on Email

- O'Hare, Bob. *Unload Email Overload: How to Master Email Communications, Unload Email Overload and Save Your Precious Time!* (2012) Balboa Press: Bloomington, IN.
- Shipley, David & Schwalbe, Will. *Send: Why People Email So Badly and How to Do It Better.* (2008) Alfred A. Knopf: New York.
- "Writing Effective Emails" on *Mindtools*.
<<http://www.mindtools.com/CommSkill/EmailCommunication.htm>> retrieved 17 February 2014.
- Note: All books can be obtained from the State Library through Interlibrary Loan.

We are here for you

For questions contact State Library Reference:

502-564-8306

800-928-7000, option 3

Email Ask-a-Librarian

<http://kdla.ky.gov/employees/sgasklib/Pages/default.asp>
x

Tell us what you think

You will be receiving an email with:

1. Link to online survey about today's training
 - We would appreciate your input.
2. Your training certificate

Thank you for participating in today's session.

Jane & Charly

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