Interlake-Eastern RHA Email Charter

The Problem:

Our current practice of email usage has become inefficient and unrealistic, resulting in a drain on human energy and resources (time) and creating feelings of being overwhelmed, ineffective and frustrated. (*LEAN Email Management project, January 2015*).

The Solution:

Email overload is something we are inadvertently doing to each other. You can't solve this problem acting alone. You will end up simply ignoring, delaying or rushing responses to many incoming messages and risk frustrating others or missing important information and deadlines. That prospect can be stressful.

But if we can mutually change the ground rules, maybe we can reduce our stress. That's why it's time for an Email Charter. Its core purpose is to reverse the underlying cause of the problem -- the fact that email takes more time to respond to than it took to generate. Each of its rules contributes to that goal. If they are adopted, the problem will gradually ease *(refer to "15 Rules to Reverse the Email Spiral" below).*

Within this charter there are items that are potentially helpful in evolving your repertoire of email behavior. By applying some or all of the guidelines in appropriate situations and always with thoughtful consideration, you may come to feel much more in control of your workday. You may continue to be on your email throughout the day, but you'll now be better equipped to minimize the stress, serve your staff, colleagues and customers more effectively and have more available time to accomplish your work.

How to Achieve the Solution:

Spread the Word! Add to your Email Signature:

- Your full name, title, place of work and phone number in the event others want to follow up by phone. Put this email signature on your BlackBerry also.
- Let others know what to expect: *As a commitment to our email charter, we would appreciate a phone call for urgent replies required within 24 hours.*

Determine if Email is the Right Tool:

Email is a helpful tool, but it isn't the best solution for every situation. Sometimes a phone call or meeting would be more appropriate. How can you tell? Ask the following questions:

- Is the issue time sensitive?
- Will sending an email raise more questions than answers?
- Does the message contain personal information, e.g. a human resources issue?
- Is a meeting with recorded minutes a good idea for this circumstance?
- Is this a sensitive issue intended only for the recipient?
- Do I have more than one subject to discuss with this contact?
- If you've answered "yes" to any of these questions, consider using Outlook to set up a meeting, picking up the phone or speaking with your colleague in person.

*Above all, you need to remember that email exchanges are not conversation; every time you click on "send", you should consider how your email will be viewed by others.

Time Management Tip:
Depending on your position and current workload, you may want to consider disabling your email "auto check" and instead check email at specific times each day (i.e. first thing in the morning, after lunch, before wrapping up for the day) to avoid constantly checking and responding to email waiting in your inbox.

DOs and DON'Ts of Sending Email:

While email can make business communication more convenient, it doesn't offer the benefit of body language, facial expressions or tone of voice. Keep in mind these helpful tips and you'll be making technology work for you!

DO	DON'T
✔ Write concise subject lines that say what is required and to help the recipient prioritize (e.g. FYI, deadline dates, etc.)	X Mark every e-mail "high priority" or leave the Subject Line blank, it may get lost in the recipients inbox.
✔ Think about whom the message is for and anticipate the details they need.	X Be ambiguous in your message.
✔ Provide enough detail so the message is relevant to the recipient and in the correct context.	X Write in UPPERCASE or use **bold type—**the equivalent of SHOUTING via e-mail.
✔ Plan before you write, particularly for difficult responses.	X Send messages in haste or anger.
✔ Be concise and clear with what you are communicating. Use point form for complex information.	X Include unnecessary details or not enough detail.
✔ Use plain language and avoid jargon and abbreviations especially if you're sending to someone outside of your program.	X Clog up people's inboxes with chain letters, jokes, advertising or trivia.
✔ Be careful when using sarcasm or humor, which could be misinterpreted.	X Never assume the intent of an email. If you are not sure -- ask so as to avoid unnecessary misunderstandings.

15 Rules to Reverse the Email Spiral

1. Respect Recipients' Time
This is the fundamental rule. As the message sender, the onus is on YOU to minimize the time your email will take to process. Even if it means taking more time at your end before sending.

2. The Beginning and The End
Make sure your email includes a courteous greeting, even if it's short, like 'Hi' or 'Hello', whatever works best for the intended recipient. Don't forget the end of your message too! Ensure that your email signature is included (as per organizational template) and always say 'Thank You' or 'Sincerely' or the like. These will help to make your e-mail not seem demanding or terse.

3. Use the 'Read Receipt' sparingly
You should not request a **read receipt** for every message you send, just because they have received it doesn't mean they have actually even read it. Doing so is viewed as intrusive, annoying and can be declined by the other side anyway. Limit use for vital information or tight deadlines.

4. Think, write, and think again
Email is a static, one-way channel - unlike live communication, there's no way to get immediate feedback (from facial expressions or voice responses) to know if we are being effective or even understood. So think twice before hitting the send key.

5. Slash Surplus "CC" Use
CCs are like mating bunnies. For every recipient you add, you are dramatically multiplying total response time. Not to be done lightly! When there are multiple recipients, please don't default to 'Reply All'. Maybe you only need to cc a couple of people on the original thread. Or none.

6. Give these Gifts
If your email message can be expressed in half a dozen words, just put it in the subject line e.g. FYI, please respond, etc. This saves the recipient having to actually open the message until they have time. Ending a note with "No need to respond" is a wonderful act of generosity.

7. Proof, spell-check, and proper formatting
Poor writing skills are a direct reflection on you! Spell checking will prevent most misspelled words, but you should always proof your email in case you've written the incorrect word or autocorrect on your smart phone has changed the context or your message. Use proper capitalization, punctuation and formatting.

8. Compress, Compress, Compress!
If you are sending an email with several large attachments, consider including the hyperlink to a shared drive instead. Or, you can try compressing your messages into a zipped file.

9. Don't SHOUT at your recipient

Typing in all caps is seen as yelling, or that you were just too lazy to use proper text formatting. It's also hard on the eyes -it takes longer to read something written in all caps than it does to read something that is properly formatted. Multiple instances of !!! or ??? are perceived as rude or condescending.

10. Celebrate Clarity

Start with a subject line that clearly labels the topic, and maybe includes a status category [Info], [Action], [Time Sens] [Low Priority]. Use crisp, muddle-free sentences. If the email has to be longer than five sentences, introduce the basic reason for writing upfront. Avoid strange fonts, colors and patterned backgrounds.

11. Tighten the Thread

Some emails rely on previous emails to provide context. It's usually right to include the thread being responded to but it's rare that a thread should extend to more than 3 emails. Before sending, cut what's not relevant. Or consider making a phone call instead.

12. URGENT! The boy who cried wolf.

Do not send all your messages as URGENT or HIGH PRIORITY. If your recipients keep receiving messages marked urgent, then eventually the red exclamation point loses its effectiveness - except to reinforce how important YOU think you are.

13. Don't "Reply All" All the Time

Refrain from using the Reply to All feature to give your opinion to those who may not be interested. In most cases replying to the Sender alone is your best course of action unless, as a group, you've identified you prefer a reply all approach. The sender can send a follow-up summary email to all respondents instead of everyone getting updates from individuals.

14. Cut Contentless Responses

You don't need to reply to every email, especially not those that are clear responses. An email saying "Thanks for your note- I'm in." does not need you to reply "Great." That just cost someone an extra 30 seconds.

15. Disconnect!

If we all agreed to spend less time doing email, we'd all get less email! Consider calendaring half-days at work where you can't go online. Or a commitment to email-free weekends. Or an 'auto-response' that references this charter. And don't forget to smell the roses.