E-Mail Etiquette: When and How to Communicate Electronically

by Joseph M. Saul

How would you notify personnel in your department of a policy change? Set up a meeting with a colleague in another department? Wish a sister who lives in England happy birthday? Inform an employee of a change in job responsibilities?

Five years ago, most people would have said “official memo,” “phone,” “mail a card,” and “face-to-face meeting,” respectively. These are all very different methods of communication, and they have different requirements.

Because the policy change is an official action, you would want people to see it on letterhead and have a file copy for reference. A quick phone call would suffice for the meeting, though. Phone calls to England are expensive, so you would probably mail your sister a card. Job actions, however, are sensitive and best handled face-to-face.

These days, many of us are turning to electronic mail for communications we used to handle by phone, letter, or even face-to-face meetings. E-mail is easy to send and does not depend on both parties being available at the same time. It even provides a written record.

E-mail may seem to be the perfect form of communication, but it does have some limitations, and it is not always the appropriate choice. It is important to understand its pitfalls and how to work around them. The four major pitfalls of e-mail are missed signals, lack of context, permanence, and unfamiliarity.

Missed signals

You can’t communicate as broad a range of information in e-mail as you can in a face-to-face meeting, or even in a telephone call. Your words come across, but all the non-verbal signals—facial expressions, eye contact, body language, tone of voice—are lost. We usually don’t think about it, but we depend on those signals for information about the context of what is said; we need the signals to help us interpret the meaning beneath the words. Without them, we are often left to guess at the other person’s intent.

These non-verbal signals are the main reason that most people prefer to handle sensitive issues (such as employment actions) in face-to-face meetings. When the situation is already potentially tense and you want your meaning to be absolutely clear, you want to have as much information as possible flowing back and forth.

Conversely, this is why e-mail conversations can become so heated. It’s hard to say something “with a smile” in electronic mail, and it is all too easy to misinterpret an offhand, joking remark as a personal attack.

Once tempers flare, both parties—each operating without those important nonverbal cues to meaning—tend to read their worst fears into the written words and react in kind. This can happen even among friends, but when the parties involved don’t know each other well, it can be worse.

As a result, experienced e-mail users have developed conventions for showing when they are joking—interjections such as <grin> or the use of “smileys,” such as this: : - )

(If you haven’t seen one of these before, tip your head to the left to see the smile.) Unfortunately, these methods are not universally understood and communicate only a limited amount of meaning.

What is the best way to avoid misunderstandings due to missed signals? Give e-mail correspondents the benefit of the doubt and seek clarification (for example, “You sounded annoyed in that last reply. Am I reading you correctly?”). If there is a dispute, don’t hesitate to call someone on the phone or talk to him or her in person.

Lack of context

A note stuck to your door is informal; a signed memorandum on departmental letterhead is official. The way a message is sent tells the recipient a lot—people have learned to recognize the status of a message from its context and formatting cues.

In e-mail, however, both kinds of message look the same. You can’t send an e-mail message on letterhead or on scented stationery. As a result, your recipient not only lacks the non-verbal content of your speech, but he or she also lacks the traditional symbols that would show its status

Revised and reprinted with permission from the University of Michigan’s Information Technology Digest, April 8, 1996. Copyright 1996 by the Regents of the University of Michigan.

Permission to publish this article in your campus newsletter is granted provided that the University of Michigan copyright and its date appear, and notice is given that copying is by permission. For other uses, contact Janet Eaton, University of Michigan Information Technology Division, 313-763-8980, jmeaton@umich.edu. An electronic version of the original article may be found at http://www.itd.umich.edu/~doc/Digest/0496/feat04.html
and context. If people in your department receive an e-mail message saying “Please get all grades in by the 25th,” they don’t necessarily know whether it is an official statement of policy or a plea for help from an overworked administrator.

As we start to use e-mail interchangeably with all of the other communication methods available to us, we have to develop ways of making the context of the message clear. Eventually, we may have “electronic letterhead” for verifiable official messages. Until then, the best solution is to explain your message’s status and context right up front. You might, for example, state, “This is a formal announcement from the office of the director” (if indeed that’s what it is).

Permanence

Unless your phone is bugged, a phone call leaves no permanent record. E-mail, however, does—and it can be forwarded again and again and come back to haunt you long after you have forgotten why you sent the original message. (This is especially true on discussion lists, where some list members may not see your message until weeks after you sent it.)

Because electronic mail is so easy to send and seems so ephemeral, people often forget just how permanent it is. You can achieve a kind of immortality through your e-mail well out of proportion to the amount of effort it takes to send it. It can be a good idea to explain your intentions to the recipient of a message. If you do not want your message forwarded, say so.

The convention on discussion lists and Usenet newsgroups is that private e-mail should not be publicly posted, but people are occasionally thoughtless or unaware of the convention. To be safe, think very carefully before sending a hostile or angry message; you can wind up defending your writings long after the feelings that motivated you to write them are past. And you can wind up defending them to people you never thought the message would reach.

Unfamiliarity

Most people learn to use the telephone and to write letters as small children. Appropriate phone or letter etiquette is second nature to most adults. Most people on your campus, however, have had electronic mail for a much shorter time—maybe one to five years. Many incoming students have their first experience with e-mail during orientation. Electronic mail is a very new method of communication for most of the people worldwide who use it—and they’re still learning the ropes.

As a result, they make mistakes. This isn’t surprising; e-mail etiquette is no more intuitive than phone etiquette, and everyone has heard children answer phones with “Who is this?” or simply with silence punctuated by giggles.

Do

✓ Do review messages before you send them out to make sure you are really saying what you want to say. This is especially important as end-of-semester stress rises.
✓ Do be as polite as possible; terseness can be taken as hostility.
✓ Do make it clear to the recipient what type of message you are sending, especially if it is official.
✓ Do give correspondents the benefit of the doubt; try not to assume the worst.
✓ Do be patient with inexperienced e-mail users.
✓ Do, if possible, include the portion of the message you’re replying to in your reply; people often forget the original context.
✓ Do enjoy and use responsibly the e-mail resources available to you as a member of your college or university community.
✓ Do be sure that the subject line reflects the subject of your message.
✓ Do include your name at the end of your message when replying to a discussion list.

Don’t

✓ Don’t send a message when you’re angry; cool down, look at the message again, and then decide whether you really want to send it. Most e-mail programs let you easily save a message for sending at a later time.
✓ Don’t copy an entire, large message in your response just to add a line or two of commentary.
✓ Don’t reply to “all recipients” unless they all need to see your reply.
✓ Don’t type in all capital letters; this is SHOUTING and is considered RUDE.
✓ Don’t send off-topic messages to mailing lists, especially work-related lists.
✓ Don’t “spam” (broadcast messages to multiple lists and/or individuals regardless of their interest in your message).
✓ Don’t send chain letters or messages recruiting participants in make-money-fast schemes; doing so not only usually violates campus policy, but may also violate federal law.
✓ Don’t edit quoted messages to change the overall meaning.
change. If the organization decides to turn on a dime, follow it like a trailer. Corner quickly. Turn for turn. The organization can’t wait for employees to go through some slow adjustment process. It can’t afford to gear down while people decide whether or not they’re going to get on board.

The chapter entitled “Stay in School” ends with a straightforward recommendation that speaks to the importance of such activities as CAUSE’s newly expanded and expanding professional development program.

So just forget about “finishing” your education. Defend your career by developing a better package of knowledge and skills than the next person.

Although this and other handbooks in the series would be useful tools for anyone in an organization, some focus specifically on managers. High-Velocity Culture Change tells managers on page one that “... you’ll have trouble creating a new culture if you insist on doing it in ways that are consistent with the old one.” The authors Price Pritchett and Ron Pound advocate a blunt, hard-hitting, persistent, results-oriented approach to changing the culture of an organization. The title for their final chapter, for example, is “Go Flat Out.”

In Culture Shift: The Employee Handbook for Changing Corporate Culture, Price Pritchett offers guidelines to “Stop doing what comes naturally... and do what works.” In so doing, he attacks many of the shibboleths of our behavior in organizations and, indeed, our self-image and identity as members of organizations. For example, although it is natural to “rely more heavily on the self,” Pritchett admonishes, “don’t let strengths become weaknesses.”

Each of the more than a dozen handbooks in the series has a slightly different format. Most are fewer than fifty pages and offer a dozen or so guidelines for achieving the personal or organizational change recommended in the title. The series confronts us with the brunt of the new reality of the information age. While the series does not let us shrink from the full implications of that new reality, it does offer guidelines that enable individuals to establish habits, identities, and goals that are in harmony with it, and it does it with humor and panache.

Reviewed by Carole A. Barone, Associate Vice Chancellor for Information Technology at the University of California Davis. She was the recipient of the 1995 CAUSE ELITE award and currently chairs the CAUSE Professional Development Committee.

E-Mail Etiquette ...

(continued from page 51)

People do all kinds of things that offend experienced e-mail users—copying entire messages just to add “I agree,” passing on chain letters, replying to entire discussion lists instead of just the sender, typing in all capitals (which is interpreted as shouting) or all lower case letters. The list of “sins” goes on and on.

Never assume that another person is deliberately trying to be annoying over e-mail without supporting evidence; he or she simply may not know better. Most people, if told politely, will be happy to follow the conventions. They just need to know what the conventions are.

Use with care

E-mail can be a wonderful communication tool when used with care. Avoid the pitfalls, think before you act, and remember that we are all learning the ropes together.

“Take no part whatsoever in resistance to change. If the organization decides to turn on a dime, follow it like a trailer.”

C/E

CIO Constituent Group...

(continued from page 9)

meeting with topical breakout sessions was new at CAUSE95. Participants agreed that it was successful enough to try again at CAUSE96 in San Francisco, with some suggested improvements: having each participant come with a list of questions to be answered, beginning the meeting with a panel discussion on controversial issues with recognized leaders/innovators in information technology, and focusing more on the big-picture issues (such as the future of transformation in higher education) and less on technical detail.

In the meantime, back on the CIO online discussion list, exchange of ideas has been frequent, detailed, and informative. Recent topics have included the pros and cons of specific commercial administrative systems solutions, the best ways to set up student computing labs, the potential effects of the telecommunications legislation, outsourcing information technology services, World Wide Web policies, technology fees, using Social Security numbers for ID numbers, staffing patterns in information technology services organizations, budgeting practices, methods of assessing technology services, and the effectiveness of strategic advisory councils for technology. With this level of online interest and energy, the 1996 face-to-face CIO meeting should be lively and productive.

C/E

3 The CIO constituent group’s online discussion is archived on the CAUSE World Wide Web server at: http://cause-www.colorado.edu/member-dir/cg/cio.html