Summary of Video Training Program: *Taming the E-mail Etiquette Beast*

Finding Clarity and Reducing Aggravation in Your E-mail Communications

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The video program on ***"Taming the E-mail Etiquette Beast",*** presented by Randy Dean, MBA: *The E-mail Sanity Expert®,* is a comprehensive program on composing emails effectively and getting the desired response from your messages, as well as using "common courtesy" etiquette strategies to create a positive workplace e-mail and communications culture.

Here's a detailed summary:

Introduction

Randy Dean introduces himself and his extensive multi-decade experience in leading and teaching programs on time, technology, and email management. He shares his journey from working in corporate and academic environments to starting his own firm and becoming well-known for his expertise in email and time management.

Importance of Email Etiquette and Effective Composition

Dean emphasizes the significance of efficient email management, noting that the average office professional spends about two hours a day on email, with many spending even more time. He highlights the negative impact of poorly managed and poorly composed emails on productivity, stress levels, and overall job satisfaction.

Common Email Issues

Dean identifies several common issues with interoffice/interpersonal email communication:

- **Overuse of Email**: Many people use email for tasks that could be better handled through other communication methods like phone calls or meetings.
- **Poorly Written Emails**: Emails that are unclear, overly complex, or emotionally charged can lead to misunderstandings and frustration.

- **Email Overload**: Receiving too many emails, especially those that are not relevant or necessary, can overwhelm recipients and reduce productivity.

“Think Before Compose”

Dean emphasizes the importance of identifying the purpose of your email before you start composing it. He suggests that you should ask yourself a key question: "What are you trying to get done with it?" This involves determining whether you are simply sharing information, distributing tasks and assignments, informing people of updates and deadlines, or confirming receipt or completion of something (or a combination thereof).

By thinking about what you are trying to accomplish, you can decide whether email is the right tool for the job. Dean argues that too many people use email for communications that could be better handled through other methods like phone calls, in-person conversations, IMs or meetings. He believes that considering the purpose of your email can help you choose the most effective communication method for the given situation and reduce the clutter and confusion that often come with overusing email.

Be Careful With “Urgent” Email Messages

Dean highlights several problems with using email for urgent messages:

1. **Recipient Availability:** The recipient might not be available to see the email. They could be out of the office, dealing with a personal emergency, or simply not checking their email frequently. This means that urgent emails might not be seen or acted upon in time.
2. **Email Overload:** Many people receive a high volume of emails daily, making it easy for urgent messages to get lost in the clutter. When people are overwhelmed with emails, they might miss critical information.
3. **Unreliable Delivery:** Emails are not always delivered successfully. There is a failure rate, especially with emails sent between different organizations. This means that even if you send an urgent email, there is no guarantee it will reach the recipient.
4. **Different Email Checking Habits:** Not everyone checks their email constantly. Some people only check their email a few times a day, which means they might not see an urgent email in time.
5. **Lack of Immediate Feedback:** Email does not provide immediate feedback or confirmation that the recipient has seen and understood the message. This can lead to misunderstandings and delays.

Dean suggests that for truly urgent matters, it is better to use more immediate forms of communication, such as phone calls or face-to-face conversations, to ensure the message is received and acted upon promptly. If you are going to use email for an urgent communication, he recommends that you also confirm the delivery of the message using a different two-way communication option, like a phone call or "stop by". If the sender doesn't confirm the timely receipt of the message by the recipient and therefore the needed action or response from the recipient doesn't occur in time, the *responsibility* for that missed deadline should fall squarely on ***the sender.***

Strategies for Effective Email Etiquette and Composition

Dean provides several strategies to improve email communication:

- **Use Clear and Concise Subject Lines**: Subject lines should be informative and relevant to the content of the email.
- **Keep Emails "Short and Sweet"**: Emails should be concise and to the point, avoiding unnecessary information and emotional content. *"If you have to scroll down to complete the message, the e-mail is probably too long."*
- **Consider Alternative Communication Methods**: Before sending an email, consider if a phone call, meeting, or other method would be more effective.
- **Avoid Overloading Emails with Multiple Topics**: Emails should focus on one or two topics to avoid overwhelming the recipient – avoid "kitchen sink" messages.

  "I'm so sorry I wrote you a long letter. I didn't have time to write a short one."

  – Sir Winston Churchill
- **Use Blind Carbon Copy (BCC) Wisely**: BCC should be used carefully to avoid trust issues and ensure that recipients are aware of who else is receiving the email.

Should this email instead be a document or even a meeting?

Dean suggests that sometimes email might not be the best tool for certain types of communication. He mentions that if the information is too complex to be easily digested or if there are multiple items that need to be acted upon and/or multiple people involved, it might be better to consider other communication methods. Specifically, he mentions the ability to attach or even print out and hand deliver a well-written document or file as an alternative to using email. Adding a more formal attachment to an email often slows the

recipient down and causes them to pay closer attention, especially if prompted to do so by the cover message.

And, people need to remember that both conversations and actual meetings, either virtual or in person, can often be far more effective means of communication of difficult or complex information than an e-mail.

Dean even describes what he calls “Email Ping Pong” – a situation where emails are sent back and forth multiple times between two or more parties, often leading to confusion and inefficiency. This typically happens when the communication is not clear, and the parties involved are not on the same page. Dean suggests that when you notice email ping pong occurring, it's a sign that someone is confused or unsure about the situation. The best way to stop this back-and-forth is to pick up the phone or go find the person to clarify the issue directly.

By considering these alternatives, you can reduce the clutter and misinformation that often come with email and make the communication more effective.

CCs and FYI messages – use care and caution

Dean has some specific suggestions about using CC (carbon copy) and FYI (for your information) messages to improve email communication:

CC (Carbon Copy) Messages

1. **Avoid Overuse:** Dean advises against overusing the CC feature. He mentions that some people CC everyone on everything, which can lead to unnecessary clutter in recipients' inboxes.
2. **Clarify Purpose:** If someone is CCing everyone because they don't know who needs the information, Dean suggests sitting down with that sender to clarify what information is needed and by whom. This helps reduce unnecessary emails.
3. **Trust Issues:** Dean points out that excessive use of CC can indicate a lack of trust within the organization. People might use CC to cover themselves (CYA - cover your ***) and document who saw their message. This behavior can be a sign of deeper trust issues that need to be addressed.

FYI (For Your Information) Messages

1. **Overload and Ignorance:** Dean notes that many professionals receive too many FYI messages, leading to a situation where they might not read them as closely as they

should or at all. He humorously suggests that FYI often stands for "for your ignorement".

2. **Provide Clear Instructions:** Instead of sending a generic FYI, Dean recommends providing clear instructions on what the recipient should do with the information. For example, telling them to keep the information on hand in case a specific situation arises.
3. **Avoid Hiding Tasks:** Dean warns against hiding tasks or deliverables within an FYI message. If there is an actual task or deliverable, it should be clearly stated to avoid it being missed.

The Common Problem with "Reply All" Usage

Dean has some strong opinions about the "Reply All" feature in emails. He believes that it is often overused and can lead to unnecessary clutter in people's inboxes, and even frustration with coworkers. Here are the key points he makes:

1. **Unnecessary Copies:** He points out that most of the time, using "Reply All" just gives people additional copies of a message they no longer need, as the original message was sufficient.
2. **Overloaded Systems:** Dean emphasizes that people already have too many inputs coming in, and adding more to an overloaded system is likely to cause it to break down. This can lead to mistakes and errors of omission.
3. **Commitment to Replies:** He mentions that some people feel a commitment to reply to every email they receive, which can be overwhelming when they receive unnecessary "Reply All" messages. He then mentioned possibly using these abbreviations in the subject line of the reply message:
    - **EOM: End of Message**
    - **NRN: No Reply Necessary**
    - **PUTP: Pick Up The Phone!**

Overall, Dean advises thinking very carefully before using the "Reply All" feature to avoid contributing to email overload and unnecessary clutter in recipients' inboxes. He also mentioned a strategy of the original sender putting the group distribution e-mail list into the BCC field, thus limiting recipients' ability to reply to everyone.

The Four W's of an Effective Email Message:

Dean emphasizes the importance of the "4 W's" when writing a good email. These are:

1. **Why they received it:** Clearly state why the recipient is receiving the email. This helps set the context and purpose right from the beginning.
2. **What they need to know:** Specify what the recipient needs to know. This includes the key information or message that you want to convey.
3. **What they need to do:** Outline what the recipient needs to do. This involves any actions or tasks that the recipient is expected to perform.
4. **When they need to have it done by:** Indicate when the recipient needs to complete the task or respond. This sets clear deadlines and helps manage expectations**.**

By following these guidelines, you can ensure that your emails are clear, concise, and actionable, making it easier for the recipient to understand and respond appropriately.

Take the Time to Proofread, Use Proper Punctuation, and Check Spelling

Dean emphasizes the importance of grammar, punctuation, and spelling in professional email communication. He notes that these elements have significantly degraded over the last 10 to 15 years, particularly with the rise of texting, IMs and social media. Dean argues that while casual communication standards may be acceptable in personal contexts, they are usually not suitable for the workplace.

Dean points out that poor grammar, punctuation, and spelling can negatively impact one's professional reputation. He advises considering who might see the email beyond the intended recipient, as emails can be forwarded and shared widely. This means that even if you are brilliant, poor spelling and grammar can make you appear less competent and intelligent.

Dean also highlights the importance of proofreading and using automatic spell check functions. He shares that even though he is a good speller, he still relies on spell check to catch mistakes made by fast typing or less sensitive keyboards. However, he warns against relying solely on spell check, as it may not catch contextually incorrect words that are spelled correctly.

In summary, Dean believes that taking the time to ensure proper grammar, punctuation, and spelling in emails is crucial for maintaining professionalism and avoiding misunderstandings.

Avoid the Drama – Be Professional

Dean advises against using email for emotional or dramatic messages. He believes that email is not a suitable forum for such content, especially when it is negatively dramatic or emotional. Here are the key points he makes:

1. **Avoid Drama:** Dean emphasizes that email should be kept short and sweet, avoiding drama. He suggests that email is not a good forum for dramatic, emotional, or negatively charged content because once you hit send, you lose control over the message and its potential outcomes.
2. **Unpredictable Reactions:** He points out that unlike a conversation where you can gauge and respond to the other person's reactions and nonverbal cues, with email, you cannot predict how the recipient will react or interpret. This makes it risky to send emotionally charged messages.
3. **Passive-Aggressive Behavior:** Dean identifies email as a perfect tool for passive-aggressive behavior, where people can send snide, nasty, or indirect messages without direct confrontation. He warns that this kind of behavior can destroy productivity, morale, and trust within a team.
4. **Addressing Negative Behavior:** He advises managers to address any negative use of email immediately, as it can kill productivity, trust, and morale for the entire team. Dean suggests that difficult issues should be handled directly, either face-to-face or through a supervisor, rather than through email.
5. **Positive News:** On the flip side, Dean mentions that while email can be used to share positive news, it might be better to share such news in person to make it a celebration and build team rapport.

By following these guidelines, Dean believes that email communication can be more effective and less likely to cause misunderstandings or negative reactions.

Multiparty Email Message Strategies

Dean discusses multiparty email messages in the context of ensuring clarity and responsibility. He emphasizes that when sending emails to multiple recipients, it's crucial to clearly define each person's responsibilities to avoid confusion and missed tasks. Here are some key points he makes:

1. **Clear Responsibilities:** Dean suggests breaking down the tasks and clearly stating who is responsible for what. For example, in a multiparty email, you might specify that "Bob is responsible for internal cost analysis" and "Jill is responsible for competitive analysis".
2. **Avoid Overloading:** He advises against sending emails with multiple topics or tasks to several recipients, as this can lead to important information being missed. If an email contains more than two or three items, it might be better to send separate emails to each person with their specific tasks.
3. **Accountability:** Dean introduces the idea of a "recipient's bill of rights," where the sender is held accountable if a task within a multiparty email is missed due to lack of clarity. He argues that if a recipient does not clearly see their responsibility in a multiparty message, the sender should accept the blame.
4. **Breaking Down Information:** For emails involving multiple people, Dean suggests considering whether to send separate emails to each person with clear instructions at the top, rather than one email to everyone. This helps ensure that each recipient knows exactly what they need to do.

By following these guidelines, Dean believes that multiparty email messages can be managed more effectively, reducing the likelihood of confusion and missed tasks.

Email Etiquette and Legal Considerations

Dean discusses the importance of being mindful of who could see an email once it is sent, as emails can be forwarded and shared beyond the intended recipients – consider the possibility of “FOIA” or the news media or even just having the message forwarded on to an important person “higher up”. He also emphasizes the need to avoid sending emails that could create legal liabilities – sometimes having a private conversation is better than putting something out of context into writing.

He also recommends that you consider the “historical train” of the message: When forwarding or replying to an email, review the information below your response to ensure that it is appropriate to include. Sometimes, there may be information in the historical train of the message that should not be forwarded or included in the reply, especially if being shared with new parties to the message.

Think About Your Workplace Email/Communications "Culture"

Dean discusses the concept of email "culture" in the context of how it impacts the overall workplace environment. He emphasizes that the way email is used within an organization can significantly affect the productivity, morale, and stress levels of its employees. Here are some key points he makes:

1. **Impact on Workplace Culture:** Dean highlights that the email culture within an organization is a direct component of its overall workplace culture. If the email culture is negative, it is likely that the overall workplace culture will also be negative. This is because email is such a significant part of workplace communication.
2. **Creating a Positive Email Culture:** He stresses the importance of moving from a negative email culture, where emails are distracting, stressful, and emotional, to a more positive culture. In a positive email culture, people can stay focused, calm, and productive, which benefits everyone in the organization.
3. **Responsibility of the Sender:** Dean argues that the sender of an email has a high level of responsibility in creating a positive email culture. By taking the time and care to write clear, concise, and appropriate emails, the sender can help reduce misunderstandings and improve overall communication.
4. **Training and Best Practices:** He suggests that organizations should consider developing best practices documents and providing training on email management. This can help employees understand how to use email more effectively and create a more positive email culture.
5. **Recipient's Bill of Rights:** Dean introduces the idea of a "recipient's bill of rights," where the sender is held accountable if a task within an email is missed due to lack of clarity. This concept emphasizes the importance of clear communication and accountability in maintaining a positive email culture.

By addressing these points, Dean believes that organizations can improve their email culture, leading to a more productive and enjoyable work environment for everyone.

Practical Tips and Tools

Dean lets viewers know that in his regular program on e-mail efficiency, ***Taming the E-mail Beast***, he shares practical tips for managing emails more efficiently, such as using email signatures with contact information, converting emails into tasks or calendar events, and using rules and notifications to help identify urgency and reduce distraction.

Conclusion: The Very Best Time to Use Email

Dean believes that email is the best tool when the communication is simple, straightforward, easily digestible, and easily interpreted, as well as not critically time sensitive – not when it is complex, difficult, emotional, or urgent. He emphasizes that email works best when:

- **Tasks and items are clear and understood**: The recipient should easily understand what is being asked of them.
- **Deadlines are clear and reasonable**: The deadlines provided should be clear and not immediate, allowing the recipient enough time to respond appropriately.

Dean argues that when email is used within these parameters, it is hard for it to fail and becomes one of the best communication and productivity tools available. However, if the communication goes beyond these parameters, email might not be the right tool to use and can cause more problems than benefits.

Dean concludes by encouraging individuals and organizations to create a positive email culture, where emails are composed properly and used effectively and efficiently. He suggests developing best practices documents and providing training on email management and composition to improve overall productivity and job satisfaction, as well as broader firm performance.

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Please Note: This full video program can be licensed for your workgroup or team, with deep per-person discounts depending on the size of the group. Randy actually recommends that playing this program during a staff or team meeting – and frequently stopping the video at key points to discuss interactively – may actually work better than having him present for teams in person. People can often be more frank and honest without an outside presenter in the room.

And, the team can discuss if any of the suggestions shared within the video program actually need to be modified or changed due to the specific situation of that workgroup or team – what works for many teams and organizations may not necessarily work for all companies and workplace cultures. The workgroup or team can then work to create an

internal e-mail set of policies that can lead to a better, more productive, healthier email and communications culture.

For more information on licensing options for this video training program for your company, group, or team, please contact Randy at randy@randalldean.com.

Individual copies of this video program are now being provided as a special bonus for those supporting Randy's pre-launch phase of his **new Mastering Microsoft 365 Video Program Series**, currently in production: **http://spot.fund/xqqkvsc**



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