Email Protocol Guidelines

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Email is the communication medium of choice for engineering project teams. It's quick and easy, asynchronous, and persistent.

Busy people receive 50 to 100 emails a day. If you want to reach them, you have to be clear, direct and to the point. If the meaning is not clear, you can waste days emailing back and forth trying to sort things out. Or, they just don't answer.

Here are some guidelines to make your email communication more effective.

• **Subject line.** Always include a meaningful subject line. I delete emails without subject lines. "Hi" is not a subject; neither is "Snowmobile Team". "Agenda for Snowmobile Team Meeting " is a subject.
- A missing or inappropriate subject may get trapped by spam filters.
- Use a new email, with a new subject line, to start a new subject.

Worst Practice: Don't dig up, and reply to, an old email with an old subject line when you want to open a new thread of discourse
- It's very confusing, and makes you look sloppy.
- The recipients might not even read it, if they think it's about an old matter that is now closed.
- Recipients don't know where to file it – the email could end up under the old subject heading, and they can't find it later.

• **How many topics per email?** Generally, it's best to have one topic per email, with a subject line that describes the topic. That way people can read the message, act on it, file it appropriately, and find it later.

If an email announces a meeting on Thursday, and, by the way, Bill needs to order his parts from Supplier B because the Supplier A is out of stock, (1) the second message may get lost, (2) we don't know where to file this message for later reference.

• **Identify yourself and your project team**, at the top of your message. Most of us are involved in several projects and activities, and sometimes messages get sent to us by mistake.

• **Identify actions required, and who is responsible.** When I receive an email message that is addressed to an alias or group address, I don't know whether I am an "action" recipient or an "information" recipient.

Always identify anyone who needs to take action, and what action they should take:
- o Please review and comment
- o Request approval for a large purchase
- o Answer this question
- o Please grade the attachment

• **Whose responsibility?** If you send an "action" message to two people, which one will respond to it? Neither! Specify one person, who will own the responsibility.

• **Large attachments.** Don't send huge attachments. They clog up the system. Try to keep attachments under 10 megabytes. You can transfer large files on a memory stick, or put them where they can be downloaded using a service like Google Drive or DropBox.

Executable code as attachments. The receiver's security system will probably block any executable code attached to a message, and may block the message.

• **Attachment file names.** Give files meaningful and identifiable names, so the recipient can find them later. For example, if you send a copy of your resume, don't call it "resume.pdf"; include your name, like "Sean_Smith_resume.pdf".

• **"Don't make me think** "– include all the information, even if it should be obvious or straightforward for the receiver to figure it out.
- The more work the receiver has to do, the greater the likelihood of a mistake
- The work invested by the sender is saved many times over by the receivers and by the project.

• **Acknowledge.** If someone sends you a legitimate request, answer it right away, even if you don't plan to take action immediately.
- Then they know you received it, and they can stop worrying about that.
- They won't keep trying to get your attention.

• **Close the loop.** When you finish a piece of business, as in a series of email exchanges, don't leave the conversation unfinished, even if no more action is required. If someone says, "I did the thing you requested", send a short "Thanks". This lets them purge this matter from their schedules and their minds. It's also polite, like saying "Goodbye" on the telephone; it's good for your working relationship.

• **Timeliness**. Give your recipients time to receive, read, digest, and act. I try not to read my email too often; it's more efficient in batches. Meetings should be scheduled well in advance.

Be polite. Avoid inflammatory language.
- This helps present "email" storms
- Especially important in group emails.

Reply to All?
- The more emails we receive, the less impact each one has.
- "Reply to all" often jams inboxes with pointless clutter.

• **Face-to-face or telephone?** Emails are great because they are asynchronous; both parties don't have to be present to communicate. Their information bandwidth is limited, however, and the time lag between messages can be long.
- If a matter is urgent, and there is a lot to discuss, it's probably better to do it in person or by phone.
- If a matter is sensitive, it's best not to discuss is by email.
   - Remember, emails are persistent; they never go away
      - They can easily be forwarded to people you didn't intend them for.
      - They can be dredged up and used against you later.

Cost of Unreliable Communication

Unreliable communication = uncertainty
- Did they get my message?
- Are they going to deliver the part of the project that we need?
- Do we have approval to go ahead?
- Missed meeting – some participants didn't get the word, must reschedule

Business cost of uncertainty? It's like driving through the fog.
Q: What do we do when we are driving and find ourselves surrounded by dense fog?
A: We slow down, because we're not sure what's ahead of us, and we don't want to hit it

The same principle applies in business: if we're uncertain about what's ahead, we slow down activity.

Projects don't crash and burn, they die the "death of a thousand cuts"
- Gradually run out of time
- Gradually run out of money

Good communication keeps everyone synchronized and on target.