Dave Yost
Auditor of State

Ohio Auditor of State
Dave Yost

# Effective Use of E-mail and IM

Presented by: ISA

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## Overview

- Background.
- When to use e-mail vs IM?
- E-mail Etiquette.
- IM Etiquette.

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## E-mail Background

- 144.8 billion e-mails sent *every day.* Projected to rise to 192.2 billion in 2016.
- 3.4 billion e-mail accounts worldwide.
- One of many available communication channels.
- Highly used in many businesses and state government; local government?

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## E-mail Background

- We know who claimed to create the Internet, but who invented e-mail?
- The first [illegible] 1971 by Ray Tomlins[illegible] eveloped a network [illegible] to share each other's [illegible]
- Most of [illegible] gitimate:
  - ✓ 90% of all e-mail during 2011 was spam
  - ✓ nearly half of all e-mail does not get delivered.[1]

## IM Background

- Though the term dates from the 1990s, instant messaging predates the Internet, first appearing on operating systems like Compatible Time-Sharing System (CTSS) and Multiplexed Information and Computing Service in the mid-1960s.
- The first online chat service was the CompuServe CB Simulator in 1980.[1]

## When to use IM v. E-mail? IM is a better option when:

- Simple question requiring a simple answer (e.g., "when is the meeting?").
- Timeliness is a key factor in communication (sending files to someone while in a call).
- Working relationship already established, and have developed some shorthand (must know what other party is referring to).

## When to use IM v. E-mail? IM is a better option when (cont.):

- Informality is appropriate.
- You can truly multitask (for brief and informal IMs, very possible to continue working on another task in between IMs).
- Both parties are working at the same time (if you're online and available, people expect access).

## When to use IM v. E-mail? E-mail is a better option when:

- Answer requires thought or detail (e.g., can engagement be completed as a Agreed Upon Procedure (AUP) audit?).
- Documentation is important (history of correspondence is critical).
- Initial introduction with a new contact.



# E-mail Etiquette

## Why is e-mail etiquette important?

- We all interact with the printed word as though it has a personality and that personality makes positive and negative impressions upon us.
- It is easy for e-mails to be misinterpreted because people write as though they are having a conversation; however, the receiver does not read that way.



## Why is email etiquette important?

- Without immediate feedback your document can easily be misinterpreted by your reader, so it is crucial that we follow the basic rules of etiquette to construct an appropriate tone.



## E-mail Etiquette

One subject to an e-mail:

- Keep it short.
- Avoid multiple topics per e-mail. The recipient may overlook additional topics.
- Save long conversations for face-to-face or phone.

## E-mail Etiquette

**Greetings and Closings**:

- A polite greeting.
- Briefly introduce yourself.
- A closing. When in doubt, end an e-mail with "Thanks."
- Include contact information in your signature.



## General Format: Lists and Bullets

When you are writing directions or want to emphasize important points, number your directions or bullet your main points.

For example,

1) Place the paper in drawer A.
2) Click the green "start" button.

Another example,

- Improve audit timeliness.
- Reduce backlog.



## General Format: Tone

- Write in a positive tone
  "When you complete the report." instead of "If you complete the report."
- Avoid negative words that begin with "un, non, ex" or that end with "less" (useless, non-existent, ex-employee, undecided).
- Use smiles ☺, winks ;), and other graphical symbols only when appropriate.
- Use contractions to add a friendly tone.
  (don't, won't, can't).

## When your message is long or complex

- Create an "executive summary."
- Provide a table of contents on the first screen of your email.
- If you require a response from the reader then be sure to request that response in the first paragraph of your email.
- Create headings for each major section.



## Executive Summary and Table of Contents

- An executive summary should have all the main components of the email.

""Our profit margin for the last quarter went down 5%. As a result I am proposing budget adjustments for the following areas…"

- Table of contents

"This email contains

A. Budget projections for the last quarter

B. Actual performance for the last quarter

C. Adjustment proposal

D. Projected profitability"



## Delivering Bad News

- Deliver the news up front.
- Avoid blaming statements.
- Avoid hedging words or words that sound ambiguous.
- Maintain a positive attitude.

## Do not take your reader by surprise or throw them under the bus

- Do not wait until the end of the day to introduce a problem or concern via memo or email.
- Avoid writing a litany of concerns that you have been harboring for a long period of time.
- If your e-mail deals with a touchy subject or your emotions were flaring when you wrote the e-mail
  - Sit on it for a while before sending
  - Have a third party read it over for additional perspective

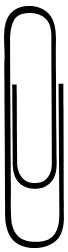


## When E-mail Won't Work

- There are times when you need to take your discussion out of the virtual world and **make a phone call**, or talk in person.
- If things become very heated, a lot of misunderstanding occurs.
- When you are delivering very delicate news then the **best way is still face-to face**.



## Attachments



- When you are sending an attachment tell your respondent what the name of the file is, what program it is saved in, and the version of the program.
- "Attached is an Excel 2007 file named "City Budget"
- Hint: Add the attachment before filling in the recipient names.

## Responding to e-mail

- Promptly – same as phone call.
- Read the entire message before responding.
- Twenty questions? – embed answers in sender's message.



## Forwarding e-mail:

- When forwarding e-mail, take the time to type a personal comment to the person you are forwarding to.
- Include original message context that is relevant to the reply:
  - A simple reply without the original e-mail body may not make sense to the recipient.
  - Including the original e-mail body makes sense as long as it is not overdone.



## Recipients:

- Send 'To' recipients who should respond; cc recipients as an FYI.
- When sending a mass e-mail, send to self and blind cc recipients to protect e-mail privacy.
- When responding to a mass e-mail, consider if you need to reply to all or if only the sender needs response.

## Recipients (cont):

- Double check who you are sending to:
  - Some programs have “predictive fill-in”.
  - Duplicate first names.
- Delete unused and incorrect e-mail addresses from contacts.



## E-mail Etiquette Family Feud Round 1

## Name the top 7 things that annoy you most about e-mail.

| | |
|---|---|
| 1 | 5 |
| 2 | 6 |
| 3 | 7 |
| 4 | Move to next round |

# Sarcasm

50 Points

# ALL CAPS

45 Points

# Acronym Over-Use

35 Points

# Punctuation

30 Points

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# Emoticons

25 Points

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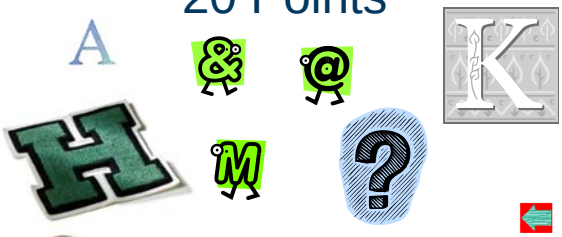
# Over-formatting

20 Points



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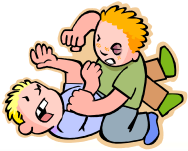
# all small case

## 15 Points

# E-mail Etiquette Family Feud Round 2





Name the top 4 most common subject line mistakes

| | |
|---|---|
| 1 | 3 |
| 2 | 4 |

Move to next round

# Blank

## 50 Points

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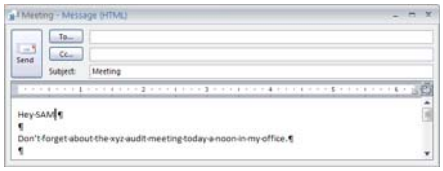
# Vague

## 40 Points

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# Too long

(entire e-mail body in Subject)

## 30 Points

Please see the attached policy for notifying the appropriate folks of pre and post audit conferences, as well as any important meetings with clients. If you have any questions, feel free to give me a call.

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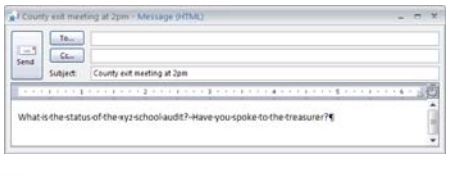
# Mismatch to content

## 20 Points






## Subject Lines

Subject lines should:

- Be concise.
- Convey your message.
- Can reduce the need for the recipient to read the body of the e-mail.

e.g., “requested contact person” vs. “contact person is Joe Smith.”



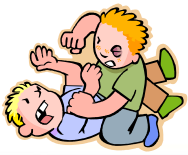
## Subject Lines

Subject line should agree to content subject:

- It is confusing when an e-mail recipient switches the topic of discussion without changing the e-mail subject line.
- A critical matter may get ignored.
- Don’t bait and switch.

Remember to change the subject line if you are changing the subject.

# E-mail Etiquette Family Feud Round 3





Name 5 consequences of responding too quickly:

| | |
|---|---|
| 1 | 4 |
| 2 | 5 |
| 3 | Move to next round |



# Overreacting

80 Points

# Incomplete Response

## 50 Points

# Poor Grammar & Spelling

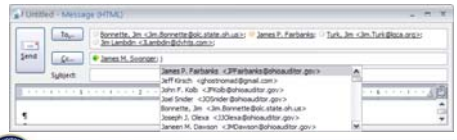
## 40 Points

'Say it ain't sew.'



# Autofill to wrong recipient

## 30 Points



# Sent to the wrong recipient - Reply instead of Forward

20 Points



## Dangers of Responding too Quickly

- E-mail is a public record.
- Don't be the news; read the news.
- Draft the e-mail first without including a recipient. Save it and come back to it later if necessary. Proofread. **Fill in the recipients LAST.**

## E-mail Etiquette Family Feud Round 4

Name something that would prevent e-mail delivery

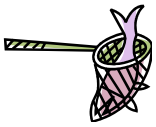
| | |
|---|---|
| 1 | 3 |
| 2 | 4 |

Move to next round



# Caught in spam filter

## 50 Points





# Attachment too large

## 50 Points

# Zipped files

## 40 Points

# Fancy formatting

## 10 Points

## E-mail Etiquette

Additional pointers:

- Proofread.
- Acknowledge receipt.
- If you cannot respond to an e-mail promptly, at the very least e-mail back confirming your receipt and when the sender can expect your response.

## E-mail Etiquette

Summary:

- E-mail remains the most popular communication tool.
- E-mail gives you the most exposure.
- Mistakes or poorly executed e-mails can affect your professional image.
- Proper grammar and spelling are critical.



# IM Etiquette

## IM Etiquette

Seek Permission to Enter:

- Be polite.
- Inquire whether it is a good time to chat.
- Drop the subject of the query.

## IM Etiquette

Pay Attention to Availability Status:

- An extension of “seek permission.”
- Use the features of the IM program.
- Wait to initiate a conversation with someone who is “in a call.”



## IM Etiquette

Keep it Brief:

- Stay on topic.
- Discuss issues only relative to the topic in question.
- Try not to be overly cryptic or your meaning can be misread.

Remember, it is called “instant” messaging.

**So get to it!**



## IM Etiquette

Use Proper English:

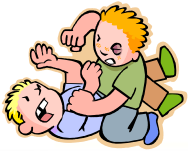
- Keep slang and IM acronyms at bay.
- Avoid the distraction of a “What is IMO?” conversation with a less-than-net-savvy IM user.
- Remember to use punctuation.
- IM is not an excuse to forget your grade school education.

## IM Etiquette

Politely leave conversation:

- Say good-bye.
- Talk to you later.
- Thank you.

## IM Etiquette Family Feud Round 5

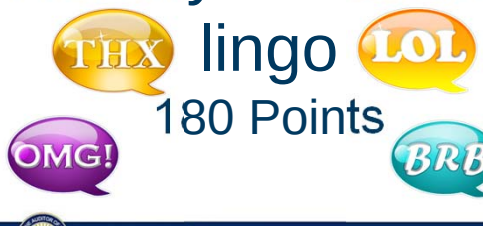




Name the top 7 things that annoy you most about IM.

| | |
|---|---|
| 1 | 5 |
| 2 | 6 |
| 3 | 7 |
| 4 | End of Game |

# Over use of Acronym / texting lingo




180 Points



# Start a conversation when you have nothing to say

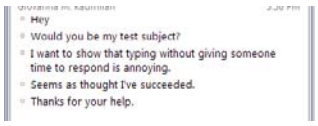
120 Points

# Over multi-tasking

100 Points

# Not providing time for response

## 80 Points






# Too many emoticons

## 75 Points

# One word answers.

## 60 Points

# Never ending conversations

## 50 Points

## Effective Use of E-mail and IM

"Your e-mail is a reflection of you. Every e-mail you send adds to, or detracts from your reputation. If your e-mail is scattered, disorganized, and filled with mistakes, the recipient will be inclined to think of you as a scattered, careless, and disorganized businessperson. Other people's opinions matter and in the professional world, their perception of you will be critical to your success."

-Peter Post, director of the Burlington, Vermont-based Emily Post Institute



## Sources

[1]http://www.readwriteweb.com/archives/email-will-never-die-the-man-who-invented-it-reveals-why.php
http://email.about.com/od/emailnetiquette/tp/core_netiquette.htm
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http://www.slideshare.net/kpruitt/email-etiquette-117745

## Questions

## Effective E-mail Use and IM

**State ISA Region**
88 East Broad Street
Columbus, Ohio 43215

**Steve Gibson**
Presenter Phone: (800) 443-9275
Presenter Fax: (866) 381-0154
E-mail: sngibson@ohioauditor.gov



Dave Yost
Auditor of State

88 East Broad Street
Columbus, Ohio 43215
Phone: (800) 282-0370 Fax: (614) 466-4490
E-mail: contactus@ohioauditor.gov
**www.ohioauditor.gov**