# EMAIL BEST PRACTICES FOR TEAMS

## –KELLY FORRISTER

A client recently asked us for our best practices around email communications, to share with their globally dispersed teams. They had learned the keys to getting to inbox zero, but their productivity was stymied by the sheer volume of unproductive emails being sent around the company. These tips were born out of the shared practices we use here at the David Allen Company with our own staff, and I wanted to share them with the GTD community.

1. **Appropriate Use** Match the message to the best medium. Recognize when email is not the best method of communicating. There are times when a face-to-face meeting is better than a string of unclear or sensitive emails going back and forth. Just because the topic started on email, doesn't mean it should stay on email. On the flip side, are there meetings being held that could be more efficiently be done over email if you trusted people were getting to inbox zero on a regular basis?

2. **To: vs. Cc:** Be discerning about your use of To: vs. Cc:. Why? Ever receive an email where it's unclear who has the action because everyone is in the "To:" field? We designate the "To:" field for who has the action (could be multiple people). "Cc:" is simply for their information—with no expectation that they will take action on the email, other than receive it.

   Personally, I find I am much more conscious about what I am asking for, and from whom, when I clearly delineate between who has action and who just needs to receive the information. And, I appreciate when that distinction is made for me in return. I'm still processing the email to get to inbox zero, but it's very clear to me that no action is expected of me in return.

3. **Subject Lines** Use clear subject lines that clearly describe the topic. I bet you've had times when you've done an emergency scan of your email (particularly on your mobile device) and appreciated having clear subject lines (versus the proverbial "checking in" or "update"). Also, don't be afraid to change subject lines if the topic has changed and you want to make the it clearer what the email string is about. While it might have initially started as "checking in," now it's moved into the "Q3 budget"–change the subject line to reflect that.

   Another spin on effective subject lines is to use code to indicate the end of a message, when appropriate. This kind of kind of code, such as "EOM," can be useful for those times when you just need to send a quick bit of information back to someone and it can be done through the email subject line. For example, for short responses such as acknowledging with "thanks" or "I'm on it," simply append your subject line with "EOM" after your text, to indicate "end of message." What that means to the person receiving it is that everything that need to know is in the subject line and they can process it based on what they are seeing in the subject line, without even opening the email.

   For example: "Re: I posted Q2 spreadsheets to the database. —THANKS! GOT IT. EOM"

4. **Reply to All** Resist the urge to simply click reply to all, if not everyone needs to receive your reply. Many clients tell us that their staff seem to use the Reply to All function because it's quick and easy, not because it's productive. On the flip side, if you're sending emails to your designated groups, pause to consider if everyone in that group (and subsequent replies to all) really need to be receiving that email. Are their roles in the company relevant to the information? If you're not sure, ask them. I bet they will appreciate being asked about what they are getting to help with their own email management. Another tip to avoid the Reply to All cycle is to use the Bcc: field for all recipients, when appropriate. That way only the sender will receive the replies.

5. **Response Times** What are your agreed upon response times for internal and external communications? If that's never been made explicit, there's a good chance those who think it's "ASAP" are feeling resentful about the ones who think it's "when I can get to it" and think they are breaking an agreement. And the "when I can get to it" folks get annoyed by the "ASAP" folks who ask them in the hallway, "Did you get my email?"

At the David Allen Company, we have a standard to reply within two business days to all internal communications. And, it's important to note that responding doesn't mean completing the action. It may just be a simple acknowledgment of "I'm on it" so the other person can relax about it. Two business days is our standard that works for us. You may find you need a shorter or longer time period in your organization. The key here is not about the time, but having an agreement that's explicit so that everyone is clear about the rules to play by.

I hope these best practices have been useful for you. I encourage you to take these ideas back to your team and organization. Get some healthy debates going about them! Adapt them to make them more your own.

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