Leadership Series 2015

BUSINESS EMAIL COMMUNICATION 101

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AGENDA

- What is Email?
- Email Basics
- Elements of an Email
- Email Replies
- Other Tips
- A Word About PHI
- Takeaways

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THE SWEET SPOT

Business Letter

August 28, 2009

Ms. Janice Lee
Buyer
Universal Parts, Inc.
101 Corporate Drive
Deerfield, IL 60511

Dear Ms. Lee,

Productivity and cost savings are even more critical today than ever before. But you can't afford to give up customer service for reduced costs. You deserve impeccable service from a supplier who also keeps costs among the lowest in the industry.

Based on the research I have done on Universal Parts, it appears that switching to Moore Manufacturing could save you as much as 12% on your annual purchases. In addition, you would have a dedicated customer service expert available to you 24/7 for any questions or issues you may have.

I'd like the opportunity to meet with you and learn more about your priorities and business challenges. I will call you on Tuesday to set up a time that is convenient for you.

In the meantime, you might find it interesting to review the attached audit that was conducted on your current offering. It reflects where you can potentially realize savings.

Sincerely,

Rachel Grossman

Rachel Grossman
Account Manager

Attachment

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Attachment

Text Message

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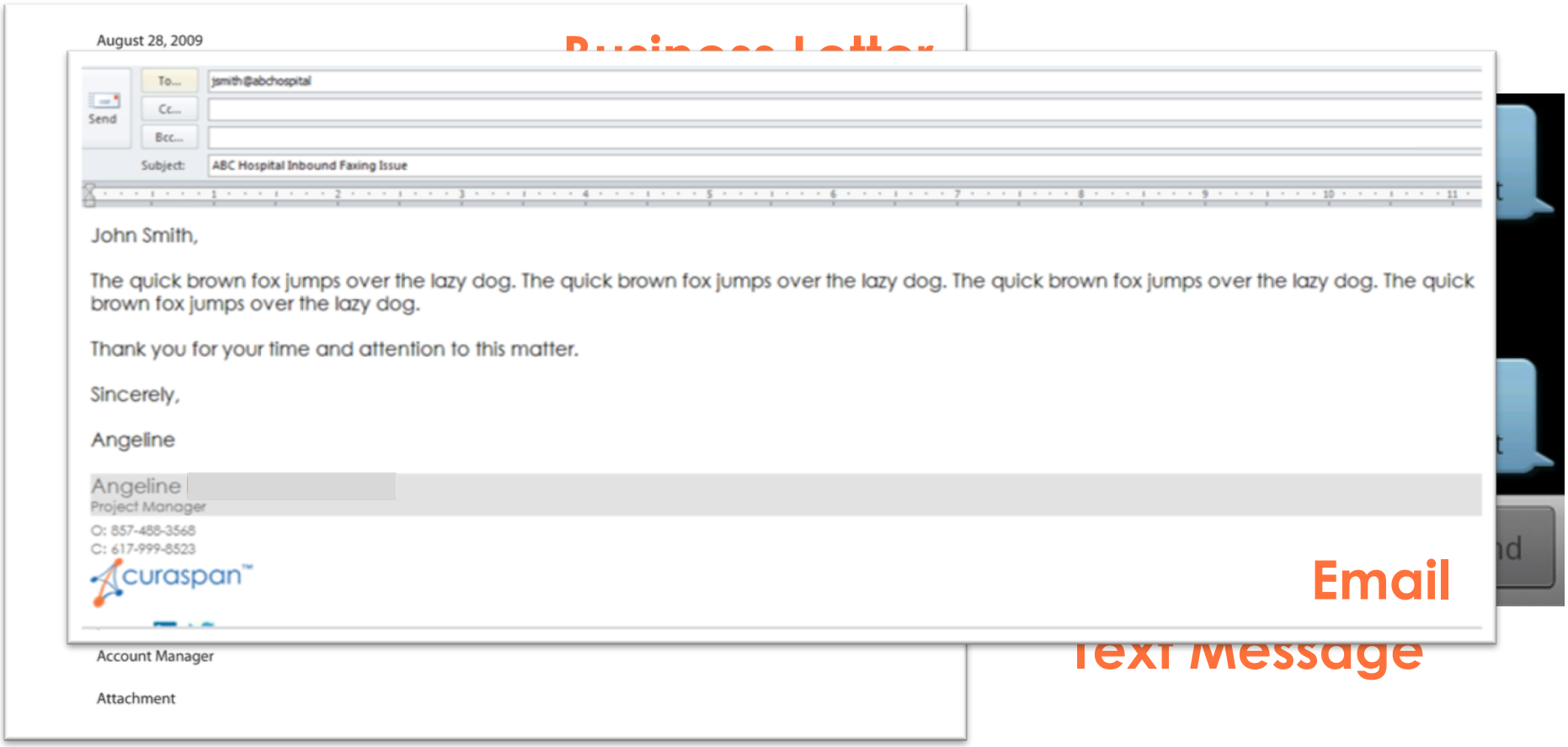

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WHY EMAIL MATTERS

"Making a good impression – projecting a **professional image** with attention to detail – reinforces to prospects and clients that they can **entrust their data to us**. That they can run their businesses more **efficiently with our help**. That they can **deliver enhanced patient care** in partnership with us. That **they can rely on us**."

Curaspan Style Guide

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WHAT IS EMAIL?

- A way to deliver information
- A request for information or call to action
- A searchable history of a conversation
- A representation of Curaspan to clients and other external parties

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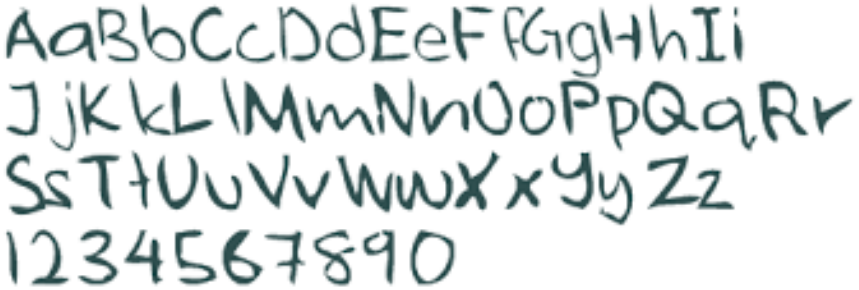
EMAIL BASICS

- Never use crazy fonts or colors — follow Curaspan styles.



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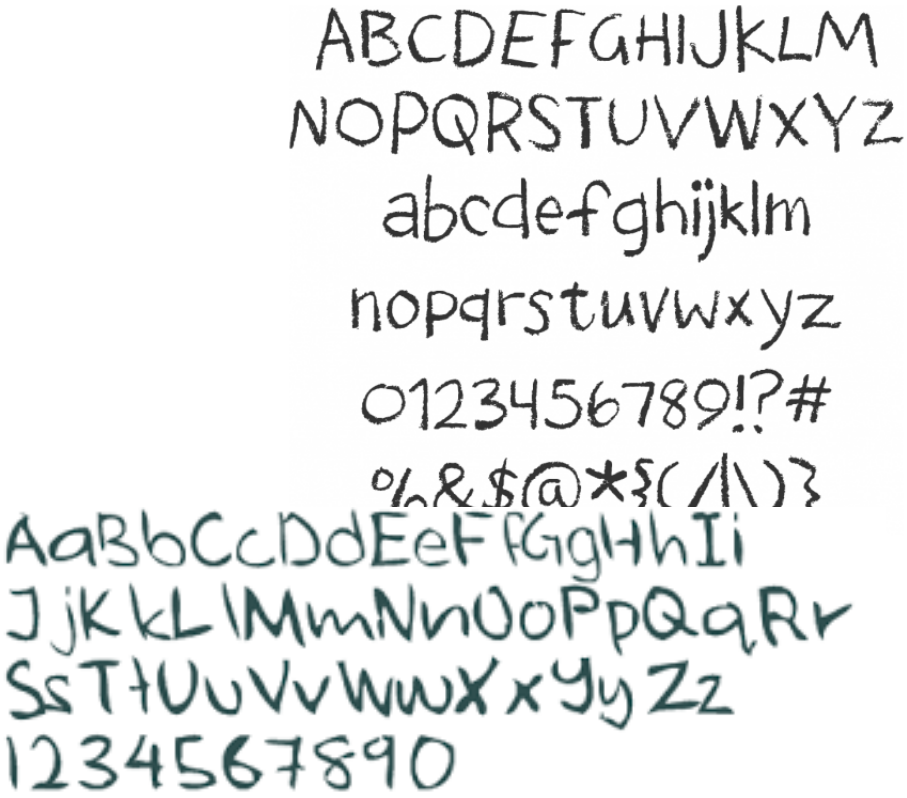

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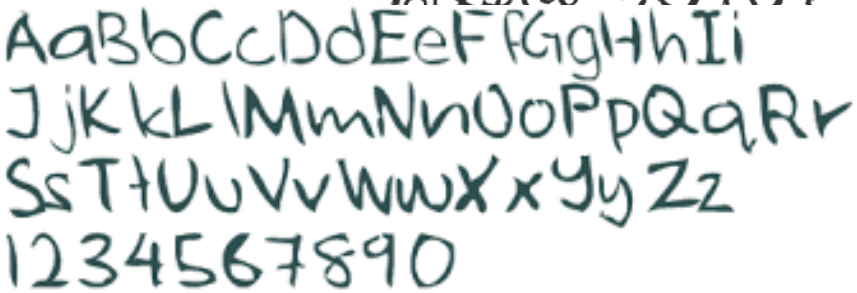

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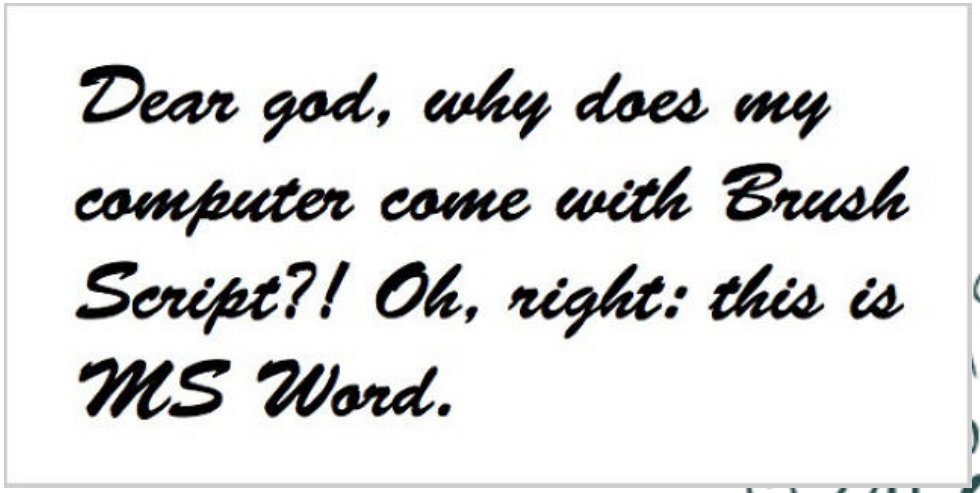

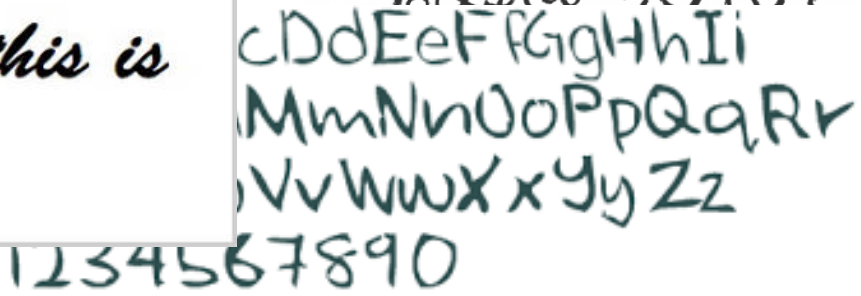

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EMAIL BASICS

- Never use crazy fonts or colors — follow Curaspan styles.

A couple of other email style notes:

- Our font style is Century Gothic.
- Font size should be 11-point, black.
- Mobile, fax and support phone numbers are optional.
- Your email address is also optional.
- The social media icons point to the company's Twitter and LinkedIn profiles

MS Word.

MmNnOoPpQqRr
VvWwXxYyZz
1234567890

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EMAIL BASICS

- DON'T WRITE IN ALL UPPER CASE…

…because it reads like you're shouting at me.

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EMAIL BASICS

- Do not use emoticons…

…use your words.

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EMAIL BASICS

- No text language.
  - Email is not just a cumbersome way to send a text message.
  - And besides…

…not everyone speaks text.

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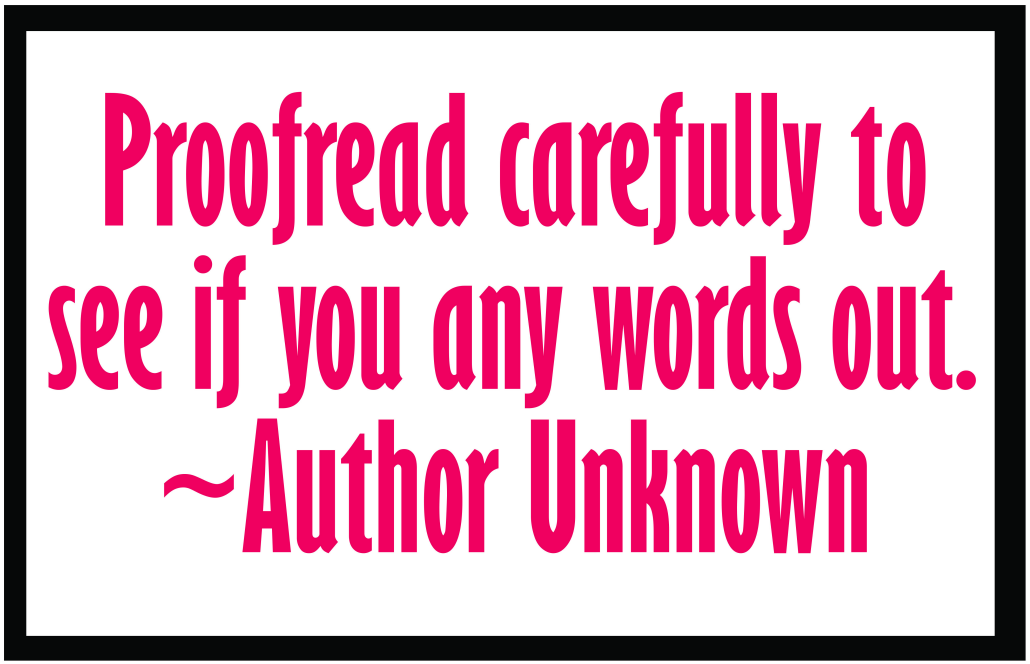
EMAIL BASICS

- Always, always, ALWAYS read before sending.



  - Read it out loud for wording
  - Read it backwards for spelling

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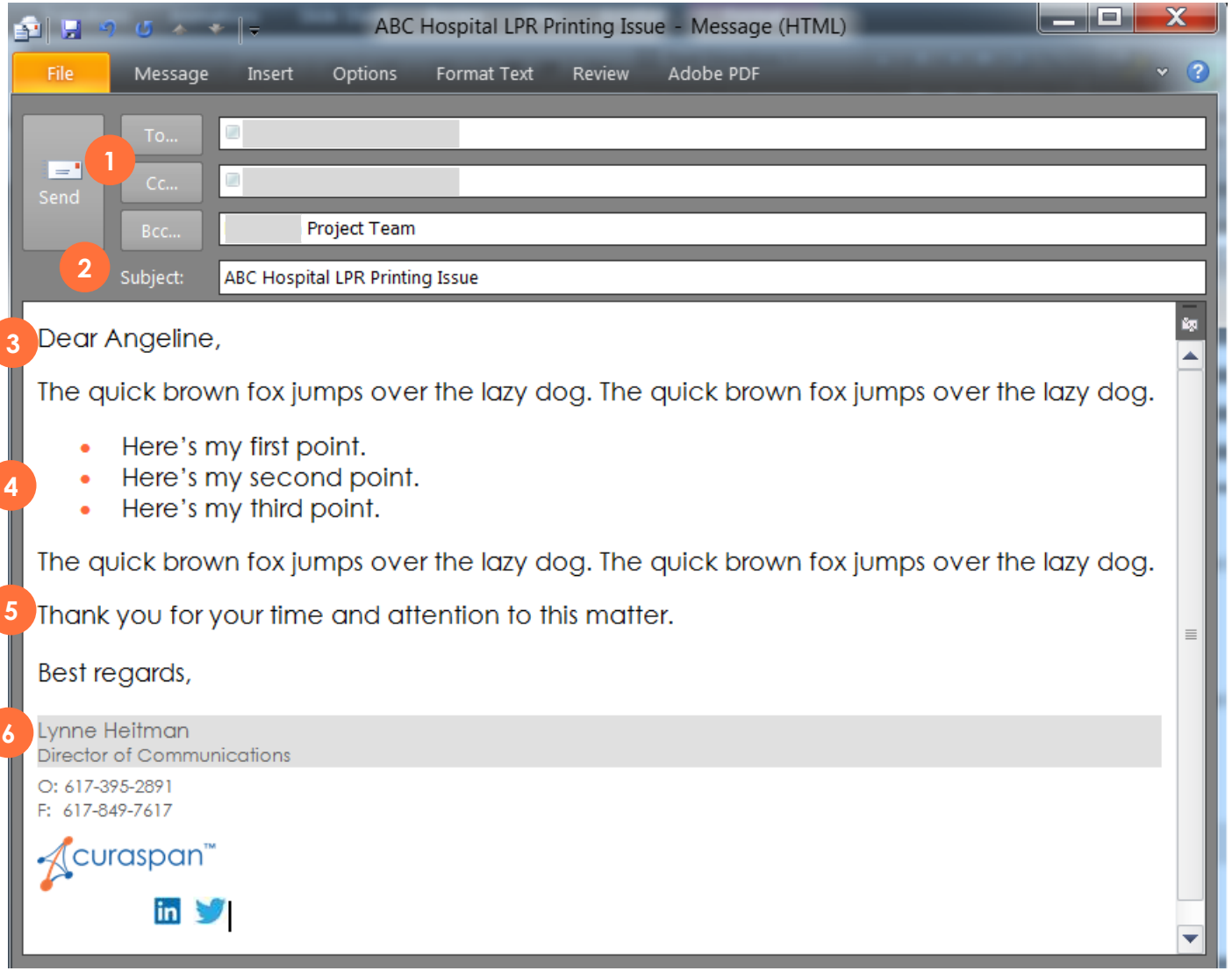
ELEMENTS OF AN EMAIL

1. To, CC and BCC
2. Subject line
3. Salutation
4. Body
5. Closing
6. Signature



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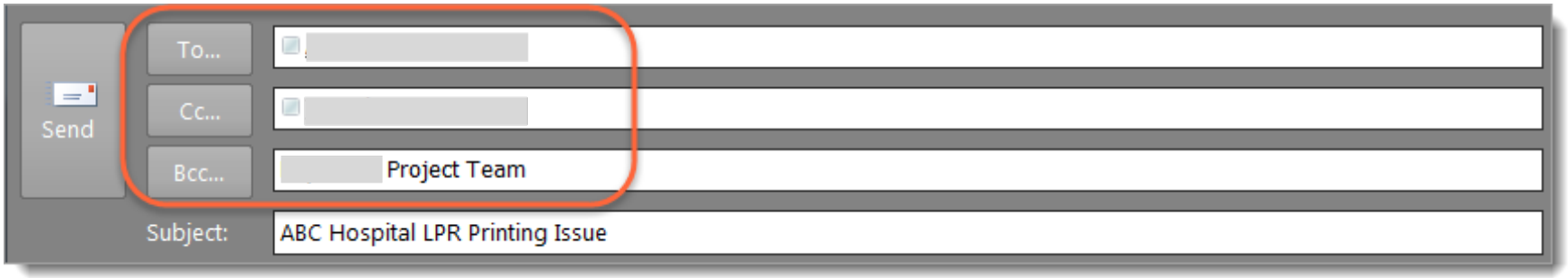
CC and BCC



- **TO:** Expected to reply and take action
- **CC:** Information only
- **BCC:** Used to mask addresses
- Always check the To and CC lines before clicking "Reply All."
  - Hint: If you are in the BCC list, do not "Reply All."

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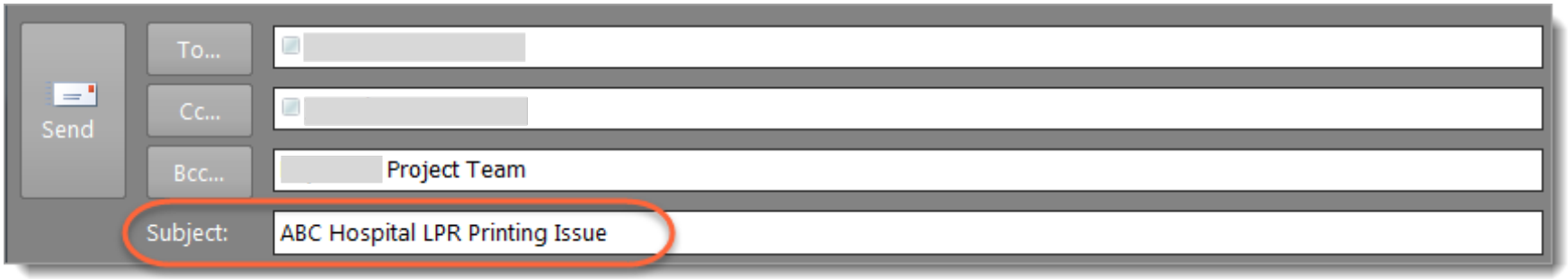
SUBJECT



- Always include one.
- Make it targeted.
  - ABC Hospital → ABC Hospital LPR Printing Issues
- Always identify the site.
- If support-related, include the case number.
- Refresh the subject when necessary.

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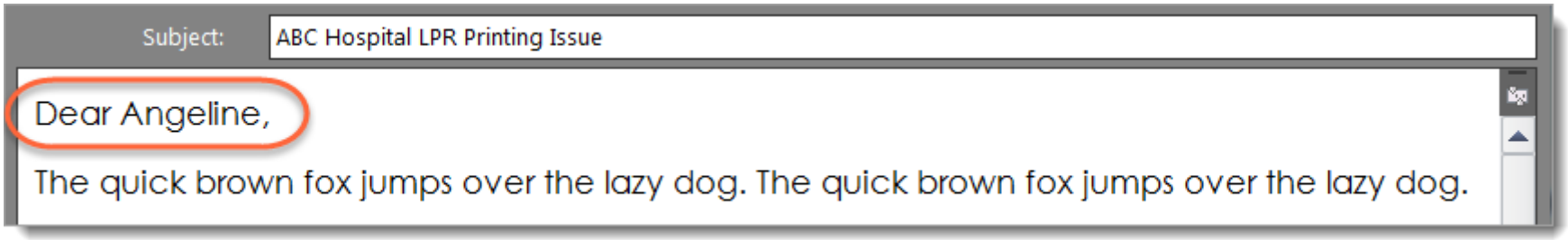
SALUTATION



- Use one. It's a way of saying hello.
- Be aware of titles. Know who you're writing to.
- Use appropriate level of formality.
  - Hi → Dear Angeline, Angeline or Hi Angeline
  - Hi all → Team, Dear Team, [redacted] Project Team
- If you're unsure of spelling, check before sending.
- If you're unsure of gender, check before sending.
- Remember that you are addressing a client.

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BODY

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.

- Here's my first point.
- Here's my second point.
- Here's my third point.

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.

Topic Content

- Say the most important thing first.
- If you need an answer, state the question(s) clearly.
- Be specific when setting appointments and deadlines. Mark action items and names clearly.
- Be concise. Edit unnecessary words to keep your message sharp.

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BODY

Format

- Make it easy to read
  - Bullet points
  - Subheadings
  - Lists
  - Spaces between paragraphs
  - Short paragraphs (5 lines max)
- If it's a longer email, begin with a summary.
- Goal is to get your point across while taking the least amount of time from your recipient.

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BODY

Appropriateness and Tone

- Be polite.
- Things to avoid:
  - Sarcasm or tongue-in-cheek humor. It doesn't translate well in email.
  - Negative words. They get amplified in emails.
- Simple and direct language is hard to misinterpret.
  - If you need to be more complicated, the message should probably be in some other communication medium.
- Never respond emotionally.
  - Have someone else read before you send.

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BODY

Grammar, Spelling and Punctuation

- Set spellcheck as a default, but…
- Don't rely on spell check.
- Don't use slang or abbreviations.
- If you're unsure about grammar, look it up.
  - Subject/verb agreement
  - Using the correct pronoun (I vs. me, he vs. him)
  - Dangling prepositions
  - Active vs. passive voice
  - Split infinitives

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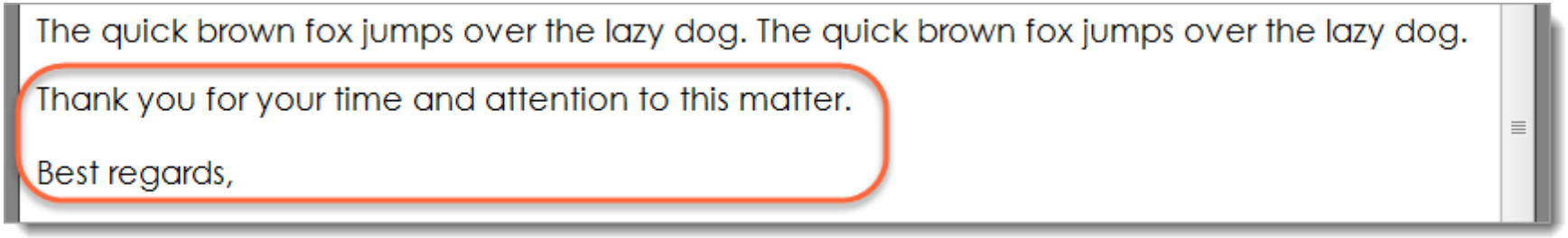
CLOSING



- Don't leave abruptly. Uses a closing line.
  - Please contact me if you have any questions or concerns.
  - I look forward to seeing you in Philadelphia on January 4 at 3:00 pm.
  - Thank you for your attention to this matter.
  - I look forward to working with you and your team on this project.
- Include Best regards, With regards, or Sincerely,

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SIGNATURE

- Set as default for all emails.
- Include in out-of-office message.
- Make sure all of your contact information is correct.
- From the Curaspan Style Guide:

Copy the signature below. In Outlook, select File → Options →Mail→Signatures. Paste the signature in the Edit Signature box.

First Last Name

Title

O: 617-395-XXXX

C: 617-XXX-XXXX

F: 617-XXX-XXXX

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EMAIL REPLIES

- Always reply to an email within 24 hours, even if you say, "I got it and I'll get back to you."
- Answer all questions asked, and the next ones they might ask.
- Don't use personal email addresses to respond to business email.
  - HotStuff212@hotmail.com is not cool.
- Don't respond to business emails from your mobile device unless it's an emergency.
  - Wait until you are able to respond from a computer.
  - If you must reply from your mobile device, make sure spell check is on.

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EMAIL REPLIES

- Be careful with "Reply All."
  - Jobs have been lost and lives have been changed.
  - Use it to respond to everyone in the email chain (so everyone is included in the conversation and conclusions).
  - If you add someone to a "Reply All" chain, let everyone know.

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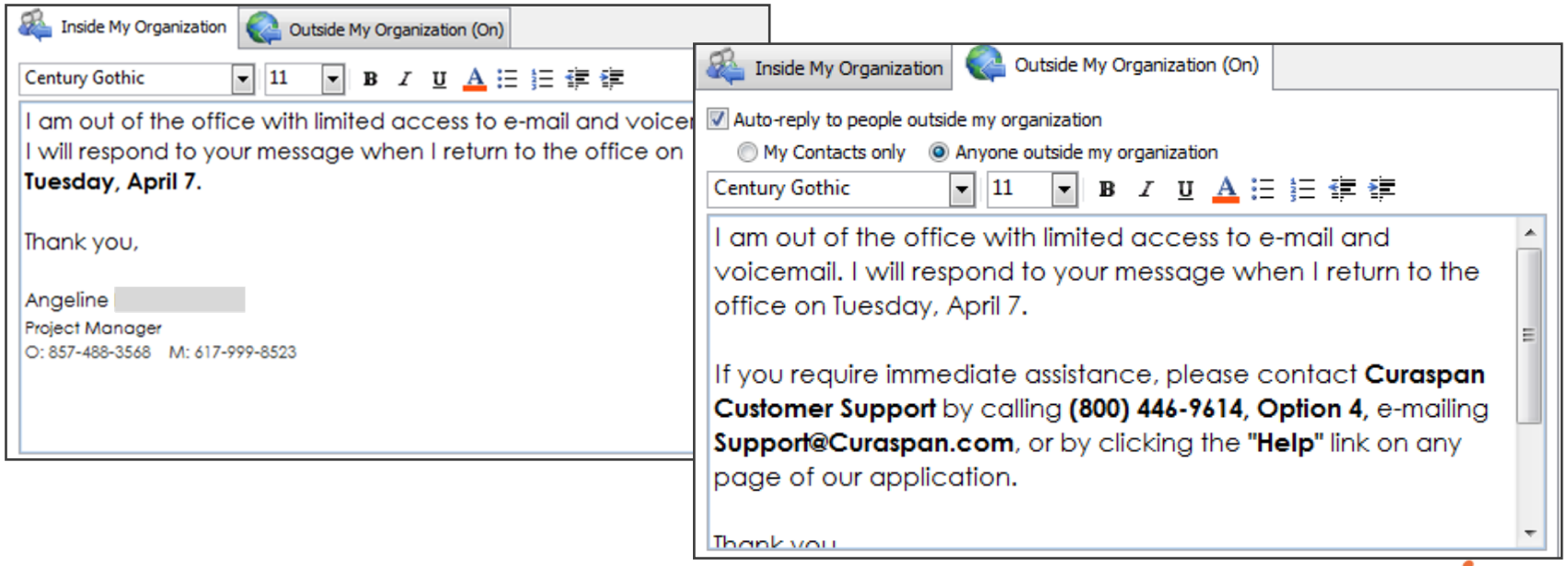
EMAIL REPLIES

- Use the Out-of-Office message when you're gone.
  - Create an Outlook appointment for times you will be out.
  - Set Automatic Replies (Out-of-Office) in Outlook both for inside and outside of your organization.
  - Indicate who to contact in your absence.
  - Remember to turn it off when you get back.



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OTHER TIPS

- Attachments
  - Be judicious with your use of attachments.
  - Use descriptive attachment names.
  - Rule of thumb: no more than 4 MB.
- Remember that all emails are public
  - Someone's privacy is in your hands.
  - Be especially careful when forwarding a chain.

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A WORD ABOUT PHI

- **Protected Health Information (PHI)**
- **PHI Confidential**: Protected Health Information that has been entrusted to Curaspan by current and former registered subscribers that use(d) its suite of web-based health care applications and networks (e.g., sensitive patient documents uploaded via IBF, virtual printing, ADT feeds).
- **Internal Confidential:** Internal company information that can be accessed only by authorized internal employees (e.g., password lists or other department-specific information).

Please see Curaspan's Asset Management guide on SharePoint for more information.

- **Do not transmit PHI via e-mail unless it is encrypted.**
- **Do not share internal confidential information with customers and other external sources.**

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TAKEAWAYS

- Your managers will determine how these guidelines will impact your team and communication methods.
- If you are uncertain about sending a message to a customer, do not send it. Use your peers and manager for review.
- Use common sense.
- Use resources.
- Read aloud.
- Practice.

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