E-Mail Etiquette

for Business Professionals

■ by Ellen Jovin

Used wisely, e-mail can be a powerful, efficient communications tool to inform, influence, and inspire.

Ellen Jovin is a founder and principal of Syntaxis, a communication skills training firm based in New York City. She is responsible for the company's written communication skills practice.

Ms. Jovin has taught business writing, e-mail etiquette, and grammar at major corporations in industries ranging from finance and fashion to law and entertainment. Previously she worked as a college writing instructor and professional writer, creating marketing and advertising materials for diverse corporate clients. She has published more than two hundred articles on banking, technology, sports, and a variety of other subjects.

Ms. Jovin earned a B.A. in German studies from Harvard University and has an M.A. in comparative literature from UCLA.

▪ Syntaxis

Syntaxis trains business professionals to speak and write more powerfully. Its experts conduct seminars in presentation skills, business writing, grammar, and e-mail etiquette for leading organizations throughout North America. The firm also provides one-on-one presentation skills training for senior executives.

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Introduction

Communicating in an Electronic Age

The advent of electronic mail has expedited business communications—but at a great cost to clarity and basic business etiquette. Many electronic messages reach their destinations in a state of linguistic chaos, lacking the traditional hallmarks of good business correspondence: a clear purpose, logical organization, and appropriate punctuation and mechanics.

Despite the conversational feel of much computer-based communication, e-mail is a written form and should therefore observe many of the conventions associated with traditional business letters and memos. This book considers these conventions while also addressing issues new to a world of increasingly electronic interactions—for example, copying, forwarding, and other technological capabilities.

Although it is often treated as conversation, e-mail is not conversation, and people who use e-mail for business communications must always remember: e-mail endures. Unethical or inappro-

priate e-mail messages can do significant damage not only to the sender's reputation, but also to the reputation (and perhaps balance sheet) of the sender's employer. Used wisely, though, e-mail can be a powerful, efficient communications tool to inform, influence, inspire—and, ultimately, to advance one's career. The goal of this book is to help e-mailers realize the full potential of their electronic business communications.

There are certain e-mail topics this book does not cover. For example, it does not address technical aspects of e-mailing, such as choosing between HTML and plain text, nor does it cover e-mail marketing strategies. Also, keep in mind that the following discussion concerns professional e-mail habits, not personal ones (though quite a few parents and grandparents would be pleased to see recommendations from this book implemented in the e-mail messages they receive from their younger relatives!).

This book is not intended to replace or override your company's specific policies on e-mail use. Heed your employer's e-mail requirements and guidelines, and be sensitive to your unique organizational environment, as e-mail culture can vary from one company to the next.
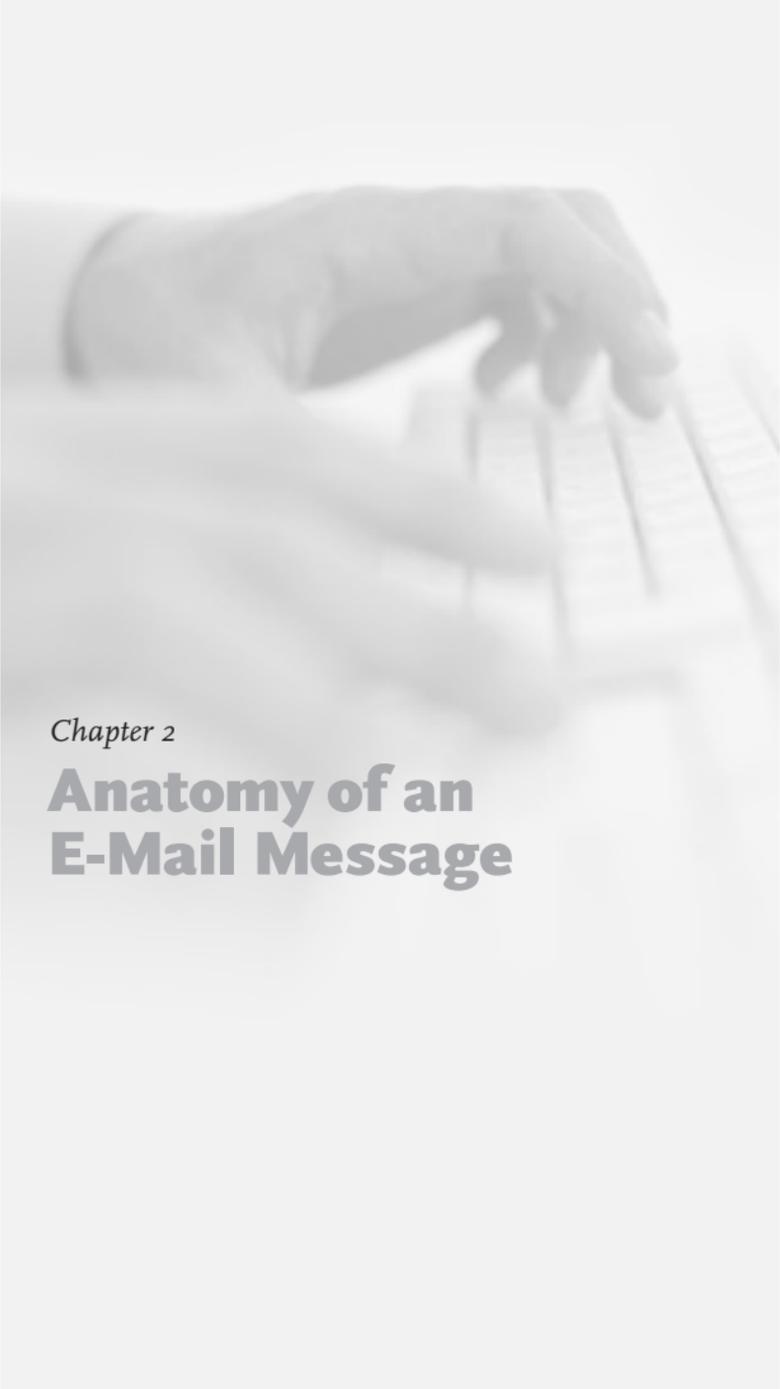
Chapter 2

Anatomy of an
E-Mail Message

E-mail professionalism requires an understanding of an e-mail's various components. Figure 2 illustrates these components, which are discussed in detail in this chapter.

From	Samuel Allison <samuel.allison@xyz-inc.com>
To	Karen Jones <karen.jones@lmno-inc.com>
Subject	Marks report

Salutation — Dear Karen:

Message Content — Have you completed a revision of the Marks report, and if so, may I have a copy of it? I would like to take it to my meeting with Rachel tomorrow.

I will be in my office until noon if you have any questions.

Closing — Regards,
Sam

Signature File —
--
Samuel Allison
Director, Marketing
XYZ, Inc.
123 Anywhere Street
New York, NY 10024
Tel: (212) 555-1234
Fax: (212) 555-3456
samuel.allison@xyz-inc.com
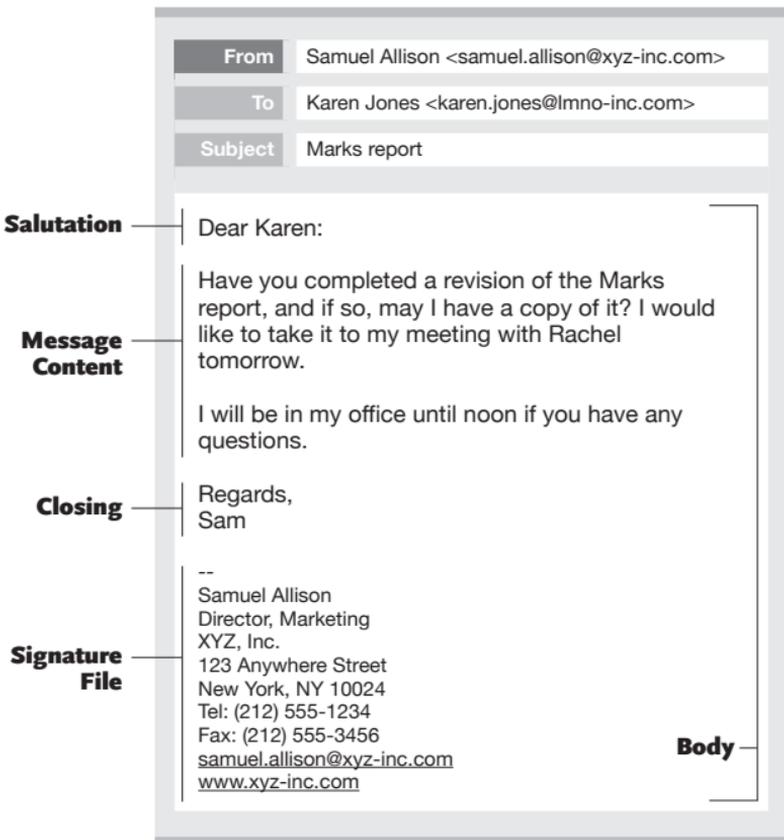www.xyz-inc.com

Body

Figure 2 • Anatomy of an E-Mail

2.1 ***To*** **and** ***From*** **Fields**

In the *To* field of most e-mail messages, you will find two elements: the recipient's name and e-mail address, as illustrated below:

To: John Smith <john.smith@xyz-inc.com>

Sometimes e-mail addresses display without the name, though:

To: <john.smith@xyz-inc.com>

If the name isn't displaying automatically, use your e-mail software to add it. If you don't know how, ask a technologically adept person to help you. Why bother? Including the person's name has a friendlier appearance than the more technical-looking e-mail address by itself.

By the way, you should also make sure that when you send out messages, your own e-mail address is accompanied by your full name in the *From* field. If you like to include a middle initial with your name, don't forget the period after the initial. For example:

From: Joanna A. Rogers <joanna.rogers@xyz-inc.com>

Additional comments on names appear throughout this chapter.

2.2 **Subject Lines**

The subject line of an e-mail should be brief yet descriptive. After all, it is by scanning subject lines that many people will find your message among a slew of other incoming messages competing for their attention.

Suppose you send two colleagues an e-mail with an attached copy of a report about technology expenses for the second quarter of 2007. Simply writing *Technology Report* in the subject line is not enough to tell them what the topic of your message is. And *Report on technology expenses for the second quarter of 2007 attached* is long and meandering. If your subject contains too many words, it will be more difficult for recipients to read it quickly, and it is also possible that their e-mail software will truncate the subject so that they can't see all the information.

Consider the following alternative:

Subject: Technology Expense Report Q2 2007

This version is superior to the previous two options because it is both concise and precise. The reader will quickly understand exactly what he or she is receiving.

Regarding capitalization of your subject line, you have multiple choices. Naturally you should

always capitalize proper nouns such as *Joan* or *Empire State Building*, but for the rest of the words in your subject you can choose between the following options:

■ Capitalize the subject line as you would a title, beginning everything except minor words with capital letters.

■ Capitalize the first word of the subject, as well as any proper nouns, but begin any other words with lower-case letters.

The decision is a stylistic and aesthetic one, based on your own preferences and the context. Capitalizing the subject line like a title often gives it a more polished, professional appearance. For long subject lines, however, initial capital letters throughout can at times be a bit overwhelming; in such cases, sometimes a better choice is to use initial caps for just the first word and any proper nouns.

Subjects with no capital letters at all generally don't look as polished as the two options described above.

2.3 Body

In an e-mail, the term *body* typically refers to everything that appears in the freeform box, including the salutation, signature file (i.e., the sender's contact information), and all the content in between.

This use of *body* should not be confused with the way the term is used in discussions of document structure. See Chapter 4 for a discussion of *body* in the traditional document-structure sense.

2.3.1 *Salutations*

The salutation is the opening line of your e-mail where you address the recipient directly, usually by name. In business letters, your choices for salutations are limited to phrases such as:

Dear Ms. Smith:

Dear Max:

To Whom It May Concern:

In the world of e-mail, however, a number of salutation styles are acceptable. Which one is best for a given situation depends on factors such as your relationship to the recipient, the culture of your firm or department, and the content and context of the message. In addition, salutations for a single recipient generally differ from those for multiple recipients.

Although recipient information appears in the *To* field, for most professional e-mails you should still greet the person in the body of the message. A greeting adds warmth that a name and e-mail address in the remote *To* field do not. In ongoing dialogues, you may consider deleting the greeting

after the initial exchange, but if you are writing to clients or to people at your firm who are senior to you, don't delete the salutation until they begin doing so themselves.

Listed below are various salutations commonly found in e-mail messages directed to a single recipient. Their inclusion here does not necessarily mean they are broadly acceptable; there are comments elaborating on the relevance and appropriateness of each greeting for business e-mail. The salutations are loosely organized from more formal to less formal.

E-Mail Salutations for a Single Recipient

Salutation	Comments
To Whom It May Concern:	Although this formulation sounds rather old-fashioned and stuffy, it has long had a place in business letters to unknown recipients. A very formal greeting, it could be appropriate in cases such as an e-mailed inquiry regarding a potential vendor's services or an e-mailed complaint.
Dear Sir or Madam:	This option is similar to the one above.
Dear Mr. Smith:	This formal salutation is appropriate when you are e-mailing a person you do not know well or at all—for example, a prospective [*Continued*]

	client. Depending on your corporate culture, you may also want to use it when writing to someone in your firm who is quite senior to you, particularly if you don't know the person.
Dear James:	Some people find *Dear* along with a first name to be a strange opening for an e-mail, complaining that it feels either too intimate—like a personal letter—or too formal. If you aren't comfortable using *Dear* with co-workers, there are certainly other options, but the salutation *Dear* has a long and happy history in business correspondence. Even if you do not use it much internally at your firm, it has a legitimate place in your e-mail repertoire, particularly for external, international, and formal communications.
James, *James -*	Fine in many contexts. Occasionally the name by itself can sound a little abrupt, but it is a solid opening for many types of e-mail messages.
Good morning, James.	This salutation can be a useful way to begin e-mail messages as it is both businesslike and friendly. Of course, at the time you send the message, it should actually *be* morning in the recipient's time zone.
Hello, James. *Hello, James -*	These salutations may be acceptable for use in a business context with someone you know reasonably well. The punctuation in the second instance is untraditional outside the world of e-mail, but is clear and practical for electronic use.

Hello James,	This salutation is common but is punctuated untraditionally and is therefore not an ideal way to begin an e-mail. (According to standard punctuation rules, the greeting requires a comma between *Hello* and *James*, but then the writer would end up with two commas in a two-word salutation, which looks odd.)
Hi, James. *Hi, James -*	For use in a business context, these salutations are usually too casual. *Hi* is a word better reserved for correspondence with friends. However, depending on your corporate culture, these salutations may be acceptable for communications with co-workers you know well.
Hi James,	This salutation is very casual and is also punctuated untraditionally. A comma is needed between *Hi* and *James*, but then the salutation will contain two commas in a row, which looks odd. Although this salutation is common, in business e-mail it may be perceived as unprofessional.

As you can see, it isn't easy to figure out how to address an individual. Addressing a group of people through e-mail can pose an even more formidable challenge. To formulate a salutation for multiple people, consider the composition of the group you will be addressing. If you are writing to your co-workers in the marketing department, for example,

you could perhaps begin your message with one of the following salutations:

Dear Colleagues:

Dear Marketing Colleagues:

The appropriateness of these salutations, however, depends on the context. Below are comments on various salutations, some good and some not so good, that appear in group e-mail messages.

E-Mail Salutations for Multiple Recipients

Salutation	Comments
Greetings.	Any of these salutations can be used in e-mail going to multiple recipients. In addition, *Greetings* can act as a salutation in an automatic reply you might set up when you are going to be out of the office.
Good morning.	
Good afternoon.	
Dear Sirs:	In a working world populated by both women and men, these salutations are out of date in almost all cases. Theoretically they could still be used with relative safety in a context where every recipient was male, but even in those cases, the formulations would be likely to come across as old-fashioned.
Dear Gentlemen:	
Dear Colleagues:	This salutation is both respectful and friendly. It can be used to address the people in your department or division, assuming that you [*Continued*]

E-Mail Salutations for Multiple Recipients, *Cont'd*

	have a good working relationship with them and that the members of the group are of similar professional status or junior to you. Do not, however, use this salutation with a group containing people senior to you.
Jane and Tim, *Dear Jane and Tim:* *Good morning, Jane and Tim.*	If you are addressing two people, you may use their names in combination with various greetings from the table of e-mail salutations for individual recipients. Some common options appear to the left. For e-mails going to more than two people, it can sound awkward to refer to all of them by name.
[*None*]	Many people don't like to receive e-mails without salutations. Nonetheless, if your corporate culture supports it, sending a mass e-mail with no greeting at all can make sense. Such an e-mail is, after all, virtually identical in form to the traditional memo, which does not contain a greeting.
Hello,	If you can't figure out a way to address your recipients directly, whether as *Marketing Staff*, *Colleagues*, or something else, the first three salutations in this table (*Greetings*, *Good morning*, or *Good afternoon*) may be preferable to the more casual, less professional-sounding *Hello*.
Hi, all! *Hi, all.* *Hi!*	Unless you have a very casual working environment — and even if you do — these formulations can sometimes be perceived as unprofessional. Proceed with caution.

Guys,	Like *Dear Sirs* and *Dear Gentlemen*, this salutation may offend female recipients. In addition, it is too casual for most workplace correspondence.

2.3.2 *Recipient Names*

It is critical to get people's names right in e-mail salutations (for example, *Dear Ms. Smith* or *Good morning, John*). Below are some guidelines and cautionary notes about name etiquette in e-mail.

■ **Spelling.** Spell the recipient's name correctly. Triple-check unusual and unfamiliar names.

■ **Form of first name.** If you are addressing a person by first name, use the correct form of that name. Even if the person's name happens to be a name that is often shortened, such as *Michael*, don't automatically assume that that individual is in the habit of shortening it. Use *Michael* unless you come across concrete evidence that the person uses *Mike*. That evidence may come from sources such as the bottom of an e-mail from him—if he signs off as *Mike*—or a voicemail message from him starting off, "Hi, this is Mike." Once you learn that the recipient prefers the shortened form, you should use that version of the name.

■ **Initials.** Don't address a person by his or her initials, unless you have specifically been told—by

a reliable source! — that initials are how that person prefers to be addressed.

■ **Mr. and Ms.** When you address people by their surnames in a business setting, use *Mr.* for men and *Ms.* for women. If a woman specifically requests that you address her with *Mrs.* or *Miss,* however, you should honor her request.

■ **Unknown gender.** It is a challenge to send a formal e-mail to a person whose gender you can't determine from the name. How do you know whether to use *Mr.* or *Ms.*? Fortunately, you are not without recourse. First, you can call the general number for the person's company and ask the operator whether the person is male or female. If for some reason that isn't an option, try searching for the name on the Internet to see whether you can glean anything about the likely gender. If you immediately find a dozen men with that name, and no women, then you can probably assume your recipient is a man. Finally, if you are still unsure, you can as a last resort use the first and last name together, without a *Mr.* or *Ms.* — *Dear Pat Lee*, for example. This option is stylistically awkward, but is probably better than guessing. If you think a less formal greeting is appropriate, you can of course avoid the issue by writing *Dear Pat* instead.

2.3.3 *Message Content*

Most e-mail messages are no longer than a few para-

graphs, and many messages are much shorter — a mere line or two. There is no minimum length requirement, but an e-mail should always be clear. Please see Chapter 4, "Organization Matters," for comments on long e-mails.

In most e-mail messages, you should skip a line after your salutation, between each paragraph, and before your closing (e.g., *Regards*). It is not necessary to indent at the beginning of each paragraph; skipping a line between paragraphs is sufficient. See Figure 2, page 11, for an illustration of appropriate e-mail spacing.

One cautionary note: if you are writing to someone who usually reads e-mail on a BlackBerry or similar device, you may want to make adjustments to this format. See Section 7.7 for additional discussion of e-mailing considerations for handheld devices.

2.3.4 *Closings*

There are multiple ways to close e-mail messages. First you must choose your closing word or phrase, if you wish to include one — for example, *Thank you* or *Regards*. If you know your recipient and are addressing him or her by first name, in most cases you can then add just your first name. If you are writing more formally and are addressing the recipient by last name, it is usually preferable to close your e-mail with your full name.

Figure 3 shows a closing, accompanied by the signature file (which is covered in detail in the next section), for an e-mail from a person who knows his recipient fairly well.
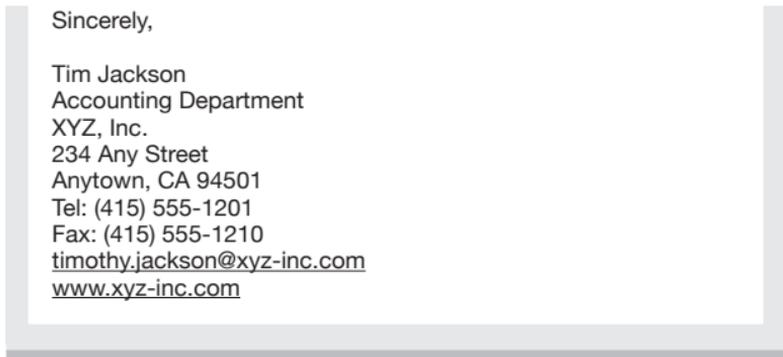
```
Regards,
Tim

--
Tim Jackson
Accounting Department
XYZ, Inc.
234 Any Street
Anytown, CA 94501
Tel: (415) 555-1201
Fax: (415) 555-1210
timothy.jackson@xyz-inc.com
www.xyz-inc.com
```

Figure 3 • Closing Format, Less Formal E-Mail

His closing word (*Regards*) and name appear on consecutive lines.

If he were sending a message to a potential client, though, he might sign his message as follows:

```
Sincerely,

Tim Jackson
Accounting Department
XYZ, Inc.
234 Any Street
Anytown, CA 94501
Tel: (415) 555-1201
Fax: (415) 555-1210
timothy.jackson@xyz-inc.com
www.xyz-inc.com
```

Figure 4 • Closing Format, Formal E-Mail

In Figures 3 and 4, the font used in the e-mail body is the same as the signature file font. If, however, your signature file has been specially formatted (preferably by your art department or a professional designer) so that its appearance is distinct from the rest of the text in the body of your message, you should in a formal e-mail repeat your full name after your closing, as shown in Figure 5. Otherwise it may seem as though you didn't bother to "sign" your e-mail.

Sincerely,
Tim Jackson

::::::::
Tim Jackson
Accounting Department

XYZ, Inc.
234 Any Street
Anytown, CA 94501
Tel: (415) 555-1201
Fax: (415) 555-1210
timothy.jackson@xyz-inc.com
www.xyz-inc.com

Figure 5 • Alternative Closing Format, Formal E-Mail

Some businesspeople put periods after their names in closings. If you feel the temptation to do so, resist it.

Incorrect	Correct
Regards,	Regards,
Tim.	Tim

In more casual e-mails, it may be fine to sign off without a closing phrase and just put your name.

As a general rule, though, don't sign off with just your initials. If you use initials, you risk irritating recipients who may view this shorthand as a sign that they are not worth the time it would take to write your actual name. (Remember a cardinal rule of e-mailing: people who are bothered by your habits won't necessarily tell you how they feel.) Some people don't care, of course, and if you use e-mail shorthand with your long-time colleague who sits two desks away, that may be fine.

Below are some common e-mail closings accompanied by comments on their use.

E-Mail Closings

Closing Phrase	Comments
Sincerely,	This is a polite, professional way to close, but is most appropriate for formal e-mails, such as initial communications with prospective clients. In e-mails with people you already know, *Sincerely* may come across as excessively formal.
Regards,	This is a safe, acceptable closing term in almost all situations, ranging from fairly casual to quite formal.
Thank you,	This closing is ideal when you want to show appreciation for something the recipient has done or is going to do for you. (If you want to be very appreciative and say *Thank you* [*Continued*]

	very much, then you can keep that as a separate sentence and perhaps add a different closing. For instance: Thank you very much. Regards, Rose
Thanks,	Similar to *Thank you* above, but more casual. Most appropriate if you are writing to co-workers you know well and have a good relationship with, or when you are e-mailing, say, vendors or people who are somewhat junior to you. If you have reason to be really appreciative, *Thank you* is generally a better choice.
[*None*]	For quick, casual e-mails to people with whom you have an established business relationship, closing with just your first name is a common and acceptable practice.
Best,	Ending with *Best* may give the impression that the e-mail writer was simply too busy to bother completing the closing. Best *what*, after all? It could perhaps be considered the e-mail equivalent of a host's failing to see a guest all the way to the door at the end of a dinner party.

2.3.5 *Signature Files*

In your e-mail software, there should be an option that enables you to create a signature file — in other words, a block of contact information that appears

automatically at the bottom of all of your outgoing messages. Although you have a number of aesthetic alternatives, a standard signature file might look something like this:
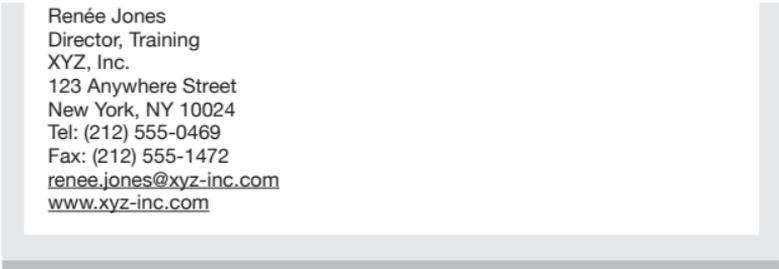
```
Renée Jones
Director, Training
XYZ, Inc.
123 Anywhere Street
New York, NY 10024
Tel: (212) 555-0469
Fax: (212) 555-1472
renee.jones@xyz-inc.com
www.xyz-inc.com
```

Figure 6 • Sample Signature File, External Communications

Why is a signature file necessary? For one thing, it helps an e-mail appear polished and professional; it is like stationery for electronic messages. In addition, if recipients of a message don't know you very well, the absence of a signature file can cause confusion as they try to figure out who you are. Finally, you should generally make it as easy as possible for recipients to find you; by including contact information in your standard communications, you enable them to reach you with minimal effort.

Your e-mail software may well allow you to set up a shorter, alternative signature file for internal communications with employees of your firm. Suppose, for example, that Renée Jones from the signature file above is e-mailing someone in her company's accounting department. An appropriate signature file for internal use could be:

Renée Jones
Director, Training
Tel: (212) 555-0469
Fax: (212) 555-1472

Figure 7 • Sample Signature File, Internal Communications

Of course, not every e-mail should have a signature file. Sometimes you may not want people to have your contact information. For example, if you are sending a message asking someone to stop sending you unsolicited e-mail, consider deleting the signature file so that you don't give the person even more information than he or she already has.

In addition, if you are having an ongoing e-mail dialogue with someone, it is often better — after your initial exchange — to omit the signature file in subsequent messages that accumulate within the same e-mail chain. That way your contact information won't show up repeatedly within the growing pile of messages.

There are multiple ways to order your contact information. Usually the sender's name, title, department, company name, and street address appear first, but after that, you have multiple options.

If you like, for example, you can then put phone number, fax number, e-mail address, and website. Or you could put website, e-mail, phone, then fax. Whatever order you choose, it should have

an internal logic, and you should carefully proof-read every letter and punctuation mark for errors and inconsistencies. In the signature file examples on the previous pages, *Tel:* doesn't include a period even though *Tel* is an abbreviation, but you could also write *Tel.:* if you prefer. The reason for omitting the period would be purely aesthetic, to make it a closer visual partner for *Fax*.

Many signature files are far from polished. They may suffer from flaws ranging from inconsistent formatting to editing errors. Here are some things to check for in your own:

- Is the font consistent?

- Do you use colors? Unless you are a professional designer or are receiving advice from one, stick to black, as erratic color can make your e-mail message appear unprofessional and distract from the content of your message.

- Do you include your business title and department below your name? If your firm doesn't use titles, just put the department.

- Do you include your physical address and all relevant details, such as suite, room, or floor? If you can't or don't want to include your address, that may be fine, but make sure you have a good reason.

- Is your use of abbreviations consistent and

appropriate? You can afford to be sparing with abbreviations in your signature file, especially less familiar ones such as *Fl.* for *Floor* or *Ste.* for *Suite.* It's not as though you have to retype the words each time, so where you think it looks better, spell out the word.

■ Do you include your company's website address? If not, consider adding it.

■ Do you include your telephone and fax numbers, complete with area codes, in a neat, consistent format? Among the various options are:

(212) 555-0989
212-555-0989
212.555.0989

■ Do you include a cell phone number? Do not do so unless (1) you check your messages regularly, (2) you have a professional outgoing greeting, and (3) you are prepared to answer your cell phone in a professional manner, as you might when sitting at your desk. If it is your personal cell phone and you use it primarily for personal calls, you should probably not include your cell number in the signature file. It is generally unprofessional to take a work-related call in a crowded bar.

You can present the cell number in various ways, including:

Cell: (917) 555-1987
Mobile: 917-555-1987

Normally the cell number would appear after your office number and before the fax, but if your cell phone is the primary way people reach you, you might consider listing it before the office number.

- Do you include your e-mail address? Although this information is available in the *From* field, it is helpful to include it in your signature file so that e-mail recipients can quickly cut and paste all of your contact data into their records. Keep in mind that not all recipients use the same e-mail software you do, so even if it takes only a mouse click to add a new contact to your software, the process in theirs might be more complicated. Also, make sure your e-mail address doesn't contain a typographical error—one of the worst typos you can have! (Suppose an important client uses that address to e-mail you and the message is returned undeliverable. Very embarrassing to you, and very annoying to the client.)

- Are there any other typos or misspellings?

- Is the spacing consistent? Do you have any extra or missing spaces between words or around punctuation?

- Is your capitalization consistent?

- Do you include favorite personal quotes or sayings? If so, delete them. A business e-mail is not an opportunity to communicate irrelevant

information about your own interests or personal philosophy. It may, however, provide an opportunity to promote your firm. If your company has a marketing tag line, it may be appropriate and perhaps even desirable to include it, as long as you have corporate approval.

- Is the information complete?

2.3.6 *Font*

Avoid unusual or eccentric fonts in business e-mail. The font should generally be black, and neither too big nor too small. Arial, often 10-point, is a common default font for e-mail; it has a clean appearance and is easy to read. Other options include (but are not limited to) Verdana and Tahoma. Justifiable exceptions to these font guidelines might be found in a professionally designed signature file, created under the guidance of a corporate art department or designer. It is fine, though, to use the same font for your signature file that you use throughout the body of your e-mail.

If you wish to depart from these recommendations for a particular type of e-mail—a marketing message, for instance—seek the design advice of a qualified professional.