

# Guidance on Email Best Practice

This Guidance has been produced to support email best practice so that we can make a positive change to the email culture of the University and have a positive impact on staff wellbeing. If we all spend less time doing email, we would all get less email.

Whilst email can provide an invaluable means of communication, to be effective and efficient, its use needs to be managed.

## 1. Managing your Inbox

- **Frequency of checking emails**

Make sure you check your email as frequently as is required to carry out your role, but it may help to set specific times aside during the working day to deal with email. This helps you to have uninterrupted blocks of time when you can focus on other work without interrupting your productive flow by checking email messages. For example, you might choose to check your email 3-4 times a day, or when you arrive at work, after lunch and before you leave each day.

- **Email Preview**

Consider turning off any email notifications or sound alerts when new messages arrive, so that you are less distracted and have more control over your working day.

- **Organise your email**

Clear out your inbox - it reduces clutter and stress. Do not store emails in your inbox; move them into organised folders (see 'Saving Emails' below). A cluttered inbox risks items being overlooked, missed or forgotten. By keeping a clear inbox you can take charge of your day and your work priorities. Consider taking the following approach:

1. Deal with emails which only need a quick response as soon as possible
2. File emails requiring a longer, more considered response in a pending file
3. Delete or organise old emails into archive folders in outlook (see section 5).

- **Try not to encourage unhealthy expectations in others**

You should not feel that you must respond to emails immediately, out of hours, when on leave, etc unless it is part of your role, or an emergency. You should ensure that if you are on annual leave, an out of office email provides a clear alternative University contact. You should, of course, agree this with that alternative contact and/or your line manager first.

## 2. Email Creation

- **Is email the correct tool?**

Before writing an email, pause and consider if it is the most appropriate communication method. Face-to-face or a quick telephone call may be more effective, particularly if the topic is sensitive, confidential or very urgent. Try to avoid sending emails in the same office or team as you unless it is absolutely necessary.

- **Response time expectations**

The use of mobiles and tablets has led to people expecting a very fast response to emails - even at evenings and weekends. Generally, common sense should prevail. During the working week, it is not reasonable to expect a response in less than 24 hours, unless the request is genuinely urgent. It is not reasonable to expect a response in the evenings and at weekends, unless the matter is genuinely urgent. If a response is required in minutes or even a few hours, then email is probably not the most effective communication tool.

Wherever possible avoid using email for urgent matters: pick up the phone or have a face-to-face conversation. Regularly flagging emails as urgent creates an artificial environment in which people feel they must view each email as it arrives. This creates an unpredictable and inefficient working day. Perhaps use the 'three hour' rule - for anything where you need a response within three hours consider using an alternative method of communication (phone or in person).

- **Writing an email**

- **Action** - Consider what action you would like the recipient to take when they receive the message and make this clear. If you don't know what that action is, then neither will they.
- **Subject Line** - Treat this as the label on the tin. If possible, include (concisely) as much information as possible about what the recipient is asked to do, including for example dates, deadlines, action (comment, approve, review). You can also use a suffix in the subject line to indicate what is required of the recipient and this can then be used as a tag to sort emails into folders e.g. 'Info', 'Action', 'Project title'
- **One topic** - stick to one topic per email. Several short messages are usually preferable to one long message covering many separate subjects
- **Content** – when writing an email be aware that all emails are disclosable under Freedom of Information and Data Protection legislation (GDPR); this includes your opinion about someone. Do not put anything in an email about another individual that you would not be prepared to say to their face. Give careful consideration to confidential and sensitive information as well as personal and commercial information.
- **Email length** - Avoid lengthy emails as the message or action can become lost or confused. If you are communicating complex information then consider using an attachment or link to a document. Avoid replying with email history unless it is necessary - this can also inadvertently lead to personal, sensitive or confidential data being shared.

- **Use proper spelling, grammar and punctuation** - this is important as poor spelling, grammar and punctuation can give the wrong impression and will not help you to convey your message. Messages with no full stops and commas are difficult to read and can distort the meaning of your message.
- **Tone** – think about how your email may sound to its recipient. Tone is sometimes quite easy to misconstrue in an email, so make sure that you are polite and courteous.
- **Attachments** - avoid sending large attachment or documents these can use up large amounts of space in your email storage. Instead, use a shared folder or Onedrive. This is particularly important in relation to personal or confidential information which should always be shared via shared folders, Onedrive, phone or face-to-face.
- **Email signatures** - All emails (including replies and forwards) should include an email signature as set per the University's approved email footer. Instructions for applying the email signature template:
  1. Open a new email message
  2. On the **Message** tab, choose **Signature > Signatures**
  3. Under **Select signature to edit**, choose New, and in the **New Signature** dialog box, type a *name* for the signature
  4. Under **Edit signature**, copy and paste the [signature template](#)
  5. Replace the template information with your details. You can alter elements as required. You can see the template in use with the various element in these [example signatures](#). Although there is the option for you to include additional logos, colleagues are reminded that images are not easily accessible to everybody. You should consider displaying important information as text, rather than as an image.
  6. Click **OK**
- **Final Check** - It is advisable to re-read your emails before sending to check that the message is clear, that attachments have been inserted (where necessary) and spelling has been checked.

### 3. Sending an Email

- **Recipients**

Consider the recipients of your email.

- The "To" field should only be used for recipients who you are asking to take action
- The "cc" field is for recipients who need to see the information. Think carefully about who you need to communicate with and limit the "ccs" to this group only.
- The "bcc" field should be used when you do not wish to share an email address with the other recipients i.e. when you are emailing a group of people who do not necessarily know each other.

- [Ensure you are emailing the correct address](#)  
The University email system has the email addresses of a significant number of people both staff and students. Some of these have very similar email addresses. You should avoid guessing email addresses and use the University Staff directory or check the student record.
- [Emailing groups](#)  
If the group you are emailing has a mailing list use this rather than trying to maintain your own list and having a large number of individual addresses as recipients. If you do need to email large numbers of recipients individually, use the 'bcc' field to enter their addresses as this will prevent recipients from identifying one another - this is very important if the information you are sending contains personal, sensitive or confidential information.

#### 4. [Replying to emails](#)

- [Think before you use 'reply -all'](#)  
Ask yourself whether all of the people on the recipient list need to see your reply. Often people are added to an email thread and are then unnecessarily included in all of the subsequent discussions which occur. Consider if all the recipients need to or should have access to all of the information contained in your message. 'Reply all' creates large numbers of emails which are often irrelevant.
- [Response](#)  
When responding to an email, double check that you have addressed all the points/questions that were raised - this reduces the need for further emails seeking clarification.
- [Pause before you press the 'Send' button](#)  
If you are angry or upset about the message you are replying to, give yourself some time to calm down before replying. Reading through your reply several times will also help. Sending a quick and angry response rarely helps and often leads to an increasingly acrimonious exchange of messages.
- [Phishing emails](#)  
Stop before you reply to an email if there is anything that looks slightly strange - follow the advice on the [University's Information Assurance](#) and [IT web pages](#)
- [Responding to common queries](#)  
If you are frequently asked the same questions then save the text of your responses so you can paste it into subsequent replies. Alternatively consider providing the information on a relevant web page to reduce the number of initial queries.
- [Take care when forwarding emails](#)  
Care should be taken if you need to forward an email to ensure that there isn't any personal, sensitive or confidential in the email chain. If you do need to forward an email consider including a summary at the beginning so the new recipient is able to determine what has already been discussed. This will also allow you to include the actions or information specific to that person so that they can quickly provide the response you require.

Never forward virus, phishing or chain emails. If you receive a message warning you of a virus that will damage your PC, it is almost certainly a hoax. By forwarding hoax and phishing emails you waste valuable resources and potentially spread viruses. Follow the advice on the [Information Assurance](#) and [IT web pages](#)

## 5. Saving emails

Once you have actioned the email identify if it needs to be retained as a **record**. Use the table below to guide you in this. Tools and tips on managing email effectively can be found here (add link to IT website)

If the email has no corporate value and therefore it not a record it should be deleted and any paper copies should be destroyed in line with the [Information Handling Table](#).

Emails which are considered records	Emails which can be deleted as soon as the relevant event has occurred, action has been taken or project completed
<ul style="list-style-type: none"> <li>• It is part of a case file</li> <li>• If it shows part of a financial transaction</li> <li>• If it is evidence of a decision or action</li> <li>• If it could show information to carry out business, such as day to day administrative records or material potentially relevant to present or future research</li> <li>• If the information would be useful to help deal with similar situations in the future</li> <li>• If it could potentially be used as evidence in court</li> <li>• If it could have any historic value</li> </ul>	<ul style="list-style-type: none"> <li>• Emails giving details of holidays</li> <li>• Invitations to events</li> <li>• Appointments</li> <li>• Message sent as thanks for information</li> <li>• Copies of reports and newsletters</li> <li>• Internal messages into which you are "cc'd" or "bcc'd"</li> <li>• Personal emails</li> </ul>

## 6. Retention of Emails

It is not possible to set a standard retention period for all emails as email is used to communicate a variety of things. The retention period is based on the content, not the format of the record. Generally, however, you should not keep information on emails after you no longer need it.

Records should be retained in accordance with the [University's Document Retention Schedule](#).

Item	Detail
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