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San Francisco

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# Best Email Business Practices

**A guide to sending effective emails**

Department of Medicine

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January 2012

# The Hard Truth....

- **Maxims of Business Writing**
  - No one wants to read it
  - Almost no one will read all of it
  - Almost everyone will misunderstand some part of it
- **Characteristics of Business Readers**
  - They have little time to read
  - They read selectively
  - They expect to read a communication once and be able to understand it

*\* Taken from: "Get to the Point / Effective business writing UCSF" 2008 Nelson Communications.*

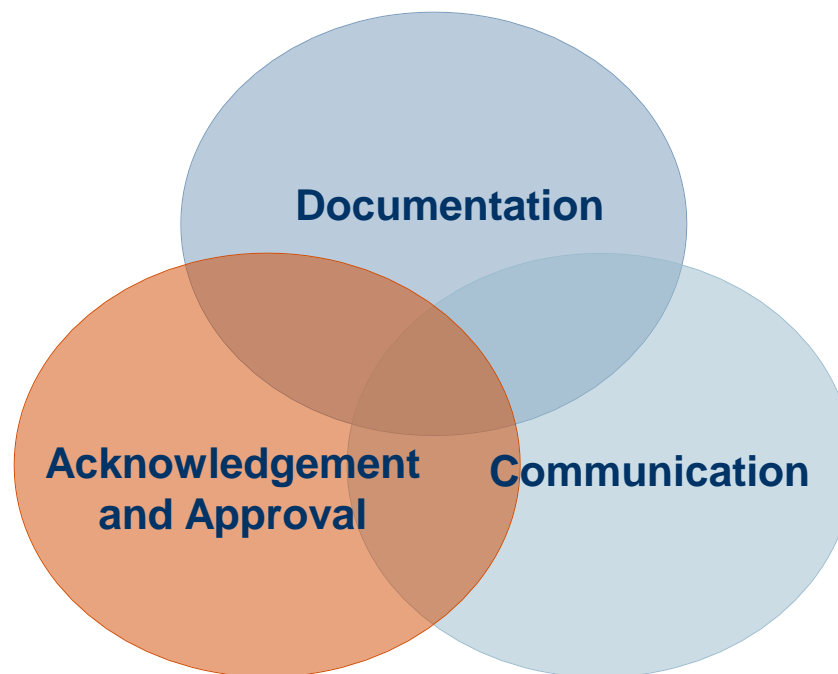
# Goals and Objectives for this Presentation

- **Improve efficiency**
- **Reduce liability**
- **Increase professionalism**





# What do we use email for?





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# Phone vs. Email



# 1. Be concise and to the point.

- **Make the most important point first**
- **Don't discuss multiple subjects in a single message**
- **Be sure the Subject line accurately reflects the content of your email**
- **Use short paragraphs and blank lines between each paragraph**
- **When making points, number them or use bullets**



## 2. Be aware of the tone and content of your email.

- Do not write in all capital letters. **IF YOU WRITE IN CAPITAL LETTERS IT SEEMS AS IF YOU ARE SHOUTING**
- Make your email personal but professional
- Do not let emotions take over your email
- Do not use abbreviations such as BTW (by the way) and LOL (laugh out loud). Also, smileys are not generally appropriate =)
- Use neutral gender





### 3. Format your email for easy reading.

- Use color selectively
- Use bullets and numbers
- Use effective spacing
- Bold or underline important points
- Don't use email backgrounds

# Example of What Not to Do

**To: Donald Dean's Office**  
**From: Henry Human Resources**  
**Subject:**

**Dear Donald:**

**There is no HR paperwork involved for Visitors Scholars. Did they accept the job offer, BTW? HAHAHA! They will be able to obtain a picture ID after I enter their affiliation to UCSF in the system and generate their UCSF ID number. Please provide the following: Full Name, Date of Birth, City of Birth, Social Security number (if they have one), DPA fund for ID card. =) P.S. What are your plans for the weekend?**

# Example of What to Do

**To:** Donald Dean's Office  
**From:** Henry Human Resources  
**Subject:** Information needed for Visitors Scholars

**Dear Donald:**

**There is no HR paperwork involved for Visitors Scholars. They will be able to obtain a picture ID after I enter their affiliation to UCSF in the system and generate their UCSF ID number. Please provide the following:**

- Full Name
- Date of Birth
- Social Security number (if they have one)
- DPA fund for ID card

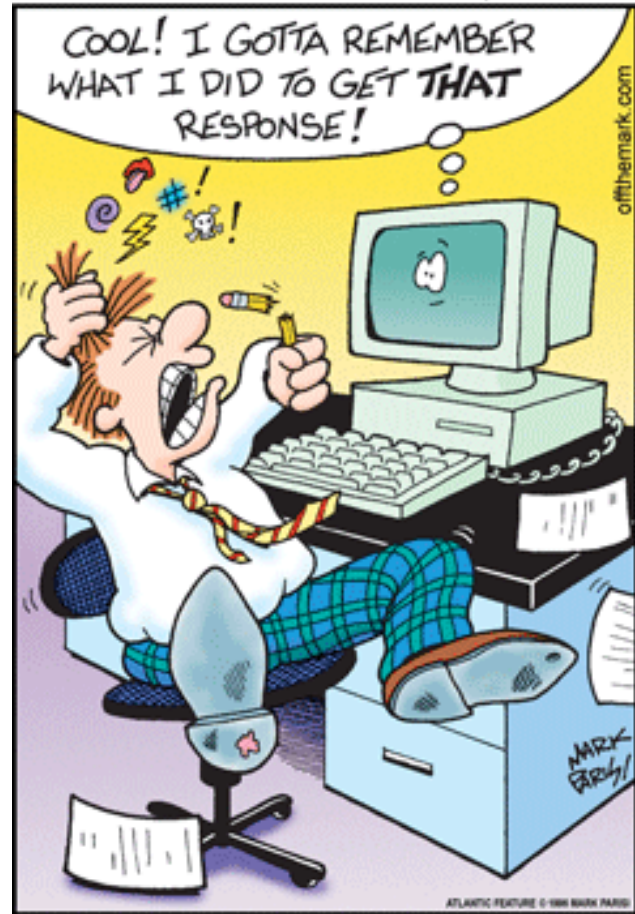
**Thank you,  
Henry**

## 4. Do not overuse the “urgent” or high priority options.

- If you overuse the high priority option, it will lose its function when you really need it
- Ask yourself, “Is it urgent to the task at hand or to you personally?”
- Examples of when it is acceptable to use High Priority and “Urgent”
  - Deadlines
  - Breaking News
  - Emergency approvals
- **Best Practice: When urgent, follow up with a phone call**

# 5. Do not request delivery and read receipts on emails.

**off the mark**.com by Mark Parisi



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## 6. Do not ask to recall a message.

- It is better just to send an email or make a phone call to say that you have made a mistake



## 7. Use email options wisely.

- **To** is the person you are sending the email to
  - You **expect** a response from this person
- **CC (carbon copy)** is strictly for your information
  - You **do not expect** these recipients to respond back
- **BCC (blind carbon copy)** is to share information anonymously or used to send mass mailings
- **Reply to All**
  - This option means that your response will go to all people listed in the to and cc lines
- **Out of Office Assistant**
- **Signatures**
  - Should include your name, phone, fax, and email
- **Disclaimers**
  - This can help protect UCSF from liability

# Disclaimer Example

- Ex. CONFIDENTIAL AND PROPRIETARY: This email communication may contain confidential and proprietary information intended only for the use of the intended recipients identified above. If you are not the intended recipient of this communication, you are hereby notified that any unauthorized review, use, dissemination, distribution, downloading, or copying of this communication is strictly prohibited. If you are not the intended recipient and have received this communication in error, please immediately notify us by reply email, delete the communication and destroy all copies



## 8. Read your email thoroughly before sending it.

- Use spell check
- Make sure to answer all questions, and preempt further questions
- Ask yourself, “Does your message convey your point?”
- Do not forget to include your attachments
- Do not send or forward emails containing libelous, defamatory, offensive, racist or obscene remarks
- Don’t forward virus hoaxes and chain letters
- Add links that support information shared in your email

## 9. Things to keep in mind when forwarding or replying to an email.

- **Make sure you know who your recipients are**
- **Use appropriate PHI subject line if you are sending confidential or clinical information**
- **Be cognizant of HIPAA policies**
- **Don't leave out the message thread**
- **Change subject line if appropriate**
- **Don't reply to spam. Delete!**

## 10. Reply to emails within a reasonable amount of time.





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# Quick Tips for Email Efficiency

- **Sort by sender**
- **Take care of email the first time**
- **Use a folder system**
- **Use flagging options**
- **Read emails from top to bottom**
- **Clean out in-box daily**
- **Do not stay on email all day long**

# What to take away from this presentation...

- **As you write your email**
  - Be concise and to the point
  - Make sure language and tone are appropriate
  - Treat as important documentation
  - Write your email as if *you* are the reader
- **Before you send your email**
  - Read again
  - Review content and format
  - Reflect on message
  - Revise if necessary

# Resources

- **“Get to the point/Effective business writing/UCSF” 2008 Nelson Communications.**
- **<http://www.emailreplies.com/>**
- **<http://iwillfollow.com/email.htm>**
- **<http://www.101email etiquettetips.com/>**
- **[http://careerplanning.about.com/od/communication/a/email\\_etiquette\\_2.htm](http://careerplanning.about.com/od/communication/a/email_etiquette_2.htm)**
- **<http://michaelhyatt.com/2007/07/e-mail-etiquette-101.html>**



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