"N'ETIQUETTE"

BACKGROUND
A recent study conducted by Pitney Bowes found that "a company's competitiveness is determined by the ability of workers to effectively manage the tremendous amount of information that crosses their desktops every day". The study discovered that "a messaging ecosystem, consisting of inextricably linked information, knowledge workers, and communications technology, has become the engine for the global information economy".

The study concludes, "Today, messaging often is the work, because the transfer of information between workers is the most important task in a person's day…Access to information and the ability to use it well will be what enables companies to stay agile and responsive in a fast-moving marketplace."

The following is a set of guidelines, based upon global best practice, which will allow you to master this new work environment. As the Pitney Bowes study states, "The company that can harness and capitalize on the messaging ecosystem will lead in the new millennium".

Telephones

When making a call:

- Have a clear idea for why you are using the immediacy of a live telephone call instead of e-mail. Make an outline of issues to be covered.
- Remember people's work, meal, and meeting patterns and schedule calls to maximize their availability. This is especially important across time zones.
- Have all documents you plan to refer to in front of you. E-mail or fax these documents to the people you are communicating with if they need to also reference them during the call, or offer to provide them at the conclusion of the call.
- Make sure you are in the quietest environment possible to assure clarity of communication (i.e. use the pay phone farthest from busy and noisy areas).
- Speak in a clear manner. Use a friendly tone of voice.
- Unless the call is going to be under one minute you should establish, up-front, how much time the people you are communicating with have for your call. Arrange to call back at a time certain if more time required than is immediately available.

When leaving a message on voice mail:

- Speak clearly and slower than your normal pace.
- State your full name (include your title and affiliation if leaving a message for anyone outside of you organization).
- State time and day of call (remember, not all answering systems automatically log this information).
- State the purpose of your call, and why the party with whom you are leaving the message needs to return the call. Please provide the specific question you require an answer, or announce information that is being passed on (stating time sensitive information like change in a meeting time or place).
- State the time frame for a return call and your time availability (telephone "tag" can be prevented if you state when you are or are not available so that your message can be returned when you are actually available).
- Slowly state your full telephone number, including area code (if needed, also include country code).
- You should state your full telephone number underline twice (so a person writing this information down can verify it).

When monitoring voice mail messages:

- Monitor your voice mail at least once a day.
- Return calls within 24 hours or at times stated in the message.

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Faxes

- Use a fax only when the document can not be e-mailed or scanned.
- If action is required, the fax should be proceeded by a preliminary e-mail or telephone call to the recipient to assure that they are there and ready to respond.
- When faxing use the person's full name, telephone number and number of pages either on the first page of the faxed document or on a cover sheet.
- Always put your full name and full telephone number on the fax.
- Explain the purpose of the fax in the cover sheet or in an e-mail, unless it is self-evident or in response to a query.

E-mails

- Always put a subject on your e-mail.
- Keep each e-mail to one subject (this helps filing by recipient).
- Clearly and concisely state the topic of the e-mail in the "SUBJECT" area.
- State whether there is an action required in the "SUBJECT" area. For example: "SUBJECT: ACTION: Meeting changed to Monday".
- By using "ACTION" as part of your topic in the subject area the recipient can assume other e-mails are informational. This greatly assists prioritizing which e-mails to read first.
- List all recipients from which action is required in the "TO" area and others under "CC". This will allow multiple recipients to know whether they are part of the action required or just being informed that action is occurring.
- Only use "High" priority when it really does require immediate attention.
- Number each item, if there are multiple actions, questions, or issues within the e-mail. This allows for the recipient to clearly outline their answers and provides for clear tracking from the responding e-mail to the original.
- Be clear why you are sending the e-mail. Make sure this is clear in your e-mail.
- Use the "Associated Press" style of organizing a long e-mail. This means stating a brief overview of what is to be covered in the first paragraph (who, what, when, where, why). You can then go into more detail. This allows the recipient to quickly scan their e-mails to better prioritize the order in which they must be processed.
- Always be professional in your e-mails. Jokes, sarcasm, and personal comments are probably contrary to your company's policy. This kind of unprofessional usage may also undermine your own credibility.
- Minimize the use of jargon. When e-mailing outside of the U.S., remember other nationalities and cultures do not have the same frame of reference or mastery of English. Use simpler terms and sentence structure to assure clarity.

E-mails (continued)
- Always provide the full term before using an acronym for the first time in your message. Link the acronym by parenthesis, for example: "the American Management Association (AMA)". Remember, not everyone knows every term and acronym, even inside your organization.
- On your first email to a new person you should include a complete set of your contact information. For example:

> Sincerely,
> John Doe
> Tel: 555-333-9999
> Fax: 555-333-9911
> Mobile: 444-222-8811
> Email: JD99@aol.com
> P.O. Box 4455
> Anywhere, NY 10000-2222

- Always make sure your attachments use the most universally available program. The lowest common denominator maximizes ease of use by the recipient. Also, limit the use of graphics wherever possible, this shortens download time and saves storage space.
- Always use a friendly tone in your e-mails. Remember written words have a life of their own. If you are upset by an e-mail think twice before responding in kind.
- Always thank people for responses to your e-mail. Always end with a pleasant closing. This can build morale and a sense of team.
- Always acknowledge e-mails in which you are the primary recipient within 48 hours.
- Review your e-mails at least once a day.
- Arrange for a team member to review your e-mails if you are unable to access them yourself in a timely manner.

Conferencing - telephones
- Have a clear idea for why you are using the immediacy and interaction of a live telephone conference instead of broadcast e-mail.
- If participants are being called, make sure every participant knows that they will be called (time certain, number certain).
- If participants are calling in, make sure everyone has the telephone number for the conference call and a back-up number to call if there is any difficulty.
- Make sure everyone knows the specific date and time of the conference call.
- Make an outline of issues to be covered and make sure every participant on the conference call has this list prior to the call.
- The duration of the conference call should be established as part of the scheduling process

Conferencing - telephones (continued)

- Remember other people's work, meal, and meeting patterns and schedule conference calls to minimize disruption of their work patterns. This is especially important across time zones.
- Participants should have all documents referred to in front of them. E-mail or fax documents to the people you are conferencing.
- There should always be one person designated as moderator to facilitate the conference call. This person also assures that everyone has a chance to speak and that everyone can clearly hear and understand the conversation.
- There should be a "scribe" to document issues covered and actions agreed upon. This person is responsible for e-mailing or faxing the "minutes" to every participant. The goal should be having this information distributed within one hour after the conclusion of the conference call.
- The meeting should have an attendance list, distributed to all participants in advance. Participants should introduce themselves at the beginning of the teleconference.
- If some participants are in a meeting room interacting with remote participants then extra effort should be made to solicit input from the remote members of the conference call.
- In the conference call room - the telephone microphone(s) should be placed as close to the speaker as is possible. Multiple microphones are highly recommended. Verify that each remote participant can hear clearly.
- Speakers should identify themselves every time they speak (remember, not every voice is distinguishable by everybody).
- All participants should minimize disruptions during the teleconference. This includes holding all other calls and making sure that non-participants do not interrupt the various meeting rooms, and remote offices.
- Speak in a clear manner. Use a friendly tone of voice.
- There should be a clear end to the teleconference, including saying goodbye to those calling in remotely.

Conferencing - video/satellite

The guidelines for a successful video/satellite conference are similar to those for a teleconference:

- Have a clear idea for why you are using the immediacy, interaction and expense of a live video/satellite conference instead of broadcast e-mail or a teleconference.
- If participants are being called, make sure every participant knows either that they will be called (time certain, number certain).
- If participants are calling in, make sure everyone has the telephone number for the video-conference and a back-up number to call if there is any difficulty.
- Build in time for a "dry-run" among the technicians to make sure all hook-ups are compatible and operational.

Conferencing - video/satellite (continued)

- Time should be spent at each location establishing how close people should sit to the camera so that they can be clearly seen. Flip charts, or other visuals, should also be tested in advance of the video/satellite conference for clarity.
- Make sure everyone knows the specific date and time of the video-conference.
- Make an outline of issues to be covered and make sure every participant on the conference call has this list prior to the call.
- The duration of the video-conference should be established as part of the scheduling process.
- Remember people's work, meal, and meeting patterns and schedule the video conference to minimize disruption of their work patterns. This is especially important across time zones.
- Participants should have all documents referred to in front of them. E-mail or fax documents to the people you are conferencing.
- There should always be one person designated as moderator to facilitate the video-conference. This person also assures that everyone has a chance to speak and that everyone can clearly hear and understand the conversation.
- There should be a "scribe" to document issues covered and actions agreed upon. This person is responsible for e-mailing or faxing the "minutes" to every participant. The goal should be having this information distributed within one hour after the conclusion of the video-conference.
- The meeting should have an attendance list, distributed to all participants in advance. Participants should introduce themselves at the beginning of the video conference.
- If some participants are in a meeting room interacting with remote participants then extra effort should be made to solicit input from the remote members of the conference call.
- In the video-conference room - the microphone(s) should be placed as close to the speaker as is possible. Multiple microphones are highly recommended. Verify that each remote participant can hear clearly.
- All participants should minimize disruptions during the video-conference. This includes holding all other calls and making sure the various video meeting rooms are not interrupted by non-participants.
- Speakers should identify themselves every time they speak.
- Speakers should look directly into the camera lens or slightly above the lens.
- Do not excessively move about or make quick movements while on camera. If the signal is less than real-time streaming your image will look disjointed.
- Speak in a clear manner. Use a friendly tone of voice.
- There should be a clear end to the video-conference, including saying goodbye to those calling in remotely.