A Checklist for Effective E-Mail

Use the following checklist to ensure that your e-mails reflect your professionalism and increase your credibility within and outside of your organization:

1. **Company e-mail is the appropriate choice for this document.** The e-mail, which may reside in your system's memory and be accessible to people other than the intended reader:
   - Contains information that pertains only to your job responsibilities or to your organization's approved functions. You followed your organization's guidelines for using e-mail for personal communications.
   - Contains no confidential or sensitive information. The e-mail could be made public or subpoenaed without embarrassment to your organization or you, the writer.
   - Is not a way of avoiding talking to someone in person or by telephone. Don't let e-mails replace human interaction that builds relationships and allows you to observe or hear people's reactions to what you are saying.
   - Contains no reprimanding or emotional wording. Constructive criticism is received best in one-to-one, in-person coaching sessions.
   - Requires immediate response.
   - Is not itself detailed information required by the reader for long-term reference. Detailed reference information has been provided as an attachment; the transmittal e-mail provides context.

2. **The distribution list is appropriate:**
   - All those who should receive the information have been copied. For example, you have not relied upon the primary reader to distribute the information to his/her direct reports if you require them to have the information.
   - Those who do not need to know the information have not been copied.

3. **You have respected your reader's time and edited the e-mail for clarity.** You:
   - Eliminated wordiness; eliminated any "streams of consciousness."
   - Used short words, sentences, and paragraphs.
   - Used precise, factual wording.
   - Translated technical jargon and acronyms as appropriate for the distribution list.
   - Deleted any unnecessary "document trail."

4. **You have used professional presentation, tone, and courtesy.** You:
   - Used simple format that will convert well to all computer systems/programs.
   - Used upper and lower case letters rather than all capitals. Upper and lower case letters are easier to read; using all capitals sounds like yelling. The rule of thumb is to put no more than eight words in all capitals; you have saved all capitals for emphasis or headings.
   - Have written the e-mail from your reader's point of view. Your wording is collegial—considerate and polite; it is objective and direct without being abrupt.
   - Used words that are appropriate for a business environment.

5. **You have organized the e-mail strategically. You ensured accurate and complete content.** You:
   - Provided a subject heading and opening purpose statement that predict the document's content.
   - Anticipated and answered your reader's questions, providing background information when it helps your reader understand your message.
   - Double-checked the accuracy of facts and figures.
   - Clearly and explicitly asked for action or described what you or a third party will do next.

6. **You have proofread the e-mail.** You:
   - Used correct, consistent punctuation.
   - Used your spell checker. Double-checked the spelling of people's names and of your organization's products and services.
   - Replaced "brief hand" abbreviations such as "w/" and "info" with standard spellings.
   - Ensured your precise use of all vocabulary, especially of any unfamiliar vocabulary gleaned from your computer's thesaurus.
   - Checked grammar (especially subject-verb agreement) and usage (for example, commonly confused words such as "there" and "their").
   - Checked sentence structure (especially to correct any fragments or run-on sentences).

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