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Draft

Email Best Practices

Dale Carnegie once said, "There are four ways, and only four ways, in which we have contact with the world. We are evaluated and classified by these four contacts: What we do, How we look, What we say, and How we say it"

Email communication makes an impression upon those we do business with. Are we professional? Do we make it easy to do business with us? Do we build trust and confidence in the responsiveness and quality of our communication?

Our Mission:
Customer expectations, in some contracts and agreements, stipulate a maximum response time of 60 minutes for emails. The DNAS family of companies strives to meet, and exceed, customer expectations ensuring a response to emails of no more than 30 minutes during normal business hours. We are required to improve our first call (in this case email) response time as part of our Balanced Scorecard by implementing this not only for external communications but also for internal communications especially related to customer requests.

How do we accomplish a 30 minute maximum response time?

1. Keep Outlook open on one of your screens at all times so you can see the incoming unread messages
2. Start each day by sweeping through your unread messages received after hours and reply to the customer even if you don't have a specific answer to their question. Simple responses such as, "Your service request has been entered." "I don't have a specific answer at the moment but wanted you to know I am working on it and will be back to by…" will provide the customer an acknowledgement reducing their need to call us
3. For group mailboxes assign a primary and back up to each box and whose responsibility it is to sweep and answer or reassign to someone else in order to answer the customer's question. For market specific mailboxes where the Customer Service, Dispatcher, Business Mgr & General Manager all have access such as refrigservice, allservice, etc. Customer Service will take the lead in sweeping the mailboxes to make sure all emails are responded to within 30 minutes. If the CSR cannot answer the question or satisfy the email on the first call response or if we need the Service team to respond to the customer the CSR will use the Categorization feature in Outlook to assign it to the Service team (Dispatch, Business Mgr, GM) . The Service team will sort their view of their market specific inbox by that color category for easy identification. This will save them time of having to sort through and reading every email to see where they need to jump in and respond.
4. All departments using group mailboxes should also use Unread /Read and Color Categorization so they know when an email has been completed. While we are at it individuals can also benefit by this as well but that is up to them as long as they respond within 30 minutes.
5. Implementation and Client Advocacy already do the same for their respective mailboxes except that they will need to forward any email to specific responsible individuals based on the scenario and request for a response if they can't answer themselves.
6. It is the responsibility of Managers or Supervisors to manage the backlog of emails in the inbox. By using group mailboxes, Read / Unread and Color Categorization Managers can quickly see the backlog of emails not yet attended to. Outlook will provide you a count of Unread messages for each inbox for easy visual triaging if necessary.
7. Timing considerations:
    a. Start of Shift – Sweep anything left over, if any, plus anything that arrived after business hours
    b. During the Day – Review Unread messages and look for oldest to newest
    c. End of Shift – Prior to closing for the business day respond to all emails
8. Rules for categorization and flagging
    a. Leave any new emails as Unread. Use the Preview view so you don't have to open it to just to see what it says.
    b. When you reply AND complete the request mark it as read, use you your color category
    c. When you reply only to acknowledge receipt leave it unread, add your color category and flag it for follow up. Once you have the final response mark it as read and chane the flag to a checkmark.
    d. When assigning an email to the Service Mgt, respond to the customer acknowledging receipt, leave it unread, assign the service mgt color category.
    e. When the Service Mgt team responds to the customer they should mark the email as read and change the flag to a check mark indicating completion.
    .

Things to consider with respect to Email best practices:

1. **Respond, Respond, Respond – (**#1 Most important Customer Experience Excellence Measure)
    a. By responding as quickly as possible we let the person know we are organized, care about them and are efficient. You bet our competitors will stress this.
    b. If you can't provide the answer right away acknowledge the request with "Thank you for your email. I will have an answer for you shortly, by 2pm, etc." This lets the person know you received their request and helps prevent follow up requests. It sets expectations with the requestor.
    c. If you are asked to complete a task that doesn't necessarily require you to provide information still respond and acknowledge you have completed the task. You can say for example, "Dear Jane, I changed your contact information as requested. Thank you."
    d. Make sure to copy all with your response
2. **To:, From:, Cc:, BCc:**
    a. Address the email to the person who requested the information or who you need to take action
    b. Place others who were on the original email or who just need to know in the Cc: field
    c. Copy internal folks only as needed
3. **Subject Field:**
    a. Always provide one
    b. Keep it short but specific
    c. Action oriented if you need customer to respond or do something
    d. Add a subject if someone sends you an email without one
4. **Reply to All:**
    a. Use with discretion. Does everyone need to see your response?
    b. Don't use to CYA or e-tattle on a coworker or to embarrass the person sending you the email. Better to send to them only for clarification and then reply to the original if required.
5. **What to include in the body of the email:**
    a. Salutation – Dear Jane, Hello Jane, Jane are acceptable based on your familiarity and relationship with the person
    b. Briefly acknowledge their request
    c. State the information they requested or ask your specific question
    d. Thank person for their question, their response or opportunity to serve them
    e. Formatted company signature
6. **Level of Formality (think of our brand)**
    a. Use black text and standard fonts
    b. Don't abbreviate words or sentences
    c. Wallpaper background is unnecessary
    d. Check grammar, punctuation and spelling before pressing Send
7. **Don't use a previous email for new correspondence**
    a. Always start a new email with the appropriate subject
    b. Don't hesitate to change the subject if someone else uses a previous email that has nothing to do with the new request
8. **Beware the long email string**
    a. Don't use "see below" when answering a question. Copy and paste or restate the request right at the top of your new response.
    b. If an email goes back and forth a third time for clarification pick up the phone and talk it through. Sometimes it is difficult to communicate tone, what someone means or needs in writing. You can always confirm in writing after the call.