CHAPTER 19: EMAIL AND OTHER E-COMMUNICATION

Chapter outline

- Guidelines for email
- Guidelines for sending attachments
- Guidelines for sending faxes

In EDC, you will be communicating frequently with team members, instructors, clients, and other interested parties. As in the business world, most of this correspondence will be through email.

As you probably know, people in business and other professions receive a large number of emails each day. A 2006 study at a technology company found that the average employee received 87 emails a day (Fisher, Brush, Gleave & Smith, 2006). Thus, it is crucial that you craft each email so that the reader pays attention to it, can understand it easily, and acts on it in the way you want. This chapter offers advice for achieving those objectives.

19.1 GUIDELINES FOR EMAIL

19.1.1 When to use email

Use email when you don’t need an immediate response, when you want to give a person time to consider the message, when you have had difficulty reaching the person by phone, or when you want to present information that would be hard to convey in a phone call (such as test data or an attached graphic).

19.1.2 How to make sure your email gets read

Because of the large number of emails received every day, people often make quick decisions about which they’ll open and which they won’t. To make sure your EDC email gets read:

1. Send the email from your Northwestern email account, not your personal account, so it looks legitimate.
2. Use a subject line that indicates the message's purpose, such as "Meeting request—adaptive knife project." The more vague the subject line, the more likely the reader will pass on to the next email. If you are emailing your client or instructors, include the name of your project, and section and team number. Avoid subject lines like URGENT and IMPORTANT, since these are often used by spammers.
3. Keep your message short, one screen if possible. The longer the message, the more likely the reader will think, "This is going to take too long. I'll get back to it later" (which often means never). One way to control the length of your email is to make sure it has only one purpose. Thus, don't send an email that is intended both to provide a project update and set up a meeting. Another way to keep the email short is to provide only the essential information and avoid tangents and extraneous details. Finally, edit for conciseness using the techniques discussed in Chapter 24. When you do need to make your document longer, or include graphics or tables, write it as a memo or report that you attach to the email.

19.1.3 How to make sure your message is understood

As with any communication, you need to organize email messages carefully.

1. The first paragraph should indicate the message's context, purpose, and main point.
   a. In EDC, the context includes the project you are working on. For your client and instructors, who are often working with multiple teams and sections, it also includes the section and team number. For experts and users, context includes the fact that you are a Northwestern University engineering student working on a design project to accomplish a specific goal. If you are writing to your client or instructors, you should also indicate your section and team numbers. Finally, if you refer to events that have occurred are or planned, use specific dates for ease of reference. Instead of, "Thank you for meeting with us last week," write, "Thank you for meeting with us on Tuesday, February 13.
   b. The purpose is a statement of why you are writing this message to the reader, for instance, to request something (a meeting or some information), to confirm something (an agreed-on meeting time or an understanding of the decisions made at a previous meeting), to provide a project update, etc.
   c. The main point is the key idea you want the reader to get from the message. For instance, a project status update might include this main point: "We have built three mockups and will test them with users during the week of February 10th." The rest of the email would go into more detail on the mockups and testing.

2. The body of the email should present the necessary information in an easy-to-follow format. Keep the paragraphs short—with only one idea per paragraph—and skip a line between paragraphs. For longer emails, use headings and lists to break up the text and to emphasize main points.

In addition to organizing the email clearly, you should also provide sufficient detail so that readers understand your points. Here is an example of a statement with insufficient detail. The team is writing to their client to confirm the requirements for a project to design a drinking system that can be attached to a wheelchair used by people with quadriplegia.

> Based on our interview with you, we have identified several design requirements ranging from safety to ease of use.

The reader cannot tell whether the team has fully understood the requirements because not all of them are stated and there is no explanation of the two requirements that are stated. Here is a revision that provides enough detail to communicate the team's understanding of the requirements clearly.

> Based on our interview with you, we have identified these design requirements:
>
> - **Safe**: The device does not harm the user or anyone near the wheelchair.
> - **Easy to use**: The user can reach and drink from the device without undue strain.
> - **Independently used**. The user can drink from the device without the aid of others.
> - **Washable**. The device can be cleaned in a dishwasher.
> - **Leakproof**. The device does not leak as long as it has been properly assembled prior to use.
> - **Inexpensive**. The device costs less than $50.

19.1.4 How to make sure the reader acts on your message

1. <u>Conclude by stating what you want the reader to do with the information you have provided</u>. If you are confirming a meeting time, ask to be notified if the time needs to be changed. If you are following up on understandings reached at a previous meeting, ask to be notified if you misunderstood anything or if the reader has further information to provide. If you are trying to set up a meeting, ask the reader to reply by a certain date.
2. <u>Provide the reader with **options** for action that will also fit your needs</u>. When you present just one option, the reader may feel that you're being overly demanding. In addition, if that option doesn't work for the reader, then you won't achieve your goal in sending the email. So if you are trying to set up a meeting, don't give just one day and time, give several that

fit your schedule, and perhaps suggest alternatives such as a conference call.

3. Use a polite and respectful tone. Tone is an element of email that causes great problems. A reader can get so irritated or offended by either an overly casual or overly demanding tone that she or he does not act on the message or acts in a way that you don't want. Therefore, when you are emailing your instructor, your client, or someone you haven't met, such as an expert you'd like to interview, make the style more formal and polite than in an email to a friend. Here are some tips for conveying an appropriate tone:
   a. Begin with a polite salutation, such as "Dear Ms. Paschen" or "Dear Professor Jones" (rather than "Dear Fran" or "Hey!" or "Hi, Prof. J."
   b. Proofread the email carefully. Readers often view typos and misspelling as a sign that you didn't have the professionalism and respect to correct obvious errors.
   c. Avoid giving brief replies that may sound rude or rushed, rather than merely concise. Adding a phrase such as "Thank you for replying so quickly" can avoid misunderstandings.
4. End on a positive note. For instance, in the conclusion to an email providing a project update to a client, after writing, "Please let us know if you have questions or suggestions for our user testing," you might add, "We look forward to sharing our results with you when user testing is complete" or "The user testing results will help us develop a design that meets your requirements and satisfies users."
5. Avoid writing angry, critical remarks or jokes you wouldn't want others to see if the email is forwarded. This can be a particular problem in emails between team members.
6. Make sure your reader knows whom to contact. Give your name and other identifying information at the end of the message to clarify who is sending the message. (The automated "from" line may show only your email address or NetID.) On mail being sent to addresses outside of Northwestern, put your email address in the signature because it is sometimes difficult to find it in the header. You may also want to include a telephone number in your signature.

19.1.5 How to keep your team and instructors informed

Because email is such an important component of project communication, it is essential that you keep your team and instructors in the loop. When teammates don't know what each other is doing because no one is being copied on emails, the entire team suffers. When instructors find out a week after the fact that your client emailed you that she can't make it to the final presentation or wants you to change your mission statement, then you are denying yourselves the support and advice your instructors might have been able to offer.

Therefore, you should **copy your instructors and teammates on all project-related email**. This includes emails to team members, clients, experts, users, etc. When you receive emails from your client, experts, and users, be sure to forward them to your instructors and teammates. Finally, print out email correspondence with client, experts, and users, and include it in your project notebook as part of the permanent record of your work.

19.2 GUIDELINES FOR SENDING ATTACHMENTS

In EDC, as in most workplaces, documents are transmitted and stored electronically to save time, simplify drafting and revising by teams, and ensure that documents are easily accessible to everyone. Sending files electronically, however, requires thought and preparation. Below are guidelines for preparing electronic documents.

1. Give your files meaningful titles, version numbers, and other useful identifying information. A ubiquitous name like “report.doc” is likely to get lost in the shuffle. Instead, give it a name like:

    progress_report_3_v2_s20t2.doc

    The name identifies that this file is Progress Report 3, Version 2, posted by Team 2, Section 20. The suffix “.doc” tells what kind of file it is. Ask your instructors what file-naming conventions they prefer, and discuss them with your teammates.

2. Identify your documents clearly on the inside as well, using headers and footers where appropriate. Readers should be able to determine quickly who the document belongs to, which version it is, which team member wrote it, and so forth. Remember that your instructors may have many different documents on their desk (or on their screen) at once. Marking your document clearly will prevent them (or you) from reading the wrong version of a document. Moreover, if an instructor downloads your file, he or she should know whose file it is once it is opened.
3. Use a file format everyone can read. Before sending a file, make sure your team members and instructors use a program that can read it. Then decide on a standard format for your group. Although Microsoft Word is the most commonly used word processor at Northwestern, check with your team members to be sure they all use it. Incompatible file formats between different versions of Microsoft Office can also cause problems.

    If someone on your team uses a word processor other than Word, save and send your files in RTF (rich text format), which most word processors can read. When publishing final versions, you can use PDF (portable document format) files, which can be read using Adobe’s free Acrobat Reader.

Software for creating PDF files is available in all public computer labs at Northwestern, including the EDC classrooms.

4. When attaching files to email, keep the file size small. There are limits to the size of a file you can attach to an email message. Files that contain graphics and other media can become truly gargantuan. If you are using Word, learn how to compress graphics within the program to decrease file size. If you have files that are still larger than 5 MB, you will not be able to send them through Northwestern's email system. Instead, you may want to post the document to Depot, generate a "ticket" link, and email that link to everyone who needs the file.
5. Guard against viruses. Use virus protection software and scan all files you receive.

19.3 GUIDELINES FOR SENDING FAXES

Occasionally, you may need to send a fax rather than an email attachment. Prepare a typed cover sheet that includes the following information:

- To: the name and title of the recipient and his or her organization
- From: your name, project, section/team, and NU/EDC affiliation
- Subject: be as specific as you would be in the subject line of an email
- Date
- Fax number
- Your phone number
- Number of pages (including the cover sheet)

19.4 REFERENCES

Fisher, D., Brush, A., Gleave, E., & Smith, M. (2006). Revisiting Whittaker & Sidner's "Email overload" ten years later. *Proceedings of the 2006 20th Anniversary Conference on Computer Supported Cooperative Work*