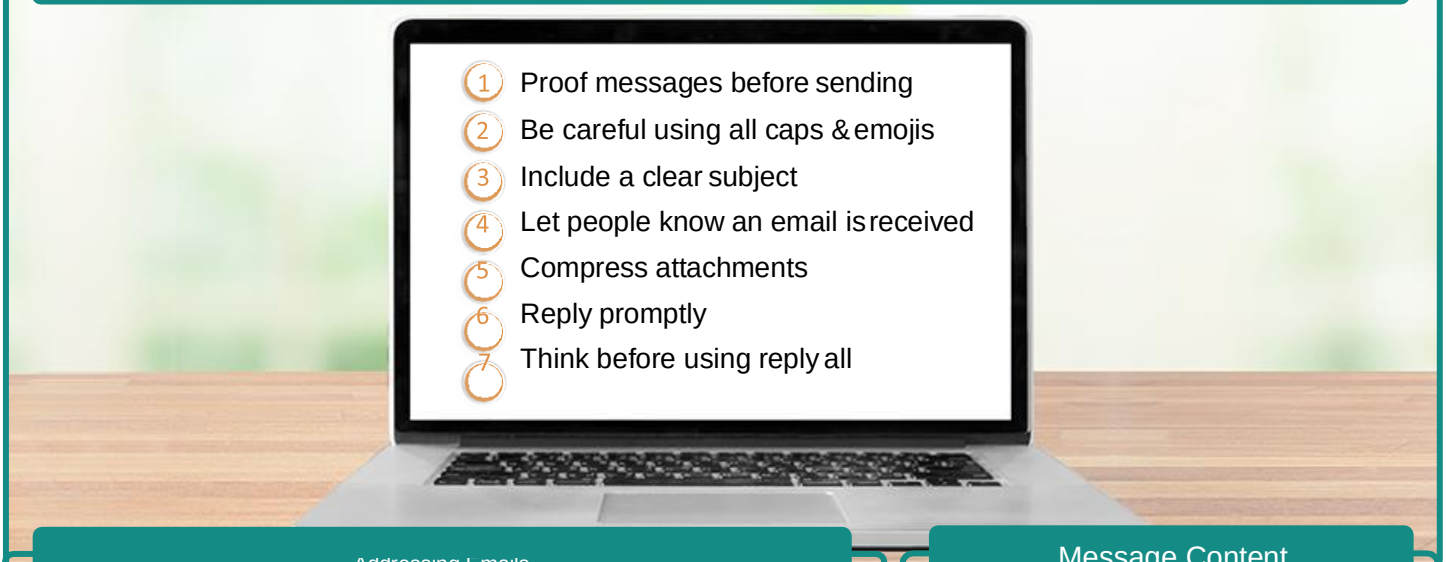
Email/Phone Guide
Email Etiquette
Quick Reference Guide



Addressing Emails

- The subject should be concise and match the message of the email
- The email should only be addressed to necessary recipients

Did you know?

47% of emails are opened based on the subject line

69% of email is marked as spam based on the subject

46% of emails are opened on mobile first

Email subjects that create urgency are opened **22%** more

Know Your Audience

Is the reader a friend? Your boss? A stranger?

Is the tone friendly? Formal?

What kind of impression are you trying to make?

All these things should be considered before including humor, acronyms, emoticons, or slang in your email message.

Message Content

An Email Message Should…

Get to the Point

The reader should immediately know the objective of your email. Your message will be lost if the action isn't identified in the first paragraph.

Be Personalized

Personal emails build direct connections with the recipient. This can be as simple as addressing the person by name.

Have Space Between Paragraphs

The white space between paragraphs increases readability and indicates a transition between topics.

Use Headers, Bullets, and Numbering

Summarizing large paragraphs into smaller sections with concise lists makes the email easier to process. Long emails are less likely to be read.

Not Include Confidential Information

Emails should never include confidential information such as social security numbers or banking information.

Formatting and Proofing

Once an email is ready to send, it's important to proof it and check for formatting issues. Check not only the message body, but the subject and recipients too.

DO'S	DONT'S
Re-read the message	Use poor grammar in your writing
Run your email client's spelling and grammar check	Overuse different fonts, font colors, or highlighting
Double-check the recipients	Use all capital letters
Keep formatting simple and easy to read	Overuse exclamation points

When Not to Send an Email

Email is not the only tool for communication, and in some cases it's a bad one. For messages that are full of emotion or conflict, or could be misinterpreted, choose a different form of communication.

A phone call should be used instead of email if you want to apologize, you anticipate a lot of questions, you need to give a long explanation, or there's a sense of urgency.

A face-to-face conversation should be used instead of email if the matter is personal, you want to strengthen a bond, seeing emotion is important, or there are complex details to discuss.

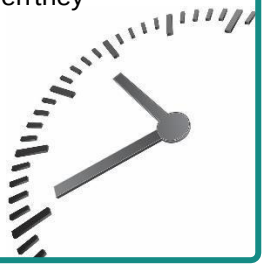
Never hide behind an email to express anger. Either write the message, then come back to it once you've settled down or cool off and then have a conversation.

Response Time

Always respond to email as quickly as possible. Customers and co-workers need a response within 24 hours.

If you need more time to gather information, let the person know when they can expect a reply.

Use an out of office message if you'll be out for an extended period of time. Include how long you'll be out.



Attachments and Hyperlinks

You can share additional information in an email by including attachments and links.

Attachments

- Limit file size—large files may be blocked
- Mention the included attachment
- Only include related and necessary files

Hyperlinks

- Should be clearly labeled and easy to identify
- Must go where they say they are going
- Should allow the reader to save time reading an email

Signatures

Lasting impressions are important, so wrap up your emails with a simple and professional signature. A good signature is informative and visually appealing but shouldn't include so much information that the reader is overwhelmed. You should also:

- Limit the number of fonts and colors used
- Keep graphic elements simple
- Use linked social media icons to drive traffic
- Make it mobile-friendly

14 Rules for email etiquette

Rules for email etiquette

Your email is a reflection of you and the organisation. Every email you send adds to or detracts from our reputation. If your email is scattered, disorganized, and filled with mistakes, the recipient will be inclined to think of you or the organisation as a scattered, careless, and disorganized business. Please see example image **Annexures**.

1. Use a clear, professional subject line

Show your recipient clearly what the email will cover. Be clear in your subject line. Your subject line should be reasonably simple and descriptive of what you have written about. Many people will decide whether they will open an email depending on the subject line. For someone who gets hundreds of emails a day, a subject line that is to the point makes it easier for them to sort through their inbox and decide what communications to prioritise.

2. Proofread every email you send

Make sure there are no grammatical or professional errors. Have you spelt the recipient's name correctly? Are there spelling errors? Are you using simple sentence structures and correct capitalisation and punctuation? Ignoring these compromises your professionalism and the credibility of your email.

3. Write your email before entering the recipient email address

It is always best practice to write the contents of your email first in case you accidentally send the message too early.

4. Salutation & Double check you have the correct recipient

There is nothing worse than sending an email to the wrong Jess or a confidential document to the wrong client or company. Include a salutation. In general, use the recipient's name, including any title such as "Dr." followed by either a comma or a colon. If you cannot find the name of an individual to whom you can address your email, a salutation like "Good Morning" or "Good Afternoon" works well

5. Ensure you CC all relevant recipients

It is unprofessional to leave out a colleague or client from a relevant email chain. Be mindful of who should be informed about a given matter and respect that.

6. You don't always have to "reply all"

Think about who needs to read your response; no one wants to read an email chain from 20 people that has nothing to do with them.

7. Send/Reply to your emails during business hours/weekdays 9 AM – 5 PM only

Most people at some points have felt swamped by the large number of emails they have to sift through. But replying to an email is good etiquette, especially if the sender is expecting a response. Acknowledging you received the email but will get back to the sender at a later time is a professional

alternative to ignoring or avoiding certain emails. E.g., "*Dear _____, we confirm receipt or your email.". OR "Dear _____, we confirm receipt or your email. We will contact you in the near future should we require any further information*". Depending on the nature of the email responding within 24 to 48 hours is acceptable. Only send or reply to email during business hours/weekdays 9 AM – 5 PM only

8. Include a signature block

If your recipient doesn't know anything about you, they may be skeptical of the authenticity of your email. It is professional to include your full name, title, your company and your contact number. Always include a signature. You never want someone to have to look up how to get in touch with you. Consider adding your title, organization, phone number, and any other information you would like to be easily accessible

9. Use the appropriate level of formality

For instance, begin with "*Dear _____", use "please" and "thank you*" where necessary, and always end your email with the appropriate phrase, "*Kind regards*", "*Thank you*", "Sincerely" and so on. If appropriate thank the recipient for their time. Bring the email toward a close with a polite statement, such as "*Thank you for your time*" or "*Thank you for your assistance*."

10. Keep emails brief and to the point

No one wants to read an enormous chunk of text. You can always follow up on the matter later or suggest they give you a call if they have any queries or concerns.

11. Avoid using shortcuts to real words, emoticons, jargon, or slang.

Words using shortcuts such as "4 u" (instead of "for you"), "Gr8" (for great) in business-related email is not professional.

12. "to:", "cc:", and "bcc:" fields

1. Understand the "To:" and "CC:" fields. The recipients listed in the "To:" field are the direct addressees of your email. These are the people to whom you are writing directly. "CC:" is for anyone you want to keep in the loop but are not addressing directly in the email. The person(s) in the "CC:" field is being sent a copy of your email as an FYI. The general rule of thumb is that recipients in the "To:" field are expected to reply or follow up to the email, while those in the "CC:" field do not.

2. Call out additions to the "To:" or "CC:" fields. If you're replying to an email and you add recipients to the thread (either in the "To:" or "CC:" field), be sure to call this out at the beginning of your email reply, e.g., "I am copying Susan for her input as well." This is a courteous alert to your recipient(s) that additional people have been added to the conversation.

3. Use the "BCC:" field sparingly. Use it primarily for sending an email to multiple recipients who don't know one another (note: if you are introducing recipients to one another, then use the "To:" field so everybody's email is visible). Avoid using the "BCC:" field to secretly loop in additional, unknown recipients.

4. Send or copy others only on a need-to-know basis. Before you click Reply All or put names on the

"CC:" or "BCC:" lines, ask yourself if all the recipients need the information in your message. If they don't, why send it? Take time to send your messages to the right people.

5. Beware of the "reply all." Do not hit "reply all" unless every member on the email chain needs to know. You want to make sure that you are not sending everyone on a list your answer—whether they needed to know or not.

13. Attachments

No more than two attachments and provide a logical name. Unless it's been specifically requested, refrain from sending a message with more than two attachments. Also, give the attached file(s) a logical name so the recipient knows at a glance the subject and the sender.

14. Fix email error with new email & Apology email for breach of privacy/confidentiality

Keep in mind, you don't want to make a habit out of sending correction emails. Client or recipient satisfaction can be negatively impacted if clients or recipients keep receiving these types of emails. The first step is figuring out if the error is big enough to warrant sending a correction email. Some mistakes are more serious than others, so you'll need to figure out what type of mistake necessitates an "oops" email. Common mistakes in marketing emails:

i. A link is wrong or not working
ii. Spelling or grammar errors
iii. clients or recipients is addressed incorrectly
iv. Secure information was leaked
v. Email was sent to the wrong clients or recipients

It's important to be prompt and send a correction email quickly. In some cases, your customers might only read the corrected version and skip over the original version. The longer you wait, the greater the chance for negative feedback from clients. In sending the correct email, please go to your sent mailbox and select the email sent in error and click reply using the "Pop out Reply" function

Dear [recipient's name],

We refer to the email below.

OPTION 1: Resending email for sending wrong information/attachment
Due to a minor error, please disregard the previous email and consider this one instead. [then re insert correct email text].

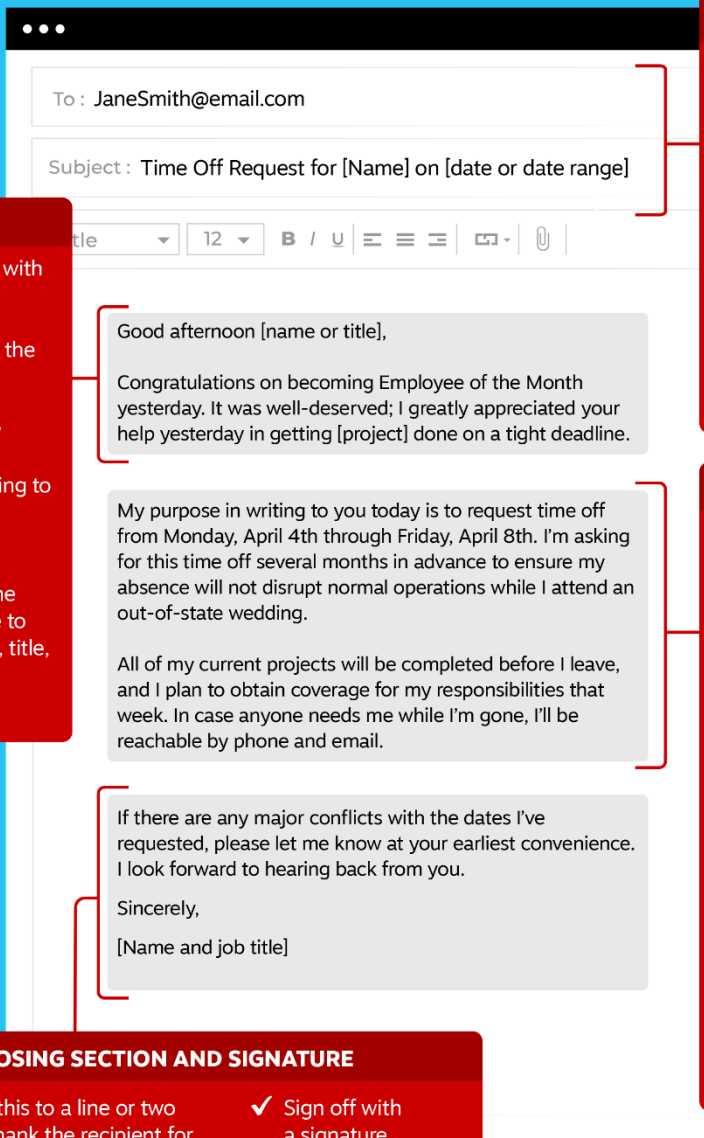
OPTION 2: Apology email for sending wrong email/person private details etc.
You may have noticed that we sent you an email that was supposed to be sent to another recipient. We are sincerely sorry for our mistake and any inconvenience it causes you. Since the information in that email was private between us and another client of ours, please help us to delete that from your mailbox delete the email from your mailbox, including attachments, not share with third parties nor retain any copies either in hard or electronic form. We are committed to managing its processes in line with our privacy policy and privacy laws. I also want to assure you that remedial actions have been implemented to significantly reduce the likelihood of this occurring again."

We take full responsibility and are sincerely sorry for any inconvenience or confusion our mistake might have caused you.

Thank you for your understanding.

If you have any questions, do not hesitate to contact us.
[Sender's signature]

How to Write a *Professional Email*



THE SUBJECT LINE

- ✓ Helps clients and colleagues immediately understand what your message is about.
- ✓ Point to the topic in a concise and specific way.
- ✓ Never leave this line blank.

THE GREETING

- ✓ Start your email with a personalized sentiment that connects you to the reader.
- ✓ Sets the tone by addressing the recipient according to familiarity and subject matter.
- ✓ Double-check the recipient's name to confirm spelling, title, and preferred pronouns.

THE BODY

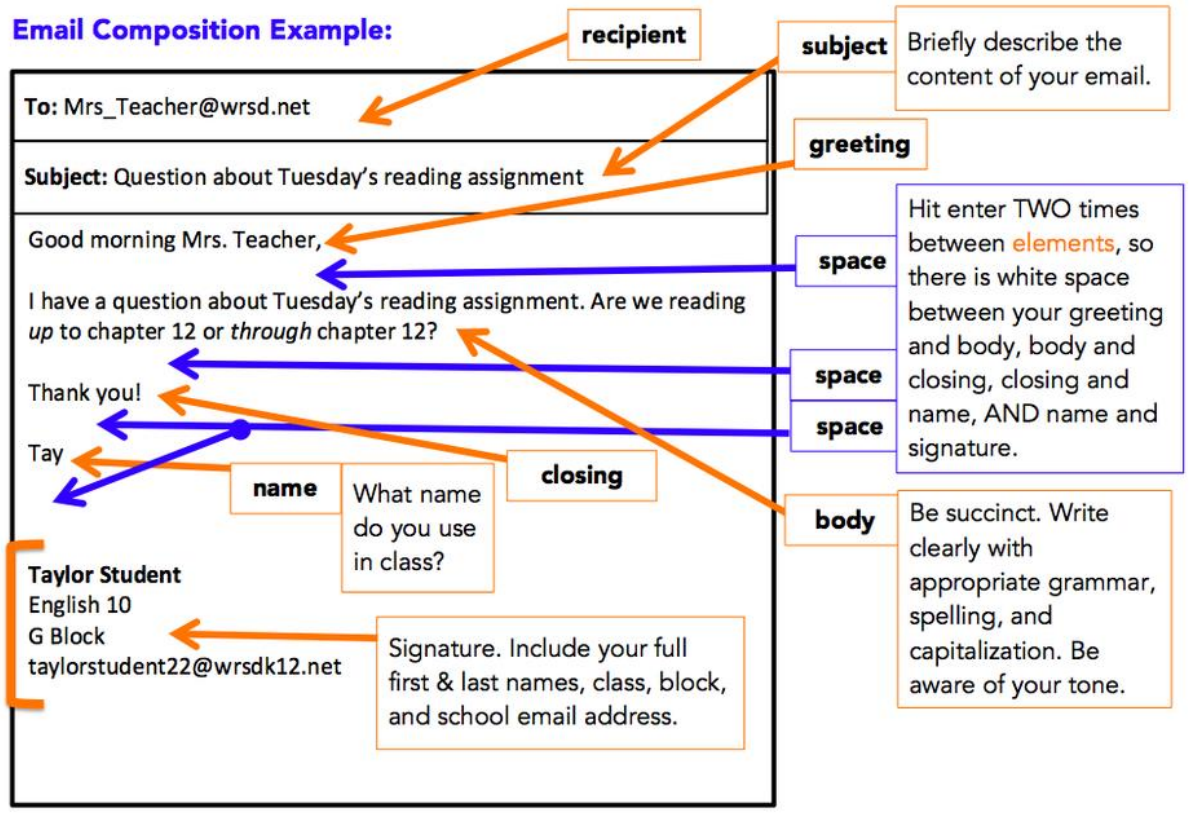
- ✓ Include a short, clear purpose statement and add context or details right after.
- ✓ Start new paragraphs as you transition from one idea to the next.
- ✓ Avoid paragraphs longer than four or five lines.
- ✓ Limit yourself to one question or request.

THE CLOSING SECTION AND SIGNATURE

- ✓ Limit this to a line or two and thank the recipient for their time. Repeat crucial info, and/or offer to answer any questions regarding your email.
- ✓ Sign off with a signature, including your full name and job title.

Staples


Effective Follow-up
Message
SarahJohansen@email.com
Hi Sarah,
I emailed you the requested project proposal last week detailing how we can help you achieve your goals. I'm checking in to make sure you received it and ask whether you've been able to look over it yet. If you have, I would love to get your feedback on it.
Let me know at your earliest convenience!
Sincerely,
John


Email Composition Example:
recipient
To: Mrs_Teacher@wrsd.net
subject
Briefly describe the content of your email.
Subject: Question about Tuesday's reading assignment
greeting
Good morning Mrs. Teacher,
space
Hit enter TWO times between elements, so there is white space between your greeting and body, body and closing, closing and name, AND name and signature.
I have a question about Tuesday's reading assignment. Are we reading *up* to chapter 12 or *through* chapter 12?
space
Thank you!
space
Tay
name
What name do you use in class?
closing
body
Be succinct. Write clearly with appropriate grammar, spelling, and capitalization. Be aware of your tone.
Taylor Student
English 10
G Block
taylorstudent22@wrsdk12.net
Signature. Include your full first & last names, class, block, and school email address.

Telephone Etiquette

Quick Reference Guide

Unit 01

Basic business telephone etiquette

Key words and phrases

- a bad time
- a good time
- check in on
- free
- interrupt
- on hold
- voice mail
- voice mail messages

8

→ Using good telephone etiquette

A. Be polite

Use the phone professionally: be polite, respect other people's time, and use **voice mail** wisely. Just because you're not face to face doesn't mean you don't have to show basic courtesies.

1. **Treat everyone equally.** Treat the initial operators or receptionists with the same respect you show their bosses.
2. **Focus on the caller.** Eating or chewing gum while talking, carrying on other conversations, or obviously working on other tasks while talking on the phone all show disrespect for the person on the line.
3. **Be helpful.** When answering the phone, ask how you can help the caller.
4. **Don't demand special treatment.** Sometimes we all have to wait **on hold**!

B. Respect other people's time

1. **Don't leave people on hold.** Even if you can't help a caller right away, **check in on** him or her periodically—every 30 seconds, preferably—to let the caller know that you are still aware of his or her presence and that you will help as soon as you can.
2. **Identify yourself.** When taking a call, identify yourself and your company; when answering someone else's phone, inform the person of whose phone you have answered. When making a call, give your name, organization, and purpose of call as clearly as possible. If you speak to a receptionist and tell him or her the purpose of your call, don't assume your message will be passed on when you are put through, repeat your name and purpose of the call to the next person you talk to.
3. **Make sure the person you've called has time for you.** Ask if the person you've called has time to speak to you, whether you are calling unexpectedly or following a prearranged plan. If the person doesn't have time to talk, try to set up a time in the future before getting off the phone. Conclude business phone calls by thanking the person you are speaking to for his or her time.
4. **Keep your calls to business hours.** Unless you've specifically arranged it, try not to call before nine am or after six pm.

The most basic principle of starting any call is to:

- Say hello to the contact by name.
- Introduce yourself by name.
- Introduce the organisation that you are calling from.
- State why you're calling.
- No matter the outcome, Thank them for their time.

TIPS:

1. If you don't get the person on the phone, leave a message with your call back number or send a follow-up email inviting them to give you a call back.
2. Be careful not to lose control of the phone call by letting the donor chatter away for 20 minutes about Fluffy, chit chat.
3. Cleary list the series of questions you want to 'Ask' before contacting them
4. Do Your Homework (before contacting external companies/organisations/individuals etc !)- If you contact someone with only minimal knowledge of who they are and what they do, they'll know it and you failed before you even started! Instead, do your due diligence and try to gather as much information as possible before contacting them. If you're unsure how to get started, here are a few places to start:

    i. LinkedIn: Look up your contact's profile on LinkedIn to confirm whether they're the right person.
    ii. Company website: Review their website to get information about their product or services and who their customers are.
    iii. Google News: A quick search here will let you know what the company is currently up to and shed light on any challenges they're trying to solve.
    iv. After a little bit of research, you will be able to open the conversation: "*I see your recent corporate responsibility initiative targets community growth; our non-profit BETA program works with many individuals with disabilities that we can directly connect to you for either education, training or employment.*"

The Outreach Call

Obviously, the problem and solution sections of the script must be modified to suit your specific organisation and appeal

The Intro

1. *Hello, {Contact Name/ Madam /Sir }.*
2. *I am {Caller Name} from BartMeph Foundation running the BETA Program.*
3. *How are you doing, this {morning or afternoon}?*

Pause , wait for the Contact's response /answers

1. *Great, whom am I speaking to ? just your first name would be appreciated .*
   (If it's Around Holiday Seasons, starting with Happy New Year or Happy Holidays is acceptable.)

Wait for a response, even a negative one. In either case, respond according to policy. If the caller remains on the line, then respond to their greetings accordingly before the courtesy question.

The Problem

At this point, you would introduce your problem. This is the reason you are calling .

1. *{Contact's Name } I would like to talk to you about {say reasons for call e.g., the non-profit BartMeph Education, Training & Apprentice Program (also known as the BETA program) / Your BETA program application/ Your employment / Your educational course, Your scholarships etc. }*
2. "*Is it a good time to talk , it will only take a few minutes?*"

If yes, continue the script. If no, then ask when a good time may be to call back .

The Ask

Ask: example phone scripts to use when asking education/employment/donor organisations engagement support:

1. "*The reason I'm calling today is to ask you if you would assist persons with disabilities this year {say reasons for call e.g., participating in the non-profit BartMeph Education, Training & Apprentice Program (also known as the BETA program) / Offer employment / Offer educational course, Offer scholarships etc. }*
2. If you sent them an email campaign, you could mention that here: *"Hopefully you got our [education/employment/donor etc] email campaign sent from our office some time ago."*
3. If you did your research homework before contacting external companies/organisations/individuals etc. you will be able to open the conversation here: *"I see your recent corporate responsibility initiative targets community growth; our non-profit BETA program works with many individuals with disabilities that we can directly connect to you for either education, training and employment."*

4. *Many [companies promoting corporate responsibility /donors/institutes etc] are supporting inclusion of persons with disabilities through offering direct [education/employment/donor etc] . We have many disadvantaged individuals on our Database that can fit your assistance selection criteria that we can discuss and share with you . Can we count on you for [your preferred support engaged] today?"*

(IF YES)

1. *"For your convenience, we will contact few selected individuals (max 10) from our Database and instruct them to directly email or submit their details to you and include us in communications. Is that okay with you?"*

(IF YES)

2. *"Thank you ! We're so grateful for your continued disability inclusion support, it's so great that you're doing this. Thanks to you, many persons with disabilities can achieve socio-economic and be able to participate and be equally visible in all areas of the community*.

Ask: example phone scripts to use when asking applicants/clients/volunteers :

3. "The reason I'm calling today is to talk to you about [say reasons for call e.g., your participation in the non-profit BartMeph Education, Training & Apprentice Program (also known as the BETA program) / Your CV/resume/transcripts/certificates/ scholarship grant notice / employment notice / education course notice/ social aid notice / volunteering for BETA Program/ Your head volunteer Part 1 assignment / head volunteer Part 2 assignment etc. }

4. If you sent them an email campaign, you could mention that here: "Hopefully you got our [scholarship grant notice / employment notice / education course notice/ social aid notice /volunteer match notice etc] email campaign sent from our office some time ago."
5. Many [applicants/clients/volunteers etc] have responded and are excited to be part of the BETA Program and continue to get assistance. Can we count on you for [your response today? **i.e**]

(IF YES/NO)

1. If you require assistance, we can link /match you up with us of our responsible volunteers to assist you with [say details assistance e.g. Your CV/resume preparation/ application for scholarship / employment / education course / social aid collection /]. Do you need a volunteer to be assigned to you?

(IF YES)

2. Great! We will send you an email shortly with you assigned volunteer link details and we will follow up on progress with you both
3. "We encourage you to be proactive and contact us should you require any assistance as we progress your file.
4. After you have successfully [received application assistance or received the scholarship / employment / education course / collection social aid/equipment /]. If possible, please can you send us a clear proof photo/picture of you (you can cover your face if you prefer) with your assistance outcome or write to us a review explaining how the BETA Program has helped you. This will help us get more organisations to help other individuals. Is that okay ?

(IF YES)

1. Great! Thank you

Objections

Now that the question has been asked, there are a few different objections that could potentially come up.

We don't do charity work/ or have employment / educational course, scholarships

2. *I understand completely – your engagement allows us to directly connect you with individuals with disabilities that would benefit from your engagement*
3. *How about future support engagement? – You can give us an estimate time far into the future for us to email you or call checking of any available engagement you might be able to offer – Do you have a direct email address I can use to contact you latter ?*

I support other individuals with disabilities

1. *I appreciate that you already support other individuals with disabilities.*
2. *However, we don't ask for help unless we really need it. Our organisation doesn't make calls all the time.*
3. *We're not fortunate enough to receive government funding, so we rely on our supporters to help us assist individuals with disabilities*
4. *As you might be aware The BETA Program works with individuals with disabilities to direct connect and secure education, training and employment with the aim to achieve socio-economic independence .*

Not interested

1. *I understand that you get a lot of calls from charities – I get them myself!*
2. *However, we don't ask for help unless we really need it. We don't make calls all the time.*
3. *I'd like to explain quickly why we're reaching out right now.*

Closing

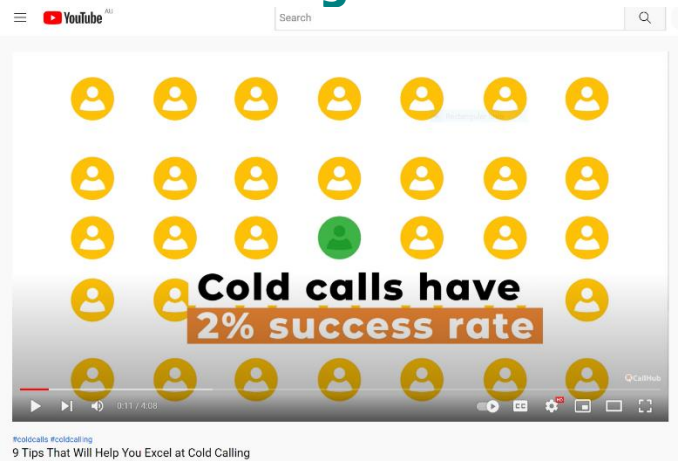
Contact says yes

1. *Excellent! – we really appreciate your support.*
2. *Do you have a detail on weblink/brochures employment / educational course, scholarships available? Or direct email address we can reach you on at the moment by any chance?*
3. *Thank you so much for your engagement support. Your support will go a long way towards achieving socio-economic independence of individuals with disabilities.*
4. *Thank you for your time, today. It means a lot to me and many other people.*

Contact says no

1. *No worries, thank you for your time today. We'll follow up with you at a later date. Have a great day! .*
   Bye !

Video Training - Lesson on calls



https://www.youtube.com/watch?v=ighmwRZ2hD8&t=120s

https://www.youtube.com/watch?v=ighmwRZ2hD8&t=120s

Answering Incoming Calls

2. *Hello! Thank you for calling the BartMeph Foundation. My name is {Your Name} _____."*
3. *Whom am I speaking to ? just your first name would be appreciated .*

Pause , wait for the Contact's response /answers

1. *{Caller Name} How can I assist you today?*

   ACTION: write down Caller name and inquiry or assist as required

2. *Thank you for that!*

Video Training – Basic Telephone Etiquette

Basic Telephone Etiquette

15. https://www.youtube.com/watch?v=MdvcXMBVP4Y
16. https://www.youtube.com/watch?v=t4w46RPukbc