

# Business Quality E-mail

A very powerful tool

*Expert knowledge means success*

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**Note:** This publication has not been updated since it was last published. Some of the hyperlinks may have changed and may need updating. In addition, some of the information in this publication may be out of date.

## Introduction

Communicating on the Internet and with e-mail is on the minds of many people today - it's the key to day-to-day productivity, profit and success.

You've been given a very powerful tool and technology, but there are benefits and risks:

### Benefits

E-Mail can produce many benefits to you and your organisation.

- Saves Time and Money
- Enhances communications
- Facilitates rapid collaboration

### Risks

You may think your e-mail is private and that you can send personal messages - It is NOT!

The problem is that you may risk violating laws or policies - libel, slander, harassment, copyright violations, improper downloading - all these can produce problems for you and your company or organisation.

## Business Quality E-Mail Guidance<sup>1</sup>

This guidance is intended to help you use it to the maximum in the performance of your job. It contains a wide range of ideas and instructions on how to make the best use of your e-mail capabilities, how to write effectively on your e-mail system, and how to avoid the pitfalls - personal, professional and legal - associated with using the e-mail system effectively.

## Make Sure You Know How to Use Your E-Mail System

Learn the features of your local e-mail system. With a little practice you should be able to do the following:

- Check to see if you have mail
- Read your messages

- Scan new and existing messages by header
- Scan new and existing messages by sender
- Save to disk or hard drive
- File or move to archive
- Delete
- Forward
- Print message
- Print attachment
- Create and send a message
- Address your message correctly to your primary recipients
- Address carbon copies (cc's) to your secondary recipients
- Address your blind copies ("BCCs") to your hidden recipients
- Create a mailing list for repeat transmittals
- Title your subject header for maximum impact
- Set the priority of your message
- Write your message for maximum persuasiveness and maximum impact
- Include a file as an attachment
- Retrieve a message from an archive
- Manage your archive
- Cut & paste text to your message
- Write off-line and load text (cut and paste or input) into your message to send
- Edit messages
- Retract a message after it has been sent (some e-mail systems)

## Writing Business Quality E-Mail

You should understand that if you behave badly in your e-mail, you will suffer the consequences both personally and professionally. Your reputation as an employee and a professional will be either enhanced or hindered by the quality and effectiveness of your e-mail.

The quality of your e-mail will determine how people respond and interact with you as a colleague and working professional. If you write poor quality e-mail, people will think poorly of you. Your performance and working relationships, career and professional development, and overall personal satisfaction can all be effected by the quality of your e-mail. If you behave

### The Regulations

E-mail can be a quick and convenient means of promoting goods and services to potential and existing customers. The Privacy and Electronic Communications Regulations 2003 (the "Regulations") came into force on 11 December 2003 and imposed new legal restrictions on e-mail direct marketing.

#### The old position

- Legally, it is generally not necessary to obtain an individual's explicit consent to receiving direct marketing e-mails, provided that in each such communication the individual is given the opportunity to opt out of receiving further e-mails.
- As a matter of good practice, however, you should refer to the British Code of Advertising, Sales Promotion and Direct Marketing which mirrors many of the requirements of the Regulations.

#### The new rules

- "Opt-in": Generally, individuals will have to give their explicit prior consent to receiving direct marketing e-mail.
- "Opt-out": If a customer's details are obtained in the course of a sale of a product or service, you may then use those details to market your own same or similar products or services to that customer.
- You must clearly and distinctly give the customer the opportunity to opt-out easily and free of charge when the details are collected and on any subsequent marketing e-mail.

#### Non-compliance

- The Information Commissioner can investigate and issue enforcement notices to individuals or companies who breach the Regulations.
- Failure to comply with an enforcement notice is a criminal offence and is liable to an unlimited fine.
- Any individual who suffers damage as a result of a breach may also pursue a claim for compensation.

badly you get a bad reputation and people will not want to work with you.

Be prudent. Treat all e-mail as confidential business communications - respect others. And don't send useless e-mail - send e-mail only if it contributes something to the recipient's knowledge.

## Tailor Your E-Mail to Specific Purposes

Use courtesy and propriety out of respect for your colleagues' time and energy. E-mail may be a time saving quick and easy way to communicate, but if you waste other people time and resources, or make them angry when they read your e-mail, you will not succeed, both personally or professionally.

Think carefully about why you are writing or sending e-mail. Ask yourself whether people will want to read your e-mail. What they will think or do after they read your e-mail. What will they think of you? Does the end fit the means?

Tailor your message to a specific purpose. Identify your reason for writing. Know what you want to accomplish by sending your e-mail. Make sure what you write and send supports your goal or objective.

Learn to write different types of e-mail for different purposes. Learn the different acceptable formats and styles you may use to achieve a business communication purpose. Become versatile and adept at using e-mail effectively for a wide range of purposes. Use a variety of e-mail writing styles and formats to achieve higher levels of effectiveness and productivity.

## Tailor Your E-Mail to Specific People

Tailor your message to a specific person or group of people. Design your e-mail to meet their needs.

Understand that different people have different needs. Different people may react to the same e-mail message differently. Their response depends on their position, experience and perspective.

Give people just what they need - not more and not less.

Learn to write effectively to the different people you deal with:

- Colleagues - need details in succinct, organised ways to describe the relationship to their job or function;
- Supervisors - typically they need top level summary information, and don't want details;
- Outsiders - need to receive information that has been cleared for release by your organisation;
- Employees need detail enough to perform delegated tasks and assignments.

Don't send unsolicited e-mail. Make sure you know who you are sending e-mail to. Many people simply delete e-mail from people they don't know. Others get a lot of e-mail and simply resent unsolicited e-mail.

If you have to write to someone who doesn't know you, make sure you tell him or her who you are and why you are writing.

## Standard of Professionalism

Don't relax your standards of professionalism. Business quality e-mail should be capable of being copied into a paper memorandum for transmittal through normal, conventional channels, without significant revision.

Don't assume e-mail is intended to be less formal, less precise, more personal and less business-like than other types of communication used by professionals in the workplace.

Do seek to achieve the highest level of professionalism in your e-mail writing. Give careful thought to your choice of words, tone, content, organization, brevity, and presentation.

## E-Mail Is Not Private

Don't be fooled by the illusion of privacy. Your password gives you access and authorisation to use the computer system. It doesn't create special rights of privacy in your messages. Once your message is sent,

there is no guarantee it will remain private or confidential and you should recognise that:

- your message can be forwarded with or without your permission
- your message can be stored and retrieved from other computers through which your message passes on the way to your recipient
- your company or organisation may monitor the messages on the e-mail system as a matter of policy
- your message may be provided to law enforcement agencies in response to an investigation, or to other parties in response to a request for production of documents during discovery in a legal action

## Choice of Words, Tone and Content

In your e-mails:

- Don't be abusive, nasty or rude.
- Don't be naughty.
- Be cheerful
- Avoid sarcasm and satire
- Write brief factual, unemotional statements, unless emotion is an important part of the message
- Always attack the idea - never attack the person
- Don't assume the sex of the recipient. Check to make sure so you don't make any unintended blunders.

## Watch your opinions, and give credit and references where they are due

You should label your opinions clearly if you communicate them, and separate them from facts. You should identify what is fact and what is opinion - provide references to substantiate facts if it is helpful to your reader. You should always give credit to others for information provided in your message. And don't quote others without their permission before you send an e-mail message containing their words.

## Be careful about including confidential or sensitive business information in your message

Don't write and send business sensitive, confidential, trade secret, proprietary, or highly personal information. Be very careful what you send about contracts, business, customers, management plans, finances, and technology. As an employee, you have an obligation to protect insider information.

If you inadvertently receive confidential or sensitive information, consider letting the sender or management know that he or she sent it to the wrong person, or sent inappropriate information via e-mail. Some companies and organisations have requirements that require such disclosure, under threat of penalties for failure to so inform the sender or management of the violation of requirements.

## Use of Symbols, Trade Names, Acronyms, Abbreviations and Jargon

Don't use special symbols, acronyms, jargon or abbreviations unless you are absolutely sure the recipient will understand what you are saying and there is no risk of being misinterpreted.

Don't use trade names. If used positively, the e-mail can be taken as an endorsement. If used critically, the e-mail may be used as evidence in a suit for defamation, libel, or slander.

Don't use smileys, emoticons or acronyms in business quality e-mail. These are

considered childish, immature, and non-professional, at least when used in business quality e-mail. When used under the right circumstances, as in personal e-mail, they can be very useful, entertaining and effective.

## Grammar and Text

Don't use all CAPS. Reading an e-mail in all capital letters is difficult and tiring on the eyes. CAPS ARE INTERPRETED AS SHOUTING!!!. It conveys anger and an overstated sense of self-importance. This is inappropriate in business quality e-mail. Using caps also make everything appear as if it were of equal value. Caps make it very difficult to understand what is important and what is not.

Use caps the way you normally would them in business writing, that is, to create emphasis, sparingly, when appropriate.

Don't use all small letters. This is interpreted as immature, non-professional. It is also grammatically incorrect

Use mixed case - Write normal sentences.

Proofread before you send - Correct spelling errors, grammar and content. As you would in any other business quality work, revise, revise, revise to make sure you get the content, style, & tone just the way you and your organisation would like to see it.

Avoid discriminatory language and be very careful discussing discrimination, political, or legal issues:

- Don't write critically about any other individual's sex, colour, race, appearance, national origin, religion, age, or physical or mental disabilities. You can become embroiled in disciplinary matters and may even face termination or a legal action.
- Don't joke, tease, harass, intimidate, threaten, cajole, or coerce anyone.
- Don't express strong political opinions.
- Don't use sexually explicit language, sexual innuendo, and profanity.
- Do be gender neutral. Eliminate masculine nouns or adjectives from your writing, in favour of sex-neutral language.
- Don't send jokes or frivolous messages.
- Don't allege wrongdoing or accuse someone of anything illegal.
- Don't kid someone about something they did, said or wrote. What you intend as a kidding remark may be taken as criticism and held against you. It also renders the e-mail un-forwardable and may be deemed useless.
- Don't create and use "secret codes".

- Don't try to send anonymous e-mail. It's no use - your e-mail identification allows system operators to identify where your mail came from. If an investigation ensues, you will be found out.
- Don't flame people or participate in or fan the flames of an e-mail war!
- Don't send outrageous e-mails.
- Don't react to outrageous mail. Use the 5-minute rule - take a break and go do something else before responding. Re-read the message, and cool off before writing back. Then be tactful and discrete - don't be angry.
- Don't forward outrageous e-mail, except to your supervisor, e-mail system administrator, or ethics counsellor or representative for appropriate action.
- If in doubt about, use parentheses to soften the tone.
- If you get flamed, don't react immediately. Think before you write. Call or go see the person before you fire off a bomb that will reverberate through the company or organisation and reflect poorly on your performance and that of others.

Follow The Golden Rule - Do unto others as you would have them do unto you!!!

## If the message is strong - don't use E-Mail

Don't use words that require a strong tone of voice.

Don't send an e-mail unless you could:

- Say the same thing right to the person's face.
- Say the same thing to a person standing in a crowded elevator.
- Be happy if it were printed in the New York Times or your local paper.
- Share it with your mother, or your in-laws.
- Present it as an exemplary sample of your work to your next employer.



## Format Your E-Mail Message Carefully

Make the message fit the situation. Always adapt to the needs of the situation. Some e-mail will fit into the "You ask - I answer" mode. Other messages may not.

Tailor your message format and content to the needs of the recipient. And tailor your message format to meet your purpose in writing:

- Keep it short and simple.
- Put the most important information in the first paragraph.
- Tell your reader what action you want him or her to take in the beginning of your message.
- Use messages that fit on one screen of three paragraphs each with two to three sentences.

If you have written a message with more than two screens think about using an alternative method. Re-read and revise your message and shorten it or break it into two or more messages.

When a message requires special time, consideration or care, write the message off-line. When it is done, load into the e-mail system, using the cut and paste commands, and then send your message.

## Addressing your E-Mail

Make sure the name and address are correct.

Don't send e-mail to people who do not need to receive it:

- Put your self in the position of the recipient - ask yourself - "Would I want to receive this?"
- Use e-mail to notify or involve other people, especially when there is a good reason for their involvement, when they benefit from knowing or can help you by providing comments, or collaborating.
- Don't over-distribute.

Describe who you are if the recipient doesn't know you or know why you are writing

Build and save mailing lists when you will send messages repeatedly to the same group of people or team.

Add a salutation and a closing - Use "John" or "Ms. Raven". Say, "Regards" or "Sincerely"

Put your phone number, address, and fax number at the end to give your recipient alternative ways to respond and communicate with you.

Choose a good subject/headline - to grab attention, state the subject and the action requested. Describe the subject succinctly to help the reader understand your message:

- Identify the subject with action words to get readers attention.
- Don't use a subject heading that is a joke, or attempt at humour.
- Don't ever leave the subject line blank.
- To establish the priority or classification, use "urgent" only when necessary such as information that is "Need-To-Know - Right Now!!!" Use normal priority for typical day-to-day or nice-to-know information.

## Know your audience - primary and secondary

Think carefully about who else may receive your message if it is forwarded. Re-read your message and addressees one last time before you click to send. Make sure you get it right!

Use "carbon copies" - ccs - to share information with secondary recipients but don't use too many ccs unless you really need to communicate the information to that many people.

When selecting ccs, think about whether your primary recipients will want and how they will feel about the cc's receiving the same message. Does this serve and further your purpose in writing?

Be careful when using blind copies - bccs. Beware the "I know but you don't know!":

- As a general rule, don't use bccs to third parties. Blind copies are viewed as unethical and underhanded. How would you feel if somebody you didn't know, and possibly didn't want to know, received a message?
- Do send yourself a bcc when you need to save a copy for your own records.

- Bcc to a third person is dangerous, but may be appropriate, if there is a special need to legal provide notification or a witness to a communication or transaction.

## Receipts (RSVPs) - Beware the Message Behind the Message

You use an RSVP to make sure a person gets the mail. It's just like certified mail.

But be very careful when sending an RSVP:

- Recipients of RSVP's quickly view the sender with doubt and mistrust. They may feel intimidated and concerned about what you will do with the message. RSVP's can be very intimidating and threatening.
- Think about the effect of the message behind the message - "I know you received this e-mail - you can't deny it!!!"

Using an RSVP can change a positive working relationship from cooperative and productive to antagonistic and adversarial.

## Replying to E-Mails

When replying include or describe enough of the original message to make sure the person knows what you are referring to:

- Don't repeat the whole message -- just the relevant parts of the original. Restate, quote, or cut and paste just what you need to remind the reader what you are replying to or to get the context correct.
- In a short "you ask - I answer" e-mail, you may chose to use ">" to identify original writing.
- Stay on topic when you reply - don't switch topics or ramble.
- Don't reply automatically, unless you have something to contribute or have a legitimate reason to respond.
- Don't reply in anger or haste. You may regret it later. Give senders the benefit of the doubt - be courteous, be professional.

## Forwarding

If you receive someone else's mail, send it to them with a note saying that you received it by mistake. Also send a note to the sender that it was sent or addressed to the wrong person, and that you forwarded it to the right person:

- Use discretion when forwarding e-mail. The person who sent you the original message will think that you can't be trusted. He or she will be much less likely to share further correspondence with you not knowing who you will send it to next.
- Forward to a third person only when it is appropriate.
- Don't forward without permission from the original sender.
- Don't forward without permission about who else is supposed to receive the message.
- Don't forward to people who don't need have a legitimate interest or need to know.
- Don't change someone else's message - it may be illegal to do so. You could be found out, and cause damage to someone's reputation. You can also harm your own reputation, and possibly suffer disciplinary action from violating professional ethics, policies, or legal requirements.
- Don't forward to upper management in your organisation by skipping over your direct supervisor.
- Don't forward to lateral employees or managers without checking with the cognisant, responsible managers or staff.
- Recognise that your e-mail can be forwarded to others. Write carefully and understand that you may have unintended readers to deal with.

## Attaching Files to your E-Mails

Attach files only what is necessary to your message:

- Not everyone appreciates having to take the time and go through the steps to download the file, enter a different program, and upload the file just to get access to the attachment.
- Label and describe your attachment so that people can decide whether they want or need the attachment.
- Watch the length of your attachments. Warn people in advance of the size or number of pages of a lengthy attachment.



- Watch the number of your attachments. Combine numerous attachments into one single file to make it easy on the recipient.
- If the length, number, or memory of your attachment is large, get permission ahead of sending your message.
- Don't send a message that takes a lot of memory without notifying and getting permission.

If your recipient is knowledgeable and has the appropriate decompression software, compress your file before attaching it, and identify the file as a compressed file. Try using Adobe Acrobat to deliver files in PDF format so that recipients can read your file attachment without needing the software that the file was first written in.

If message and files are large, consider using alternative means to deliver the information. Using conventional means (hand deliver, courier, mail, overnight express, etc.) send a disk, tape, or hard copy. If the recipient is Internet savvy, consider placing the file on an FTP site, and let the recipient know how to access and download the file.

## Managing your Mailbox

Respond to e-mail promptly. If appropriate send a quick 1-2 line e-mail reply indicating your receipt and schedule on responding in more detail if necessary. Tell your colleague or client what you are going to do and when, and follow through.

Check your e-mail regularly. Set up a schedule or routine. Dedicate the time to review and respond to your e-mail one, two, or three times a day. If you have a need to work in real-time, you can set your e-mail to chime or alarm when e-mail is received by your computer. But remember that this tends to interrupt your attention to other dedicated tasks, and it will take extra time to switch programs back and forth to retrieve your latest e-mail messages.

Clean out your mailbox regularly. Keep the number of saved messages to a tolerable minimum, one maybe two screens. After that, review all messages and delete stale or unneeded messages. Ask yourself whether you really need to save a message. Save important messages to disk or hard drive or archive them in the e-mail software program. Periodically

you may want to backup your whole system, and then purge all your folders, and start over.

Be aware that deleting a message or file from your e-mail software does not mean that the information has been destroyed and cannot be retrieved.

Be aware of computer system or organization document deletion and retention policies and procedures.

## Protecting yourself and your Company from liability

You should set up a special e-mail password for your computer station, but:

- Protect your password. Use a non-obvious password. Change your password frequently.
- Watch out for scammers - people who try to deliberately acquire your password for inappropriate uses.
- Protect your computer from unauthorised users and use.
- Don't leave your computer on with e-mail program running.
- Don't share your password with unauthorised users.
- Don't put your password on a little post-it sticker and leave it pasted to your computer screen.
- Do share your password with your secretary, and your supervisor, if policies allow you to do so.
- Don't use anyone else's computers or e-mail, without express authorisation.
- Don't read others e-mail - on their computer screen, on their desk, at the laser printer, garbage can, or recycling bin. This may be viewed as a violation of business ethics, company policies or legal requirements. You may be subject to disciplinary action, or legal penalties
- Don't encrypt messages without special authorisation.
- Don't download copyrighted materials.
- Viruses - don't download executable files.

E-mail - isn't free. It cost less than paper but when you add up the total costs of e-mail in an organisation, it can still be quite significant:

- Be responsible and considerate of e-mail system resources. Log off correctly to preserve system security, computer system integrity, protect against message or data loss, and increase energy conservation.
- Know that you will be held responsible for what you say.
- Know that E-mail is not entirely private. Overly personal writing should not be placed in an e-mail message

## Using E-Mail to the Maximum

Knowing when to use E-Mail and when not to:

- Use e-mail for normal business communications.
- Use e-mail for spontaneous expressions of gratitude and thanks. But don't forget that many of these will have greater impact if done formally on paper.
- E-mail is often used as a nice supplement to share a worthy accomplishment with the rest of the company or staff.
- Work out personal or knotty technical problems FACE-TO-FACE - don't hide behind your computer.
- Be careful about using e-mail for consensus building.
- If complex issues are to be discussed, consider using the telephone, v-mail or having a face-to-face meeting.
- Remember to let the medium match the message. Be aware of the skill level, maturity, experience and comfort level of the person who will be receiving your message.

If important matters are to be debated, face-to-face may be the only way to resolve problems or issues. Face-to-face allows for people to see and respond to body language, facial expressions and vocal inflections. Face-to-face also allows for group dynamics to influence the discussion and outcome. Synergy and a much more efficient and effective outcome may result.

## Teamwork & Collaboration

When working in a team or collaboration mode, avoid sidebar discussions. Coordinate communications so that all participants are copied or forwarded all appropriate messages, files and documentation.

Remember that:

- It is not polite or effective to communicate selectively.
- Sidebar discussions can alienate other team members or parties.
- Anger and destructive energies may then be directed at the offending team members. This can seriously reduce the effectiveness of the overall team effort.

Keep the right people posted - don't ignore key people. Create a list of key people - a network of contacts that must be communicated - who, what, when, and how, and by whom. Identify all the people who have a legitimate need to receive information of be involved in communications over time. Create a communications plan and factor the use of e-mail into it appropriately.

Don't use e-mail for:

- Hiring
- Firing
- Quitting
- Asking for a rise
- Asking for a transfer
- Filing a formal complaint
- Or other critical personnel issues or legal matters

Don't rely on e-mail for time critical messages. Some people don't use their e-mail regularly. Others may not be physically available. If there is any doubt, use a phone, voice-mail or face-to-face if you can't be sure recipient will receive message in time.

Be aware of the internal role e-mail plays in corporate politics:

- Consider the rank of the people who will receive your message. Be especially careful when sending e-mail to upper management. Be careful not to write to or send e-mail (copy) to someone your bosses, their supervisors, or other senior officials wouldn't want to have receive your message.

- Run a draft of your e-mail through your supervisor for review and possibly for concurrence before sending a message to another division, to an upper management official, or an outside client, customer, or individual, or organisation.
- Don't forward to upper management in your organisation by skipping over your direct supervisor.
- Don't forward to lateral employees or managers without checking with the cognisant, responsible managers or staff.
- Seniors should take care writing e-mail to junior employees. Don't use words that can be viewed as critical, harsh, demeaning, patronizing, or intimidating. Don't appear to download tasks without coordination or delegation through middle managers and supervisors.

## Promoting your E-Mail Address

Learn your e-mail address and share it with your colleagues, and clients or customers. Tell them to use e-mail. Collect their e-mail addresses and enter them into your e-mail address book.

Add your e-mail address to your business cards and stationery, and all promotional materials.

Know your company policies about:

- Use of e-mails for business related purposes only
- Limits on personal uses
- Company monitoring

## Helping new users to learn the system

New employees should sit back and study the mail they receive before they start using the e-mail system. Get a feel for the climate, the style of writing, the content and tone used by colleagues.

Help new users survive and grow. Don't be too quick to criticise their mistakes. Share your experience and help them learn. Mentor them and help them become effective productive e-mail users.

## Using Internet E-Mail Capabilities

You can include a "hot link" to an Internet web site (also known as a URL, for Uniform Resource Locator) in a message. Enclose it with less than and greater than signs (angle brackets) to ensure that the recipients e-mail application software can identify it as a URL. An example would be:  
<<http://www.yourcompany.com>>

You can also include pop-up e-mail addresses, which bring up your e-mail software and automatically address your message. Place the words "mailto:" immediately in front of the e-mail address you wish to use. For example:  
<<mailto:boss@yourcompany.com>>

The underline beneath these hot buttons signifies that they will automatically link to the Internet or your e-mail system.

## Use E-mail to lessen the impact on company resources

Reduce the drudgery on secretaries. Use e-mail as an alternative to typing memos letters, long documents, multiple photocopies, newsletters etc.

Logging off and disconnecting correctly saves money, protects data from destruction, and protects system from unauthorised use. E-mail is environmentally friendly - it saves paper, saves trees, saves money, time, and energy. It is a good way to squeeze the most out of limited financial resources.

Use e-mail to enhance communication of news, events, policies, and facts of interest to the company workforce. Use e-mail to communicate news that will benefit your colleagues and management:

- Assignments and Requests
- Critical Items Reports
- Weekly Reports
- Issue Papers & Analyses
- Meeting Notices/Invitations
- Meeting Minutes
- Field Reports
- Team Reports

## Further Information

This guide is for general interest - it is always essential to take advice on specific issues.

We believe that the facts are correct as at the date of publication, but there may be certain errors and omissions for which we cannot be responsible.

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### Reference:

<sup>1</sup> Written by Paul J. Krupin, an acknowledged expert on e-mail marketing. Direct Contact Publishing publishes the *U.S. All Media E-Mail Directory* with nearly 12,000 e-mail listings for magazines, newspapers, radio, TV and syndicates. Available as a book (\$79), a database (\$99) or both (\$129). Contact details are shown below. <http://www.directcontactpr.com/>

### Acknowledgement

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