

# STAFF TRAINING

## Email Habits and Tips

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### PURPOSE:

Have aligned habits and skills with emails to maximize efficiency and speed of communication internally and externally.

When you see an email, consider always do one of the following:

- Toss it / Refer it / Act on it / File it
- Delete it / Do it (respond or file) / Delegate it (forward) / Defer it (using categories / flags)

Give a short reply when possible, so that the sender knows you received the email.

- Got it, on it, done.
  - As the sender, request a response specifically to yourself or reply all for team. *This will eliminate multiple people emailing "Got it" to everyone on the email chain.*

Use subject line to save time: clarify purpose / make it easily searchable for later reference.

- "reply needed" / "FYI" / "Changes we've made with volunteer scheduling"

When including other people in the body of email, make their name stand out at the beginning:

- @Filipe - Can you take care of the below?
- Filipe - Can you take care of the below?
- +Filipe - Inviting Filipe to the conversation, he is the Executive Pastor @ Echo.

Keep your message short and sweet, and pay particular attention to formatting. Your email needs to be as easy as possible to read (bullet points for example always help) and straight-to-the-point. Use short sentences instead of long paragraphs.

When emailing groups, clarify why they are getting this email or who it is addressed to.

- "Hi Echo Group leaders..." / "I'm emailing you because you recently visited Echo.Church and I thought you'd want to know..."

- When sending emails to large groups, always use BCC.

Separate email accounts - Keep a separate email account for business & one strictly used for personal mail. Keeping the 2 accounts separate helps you focus on your work responsibilities.

- Always use your Echo.Church Google Apps account for church related emails, documents, spreadsheets, and other Google drive functions.
- Consider having only 2-3 email addresses: work, personal, "sign ups".

#### Great goals with emails:

- Reply within 24 hours to your emails during work week.
- Finish the work week with few emails in your inbox .
- Prioritize your supervisors emails by using the VIP function on your iPhone.
  - Open the Mail app & find an email with a sender that you want to mark as a VIP.
  - Tap on the email address of the sender / Tap Add to VIP.

#### Other tips:

- Consider using a single archive box, instead of many labels.
- When you receive junk emails, immediately unsubscribe instead of deleting.
- Set unique times to check email daily: 8-9am.
- Not Available Messages - It is okay to post a message on your account that says, "I am not available right now. If this is an emergency contact XXX." This allows you to maintain your focus on the job that must be completed now.
- Consider merging your email with your task system. For instance if you use Trello to manage your tasks, you can use an add on feature from gmail to easily create tasks in Trello straight from your email.