

PRASC



**Project for the Regional
Advancement of Statistics
in the Caribbean**

**Projet régional pour
l'avancement de la statistique
dans les Caraïbes**

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Information Management Module 3: IM Practice - Email



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Module 3: Email

Session Overview

- Email challenges
- Crafting emails
- Handling emails
- Managing emails: What to keep and not to keep
- Storing emails

Discussion

- Personally, how do you manage your emails?
- Overall, how does your organization manage emails?
- What are some of the challenges you have encountered with email in your organization?

Common challenges -- Do these seem familiar?

- Where is the email?
- I didn't get a response
- I didn't get copied on this
- What was that decision?
- I have too many emails!

What can we do?

Crafting your email

- Subject
 - Clearly state the subject
 - Best practice: one subject per e-mail
 - State the purpose up front (e.g., for review, for decision, for information)
- Recipients
 - Include only those who need to respond or be informed
- Message
 - Be clear, concise
 - Make sure the recipients know what is required of them
 - Provide a due date for a request

Crafting your email – additional aspects

- Consider etiquette / courtesy
 - Tone, salutation, signature block
- Check it before you send it
 - grammar, spelling, messages, tone
- Security
 - If the information is sensitive, use appropriate security measures (e.g., encryption)

Handling emails

- Deal with your email, then delete or store it as soon as possible
- If you need to keep your email in the short term:
 - Use folders to organize your email
 - Use the features of your email application that will help you manage emails (e.g., flags, categories, rules)
- If you are falling behind, set aside time to do a clean-up

What to keep and what not to keep

- 95% of email is needed only for a short period of time (transitory), then it should be deleted
- Keep only what has business value
- Best practices:
 - If the email originates from within your organization: the writer of an email of business value is responsible to store it
 - If the email comes from outside: the primary recipient of the email is responsible to store it
 - Store only the last email in a thread – it contains the history of all the “back and forth”
 - (Exception: Where there are multiple responses to an original email that all have business value, you will need to keep the last email in each chain of responses)

TO KEEP OR NOT TO KEEP – HOW TO MANAGE YOUR EMAIL

TO KEEP



- ✓ Information still useful for decision making, program operations or service delivery
- ✓ Final instructions
- ✓ Accounts of the Agency's business activities
- ✓ Decisions involving financial and legal matters
- ✓ Records of how and why decisions or actions were taken
- ✓ Emails containing information that should be part of the corporate memory
- ✓ Emails required for an active Access to Information and Privacy (ATIP) request

- ✗ Casual/personal communications
- ✗ Meeting requests or notifications
- ✗ Emails containing / referring to content available elsewhere, e.g. the ICN
- ✗ Emails containing annotations and comments incorporated elsewhere

- ✗ Notification emails for past events, e.g. social activities, building closures
- ✗ Emails automatically generated by a system, e.g. SRM and TMS requests
- ✗ Emails with wide distribution lists and generic content, e.g. GCWCC, @StatCan

NOT TO KEEP



Where to store emails of business value

- Best option: Use a repository if you have one
 - i.e., a system that is organized, allows search, has security controls, etc.
- Alternative: Use a shared drive, or other shared storage location
- Less desirable: Printing the email to place in a hard copy file
- Risky choices:
 - use of removable storage (except as a back-up)
 - keeping information of business value in your work email account or in a personal drive
 - Use of email archive files (eg. PST files in Outlook)

Never keep information of business value in your personal email

Best practices for storing emails

- In your electronic document storage location:
 - Organize folders by function and activity
 - Use naming conventions for folders
 - Choose descriptive titles or file names
 - Store emails in the same folder as documents related to the same activity
 - If you have attachments, consider if the attachments need to be stored separately from the email (e.g., so that they can be more easily located)

Recap

- When sending emails be clear, concise, and accurate
- Handle your emails right away
 - Once you have read or responded to an email, store it or delete it.
 - Schedule regular time to clean up your email account.
- Delete any emails that don't have business value
- Save emails of business value to a location with the appropriate security, access, organization, and search capability

For reflection

- What can you do to improve how you manage your emails?
- What can your organization do to better manage emails of business value?

Add to your action plan

Apply what you have learned

Task: Create instructions to staff on managing email

- This could be:
 - A one-page tips sheet
 - An email to be sent to staff
 - An email clean-up event
 - A presentation
- ... or a combination of the above