

Transcript of Presentation

A note from Ryan:

Most of my writing programs have a rigid structure.

In contrast, I always say that my program on email etiquette is “closer to a *conversation* than a *presentation*.” You, the audience, choose which topics we cover and which ones we do not.

In case there is a topic that we do not cover, or one that you would like more information on, you are welcome to read below.

The material below is a transcript from an e-learning edition of this program. When I recorded the e-learning program, there was no audience in front of me, so I simply went through the topics in order.

1. Email length

How long is too long?

Here is a sample email. The subject is “Follow-up Program” and the sender is me.

This is an email that goes back to the first time I taught at a particular company. I gave a seminar, it went well, I received positive feedback from attendees, and I figured, why don't I follow up with the company to ask for some more work?

So I wrote to my contact, Lisa.

See if you enjoy receiving emails that look like this. A big wall of text!

Ugly; scary; horrible, right? So how are we going to write a better message?

Well, I cut it off right there (see the arrow). I wrote:

Hi Lisa,

Thank you for organizing our session last week.

And then I finished with just a short message that had lots of white space.

As we discussed, I would love to return in a few months to deliver a follow-up program. Attached is an overview of what the program would cover.

This completely changes how Lisa feels when she receives my email. Most importantly, I have shown her that I respect her time. I've sent her a nice, short email that she can scan in five seconds to see what it says.

Think about the original version that we looked at. There's nothing in it to suggest whether the key information is in Paragraph 1 or Paragraph 7, and so the reader would have to read the entire thing just to wrap their head around it.

In the revised version, we flip the narrative. Lisa says: I like the way Ryan communicates; he respects my time; so I actually want to open his attachment and read what else he has to say. Lisa feels empowered because she is now *choosing* to read my message rather than having it *shoved at her*.

In my seminars, however, I always get people saying: My clients are too busy or too lazy to open attachments. I respond with: Okay, so think outside the box; what else could you do in this situation? Instead of writing "Attached", you could write "Below".

There isn't a single correct way to do this, but my style is to leave the "Warm regards, Ryan" where it is but pop my email signature way further down.

And, by the way, is my text still going to look like those long, clunky paragraphs? No, of course not. Here is a bird's eye view of the entire layout.

It now has some colour, some bold, some headings, some bullets, etc.

Not only is this easier to read the first time around, but think about a week later when your reader needs to refer back to your email just for one specific piece of information.

In the original version of the email, there's no "signage", so the reader would need to read the entire thing just to find the one item. In the revised version, there is so much signage, or guidance, that it shouldn't take more than a couple of seconds.

2. Response time

What do you think is considered appropriate response time? It's a tough conversation to have, because there's a lot of "it depends". But we'll try to set out some parameters.

First, urgent is urgent. If something's urgent, try to write back as quickly as you can, and we won't talk about that any further.

Second, your team, your office, your supervisor in particular, might have certain expectations, and if so, you follow those unique guidelines. You might have a policy in place that basically says *We respond to everybody within an hour or*

two, even if it's just — I received your message and I'll get back to you once I have the complete answer.

The next place to go in this conversation is the more general, 24-hour or same-day rule.

You hear that timeframe mentioned a lot. It means that you should respond to someone within 24 hours, or if you received an email in the morning, and it would seem a little nonchalant to wait until the next day, then you try to get back to the person at some point on the same day.

The thing is though, that the pace of work moves so fast, that if you fail to respond to an email for five or six hours, a lot can happen in the interim. For a bit of an extreme example, if a prospective client is contacting you, one of your competitors may have already written back to them ... and you know how impatient your existing clients are. Each one thinks they're your only client.

So you have to walk the line between being Superman or Wonder Woman – dropping everything and writing back at warp speed – and allowing yourself to control your clients.

Because, your response time has the effect of setting expectations. If you're always writing back immediately, then you signify that that's your normal response time. And then if you suddenly get busy with something, and you can't respond to clients quickly, you give off the signal that they've become less important to you.

So it's a very delicate balance, and I know that I'm painting the whole picture without really giving you any specific guidelines, but I'll get a bit more specific now.

The bottom line, in my opinion, is that you should not rush to write people back, but once you've been in the workforce for a while, you get a little voice in your head that tells you when you should jump on something, depending on the personality of the client – or colleague – and the nature of the file.

The good news is that the longer you develop a relationship with someone, the less of an issue response time becomes. After you've done three or four pieces of work with the same person, they know what you're made of. At that point, they're just relieved to be working with you, because you've established a reputation for producing high-quality “stuff”, and they're happy to wait through a short delay if you get busy with something rather than roll the dice with one of your competitors.

I actually love those people who sometimes take two or three days to get back to me; maybe even a week; but they always *do* get back to me. In turn, I take it as a

sign that I can write back to them slowly if other things come up, and it gives me a sense of calm in an otherwise hectic world.

The last thing I'll mention about response time is the phrase: I'm sorry for the delay.

I hate everything about that phrase, and yet I still use it occasionally. It feels like good manners, or, at least a way to ask for forgiveness. The reason I don't like it is that I don't feel as though I need to apologize; I didn't delay because I was sitting around watching Seinfeld ... I delayed because your matter wasn't urgent and others were! But anyhow, I think I'm fighting a losing battle, so let's move on to Topic 3.

3. Subject lines

Much of the hype around subject lines is overblown, because it's the topic that you think we're going to spend a long time on in an email etiquette session, but when you really dig beneath the surface, you'll see that all the literature on subject lines is for people who are sending emails to recipients they don't know.

Another way of saying that is people who are sending out "cold emails"; an expression that comes from "cold calls". The question there is: What are the magical words to get people to open your email?

But how much of your week is really spent emailing people you don't know? If you're not a full-time sales representative, probably not a huge amount.

For those who do spend a lot of time sending cold emails, here's an article that I would encourage you to check out: <https://www.yesware.com/blog/email-subject-lines/>

For everyone else, I think you decide whether or not to open an email based on who it's from. At least for me, that dictates 99% of my decision. So you don't have to worry too much about what you put in your subject lines, but I'll make a few quick points.

The main point that I want to get across is to put yourself in the shoes of your readers. Ask yourself whether the subject line is one that would be logical not just to you, but to your recipient as well.

Here's my before-and-after example of an email.

Let's pretend I am preparing to teach a workshop, and I am deeply immersed in my preparation. It would feel quite natural for me to use the subject line "Workshop" when I email my client with a question about it.

But my clients organize tons of workshops, so think about it from their perspective. If I am emailing my client out of the blue, would this be a useful subject line?

It's much more effective to give some detail, which makes your email understandable upon a quick glance. See the revised version on the screen.

As we talk about subject lines, it's a good time to bring up two competing considerations.

The first is: Staying on the same email chain.

But we need to balance this against the idea that: The subject line should match the content of the discussion.

On *Point Number 1*, It's a good idea to keep an email chain intact. If a conversation is ongoing, then you should respond to the existing emails rather than start a new chain. That way, people can easily review all of the emails below.

And always respond to the most recent email in the chain, even if *you* sent it. For example:

Imagine if you emailed me with a question at 9:00 a.m. and I responded at noon. Then, two more hours went by and we still hadn't had any further contact. At 2:00 p.m, some new information came to my attention that I wanted to pass along to you. What do most people do, versus, what should people do?

The easiest, and laziest, way for me to email you at 2:00 p.m. is to go to your email of 9:00 a.m. and press Reply — it's sitting there in my inbox. But what I should be doing is finding my sent message from noon and responding on top of that one.

The longer the conversation goes, however, the more we need to start thinking about *Point Number Two*: The subject line should match the content of the discussion.

If the conversation takes a turn, then the old subject line may no longer be applicable.

Imagine if I have an email chain with a client where the subject line is "Looking forward to our workshop." Well, that would no longer be a great subject line once the workshop has passed and I reply to the email chain to share some feedback I received.

This isn't a huge deal at the time you first receive an email; it's more of a factor when you try to search through your emails for something you've received in the past. Using my example, if you're searching for an email that contains feedback,

then you're unlikely to have your eyes out for an email where the subject line is "Looking forward to our workshop".

So, know when to begin a new chain, or, if appropriate, change the subject line.

If I was the person who came up with the original subject line, I might decide to change it a few weeks later. But if my client came up with the original subject line, then I'd probably be too shy, so I'd just start a new chain.

4. Formality ("greetings" and "sign-offs" fall under this item)

I have led a bunch of seminars at the law firm Bennett Jones.

Here's an email from when I first reached out to my contact person, Chris McKenna.

I didn't say "Dear", because I knew he was a young guy, but otherwise I made it quite formal because I wanted to show him my level of seriousness. You can always make your writing less formal in a subsequent email, but you can never erase having written "Hey" or "Cheers!".

So I wrote:

Hello Mr. McKenna,

I hope you are doing well.

My name is Ryan Standil, and I obtained your contact information from Douglas Chen of your Toronto office.

The key part of this email is: I obtained your contact information from Douglas Chen of your Toronto office.

It wasn't too stuffy, unlike the version below.

It also wasn't too casual, unlike the version at the very bottom.

More broadly, under the topic of formality, we will cover: Greetings. Contractions. Word Choice. Exclamation Points. And the idea of "Mirroring".

Starting with Greetings, see where you fall along the continuum on the screen.

Are you more of a Dear-Mr.-Smith-with-a-colon type of a person? Or are you a Hi-John-with-a-comma person?

"Hello" and "Hi" are the most common greetings. "Hello" is a bit more formal.

"Dear" is used when you are really trying to dress up your email, but it is more typical in a letter. The only time I consistently use "Dear" is when I am reaching

out to someone whom I've never spoken with before and I want to ensure that I am no less formal than they are.

Personally, I would stay away from "Hey" in a professional context. But my one caveat, which we will keep coming back to, is that if the other person is doing it, then you can get away with it too.

Where it says "Nothing at all (just the name)", I am referring to the concept of writing, "Ryan," without saying "Hi" (or anything else) before the name. Tons of people write like this, so there can't be anything wrong with it. Personally, I find it to be a bit more reader-friendly to write "Hi" before the name, because, if it only takes an extra two seconds, then it could be argued that you're making a deliberate choice of whether you want your writing to sound friendly or not.

I think that first names are a lot more common in the 2020s than last names; but there's certainly nothing wrong with writing "Mr. Smith,".

Commas are used much more frequently, but colons are perfectly acceptable and they show a higher degree of formality.

I'm thinking of a lawyer whom I email back and forth with; he always uses a colon! Even if his email is about lunch or coffee, he will write to me: "Ryan: Are you available for lunch on Friday?"

So, in that case, how do I respond? Exactly the same way, because if he has shown me that using a colon is his preferred style of communicating, then how could he ever accuse me of doing something wrong when I write back: "Arthur: Lunch on Friday sounds delicious."

This brings up the point at the bottom-left of the screen called "Mirroring". As you can probably hypothesize, what I'm saying there is that as long as you mimic your recipient's style, it would be hard for them to think there's something unprofessional about your writing.

I haven't designed any slides on the concept of "sign-offs", but they fall along a similar continuum as it relates to their level of formality. The most formal ways to sign off would be "Yours truly" or "Sincerely". Those sign-offs are akin to opening with "Dear".

In the middle, you have options like "Best regards", "Warm regards", "Thank you", "All the best", etc.

And the least formal, akin to opening with "Hey", would be "Cheers" and "Thanks!".

Contractions. This is a high-school concept, so it needs to be covered but we'll go fast.

Here's a little chart that says: Use ... Avoid

You can read these to yourself.

These are just some examples; it's not an exhaustive list. And yes, in my speaking, you will hear tons of contractions, because who avoids them in speech!?

There is a caveat to this topic (well, in fact, the caveat applies to essentially every topic under email etiquette). If you've been working with the same client or the same colleague for years, then you can get away with contractions!

We'll move on to Word Choice, which is another high-school concept.

It would be better to write, "I will provide you with the documents", than "I will get you the documents". Here are a few more examples on the screen.

How about exclamation points? Is there a place for them in formal communication?

The rule is, try not to use them, but if one slips into your email, it's okay to show a little emotion. I wouldn't use more than one in the same email.

But at the end of the day, I always come back to Mirroring.

When I finished my first year of law school, I spent the summer working for a lawyer who used 20 exclamation marks in every email. Therefore, if I didn't use a couple, she would have thought I was as boring as watching paint dry.

The same idea goes for smiley faces.

5. Tone

The fifth topic is tone.

The previous topic, formality, sets the tone, for tone, if you will.

A lot of what we discussed in the last five minutes shows a spectrum of writing styles, ranging from:

- 1) too bubbly for the office; to
- 2) acceptable but still really friendly; to
- 3) acceptable and more formal; and finally to
- 4) downright-stuffy.

But we can say a bit more about tone itself.

The word "fine" is an interesting place to start.

In the upcoming example, assume that you have a team member named Shelly. Shelly has sent you a long email with her ideas/recommendations for a particular project, and I am about to reveal your response.

It is important to note that you love Shelly's ideas/recommendations. So you write, "That sounds like a fine idea!" In your head, "fine" is a synonym for "awesome".

But, Shelly is reading this email to mean "merely fine."

So you're better off searching for a word that's unambiguous. A "terrific" idea, a "strong" idea; those seem like better ways to go.

Thus, it would be better to write, "That sounds like a great idea." But does that statement really assure your team member, Shelly, that you liked her ideas and you took the time to truly read her proposal and consider her suggestions?

No, because the statement is generic.

So what could you do to make your praise more specific? You could ask Shelly when she is available to discuss implementation/next steps. Better yet, you could specifically address parts of her email. For example, you could say that you really liked her first and second ideas and give reasons why. You could also take it a step further by providing constructive criticism for anything that you think could be improved. By politely adding your constructive criticism, it assures your reader that you were being genuine in the parts of your response where you offered praise.

The upcoming example is an email I was planning to send to someone whose offer I was declining (I wasn't interested in buying the product or service they were trying to sell me), but I still wanted to wish them good luck.

Fortunately, I showed my draft email to a proofreader, who thought that my "good luck" sounded sarcastic!

So, in order to be more clear, I changed it to, "Good luck with your efforts and I would love to receive updates on how it's going."

6. Acronyms and abbreviations

Acronyms and abbreviations are usually self-defeating.

A good use of short forms is when you have to use the same word dozens of times in the same document. In that case, you can abbreviate a term as follows:

DISCLAIMER. The information contained in this confidential memorandum (the "CM") is based upon data provided to our office by Johnson Investment Corporation ("Johnson").

Now, going forward, you can use those two abbreviated terms. For example:

While the information provided by Johnson is believed to be accurate, our office has not retained a third-party auditor to verify the data in the CM. – that's acceptable writing.

The problem occurs when you overdo it. The more abbreviations you use, the harder it becomes for your reader to remember them all. And suddenly, your efforts to save time become counterproductive. If a reader has to scroll back to your definitions section near the beginning, then are you really saving them any time?

There's an incredible scene in the TV show "The Office" that proves this point about the counterproductive nature of acronyms and abbreviations.

And a story that I thought of was told to me by someone during one of these workshops on email etiquette. A participant in the session told me that a customer once emailed her to ask if he could pay by "CC". She responded, asking if he meant "certified cheque". He said, "No, credit card." Time saved, or time wasted?

7. Pleasantries / "I hope all is well."

I was once teaching this course at MLSE, which is the company that owns the Toronto Maple Leafs, and the room broke out into a heated debate about whether to use the phrase "I hope all is well" in emails to customers. After 10 minutes, I had to move the session back on track, but the point is that some people like to include a pliantry at the beginning of their emails while others think they should get straight to business.

The reason I use this expression is because, if someone's not expecting to hear from me, it gives them an opportunity to catch their breath.

I have a client whose emails all look like what I'm about to show you.

This type of email annoys me. If the client is emailing me out of the blue, this email just hits me in the face. It's as if the client thought I was expecting to hear from her. But look how much better this email gets if you just add a simple pliantry and press Enter.

That softens it.

The last thing I'll say about pleasantries is that, if you want to succeed in life, do active listening. This means that instead of saying something generic, you should say something that's specific to your readers. You'll get incredible results if you can replace "I hope all is well." with "I know we haven't touched base in a while — How did your charity bowling event go?"

8. Writing outside of business hours

Are there still business hours? Did the pandemic affect that?

I rarely email people before 8:00 a.m. or after 6:00 p.m. The reason I do this is that I know there is a large group of people who think that it's either bad form to email outside of those hours or they just want a healthy separation between work and home.

To argue that those people don't have to read their emails when the emails arrive is a straw man, because most people are conditioned to check their phone.

I was recently teaching in the MBA program at Ivey Business School, and when I made this point, the students thought I was crazy. They are living in a 24-7, go-go-go, work-around-the-clock type of world. That's perfectly fine. My only caution to people with this mindset would be to make sure that the person you're corresponding with lives by the same rules. If the other person has never sent you an email outside of normal business hours, then you can take it as a sign of how they view this concept of "communicating during or outside of standard business hours". If someone despises the thought of receiving emails in the evening or on the weekend, then you wouldn't want to upset them when you are trying to attract their business or needing them to write you a favourable performance review.

But, if a person regularly sends you emails on Sunday afternoon, then they're making a statement that they are willing to receive emails at any and all times.

To recap, you just don't want to get into a situation where you email a potential client (or even someone on your team) at 10:30 at night, and the person thinks that you weren't organized enough to get your work done by a normal hour, whether that person is right or wrong in their suspicion.

I am a night owl. I focus really well in the evening and I draft emails at all sorts of weird times. I would love to send them right when I finish drafting, but I don't. I wait until the next morning, when I press Send Send Send. It takes me one extra minute.

9. Using “you” instead of “I”

This is the idea that a reader is going to be far more excited if an email is about them (rather than yourself). So try using reader-centric language, such as “you” and “your” instead of “I” and “me”.

Perhaps instead of: “I will send over the documents by Friday.”, you change it to: “You can expect to receive the documents by Friday.”

Perhaps instead of: “I would love to discuss this.”, you change it to: “It would be great to discuss this with you.”

10. Signing off with your name (in addition to your email signature)

At the bottom of every one of my emails, it says Ryan Standil, Write To Excite, here’s my phone number, etc. This is called an email signature.

In light of the signature, do I still need to write something like “Warm regards, Ryan” every time? Is that just redundant – or is it polite?

I see tons of polite people going about it both ways. Personally, I always write my name, but I’ve never heard a compelling argument for or against it.

One thing I would point out is that by the second or third email in the chain, the need for a greeting and a signoff is much less. You don’t need to start with: “Hi Bob, Hope you’re doing well”, when it’s the fourth time you’ve emailed Bob in the last 38 minutes. That would be inefficient.

A great little trick that you can do is start your second email with “Thanks, Bob.” That way it’s a quasi-greeting but it also makes it clear that we’re finished with the whole “Hi, how ya doing” thing. In this example, you should have a comma between “Thanks” and “Bob”.

11. Making it easy for people to respond to you

Before you send an email, you need to preemptively picture, or envision, how it would feel to receive that same email. In other words, if someone sent the identical email to you, rather than the other way around, what would be required of you to formulate a response? Would you have to write a lot, or only a little? Would you have to initiate a calendar invite, or just accept one? Etc. How much *work* is involved?

See the sample email on the screen.

At first glance, it doesn't seem like the worst email ever. It's pleasant. It's smoothly written. It's easy to understand. If I just think about things from the reader's perspective superficially, I might not catch the weaknesses of this email. But it is indeed weak.

If the reader of this email, Sanjay, is my client, I am asking too much of him. Let's carefully "picture the reply"; picture what would be required of Sanjay to respond to me.

Sanjay has no clue how long I want to meet with him for, when or where I want to meet with him, or what's required of him to prepare for this meeting, so this is a very difficult email to respond to. For example, pretend Sanjay peruses his calendar to see his availability; he doesn't even know whether to look for a 30-minute hole or a 60-minute hole. Moreover, depending on whether this meeting is in person, on Zoom, or over the phone, he will need to allocate different amounts of time before and after the meeting itself. There is too much vagary here.

This email is missing information such as what I'm putting on the screen now.

Are you available on July 13 between 10:00 am and 2:00 pm or on July 16 between 1:00 pm and 5:00 pm (ET)? I can send you an invitation for a 30-minute meeting over Zoom.

- Also, giving two specific time slots is very helpful because it reduces tons of the thinking for the recipient. Now, the recipient is not being asked to scour their calendar and find the optimal date, but rather shoot to those two time slots and see if they are convenient.
- The recipient no longer has the undertaking of proposing times to me or sending me a calendar invitation.
- I am volunteering to do all of the work. I am trying to get this to the point where my recipient only has to include a few words in his response.

You could add to your email:

In preparation for the meeting, I would ask that you provide me with the following items at least a week in advance:

- *1 internal email and 1 email sent to a client*
- *1 internal memo and 1 memo (or letter) sent to a client*
- This type of writing takes the guessing out of it for the reader. It's no longer a big unknown; you have filled in the blanks for them.

12. Copying – Reply or Reply All?

If you're starting a new email chain, this isn't so hard. Copy the people who need to receive the information you're disseminating.

If you're copying someone new into an existing chain, ask yourself: Is there anything confidential, below, that I need to clean up before I press Send?

The decisions become tougher once the email chain gets rolling. Reply or Reply All? When the office is ordering sandwiches, don't Reply All to say, "Please hold the mustard on my turkey club." (Not to mention that mustard is the best condiment!) And if you see an obvious reason to remove someone from the chain – for example, they are no longer involved on the file – go for it. People get too many emails.

But what about when someone may or may not want to be kept in the know? In particular, I'm thinking of a boss or supervisor whom you're doing the work for. Is that person's attitude:

Please don't copy me on every little item; just let me know when the file's done?

Or, is the person more of a hands-on leader who wants to be kept in the loop at all times?

People differ in this regard, so my advice would be to ask them. Go up to the boss one day at the water cooler, and say, "I was just wondering: do you like to be copied on every single email, or would you prefer me to spare you the pings and just give you an update at the end?" What boss wouldn't love you for going to such an extent to tailor your communication style to their preferences?

13. Including a new person in an existing chain of emails

Let's pretend that you and I are on the same team, and we just exchanged 20 emails on a certain file. Only on Email 21 do we need to bring in our third team member, Ronnie.

Furthermore, let's pretend we only need Ronnie's input or response in relation to one narrow question that came up about a third of the way down the chain.

What do most people do when they add Ronnie into the chain? They just write: "See below.", or some other un-helpful phrase, like, "Let me know your thoughts."

That type of writing forces Ronnie to comb through the entire chain to figure out what's being asked of him. Time is our most precious asset, and look how much of Ronnie's we've just wasted. Instead, tell him where to look and what he's

being asked to do. Usually all it takes is a simple highlight and a message as short as: “Please let us know your answer to the question highlighted below.”

Furthermore, if you determine that Ronnie doesn’t need to read any of the other emails in the chain – he doesn’t need that context – then perhaps you should forward him only the email that contains the question, thereby ensuring that he won’t waste his time.

14. Out-of-office messages

This goes back to the concept of setting expectations. Picture this:

Someone emails you;

They receive your out-of-office message, which says that you’re on a beach in Mexico with no connection to the Internet;

Three minutes later, you send a complete response with six attachments.

→ How are you ever supposed to take another holiday?

I understand that we live in a 24-7 world, so I think that if you are a sole practitioner with no assistant, then you would feel some pressure to check your email every day or two. I also understand that some people enjoy checking their emails while on vacation. But for those who like to unplug, the best thing to do is to craft a polite out-of-office message, saying: “If your matter is urgent, please contact [and then name your colleague of choice].”

That way, your colleague can handle the matter on their own, or they can bring it to your attention if a problem exceeds the vacation-ruining threshold.

15. Drafting with an empty “To field”?

Have you ever been halfway through drafting an important email, and then, whoops — you pressed the Send button? Perhaps you were trying to minimize your emails but you accidentally clicked Send.

The way to avoid that is to draft with an empty “To field”. This refers to the boxes, or “fields”, at the top of your email software. There’s the cc box, the bcc box, and the main box where you enter the recipient’s email address. What I’m suggesting is that you don’t enter their email address until you have finished writing and proofreading your message.

This becomes more cumbersome when you’re replying to an email rather than starting a chain from scratch. For example, assume an email was sent to you and

it also copied two other people. If you are hoping to draft your response with empty address fields, you would have to remove all of their names while you are typing and then remember to reinsert them into the correct boxes.

If that sounds way too annoying, some email programs have a different feature that will accomplish this same outcome. If you turn this feature on, then after you press Send, it will give you a 30-second window to say *w-w-w-wait! I didn't mean to do that* — and you can recall the email before your recipient ever sees it.

I was giving a workshop at TELUS and there was an engineer in the class who jokingly said, “Yeah, that’s a good feature. Then you don’t have to rip the computer cables out of the wall.” So I paused for a minute, because I thought to myself, *that was far too witty to be spontaneous. I would never have been so quick to come up with a joke like that.* I turned to him and said, “You actually did this, didn’t you?” He said, “Yeah.”

16. Attachments

If you are scanning a document to send to a client, and your scanner uploads a file onto your computer entitled Scan 7255, you should probably change the name before you attach the file to your email.

Try to think of titles that make sense to your reader. Most of my attachments are titled “Proposal from Ryan Standil”, “Contract from Write To Excite”, etc.

My next point is that if you are attaching multiple attachments, you should attach them in the same order that they are discussed in the body of your email. Otherwise, it’s way too confusing.

My next point is a small one, but I get frustrated when someone writes to me as if I’ve already read their attachment. Remember to put yourself in the shoes of a person who doesn’t even know what’s in your attachments, let alone having read them. So rather than launching into a sentence about Page 5 of the attached report, I prefer seeing:

Please refer to Page 5 of the attached report. There you will find a chart, which sets out the key information for the most recent 12 months. You will note that yada yada yada.

That type of writing brings the reader along for the ride, as opposed to sending them down the rollercoaster before they’ve even settled in.

Finally, the big point: Don’t forget your attachments.

Okay ... you might tell me that you’ve got a feature in your email software that warns you if you’ve forgotten to attach the attachment. Well this warning usually

only comes on if you've written a word like "attached", "attachment", etc. So maybe, instead of saying "Don't forget the attachment.", my advice should be "Don't forget to write attached."

And by the way, when will that attachment warning not come to your rescue?

When you have multiple attachments! Pretend you're in the process of composing a lengthy email that will have multiple attachments; you begin writing; you attach the first attachment; your phone rings and you get distracted; you return to the email but you forget to attach the second attachment; you press Send. In that scenario, you're out of luck, and you must face the embarrassment of THE FORGOTTEN ATTACHMENT!

17. High importance / Marking urgent

If all of your emails are marked "URGENT", then ... none of them are.

18. Remembering to respond to each question

When I receive an email that has one main question and a few smaller questions, I get so excited to answer the main question that I draft my response and I feel ready to press Send. I have a huge focusing problem, so I could easily forget to answer the remaining questions. Therefore, as part of my proofreading process, I force myself to re-read the email to which I'm replying, and ask myself, "Did I answer all of the questions that were posed to me?"

19. Knowing when to pick up the phone or meet face-to-face

Sometimes, the best email strategy is to bypass emailing altogether and opt for a voice-to-voice conversation.

If you find that an excessive number of emails are being exchanged on a file, suggest having an oral conversation. A meeting or phone call can resolve many of the issues that have not been resolved by email, which will save you time.

The other instance when an oral conversation is preferable to an email thread is when an issue is complex. Voice-to-voice communication has many tangible and intangible benefits that email communication does not, which makes the former a better choice for solving hard problems and tackling complicated tasks.

Notwithstanding the possibility of having a conversation, it is often important to also create a paper trail documenting the developments on the file. For example,

at the end of an oral conversation, the other party to the conversation might ask you to provide them with a written recap of what you discussed. Surprisingly, this is a situation where it can be challenging to write clearly. Knowing that both of you were present at the conversation, you also know that anything you write, whether clear or unclear to the average person, will be clear to the specific person you are emailing. However, other people in their office may also read your recap, either immediately or long in the future. Therefore, your writing needs to be objectively clear, rather than clear only to those who were present for the oral conversation. To achieve this level of clarity, you should put yourself in the shoes of a reader who was not present for the meeting or phone call.

20. 21. 22. 23.

Numbers 20. to 23. say:

12:00 p.m. vs. 12:00 pm

Oxford commas. Should we use them?

One space or two after a sentence?

email or e-mail?

In each case, you have two choices. Which choice is preferable?

My answer to all four of these is: who cares, but ... be consistent!

Consistency is a sign of attention to detail. Attention to detail is a sign of intelligence.

24. Correct spelling of names

My writing company is called Write To Excite, and I spell the name with a capital T in To. If two marketing firms approach me, or two website developers, two CPAs, two lawyers, two of anything; it's just a natural reaction to want to place my business with the one that can spell my company's name right. Lots of people fail to capitalize the T when they write to me.

Accents: I communicate with someone named Zoë, who has an umlaut in her name. Where can you even find one of those on your keyboard? I still have no clue, but all you have to do is copy it from one of Zoë's emails and paste it into your own.

Some organizations have commas in their name where you may not expect it. For example, a close friend of mine works at the law firm Paul, Weiss.

Hyphens can pop up from time to time.

And so on.

If you and a competitor are reaching out to the same prospective client, and one of you can't even spell the client's name properly, whom do you think the client is more likely to retain?

25. [See below]

Sticking with names, what do the following names have in common?

Dale, Leslie, Pat, Sam, Alex, Taylor, Riley

If you still haven't guessed it, I'll give you a clue. Assume that you are introduced to one of these folks over email; aside from your email exchange, you have never come in contact with the person or even heard of them before.

These are the types of names where, if you don't have a prior relationship with the person, it's quite easy to accidentally refer to the person with the wrong pronoun. Of course, this is simply an accident that happens on a subconscious level and will likely be forgiven, but because it is common to see both males and females with these names, we need to avoid the instinct to make an assumption. For example, if I had a brother named Dale, subconsciously, I would naturally associate Dale with male pronouns, and so when I got introduced to someone named Dale by email, I could accidentally refer to *her* as *him*.

To avoid this trap, wait until someone who knows the person's pronouns – usually one of their team members – makes it clear in conversation. Or visit their LinkedIn page or email signature to see if their pronouns are specified.

26. Can you refer to Stephen as Steve? Beverly as Bev?

Still sticking with names, can you refer to Stephen as Steve? Beverly as Bev? Probably not until they refer to themselves as that.

If one of Beverly's team members refers to her as Bev, is that necessarily a licence for you to refer to her as Bev? Make a judgment call, based on the formality of the situation.

27. Proofreading

Do not send an email immediately after drafting it. Step away for a while and then proofread it with fresh eyes.

Steven Pinker, the leading writing expert in the world, says that he looks at his drafts an hour later and says: Who wrote this junk?

28. ALL CAPS IS PERCEIVED AS SHOUTING!!!

In addition to being perceived as shouting, ALL CAPS is very hard to read. If you use ALL CAPS as a technique to accentuate key information, for example, on your website, you should stop!

If you don't believe me that people are struggling to read text that is in ALL CAPS, you can perform a simple experiment that will change your mind:

- 1) Go on the Internet and copy a few paragraphs of text. Make sure the text is something that you have not read before.
- 2) Paste the text into a Microsoft Word document. Once in the Word document, change the font to ALL CAPS (using a button under "Font" (see the area where it says your font, such as Arial, your font size, such as 12, etc.)).
- 3) Try reading the text as fast as you would normally read.

29. Following up

What should you do when you email someone ... and ... silence. No response.

How long should you wait before you follow up? What should you say when you follow up? You don't want to be a pest ... but you and your boss need an answer!

Over the years, I've become much more positive towards the idea of following up. When I'm trying to get the attention of a busy person, I find that very often I will send a polite follow-up email, and even if a week has gone by since my original email, within 30 minutes, I get an extremely friendly message, saying: "Thank you so much for the follow-up. I'd been meaning to get to this and I really appreciate your bringing it to the top of my inbox."

So don't be shy to follow up, either by email or by phone.

When we talk about following up, we need to spend a minute discussing the word "just". What does "just" do to your follow up message, as in, "I am just following

up to see if you've had a chance to look at my email?" The word "just" weakens your message.

Sometimes, a softer approach is exactly what you're looking for, in which case, you are free to use "just". But if the other person is being rude or irresponsible by not responding, then I would encourage you to give them what they deserve by removing the word "just". Say: "I am following up to see if you've reviewed my email."

30. Moving from a conversation to a calendar event

This topic is about moving from a regular email conversation to a calendar invitation/ event.

My main observation is that when you're scheduling something with a **team member**, often there is one too many emails that gets sent before someone turns it into a calendar event, and, conversely, when you're scheduling something with a **client**, often there is one too few.

For example, if a team member of mine says that they're available to speak on Monday at 2:00 p.m., my next move is to fire off a calendar invite. It's too inefficient to start writing back: "Thank you. That time sounds great. I just sent you a calendar invitation, and I look forward to speaking with you then."

On the other hand, with a client, that last email is a nice touch. Otherwise, they might recoil when they see how little time you have available for their file.

When you're scheduling a meeting, you can put whatever you would like in the title of the event, but personally, I'm a huge fan of using names. If I see, for example, Kathy's name in the title of an event, I can cue in to what's going on a lot faster than if I just see "Meeting to Discuss Next Steps".

See the calendar on the screen. This calendar belongs to my client, Scott.

If I am scheduling a lunch meeting with Scott (that will end up in his calendar), which of the following would be a better way to title my calendar event?

Ryan & Scott – Meeting for Lunch or

Scott & Ryan – Meeting for Lunch

It definitely feels more client friendly (or colleague friendly) to put the other person's name first. But, if your meeting is with a busy person, then you may not want to do that. Because if everyone does that to Scott, then we're right back to the situation that we saw at the beginning of this workshop (the example that said: *Call with Jason Feifer*).

Scott doesn't want to look at his calendar and see that he has a bunch of appointments with himself.

So maybe you should put your own name first. Neither option is fantastic, but if you've never thought about this before, at least you're now in a position to make a judgment call based on whom you're meeting with. If it's a really busy person, who might just look at the "preview mode" of their calendar, then perhaps you're better off putting your own name first.

If you think I'm crazy for suggesting that names should go in a meeting invitation, then you'll at least agree with my general advice: you should lead with the key words.

Let's look at an example. Here it says:

Planning Meeting for Annual Team ... I have no clue what!

Since we all have "first-world problems", whereby we don't have time to click beyond the "preview mode", I recommend leading with the key language. Instead:

Annual Team Golf Day – Planning ... and then presumably it says Meeting or something. This is much better.

That was the general advice. And finally, phone calls.

Phone calls are great because you can just go with: I'll call you. As long as you are the one making the call, it is easy to write the calendar invite. You simply write a normal sentence, such as:

Ryan to call Deepa

This way, you're not being rude by putting your name first; you're simply writing a sentence according to the syntax of the English language. Again:

Your Name to call Their Name

31. Autocomplete

This is a feature on email programs such as Outlook or Gmail through which the program guesses the rest of your word or phrase.

The question is: Should we accept the "autocomplete" endings that are offered to us?

Personally, I am a fan of accepting the computer's suggestions.

This might sound obvious, but *people are accustomed to reading the words that people are accustomed to reading*. Therefore, I recommend using the common

expressions, such as, “I look forward to hearing from you.” or “Thank you for the information.” Readers are expecting to see these words and phrases, so they won’t cause people to stumble over your writing.

People read shapes, rather than words. When you come across a familiar expression, such as, “I hope all is well.”, you can read all five words in the time it normally takes to read one word, because the whole familiar thing is just one shape. I’m such a big fan of these expressions that I will even advocate for “I hope all is well.” in spite of what I said earlier about using “you” and “your” over “I” and “me”.

On rare occasions, I will shorten “I hope all is well.” to “Hope all is well.” I only do that if my next paragraph or two start with the word “I”. I try not to start a string of consecutive paragraphs with the word “I”. But otherwise, I stay away from “Hope all is well”, because it’s not a sentence, and people are not expecting to see things that are not sentences, so they stumble over them.

32. A tip for writing concisely

Whenever you draft an email, you get a sense of whether you have written more than your reader is willing to read. For busier readers, and for those with poorer attention spans, your implied word limit is lower than for readers who have more time and better focus.

Pretend you have to write an email that contains four points, but you’ve come to the belief that your reader only has the patience for three. You believe that if the reader opens the email and it contains all four points, it will look too long so the reader will cast it aside.

In that situation, a good technique is to send two shorter emails instead of one longer one. Each time the reader receives one of your shorter emails, it will feel easy to read.

To be clear, I am not suggesting that you send both emails at once. Rather, the pattern would be:

You send the first email;

You receive a response:

You respond to the response.

In the pattern above, you could include two (or three) of your points in your first email and reserve your remaining two (or one) points for your second email.

This begs the question: How do you know if the reader will respond to your first email, such that you will even have the opportunity to write to them a second

time? The reality is that sometimes the reader will not write back, in which case this strategy will be rendered unavailable. But the key to maximizing the odds that the reader will write back is asking a direct question.

It is true that some readers may even ignore a direct question; that is out of your control; but if you ask the right question, you can virtually guarantee an answer.

For example:

- *To which address can we make your payment?*
- *I know someone who is interested in retaining an expert in your line of work. Do you have an information package that I can share with them?*

33. A tip for achieving readability

Research shows that the second time you read the same word, the word is much easier to read. Therefore, you can give your emails an air of readability if you use the identical words in both the subject line and in the first sentence.

See the example on the screen. The subject line says, “Question Regarding Section 7” and the email starts like this:

Hi Bob,

I have a question regarding Section 7 of our contract. Could you please give me a call at your convenience?

The second time the reader comes across the repeated words, which is in the first sentence of the email, the repeated words are very easy to read. This gives the email a feeling of smooth readability, which causes readers to feel like they can race through your writing. It makes them want to go on.

34. “Sales emails”: crafting emails for the purpose of generating business

This topic requires an entire course of its own.

But I want to make two quick, related points. First, the email has to be customer-focused. People buy things because those things benefit them; not because you want them to. Your email needs to be entirely focused on making the customer’s life better (which could mean less expensive, more efficient, more enjoyable, etc.)

This does not mean that you should avoid extolling your virtues – you still need to demonstrate how you can add value to your customer’s life – but you should do so in a way that is framed around your customer, rather than just yourself. For

example, instead of merely saying that your team members were educated at the top universities, describe how your team members have taken the principles they have learned at those universities and imparted them on your customers' organizations. Moreover, you could state the results of your customers having adopted these principles.

The second point, which is just an extension of the first point, is about customization (vs. standardization). To what extent should you customize, or personalize, your email to each prospective client?

[For this point, let's put aside companies that are selling to a huge number of individual consumers. For example, I am not sure how practical it would be for Uber or AirBnB to personalize their sales emails, but I assume the answer is not at all.]

This is an easy discussion in theory but a harder one in practice. As a starting point, if your email begins with "Hi there" (or any other greeting that doesn't include a name), it will likely be deleted. Next, even if your email says "Hi Ryan" but it doesn't show any other signs of customization, it will probably be deleted, since people know how easy it is nowadays to download a software program that automatically generates the names at the beginning of your email.

So that leads to the conundrum of how much time you should spend tailoring each one of your emails to the recipient. You could groan at the massive amounts of time it would seem to take to tailor your emails and argue that you would never get anything done if you undertook this effort; that life would become so inefficient that you'd only reach a few prospects a week. That may be true, but there are two strong counterpoints: 1) Would it be better to reach 100,000 prospects a week through mass marketing if none of them are becoming customers? And 2) At least if you are personalizing your emails, you are presumably reaching out to your ideal customers, rather than casting an incredibly wide net and having to serve any undesirable customers who come your way.

In light of the above, the calculus could be described as follows:

- Assume that it takes 10 times longer to tailor your emails than to send out generic blasts.
 - (In the bullets above and below, you can substitute 10 for any number that would be more realistic in your scenario. In any given organization, the number could be lower, such as 2 or 3, or it could be higher, such as 50 or 100.)
- This means that you can reach 10 times more prospects if you do not tailor your emails, and 10 times fewer if you do.
- Therefore, the question is: If I tailor my emails, does it increase my likelihood of attracting a client by more than 10 times or less than 10

times? If the answer is more, you should tailor your emails; if the answer is less, you should not.

As I mentioned, this is an easy question to answer in theory but a hard one to answer in practice. The only way to answer this question in practice is to attempt both strategies for an extended period of time and monitor the results. If no clear winner emerges, go with your gut.

35. [See below]

The last item on the list says: Remember that time you were working on a file with Dan Smith, Dave Smith, David Sampson, and Dean Sanders? (And some of them were your colleagues whereas others were your clients.)

The idea behind this last topic is that it's so easy to put the wrong person's name in the "To field", so be extremely careful!

Conclusion

That's the end of the program. Thank you for your time. This is the only one of my workshops that doesn't focus on writing *per se*. This program obviously focused on conduct that goes hand-in-hand with writing, but if you're interested in taking your writing to the next level, I would encourage you to attend my other three workshops.

One focuses on clarity, one focuses on conciseness and attention to detail, and one focuses on readability.

You can always email me for a promo code, at ryan.standil@writetoexcite.com.

That's all for today. I hope you enjoyed.

Thank you for attending the presentation.

Ryan's Contact Info:

If you have any questions, I can be reached at:

- (416) 707-0359
- ryan.standil@writetoexcite.com

Sincerely,

A handwritten signature in black ink that reads "R. Standil". The signature is written in a cursive, slightly slanted style.

Ryan Standil