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Top 10 E-mail Etiquette Rules for Estate Planning Professionals (and Their Assistants and Staff)

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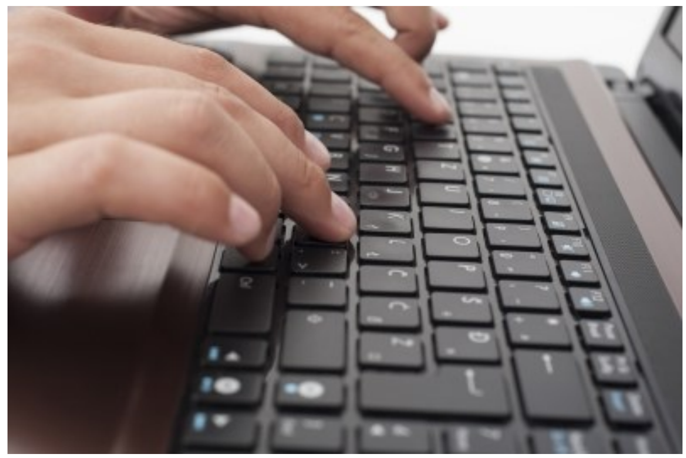

Electronic mail (otherwise known as e-mail) plays an important part in any business these days. It's helped make communicating and doing business far more efficient and simpler. However, as with most things in business, there are certain rules that professionals should follow when it comes to using e-mail. If not done correctly, it can actually create unnecessary confusion, chaos, and an unnecessary amount of miscommunication (and maybe even legal liability!).

Below, you will find what I consider to be the ten most important e-mail etiquette rules to live and work by. (NOTE: These are great principles to follow for all professionals, not just assistants or administrative support staff. Having seen some of the e-mails that professionals have sent, it could be quite helpful for EVERYONE to abide by these rules when using e-mail, both professionally and personally.)

E-mail Etiquette Rule #1: Be conscientious about private information.

For estate planners of all designations, you handle a great deal of personal information for your clients and may even be held to a certain amount of ethical standards and practices to maintain that privacy for your clients, including attorney-client privilege, HIPAA laws, and FINRA rules. That being said, it's important that when you send information by e-mail that you're always conscientious about any private information that you might be sharing. Also, you may need to check your own state bar or applicable regulatory agency for any disclaimers or privacy notices that you may be required whenever you send e-mail.

E-mail Etiquette Rule #2: Watch out for that "Reply All" button.

Nothing is worse than sending out an e-mail utilizing the "REPLY ALL" function, instead of just to the person that sent the e-mail, or maybe even someone different altogether. When you "reply all" a lot of eyes may be reading it whom you hadn't intended. Plus, people are inundated with e-mails each day, so use the "Reply All" button sparingly. This also brings us to…

E-mail Etiquette Rule #3: Use CC and BCC features only when appropriate.

Not everyone needs to be CC'ed (carbon copied) or BCC'ed (blind carbon copied) on the e-mails that you send. Sometimes it's important and relevant, but as stated above, people are inundated with e-mails each day, so unless you feel that it's absolutely relevant and necessary to what you're trying to do, try to use the CC and BCC options only when you need to. Also, the most appropriate use of the BCC feature is when you want to CC someone, but don't want others to either know that someone else was copied or to know their e-mail address. For example, we will often times BCC Phil at his personal e-mail address, because that's not an e-mail address that he wants distributed freely to others.

E-mail Etiquette Rule #4: ALWAYS use a signature.

This seems pretty obvious, but you'd be surprised how many professionals neglect this pretty simple and easy step when it comes to e-mail. It's helpful not only in identifying you, but having your contact information handy (under your signature). This should typically include, at the minimum, your name, company name, a telephone number (if not your direct number, then your general office number), your e-mail address (in case your e-mail is ever forwarded and someone wants to reach out to you), and your company's website. (If you don't know how to set up your signatures, here's a website with some easy procedures to follow to help you set up signatures in Microsoft Outlook. And, for the daring, here's a website with instructions on how to customize your signature to include fancier features, like your photo similar to what's found in our e-mail signatures at The Ultimate Estate Planner, Inc.).

E-mail Etiquette Rule #5: Reply to e-mails in a timely fashion.

While e-mail communication is typically reserved for non-urgent matters that require immediate assistance, it is important that you return all e-mails in a timely fashion. A best practice would be to return all e-mails received during the same business day. Even if you don't have a complete answer, it's nice to let people know that you received their e-mail, acknowledge their request, and let them know that you will be putting together a more complete response to their inquiry and provide them a time frame that you can meet to get them an answer. Nothing is more annoying and frustrating than e-mailing someone that doesn't return e-mails in a timely fashion and feeling like you're sending an e-mail into an abyss.

(On a side note, this could become extremely cumbersome for a busy professional, which is why Phil has a personal e-mail address that is only given to his key staff members to use for items that are important and cannot wait for the designated meeting time he reserves for his staff. A busy professional may wish to consider having an assistant review his or her e-mail primary e-mail used for the office and for clients. This way, the assistant can determine if the e-mail needs to be handled by the boss, but also be the one to respond to the sender in a timely fashion.)

E-mail Etiquette Rule #6: Consider using read receipts.

If you're not already using read receipts, you might want to consider using them so you know whether your e-mail has actually been opened (and hopefully read). It's not usually something people need for their personal life, but it's helpful when you're running a business. If you hate receiving those read receipt notices, you can actually set up your settings to log the tracking information and then delete the read receipt itself, so you don't clog up your e-mail with read receipts. For more information on how to set up read receipts in Microsoft Outlook, click here.

E-mail Etiquette Rule #7: Know your audience.

It's important that you always know your audience, whether you're sending a personal e-mail, or sending a professional e-mail. There are appropriate ways to "talk" or "joke" for certain audiences that are not appropriate for others. The same goes with controversial topics for conversation (race, religion, and politics are the three major ones that come to mind). Also, how you interact with your clients vs. colleagues vs. staff vs. good friends are all probably very different. You might not be very technical with your clients and use phrases or words that might confuse them, but that might be perfectly acceptable for your colleagues or staff. You might be much more formal with your staff to uphold a certain level of respect and chain of command, which you wouldn't with your colleagues. You get the idea. Be sure when you are e-mailing that you are keeping your audience in mind.

E-mail Etiquette Rule #8: Never e-mail when you're angry (or annoyed).

This seems like common sense, but we have all probably been guilty of, at one time or another, sending an e-mail when you're angry or annoyed. But if you're e-mailing someone and you're emotional, it's just never a good idea to send that e-mail. Even if you tried toning down your e-mail, your anger and frustration will still come out loud and clear. Walk away from your desk, take a quick walk outside, maybe wait a day or so (if you can) and then put your thoughts together or figure out how best to handle the situation. And, as a bonus best practice here, you should always proofread your e-mail before you send it. You can check your tone, and also for grammar and typos. When in doubt, don't send the e-mail. It just might not be the best way to communicate in this situation, which then leads me to…

E-mail Etiquette Rule #9: Pick up the phone.

Sometimes e-mail is simply not the appropriate medium to communicate with someone. In a world that is so digital and tied to technology, the telephone discussion and even in-person meeting seems to be a lost art. If you find yourself in an e-mail chain that's becoming discussional with someone, you may be better off just picking up the phone and speaking with them. Other major no-no's via e-mail: addressing time-sensitive items that require immediate answers, delivering bad news, firing a client or vendor, and firing or reprimanding an employee. (Oh, and breaking up with someone. You should never do that.)

There's plenty of other things that should not be sent via e-mail, which brings me to…

E-mail Etiquette Rule #10: Remember that your e-mail is a reflection of YOU (and your company).

More and more these days, especially with the onset of the internet and social media, you start to see that people aren't very conscientious about the kind of impression they leave with people through written communication. Imagine every single e-mail you're about to send being logged on a website for the world to see. Effectively, it could be. So, if it's not something that you would ever want to be judged on (or have your boss, mother, or significant other read), then chances are that you should probably not be sending that e-mail. Take the time to add spell-check and even read through your e-mails to make sure that they make sense and are communicating what you want it to.

There's plenty of other best practices and e-mail etiquette tips that could be followed, but these are the ones that I felt were the most important ones for professionals. I hope that this article is helpful to you and that 2015 will bring along with it better e-mail practices!

ABOUT THE AUTHOR:

Kristina Schneider is the current Executive Director of The Ultimate Estate Planner, Inc. She graduated with a Bachelor's Degree in Business Administration from Pepperdine University in 2004 and was hired right out of college to work for the Law Firm of Kavesh, Minor & Otis, coordinating and facilitating Philip Kavesh's "Missing Link" Boot Camps while also providing administrative support to Mr. Kavesh as his Executive Assistant for over 7 years. With a combined almost fifteen years of administrative experience and her direct experience working at Mr. Kavesh's law firm, Kristina has been able to assist numerous estate planning professionals through The Ultimate Estate Planner, Inc. And, equally as important, she has assisted the executive assistants and staff members of many of these estate planning professionals to provide better service and support. You can reach Kristina at (424) 247-9495 or by e-mail at kristina@ultimateestateplanner.com.

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