

Quick Reference Card (QRC)

Best Practices for Creating E-mails and Text Messages

- Try to keep e-mails to no more than half a page. If they go any longer, you probably need to have a call or hold a meeting on the topic (if it takes you 20 minutes to draft a lengthy e-mail, and 20 minutes for your respondent to interpret the e-mail and reply to you, you could have had a 15-minute call and saved time for both of you).
- E-mail and texts can't convey the tone in which something is written, so don't try to be humorous or lighthearted. Adding "LOL" or a smiley face might help, but if the recipient is not in the right frame of mind, he or she may not understand your perspective (also, jokes don't always transcend cultural boundaries).
- Don't send e-mails or texts when you're upset. Drafting them often helps to let off steam, but don't press the send button until you've had a night to sleep on it.
- Don't attack people. If you need to be critical, challenge the idea or actions rather than the person, and offer a solution to show that you want to be constructive.
- Don't reply to a previous e-mail or text if you are starting up a new thread of discussion. The subject line won't make sense. Also, you or the recipient may forward the new thread to someone pertinent to the new topic, not realizing the person now has all of the content from your initial exchange.
- If sending to multiple recipients who don't know one another, consider using the BCC function, so that you respect the privacy of each recipient's e-mail address
- If you need someone to take action (e.g., respond by a certain date), underline it (many analysts and portfolio managers get 200 to 600 e-mails a day, and so they may spend only five seconds scanning your e-mail)
- If you want to make it easy for others to reach you, make sure to include a signature file with as many contact details as possible.
- Check with your IT department to ensure that your e-mails are being backed up and are in a place that is included in your desktop search feature.
- If your email or text pertains to a stock-related message, ensure it contains as much of the ADViCE™ framework as possible (found as another QRC).¹
- After you have written the email, but right before you press "Send":
 - Attach files referenced in your email
 - Put the relevant recipient(s) name in the To/CC/BCC fields
 - Write the subject line, ensuring it's descriptive so that the recipient will be more motivated to open it
 - Ensure there isn't any content below your email (in terms of a reply from someone) that may be forwarded accidentally

¹ Contact us at Info@AnalystSolutions.com if you do not have access to this QRC