Email Protocol and the Family Business: When and How To Best Use Email

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Father and Son

Irwin and Mark are father and son who work closely together in their family enterprise. Their relationship is very open with one another. One evening Irwin wanted to speak with Mark about an important matter that involved a meeting on the following day, so he sent his son a crisp email with nothing in the subject field and in the body of the email simply typed, "Call me."

When Mark read the email, he interpreted the message as an expression that something was wrong and, for a while, pondered what he might have done to cause an issue. When he called Irwin, he asked if something was wrong. Dad's reply was, "No, not at all" and explained that the brevity (perceived by son as being curt) was simply because he was tired but didn't want to initiate a call to Mark, deciding to respect his family time.

Fortunately, Irwin and Mark have the kind of relationship that allows this type of dialogue. Imagine how easy it is to misinterpret a simple act without questioning it further and how Mark might have reacted to his dad the following day had this not been clarified.

Jane and Charlie

Jane and Charlie are family office colleagues charged with planning a Family Retreat. An enthusiastic Jane is clear in her ideas around the format and content for the Retreat and after much research sends repeated drafts of her plan to Charlie seeking his support. Charlie, who has lingering doubts about the Retreat in the first place, keeps sending Jane's plans back to her, finding fault with detail after detail. Exasperated, Jane sends Charlie an email telling him it's time for him to create a plan since he is not satisfied with hers.

After four days of no response from Charlie, Jane is infuriated. She has put significant time and energy into this and now storms into Charlie's office where a battle ensues. Email might be quick and easy, but a more efficient and effective mode of communication is oftentimes the old fashioned face-to-face type where Charlie could have addressed his concerns with Jane before she even started drafting plans.

Email "Dos" and "Don'ts"

Most of the articles on the web about the inappropriate use of emails refer to security, personal use issues and sharing offensive material in the workplace. In our work with family and closely held enterprises, we know that their concerns are far more reaching. They center on "courtesy" vs. "rudeness" or downright "hostility." So here is our attempt to capture some "dos" and "don'ts" around email usage.

- Resist using email when a phone call might be better.
- Keep the "subject" line brief.
- Keep the formatting simple.

- Have a courteous greeting and closing.
- Be concise. Make it easy for the reader to grasp the content quickly. Break your message into paragraphs if appropriate and use "headers."
- Type in complete sentences. Cryptic messages are easily misinterpreted.
- Neither tone, nor volume, nor inflections, nor body language are available to the reader. Be aware how they might be interpreted from your choice of words.
- The reader may read your email more than once. Consider how your message might be interpreted when re-read at a later date.
- Sarcasm is exceedingly dangerous. Some will interpret it as "anger" disguised as "humor."
- It's easy to hide behind the screen and send rude emails when you are angry. Be polite.
- If you receive a nasty email (in email lingo it is called a "flame-a-gram"), resist replying immediately- if at all. Think about addressing the email, not responding to the email.
- If you must reply to a nasty email wait at least 24 hours to do so.
- Don't hide behind email. Ask yourself if you would say the same thing face-to-face.
- Be careful with the use of CAPITAL LETTERS. They are typically interpreted as shouting.
- Your email may get forwarded to others. Be sure this is how you wish to be perceived by others.
- Caution when using the Cc: field. Many people do not wish to have their email addresses passed around with lots of others whom they may not know well (or at all). It can also be perceived that you are ccing someone to throw the recipient under the bus (like ccing his or her boss).
- Only reply to those who need to see your reply, not to all those who were copied.
- Reply in a timely manner. In this world of iPhones and Blackberries, we tend to assume that our emails are read by others within a minute of our sending them. Then, of course, we expect an instant reply. When we don't get one, we assume the recipient is ignoring us and then we wonder why. If you need a quick reply, let the person know that when you send the email.

- Use the Return Receipt only when it is critical to know when the email is opened.
- When forwarding emails, be sure to delete other email addresses and commentary from other forwarders.
- Use spell-check for possible spelling and grammar errors. Spelling errors are perceived as sloppiness, laziness or lack of education.
- Hold off on smiley faces or :). They can be perceived as immature.
- Establish an office policy on email use. Specifically address personal use, abusive or offensive material, policy on receiving offensive material from other employees, etc.
- Use appropriate signoff. If replying, you may wish to mirror the signoff of the sender. Some gurus suggest that "Sincerely" is always safe. Same with "Yours truly" and "Regards;" reserve "Best" for only those whom you know well.
- Don't keep "thank you" as a permanent part of your signoff. Sometimes it may not apply.
- Your emails are a reflection of yourself- your personality and style. Re-read emails before sending them with this in mind: "Is this how I want to be perceived by the recipient?"
- Resist bombarding people with single thoughts or questions email after email. It might make more sense to save an email in drafts and simply add thoughts/questions to it as the day goes along and then send it at a later time.

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