Company / Org **Communication Protocol***

as of Date

** Note: this is a template - not an absolute - and we can work with you to adapt it to your desired workplace culture, business objectives, types of roles, and other communication platforms you've adopted.*

Using communications technology effectively is critical to our culture of clear communication, accountability, and execution excellence. Below are the best practices we've aligned on to help create more efficient email and other communications. Following these guidelines will:

- Reduce interruptions, distractions, and time spent in your inbox
- Make email and other communications more clear, concise, and consistent
- Get stuff done faster and more accurately

Platform/Device	**Context**	**Response Time Expectations**	**Comments**
Phone or go in person	Urgent	asap	• For emergencies or very urgent matters, reach the person directly. • Do not expect that people live in their inbox and will see your emails right away.
Email	• For important but not urgent matters • Reference only material • Read only material	x hours *(Note: Different response times may be stipulated for internal vs external emails and on role expectations)*	• Email is not the best tool for urgent matters or immediate responses. • If you won't be able to respond within expected timeframe, acknowledge and provide alternative. • If you cannot meet a deadline, renegotiate with requestor. • **See detailed email protocols below.**
Text and IM	Short and relatively timely communications	x minutes	• To be agreed upon by team, as appropriate • Only use IM if recipient has status set to "Available"
SaaS Collaboration and Project Mgmt tools	Ongoing progress, doc sharing, team posts, etc.	x hours	• Google Workspace, MSFT Teams, Slack, Trello, Basecamp, Asana, monday.com, ClickUp, etc. • To be agreed upon by team, as appropriate
1:1 Meetings	• Catch ups that are best done F2F or on video • Accountability check-ins on goals / projects / priorities • Coaching and feedback • NOT for topics that can easily be covered by email	n/a	• Collect non-urgent items on a running list for review during regularly scheduled 1:1s with supervisor instead of sending an endless litany of one-off emails

EMAIL PROTOCOLS:

I. **The "NO BAD Emails" Model** - Creating effective email requires thought prior to typing the message. For emails longer than a few lines, use The LeaderShift Project's "NO BAD Emails" model to compose clear and thorough emails and reduce the volume of messages sent and received. It applies to original emails as well as subsequent responses.

N – Necessary. Is the email necessary? If so, is email the most effective way to communicate?
O – Objective. Clearly state in one or two sentences the objective of the email and what business goal it relates to, if not obvious.
B – Background. What information, data, and/or other context does the recipient need in order to act on and/or respond? Options for providing background material include:

- Write it succinctly in the body of the email itself
- Links or references to files already posted on a shared server/SaaS collaboration platform
- Attach document(s)

A – Action(s). Be specific and detail WHO is responsible for WHAT action(s).

- If there are multiple individuals involved, clearly specify who is responsible for which action(s)
- Separate each requested action into a separate bullet for clarity

D – Deadline. Specify a deadline for the response or action. They should be realistic and respectful of the recipients' workload.

NOTE: If the email is very short, there's no need to use the "NO BAD Emails" format.

II. **Subject Line** – Summarize the email in the subject line so the recipient(s) sees at a quick glance the purpose and deadlines - even before they open it. Never leave a subject line blank. Adopt consistent signals for recipient(s) as to what is required. For example:

- Action Requested or AR ("AR: Review and comment on draft RFP for Company X by 4/15")
- Response Requested or RR ("RR: Availability for meeting with Prospect X next week in CT")
- Read Only or RO ("RO: interesting perspective on inflation in this Business Week article")

III. **Recipient Lines**

- "To" line – the people who are responsible for taking an action or replying
- "Cc" line – no action or response expected of these people, but there is a need or request to know
- "Bcc" line – use only to protect contact info on a list. Otherwise, be transparent.

IV. Save yourself from yourself before sending

- Is it written so it won't be tossed back to you with questions?
- Prone to writing novels? Use bullets to simplify and/or to highlight actions to be taken. Paragraphs should be short, no more than 5 or 6 lines.
- Ensure attachments are included and links work.
- Check grammar, spelling, and jargon. Use spell check, but it isn't a substitute for careful proofing.
- Avoid use of "shouty CAPS," as it is often misconstrued as hostile.
- Verify correct people are in To and Cc lines (wrong autofill and emailing the wrong person while multitasking can be fatal career errors!).

V. Replies and Forwards

- "Reply" and "Reply All"
    - Does a reply add value to the conversation? If no, don't send one.
    - Change to a relevant subject line when thread has changed topics.
    - If confirmation is specifically requested by the sender, reply only to sender, not to all.
    - "Reply All" should be used sparingly, understanding that it proliferates email.
- Responsible Responses
    - Don't forward emails in a vacuum to hand off ownership. Establish a clear understanding of roles/responsibilities before forwarding an e-mail.
    - Work out disagreements one-on-one or via phone. Email often escalates conflict.
    - Out of Office messages should contain emergency contact or coverage information in case decisions need to be made during an absence.
    - Out of Office messages can also be used to communicate short term inability to respond in timely fashion (i.e., I'm on a tight deadline today. If this is urgent, please call me. Otherwise, I will respond by COB tomorrow.")