



E-Mail or Forum?

Tips & best practices for individual contributors & virtual teams

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For many organizations and individuals, e-mail is the “killer application” in two senses. First it is an enormously handy, easy to use and effective communication tool. Secondly, improperly used, it “kills” us by overuse and misuse.

On the other hand, threaded discussion, sometimes called forums or bulletin boards is an often-unused alternative because experiences of poorly managed forums discourage frustrate and discourage users.

This article contains guidelines and best practices for when and how to use e-mail and threaded discussion, sometimes called forums, conferences or bulletin boards. It adapts material from our white paper on “Choosing and using your electronic toolkit,” used in our training courses at Management Centre Europe.

E-mail tips & best practices

E-mail is the flagship of global connectivity. It is also the leading cause of information overload. It's a near-synchronous-to-asynchronous medium, which indicates that with e-mail you need to make clear when you expect a response. As a one-to-one or one-to-many tool it does not allow the level of interaction and dialogue needed by virtual teams that can be found in forums or other tools. So, use e-mail, but use it judiciously.

When to use e-mail

Prefer email over the telephone to:

- Give names, addresses, dates, figures, lists, URLs
- Convey complex facts & structured info
- Ask or reply to simple questions
- Create a precise written record of a message
- Express yourself in writing if this is more comfortable for you
- End telephone tag (2 in 3 times you call, the person will be out)

Prefer email over fax when:

- There's a wide distribution list
- Recipients need to edit, store or forward your message
- You can attach graphics or pictures
- You want to save paper or reduce paper congestion
- Email is an accepted or legal document

When not to use E-mail

Tips & best practices

1. Reflect and compose, then write and send
2. Make priority and content clear in subject line and first paragraph
3. Use separate messages for each topic
4. Be specific about the questions you want answered or action you want taken.
5. Create group conventions for subject lines, and for who gets mails and copies of mails and their responsibility to respond
6. Break text into small easy-to-read paragraphs. Keep messages short but not abrupt, a single screen if possible, otherwise consider sending an attachment
7. Manage your distribution lists. Use listservs for consistency of distribution and purge them to avoid useless mail. Avoid FYIs
8. Sarcasm, humor may not be understood
9. UPPERCASE looks like SHOUTING unless it has a specific purpose
10. Write nothing and forward nothing that you would not want printed and distributed publicly. You represent your team and your organization—do not embarrass them

- Personal or emotional issues. If the recipient is the subject of the message, use a phone call or meet face-to-face
 - Private issues
 - Urgent messages. Other people may not check their email regularly or in time
11. Ask permission to forward others' mails
 12. Install filters and prioritizing systems to manage the volume effectively
 13. Try to handle incoming mail only once
 14. When replying quote the relevant part of the original message or message thread. (Your system may quote the entire thread automatically but you may want to quote only parts in your new text)
 15. Shift to threaded discussion if possible.

Multimedia e-mail

The growth of bandwidth and transmission speed are making it possible to send e-mail containing images, voice and other objects in addition to text file attachments. Explore these tools for their advantages and disadvantages in respect to other media that may do the same thing.

When to use multimedia attachments

- Use added dimensions of sound and imagery for social cohesion or to add a personal touch to text transmissions.
- To explain or illustrate in ways that pure text cannot

Tips & best practices

16. Check team preferences and capabilities for receiving such mail
17. Ease of transmission leads to volume. Ask, "Is this necessary?" before sending multimedia. Use sparingly to respect time and memory considerations

Online threaded discussion (forums, bulletin boards, conferences)

The terms *threaded discussions*, *online conferencing*, *computer conferencing*, *bulletin board*, and *newsgroup* or *news forum* all refer to much the same thing, an online area where team members can post messages and documents, then asynchronously discuss, revise, and make decisions about them. As in a face-to-face meeting, everyone else can hear everything that everyone says in the meeting. However, it differs in that people do not have to be in the same place at the same time and they write things rather than say them.

As in the face-to-face meeting, a tool (however sophisticated) cannot guarantee an effective meeting; it all depends on the meeting coordinator, participants and enabling protocols. Effective coordination, planning and shared protocols are required for conducting an effective meeting. Of all online tools, forums are most likely to fail from inadequate management and facilitation.

When to use threaded discussion

Use a forum rather than e-mail when:

- Your group is going to communicate with each other over a longer period
- Your team needs to discuss the same subject matter a great quite a bit
- You need to discuss and deliberate, solve problems, or brainstorm, and not just exchange information
- You want to increase person-to-person contact & a sense of community

Advantages of threaded discussion:

- Allows time for reading, reflection, and response.

Tips & best practices

18. Have a well defined and shared purpose for a virtual meeting using online threaded discussion
19. Attend to the comfort level. The more comfortable everyone is in communicating with each other, the more they will collaborate. Tackle issues of collaboration and "groupness" head on
20. Guarantee privacy. Make sure people know who is in the group. Institute a strong, clear boundary between who is in and who is out. Add new members (ideally) within the defined boundary or with agreement of the existing members. People should know that nothing that they write would be communi-

- Is easily launched and closed by anyone on the team.
 - Does away with distribution lists
 - Reduces information overload
 - Allows shorter individual messages
 - Collects messages in a common index, where they never get lost or misfiled and are easier to find, being accessible by subject, not chronology
 - The history of the group's messages is preserved for newcomers or later use
21. Promote a culture that encourages open, comfortable communication in the group:
 - Information is the group's, and not the personal possession of individuals
 - Information and opinions are never "right" until tested amongst one's colleagues
 - People take responsibility for what they communicate with others, and it is their responsibility to judge the value of what they receive from others
 - People explicitly value the contributions made by others
 - Trust is needed for open communication and collaboration within a news forum
 22. Integrate virtual work into normal business processes: people devoting their time to virtual meeting need to know that their participation is legitimate and seen as normal business by management
 23. Provide not just technical support but supportive environment virtual workers. It comprises new policies, roles and artifacts of the online virtual environment
 24. It is easy to "lose one's place" in the virtual meeting. Deadlines, milestones, work plans and timetables must be clear at the outset, and the coordinator of a news forum needs to restate the targets and track progress
 25. As in the face-to-face meeting, the virtual meeting "room" has to be designed to meet various need of the team. A project manager should think about not just one forum, but a suite of forums. Perhaps a main coordination forum and separate forums for each task group
 26. A news forum does not accommodate papers. Ensure that materials and work products stay electronic until last possible moment
 27. Train entire team in discussion process, expectations, and application use.
 28. Moderate every discussion
 29. Establish logic for topics/folders (e.g., sub-teams, product components, project phases)
 30. Link to online documents, graphics and other artifacts; don't include them in messages
 31. Use brief discussion points; don't lecture.
 32. Be inventive... don't be boxed in by User Guides