Formulating E-mail Guidelines
By Christina A. Cavanagh

Although most organizations do not have guidelines for other communication channels, we've seen that e-mail is in a category all its own. Its misuse in the workplace can contribute to inefficiency and inappropriate messaging. When so many of us are trying to grapple with the best way to use e-mail within different work environments, establishing general guidelines becomes a worthwhile investment of corporate time and energy. Companies have nothing to lose and a great deal go gain through establishing and maintaining a relevant e-mail policy.

An organization's e-mail policy should incorporate the following:

Purpose	• Briefly outline the rationale for the e-mail policy • Describe protection from potential liability and better use of the system
Scope	• To whom does the policy apply? • Which systems does it cover? • Is there one global policy or will there be regional policies?
Ownership	• Statements that reinforce the fact that the e-mail system is a corporate resource and that all e-mail traffic is the property of the organization
Liability	• Indicate that e-mail is subject to disclosure during litigation proceedings • Types of liability include: defamation, harassment, copyright penalties, infringement of tangible property rights, infringement of intellectual property rights, disclosure of trade secrets, criminal penalties • Include a cautionary note that information that would not normally be committed to writing should not be transmitted by e-mail • Indicate that all users are personally accountable for the messages that they originate and forward using company email systems
System monitoring	• Disclose the nature and use of surveillance software that protects individual employees and company information
Policies on expunging	• Briefly explain how this works for deleted email and the company's retention policy

Appropriate use	• The system should not be used in ways that are disruptive and offensive to others and inconsistent with the organization's professional image • Information of a confidential, sensitive, or otherwise proprietary nature is not to be disclosed • Use for personal purposes permitted within reasonable boundaries
Corporate Intranet	• Describe its purpose, its location, list of all employee bulletin boards, what to post, and procedures
Email protocols	• Define the scope of acceptable e-mail traffic - i.e.: in the performance of job-related functions • Outline the types of information that should be posted on the Intranet • Explain how distribution lists are used • Describe appropriate use of forwarding, reply-to-all and corresponding-copy functions • Emphasize brevity and clarity of messages • Describe acceptable message tone and professional formatting - what lengths are optimal • Identify restrictions with use and/or size of file attachments, especially for remote email users • Suggest ways users can archive and remove e-mail from boxes and folders
Virus protection	• Inform users about the nature of the system's operation • Caution users about opening unknown attachments • Explain procedures to follow if a virus message appears
Contact information	• Indicate where employees can seek further information and/or provide feedback and inputs

Tips for Success

Developing e-mail guidelines is a challenging task that is worth a company's effort. The key is to be brief and concise while using *plain language*. Because of the potential legal liabilities involved in using corporate e-mail, it is important to expose these issues without making the policy read like a legal document. Words and tone play an important role in how employees will respond to these guidelines.