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Effective Communication

Guidelines

Version	Date	
1.0	Jun 8, 2013	First version of the document
2.0	Sep 17, 2014	Extended and updated version of the document
2.1	Nov 12, 2014	Added rule which explains why it is required to use a colon instead of a dash before numbers
2.2	Dec 4, 2014	Added rules on the structure of approval requests and how to explicitly address people from whom actions are expected; recommendation to be concise in business correspondence
2.3	Mar 2, 2015	Link to Productive Meeting / Call Rules guideline added
2.4	April 2, 2015	Added rule to total all columns / rows which can be totalled
2.5	May 15, 2015	Added rule on resending corrected / updated email messages (see 2.7)
2.6	May 24, 2016	Updated section 36 in paragraph 3, added information about the importance of call recording.

1. Introduction

First and foremost, Dev-Pro sells a service and we position ***effective communication as one of our competitive advantages***. While corresponding with a Client, you act as a representative of the Company Dev-Pro. We are trusted as professionals and value our Company's reputation.

At Dev-Pro.net we have very high expectations with respect to the form of communication used by our Project Managers. The rules below will help you to write effective emails and to make sure all your meetings, actions and communication are productive.

Remember! It is very very hard to find a new client and very very easy to lose an existing client.

2. General Company Rules for Email Messages

1. ***All Dev-Pro business correspondence (including internal email messages) should be written in English.*** This rule is designed to ensure that any thread can be easily forwarded to the Dev-Pro President, or Dev-Pro Clients, in case of need. If you use Russian or Ukrainian, and then some issue requires the Dev-Pro President's or Client's involvement, you will have to waste time rewriting all the info in a new email message in English, or translating the existing thread.

2. ***All email messages must be responded to within one business day.*** If you don't have the answer, it is OK to say "I don't know but I will find out and get back to you by Thursday." This will let the sender know that you saw the email message and are going to work with it.

3. ***You should copy top management alias to all email messages sent to Dev-Pro Clients***. This will ensure that the Dev-Pro Top Management, and the Dev-Pro President receive a copy of your email message and are aware of all project issues.

4. ***If a Client has emailed / replied to you directly, you should forward this email message to top management immediately*** when you see it and BEFORE you start working on a DRAFT reply. There is no need to add comments to the email message. It is important to keep the original recipients of the email message in the loop.

5. If you need to forward an email message, please make sure to remove your signature block above the forwarded text before you press the "Send" button. This is because it doesn't contain any useful information and it just makes it inconvenient to read the forwarded email message.

6. In cases in which you need to make a small fix to an email message which has already been sent or resend it with an attachment, you can do this in the following way: create a new email

message and write "UPDATED:" in the subject line. This way the recipient can delete the old email message and keep only the updated one in the inbox.

7. If you are asked to resend the email message with updated / corrected information or attachment, you should send it as a clean email. It is important that you don't leave incorrect / rejected information, or internal comments in the thread. Otherwise your email can't be easily forwarded / used by the recipient in case of need, or incorrect information can be used by them by mistake. Make sure that after some piece of information is rejected, it doesn't appear in the updated email message further.

8. Unless other rules have been communicated to you by the Dev-Pro Top Management, ***before sending an email message to a Client, you are required to prepare a DRAFT and have it approved by an Authorised person***. This approach is designed to help you make sure that you have covered all relevant details and that the information is given to our Clients in the appropriate way.

Check all the details in the Guidelines - DRAFT Rules

9. ***Never ask an Authorised person if you need to prepare a DRAFT; instead, just do it.*** As the Authorised person may be in different time zone, travelling, or just very busy, asking such a question generates an extra round of email messages and may waste a lot of precious time. Go ahead and write the DRAFT and include it in your email message, asking if it should be sent. Then the Authorised person can approve the DRAFT (single step) versus saying OK to your writing the DRAFT and then a separate approval of the DRAFT. In some cases the time taken to write the DRAFT will be wasted but, overall, time will be saved.

Check all the details in the Guidelines - DRAFT Rules

10. ***Explicitly mention whose approval / thoughts / answers you expect to receive.*** It may be misleading if you email a group of people and ask for action or feedback without specifying who exactly you expect an answer from. In such a situation you run the risk of your email message being ignored by the person you really need actions from, or you can mistakenly start acting without first having received all necessary feedback. Address by name the people you expect a response / action from in order to avoid misunderstanding and wasted time.

11. **Be concise.** The Dev-Pro President and Clients are normally very busy, so save their time and make sure your email doesn't contain superfluous details and can be read through quickly. If you put too much detail in your email and write a long story instead of outlining your main ideas and questions, the chances that really important information will be missed by Dev-Pro president / Clients are very high. Try to summarize the main idea at the top of the email and make it very clear what the purpose of your email is. Then you can provide details as required.

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12. Before sending, review your email message and think about what questions the Dev-Pro Top Management / Client could have. Then update your email message to ***address all possible questions BEFORE they are asked.***

13. ***An approval request to the Dev-Pro President or a Client needs to cover the things that the Dev-Pro President finds important (or the Client finds important).*** You can use the following checklist to write a good approval request to the Dev-Pro President or a Client. Make sure your email message answers all the questions listed below.

i) (*for requests to the Dev-Pro President only*) Did the Dev-Pro Top Management (based on the type of request) approve this?
ii) Is this something that should be done?
iii) What are the costs?
iv) What are the impacts?
v) What are the risks?

14. Learn how to write OK email messages and other useful advice on effective communication via email.

Check all the details in the presentation “Effective Communication”

15. ***Always send an offline copy of the document in the email message; it is not enough to share an online copy of the document (e.g. Google Document) with the Dev-Pro President / Client.*** Always send an offline copy of the document in the email, so that the Dev-Pro President / Client can review the document in offline mode while processing emails (e.g. when on flights).

Check the Guideline - Attachments and Links in Email

Name your attachments according to the Guideline - File Naming

16. ***Everything that can be totalled should be totalled.*** If you provide calculations in a spreadsheet, or in the text of the email message, the most interesting thing for Dev-Pro’s Client / President / other recipients in most cases is the total. That is why you should total everything that can be totalled and not make the Client / President do the math.

17. ***Spell check your email messages before sending***. Email messages with spelling and grammar mistakes look unprofessional. Keep in mind that, being Russian native speakers, a lot of people automatically tend to apply Russian grammar rules to English text (e.g. starting an email with “Hi, John” instead of the correct, “Hi John,”) and you should be careful about this.

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18. Highlight all items in your email message which require the recipient's action (answer / confirmation / decision, etc.). Try to put them at the top of your email message. This way you will make sure that they are easy to see and won't be overlooked.

The Dev-Pro President expects you to highlight all items which require his answer in yellow, so you are expected to use this type of highlighting in communication with him. Please note that this may not be appropriate in email messages to Dev-Pro Clients and you may need to use some other type of highlighting (e.g. bold text).

19. ***Be careful about asking "is the deadline ok with you" / "let me know if you need the results earlier" in case you can't actually change anything***. What happens if the Client says s/he needs the results faster? Can you do it faster? If not, then you shouldn't suggest or ask about a faster option.

20. Make sure that your email message is well-formatted and does not contain broken layout or inconsistent fonts. Formatting is important. ***Don't use a variety of fonts or sizes***.

> Check all the details in the [Guideline How to Write Well-Formatted Email Messages in Gmail]

21. ***Follow Dev-Pro requirements for currency and date formats***. This rule is aimed to ensure that your numbers are not misleading for the Dev-Pro President / Clients.

> Check all the details in the [Guideline - Currency and Date formatting]

22. ***Use numbered lists instead of bullets*** to make it easy for the Dev-Pro Top Management / Clients / Colleagues to refer to some particular item in your list. If your email message contains several lists, make sure that item numbers are not repeated and it is possible to refer to any item from your lists unambiguously.

> Check all the details in the [Guideline - Lists and Numbering]

23. ***Don't use a dash as a punctuation mark before numbers.*** If you use a dash before numbers it may be confused with a negative number. Use a colon instead.

24. When you send a regular report to the Dev-Pro Top Management, start your email with the report itself. Don't put a greeting or obviously introductory portion of text in the report. If you don't follow this rule and start the email with a phrase like "Hi all, below you can find a CMS availability report for today," you don't add any valuable information as all this is already clear from the subject. Moreover, you make your email harder to read via mobile device due to the extra vertical lines.

25. ***Always refer to the Dev-Pro President's / Client's time zone*** in case you refer to some particular time in your email message **and always specify the name of the time zone or code**.

26. Change the email message subject line if the topic discussed is different from the current thread.

Check all the details in the Guideline - When to Change Email Message Subject Line

27. Do not click the "Send" button and leave the office the very next minute. ***Make sure that the results of your work are reviewed and accepted*** / DRAFT approved and sent, and only then consider your working day finished.

28. Use the appropriate contact method when handling tasks of different levels of priority and urgency:

Email - for normal priority tasks/reports
Skype - for some urgent needs
Phone - critical situation to address if the person is unavailable via Skype

29. ***Remember that the absence of a Client's feedback to your email message is a potential problem.*** If you notify the Client about potential risks / problems or ask questions, your job is not considered done if the Client has not replied. An unreplied to email message cannot be later referred to in conversations with the Client. S/he can just overlook your email message with important information (or say s/he has done so). It is your job and responsibility to ensure that the Client did not overlook the email message and that there is written confirmation of it. If you talked to the Client via Skype chat or a call, you should send a follow up email to connect the feedback with the original request.

30. The Dev-Pro Top Management would rather be copied on too many email messages than on too few.

3. Company Rules for Calls and Meetings with the Dev-Pro President / Clients

31. You must always be prepared for planned meetings with the Dev-Pro President / Clients so you don't waste anybody's time and cover all your questions within the specified agenda.

32. Use the standardized format to prepare for onsite meetings with the Dev-Pro President during his visits to Kharkiv.

Check all the details in the Guideline - Preparation for monthly meetings with the company president

33. ***Always refer to the Dev-Pro President's / Client's time zone when setting up a meeting*** with the Dev-Pro President / Client. By default, the Dev-Pro President always refers to PST / PDT time. If he says that he would like to have a meeting at 7:00 am, he refers to 7:00 am PST / PDT.

34. ***Properly set a call / meeting and prepare to it to make it productive.*** Remember the following simple rules to hold a productive call / meeting:

a) Choose appropriate tool for the call / conference room for the meeting

b) Book conference room / conference line / GoToMeeting as soon as the meeting is planned

c) Send clear instructions and meeting details to other participants

d) Test the work of the equipment in advance

e) Arrive to the meeting 5-10 minutes before start to properly initiate the meeting

f) Start the meeting with announcing its goal, time frame and proposed agenda

g) Have handouts ready and send them to meeting participants in advance if possible

h) Concentrate on the meeting instead of working on background tasks (check email, chats, etc)

Check all the details in the Guideline - Productive meeting / call rules

35. For screen sharing sessions we use corporate Business Skype or a corporate GoToMeeting account.

Check all the details in the Guideline - How to set up a Meeting with GoToMeeting

36. You must take notes during your calls and meetings and **always send a summary to keep records of information discussed.**

36.1. It is very important to capture on the call:

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a) what was discussed, especially if a decision was not made but this may have an impact on our work;

b) what was decided, if any of the questions from the email / agenda were discussed and decisions were made;

c) any action items or open topics that need to be recorded in order not to be lost.

We want our clients to trust us and to be confident that whatever was discussed / asked / raised during the call will be properly tracked and handled. Additionally, email is a record that, when some time has passed, can be helpful to reconstruct what was discussed and what was decided.

36.2. Remember the importance of calls records with the client:

a) Check the recorder setting before the call starts.

b) Be careful with these records, don't use this information before approval. You need to make the clients aware if you plan to record important calls before the discussion starts (recording calls without notifying all participants could be illegal in some countries/states).

Check all the details in the presentation “Effective Meetings”

4. Other Rules on Effective Communication (Providing Visibility and Keeping Track of Your Tasks)

37. ***When you start working on a new assignment, make sure that the requirements and criteria are clear***. It is better to spend a little extra time to get the initial results approved by the Dev-Pro Top Management / Client / Colleague to be sure that the task is clear than to spend several days going in the wrong direction.

38. ***Keep track of your tasks***. It is your responsibility to track the tasks the Dev-Pro Top Management / Client has assigned to you and to report on the status of the task.

39. ***Provide visibility on the tasks you are working on***. Report on the status of the tasks to the Dev-Pro Top Management / Clients / your Manager / Colleague; let them know when they should expect the results to be delivered, and give regular updates on the status. Communication matters!

40. Acknowledge urgent tasks. Try to respond to the client before s/he gets up in the morning. When the Client wakes up and checks their email they want to know that the urgent task they have assigned is either complete or in progress. If they see nothing in their email box they will be very concerned that nothing is happening and that it won't be finished on time.

41. ***A task is finished only when the results are approved / accepted, not the moment you have sent your results***. Remember this and consider that you need time to have the results approved after they are delivered when you have a deadline to meet.

42. If it takes you 15 minutes to do something that would only take the Dev-Pro Top Management / Client one minute, it is better for you to do it than expect them do it.

43. If you admit your mistakes, you will get much farther than if you argue every small point and try to justify everything.

Feedback on the guideline

If you have any comments/suggestions/questions or noticed a mistake in the guideline, please send us your feedback by filling the **form**.