

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

## TECHNOLOGY

# There's No Shame in Being a Pro: Maintaining The Professional Approach to All Communications

Column: Better Technology for Better Clients

Apr. 17, 2007

In today's tough and changing business world, it is often our professionalism that separates us from the others who interact with our clients. That becomes even more important in the fast lane of business communication, which today is almost always done electronically.

You know the tools: e-mail, instant messaging and electronic faxing. That's the good part. Here's the statistics that highlight the bad part: We're only conveying 30 percent of our message when we don't have the luxury of also using body language and/or voice to reinforce that communication. It's all the more important that we ensure we are getting our point across truthfully and accurately when we rely ONLY on the written word. Maintaining our professional approach is vital when relying on technology to carry the message. Here are some tips that can make you stand out as a true professional:

### **E-Mail – Care & Feeding**

It takes a bit longer, but treat every e-mail with the care and concern you would give a letter of highest importance. The “art” may have gone out of letter writing with the

ease of sending thoughts and words from the computer, but just because it is quick does not mean it is less important. Every e-mail you send is a written representation of you and your business professionalism. A well-written document is respected no matter what form it comes in, so let it represent you at your best.

- Don't send anything in an e-mail that you would regret being seen by others not on your mail list. As quickly as you hit "send," the receiver can hit "forward" and your message is in the "Inbox" of others.
- Be sure you use Spell and Grammar check, and actually look at what's highlighted. Incorrect spellings and bad grammar do not reflect well on you.
- Can the recipient find your information quickly? It is frustrating to get a business e-mail without the person's name, title, phone number, etc. Take the time to build a standard signature for everyone in your company and insist that people use it. Add your logo in for some color and recognition. In time, it becomes your company brand.
- While you can't stop your e-mail from being forwarded to others, you can make people give it a second thought before they send it on. A confidentiality statement conveys the following message: Think about this before you hit "Forward." Make sure you add it to your signature block. Here's a standard sample to help you get started:
  - Confidentiality Notice: This e-mail message, including any attachments or previous e-mail message(s) within it, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. If you are not the intended recipient, please contact the sender by reply e-mail or please notify us at and destroy all copies of the original. Thank you.
- Salutation. Always use a salutation. It could be Dear Jane or as welcoming as a Good Morning! The point is don't just start in on the letter; be courteous by starting your e-mail with the intended recipients name or some introduction.
- Blind copies. They're okay and sometimes very important; just be sure those copied understand they should not disclose the confidence.

### **Exchange Server: How can it support you?**

If it's more than just you, be sure your business systems mirror your professionalism. At its basic level, Exchange Server is the tool that ties together your team's Outlook and that brings you a whole new level of benefits:

- When you backup Exchange Server, you are actually backing up everyone's individual e-mail. Would it be beneficial to you if nobody ever lost an e-mail when their system went down? Without Exchange, you must rely on each person to backup their Outlook.
- Would it be beneficial if when you got a new laptop or replaced a lost or damaged one there was minimal time spent getting your e-mail back to "whole." With Exchange, it is as quick as "re- syncing" between the "new" computer and Exchange to get up and running. That's a timesaver that really makes you look like a Pro.
- Are you ever at a client's office or off somewhere when you need a document from your e-mail? With Exchange Web Services, you can access your e-mail from any computer.
- Shared calendar. You can eliminate much of the "back-and-forth" when coordinating people for a meeting with a shared calendar. Then, use appointments in Outlook to invite meeting attendees and easily get the appointment on everyone's calendar. This is great for improved customer satisfaction and loyalty.

### **Hard Disk Space is cheap, but conservation is valued**

The amount of data in our offices grows exponentially with every attachment to an e-mail. Just imagine what happens if it's going to a group of team members. We thought about that after planning for our semi-annual Customer Group Conferences. We realized how we were sharing PowerPoint presentations among team members. The presenter wanted feedback so he'd send the PowerPoint to everyone involved. A 1MB attachment to 20 people is suddenly 20MB of space used. A few people kept the original for reference, did some edits and then e-mailed back. You get the idea. The server starts getting full, the backup needs a larger tape drive and even the workstations are feeling the effects of clutter. What would a Pro do?

- Use the hyperlink capability in your e-mail to embed a link that points to where the document you are referencing is stored on your server. In Outlook, just create your e-mail and choose:
- Insert > Hyperlink, then point to the document you want. You just saved that 20MB of space.
- Use Public Folders. This Microsoft Exchange feature provides a way to collect, organize and share information with others in your organization. It is great for project teams to use.
- R U in? Instant messaging (IM) makes it easy to boost productivity, and that's good because you want to be responsive. IM enhances

collaboration. It is a very “respectful” tool in that it lets you quickly react while you’re doing something else. But this tool for multi-tasking also brings some challenges.

- You work hard to develop good writing skills. Keeping them is a challenge in the cryptic slang known to the gurus of IM. You’ve seen the favorites, such as lol (laugh out loud), k (OK), BRB (be right back), and one my kids like, TTFN (ta-ta for now). Keep in mind the recipients of your IMs before you show off your slang vocabulary. Professionalism is needed even in IM.
- Frustrated in trying to maintain IM relationships with people using a diverse group of services? The cure: Use a tool that lets you access instant messages from a diverse group of accounts such as AOL Instant Messenger, MSN, IQC and more. One solution is a tool called Trillian. You can find it at [www.trillian.com](http://www.trillian.com).

## **Just the Fax**

Treat your fax with the same care as an e-mail. Since so many faxes today are received electronically, apply the same rules as with e-mail. Remember, your cover letter is your correspondence tool. Make sure it is professional.

Also remember that you are what you write. Be picky about how it looks and how your company presents itself through the writings of your team. It makes good business sense to be a professional communicator regardless of what the technology tool du jour is.

As a timely fortune cookie says: “Words must be weighed and not counted.”

Technology • Article

CPAPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2023 Firmworks, LLC. All rights reserved