Standardizing Broadcast Email Messaging to Business Operations  (rev.3/2014)

The desire to see that important information gets conveyed throughout the organization in an effective, streamlined, and timely fashion has prompted a change in the way broadcast email messaging is constructed and sent to staff within Business Operations.

Planning

After you have formatted your broadcast message using the Business Operations messaging standards, detailed below, please forward your draft to the appropriate FBO Communications Resource, who will coordinate the next step in the message process with the chair of the Operating Group (OG). The OG will evaluate its impact on business operations and make any recommendation to ensure smooth follow-through and understanding of your message. If the OG chair determines that your message does not need to be reviewed by the Operating Group, your message will be forwarded quickly back to you for final approval and distribution.

Please allow 24 hour turnaround for group response.

Please note: upon receipt of the Operating Group’s response, your message will be forwarded back to you or to the appropriate FBO Communications Resource to incorporate recommendations—if any—and for distribution.

Please allow a maximum 2 business days for this review and/or revision process.

Guidelines

The guidelines listed below are followed by a sample template.

1. A standardized broadcast message format
   We wish to standardize the format of the “From” field to eliminate the individual sender name and change the current practice to use a standard unit or department label (for example, Business Operations, Procurement, etc.). This new practice enables business operations staff to sort, store, search emails, and also apply “rules” for automating the forwarding of information within a unit. The Officers of the University will continue to use their individual addresses, but we recommend that departments within the Officer units adopt this format.

2. Sending broadcast messages to Lead Administrators
   When sending broadcast messages to lead administrators, include operations managers, BOLT, and the lead administrators CC List, unless otherwise noted. There are situations when it is appropriate to only send messages to lead administrators. Lead administrators will make the determination to cascade messages to other staff, faculty, or other individuals based on the needs of the unit.

   Please work with the designated FBO communications resource, who will have the most current listing of the business operations groups and can advise best vehicles for communication.

(3/24/2014)
3. **Use strong subject lines**

   Use strong subject lines to succinctly identify the topic and what is required by the recipient.
   
   a. Insert “FYI” at the beginning of the subject line if no action is required.
   
   b. Use “Action Required (with date)” at the beginning of the subject line to signify an action is required.
   
   c. Add “Urgent Attention” at the beginning of the subject line to alert recipients to important information that may require immediate attention or action.
   
   d. Place “For Distribution” at the beginning of the subject line to indicate that the message needs to be distributed within the unit.

4. **Message Distribution within a Unit**

   To aid in distribution, please identify the intended recipients at the top of the body of the message (as appropriate).

5. **Individual ownership of the message**

   The individual responsible for the content of the email will sign or show ownership of a broadcast message by providing a simple closing statement, name, title, and follow-up contact information at the end of the message. The follow-up contact information may be an email redirect to an individual responsible for referring questions to the message owner or may direct inquiries to a help desk.

6. **Encourage close collaboration with the business offices**

   We suggest that central process owners and administrative units add this line at the close of each of their messages, “Please consult with your business office regarding local unit practice,” as appropriate. This will help avoid confusing messages that conflict with local operations of schools and departments and lessen the time faculty, staff, and students spend determining appropriate action.

**Anticipated Benefits of Standardizing the Broadcast Messaging Process**

Standardizing our broadcast messaging process will permit more effective and timely communication on important matters. Specifically it will 1) simplify the maintenance of email lists and eliminate ones no longer useful, 2) provide clarity about who receives messages, and 3) reduce confusion in departments resulting from messages being sent directly to staff, faculty, and students and sometimes not to operations managers or lead administrators.
Sample Email Message Template

From: Business Operations  1.  Sent: Thurs 8/19/2010 3:00pm
To: Lead Administrators, Operations Managers, BOLT, Lead Administrator cc list
Cc: 

Yale Business Operations
For Distribution: Lead Administrators
Operations Managers and department staff  4.

We are continuing to standardize the collection of data for our staff directory. Please be sure to have all staff in your unit make changes to their employee profiles and submit the information (name, address, phone and other contact information) on the attached spreadsheet to directory.office@yale.edu by August 26, 2010.

Thank you for your cooperation in this matter.

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NOTE: It’s always good practice to identify the owner/sender of a message to Business Operations. There are times when the AVP of Business Operations and the Deputy Dean of YSM will jointly issue the message and other times when it is more appropriate for the message to come from one or the other.
### Communication Resources & Partners for Finance and Business Operations

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<tr>
<th>FBO Division/Functional Area</th>
<th>FBO Communication Resource</th>
<th>Functional Area Communication Partners</th>
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</table>
| • Accounts Payable, Controller, Finance (Auditing), Procurement, Yale Shared Services | Beth Labanara | TBD  
Sue Visken-Diaz |
| • Business Operations, (Service Groups), BOLT, Research Administration, Student Financial and Administrative Services, VP Finance Business Operations | Kate Reynolds |
| | Joe Charlet (message distribution) | Sheryl Spector (ORA)  
Eileen Joyce (ORA)  
Anderline Bredy (BusOps) |
| • Organizational Change Management | Depending on functional area:  
Kate Reynolds, Beth Labanara, or Janet Jeddry | Change Management Staff |
| • ITS | Janet Jeddry | TBD |

**External to FBO**

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<tr>
<th>Communications Resource</th>
<th>Functional Area Communication Partners</th>
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<tbody>
<tr>
<td>• Human Resources</td>
<td>Brenda Naegel</td>
</tr>
</tbody>
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*(rev. 3/2014)*