Using Email to Communicate with Clients – more details

Check Email during your shift
1. To open Outlook email, see “Communicating with Clients through Email” in this binder
2. Click the Inbox to view the emails (These emails may, or may not, be resolved)
   To determine if the email was resolved, examine its icon
   (The icon = a small envelope to the left of the sender’s name)
   (1) No action as yet = small envelope with closed flap
   (2) Email Opened, but no obvious response = small envelope with flap opened

   Caution: Before you respond to a previously opened email, check the Daily Log to determine whether previous MGs answered the inquiry via phone or email.
   If via the latter, the response should be in Outlook’s Sent Folder.

   (3) Email Reply Sent = small envelope w/arrow pointing to the left
   (4) Email Reply Forwarded = small envelope w/arrow pointing to the right

To respond to an email
   a. Open the email with a double-click
   b. Review the message
   c. Verify that the email requires a response (See box, above)
      If the email requires action, do the needed research
   d. To email a response to an inquiry, select the appropriate method from the Guidelines, below

   Please don’t delete any emails from the MG computer.
   (The reason: Weston wants to maintain an Email Archive as an educational tool)

Guideline A:
Client Email → MG Email Response
1. To respond to the email, click Reply on the toolbar near the top
   (Notice that the cursor is automatically placed just above the automatic signature)
   Note: Some client email is forwarded to MGs; to reply, see Guideline B, below

2. Type a response which includes:
   a: Greeting (e.g. Dear Joe; Dear Mrs. Smith)
   b. Brief re-statement of client’s question
   c. Summary of your research (identification, management, etc.)
   d. When appropriate, the URL of a suitable publication or an applicable image

3. Click Send
   NOTE: Spell Check activates automatically; follow the prompts

4. Record the client contact in the Daily Log (See Tab B)
   (e.g.: Summarize client’s question and MG response, including resources whenever possible)
Guideline B:

Forwarded Client Email → MG Email Response to the client

- e.g.: 1. Sometimes, Weston, Jordis, and Al forward client emails
- 2. In the Clackamas office, Kim forwards all client email to the MGs

1. To respond, open the email, then click **Reply** on the toolbar near the top
2. **Delete** the existing email address following **To:**
3. **Copy** the client’s email address, and **paste** into the box following **To:**
4. To type and send a response, set the cursor above the automatic signature, then follow steps 2-3 of **Guideline B, above**
5. **Record** the client contact in the Daily Log (See Tab B)
  (e.g.: Summarize client’s question and MG response, including resources whenever possible)

Guideline C:

Client Email → MG Response by Phone → MG Email Follow-up w/Summary

Sometimes it’s easiest to resolve an emailed question via phone. If so, also email a follow-up

1. To begin a new email, click **New** toward the left on top menu bar.
2. To type and send your response, follow steps 2-3 as in **Guideline B, above**
3. **Record** the client contact in the Daily Log (See Tab B)
  (e.g.: Summarize client’s question and MG response, including resources whenever possible)

Guideline D:

Client Email with an Attachment (e.g. images or additional info) → MG Email Response

1. Send a response which retains the attachment
   To do so, open the email, then click **Forward** on the toolbar near the top
2. Copy the client’s email address and paste it into the space following **To:**
3. If needed, type an appropriate descriptive phrase in the box following **Subject:**
4. To type and send a response, set the cursor above the automatic signature, then follow steps 2-3 of **Guideline B, above**
5. **Record** the client contact in the Daily Log (See Tab B)
  (e.g.: Summarize client’s question and your response, including resources whenever possible)

Guideline E:

Client Phone Call → MG Email Response

1. To begin a new email, click **New** toward the left on top menu bar
2. Type client’s email address in the box following **To:**
3. Type a descriptive phrase in the box following **Subject:**
4. Set the cursor in the message area and just above the automatic signature
5. To type and send your response, follow steps 2-3 as in **Guideline B, above**
6. **Record** the client contact in the Daily Log (See Tab B)
  (e.g.: Summarize client’s question and your response, including resources whenever possible)