

# Managing by Email

## A Position Paper for the ECSCW 2003 Workshop on “From Good Practices to Patterns”

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### My Position on Patterns

I have been interested in the application of pattern languages to HCI topics since the early 1990's, was involved in the first HCI patterns workshop [1], and maintain a web page on patterns for interaction design [4].

Elsewhere [2, 3] I have argued that pattern languages are chiefly useful in HCI as a descriptive and rhetorical technique. That is, they are useful as a way of describing patterns of activity as they are, and at enabling designers, clients, and other stakeholders in a design process to discuss interaction design issues using a common, grounded-in-the-situation language.

I have been less enthusiastic about the program of trying to capture best practices in pattern languages and to use them prescriptively, simply because I believe that interaction design—at least as it is entwined with new technologies—is too young to permit much confidence in the correctness of our solutions.

This position paper marks a departure from this stance, in that I am proposing to develop a prescriptive, this-is-how-one-ought-to-proceed language for managing processes by email. This is not so much a rejection of my earlier stance, as an exploration of alternatives.

### Email as a Domain

I propose that one possible activity for the workshop is to develop a pattern language that tries to lay out the best practices around managing a project by email. I suggest that this is a good workshop activity because

1. Email is one of the oldest forms of digital communication, and therefore, if best practices have had time to evolve anywhere in the digital world, we should see some of them in email.
2. It is likely that all of our participants have considerable experience with email (anything else would be quite a surprise!), and that they have had experience either managing something by email (e.g. the process of pulling together workshop) or have at least been involved in such a ‘managing by email’ process.

Thus, we have both a digital domain in which best practices are most likely to exist, and we have a set of people who share experience in the domain.

I am interested in this particular area because I have had quite a lot of experience at managing things by email (on the order of a dozen workshops and review processes organized and managed by email), and

because my recent experience as Papers Co-chair of CHI 2003 led me to reflect on the process, and provided feedback on techniques I had developed elsewhere. As a consequence, I have sketched out a start at a pattern language, which could serve as a useful starting point for the workshop.

## An Outline of a Fragment...

Here is an outline of a fragment of the language. Please keep in mind that it is very tentative, and intended only as an illustration, and perhaps as a starting point.

### The Aim of the Language

More and more processes are being run entirely through email. Email serves as a means of calling for participation, receiving submissions, managing review processes, and so on. In my experience, there is a lot of skill involved in managing a process by email. There are a variety of technical forces (e.g. email clients with different features; spam filters; invisible bounces) and social forces (email overload; human forgetfulness; email reading practices) that must be addressed to succeed. The goal of this language is to capture some of the collective knowledge about carrying out such a process effectively.

### Examples of Types of Patterns I have in mind

To provide a flavor of what I have in mind, here are few sketches of representative patterns:

#### **Information Island: All-in-One Messages**

Storing and finding messages is a challenge for many people. When crucial information needed to complete a task is spread out across multiple messages, the problem is exacerbated. Therefore, make sure any message that asks the recipient to do a task contains all the information necessary to do the task. When possible, this means *not* relying on links, in that many people do not have ubiquitous connectivity, and may wish to do the task when, for example, they are in a plane.

#### **Subject Line Architecture: Foreground Key Information**

Many people manage their email by scanning through lists of messages which display subject lines. The careful construction of a subject line (keeping in mind both this social practice, as well as technical constraints such as subject line length) can help recipients manage email related to the process. This pattern would address issues such as beginning the subject line with a process-specific identifier (so all related messages will appear in a by-subject sort, and including critical information (e.g. due dates) and instructions (e.g. "SAVE THIS!") in the text of the line.

#### **Skimmable Messages**

Often people skim email when reading it. With this in mind, it is a good idea to design email with a clear structure, so that it is easy to skim (keeping in mind, as well, that many mail readers may not support rich text). This suggests a family of low level patterns having to do with the form of email, including: To-Do's in the First Fifty Words; Summary for Long Messages; Numbered Lists; Checklists; and so on.

#### **Content-ful Pings**

In managing a long, drawn out process such as paper reviewing, it is often helpful to remind participants that process is going on and that the deadline is slowly approaching. At the same time, one must take care not to anger participants by overwhelming them with nagging messages

urging them not to forget. One technique is to send very occasional notes that serve a purpose: broadcasting the answers to questions received from individuals, pointing out the availability of a new resource for the review process, and so on. In all cases, such 'content-ful' pings should be brief and polite.

### **Conciliatory Responses**

In the course of conducting a long process, misunderstandings or disagreements sometimes occur. It is well known that reduced social cues can lead to flaming and other sorts of impolite behavior. Polite responses from the recipient of the flame, accompanied by an apology if necessary and/or a full and non-defensive explanation, often serves to repair such breaches.

### **Informed Commitment**

When recruiting people to participate in a long process, it is helpful to provide -- up front, at the time of recruitment -- full details about the commitment they are taking on, and what is expected of them. Thus, providing a job description and schedule is quite helpful. Related to this pattern, is providing an explicit "Easy Exit" option so that those who are unable to participate due to changes in their personal circumstances can withdraw before it becomes a problem, and while replacements can be easily recruited.

### **Fully-Formed URLs**

Always include the "http://" prefix to a url. Some mail clients rely on this make a URL live, and a live URL saves the recipient the steps of selecting the url text, copying it, opening a browser, pasting the copied URL in, and executing the URL.

So, that's what I have in mind. I have tried to give a number of patterns that range in scope from the primarily social (Conciliatory Responses) to the technical (full-formed URLs) to those that are mixes of the two (Subject Line Architecture).

## References

1. Bayle, E., Bellamy, R., Casaday, G., Erickson, T., Fincher, S., Grinter, B., Gross, B., Lehder, D., Marmolin, H., Potts, C., Skousen, G. & Thomas, J. "Putting It All Together: Towards a Pattern Language for Interaction Design. Summary Report of the CHI '97 Workshop" *SIGCHI Bulletin*, ACM: January, 1998.
2. Erickson, T. "Lingua Francas for Design: Sacred Places and Pattern Languages." In *The Proceedings of DIS 2000* (Brooklyn, NY, August 17-19, 2000). New York: ACM Press, 2000, pp 357-368.
3. Erickson, T. Towards a Pattern Language for Interaction Design. In *Workplace Studies: Recovering Work Practice and Informing Systems Design*. (ed. P. Luff, J. Hindmarsh, C. Heath). Cambridge: Cambridge University Press, 2000, pp. 252-261.
4. Erickson T. The Interaction Design Patterns Page. Web page at: [http://www.pliant.org/personal/Tom\\_Erickson/InteractionPatterns.html](http://www.pliant.org/personal/Tom_Erickson/InteractionPatterns.html)