

What is this guide about?

“Our Earthquake emergency plan is changing”, “you need to complete the new online course”, “don’t forget to bring \$2 for the bake sale this Thursday”. These are examples of some of the messages we may need to email people about.

We all get lots of these types of mass emails (emails that are sent to large numbers of people).

While these emails may be important, many of us might merely pay them a passing glance or just completely ignore them. However, we can use behavioural science to increase the odds our emails will be read and understood¹.

When the Behavioural Science Aotearoa (BSA) team use behavioural science principles to optimise emails, we start with five simple steps:

- Step 1. Identify what we want the reader to do
- Step 2: Simplify the email
- Step 3: Make it social
- Step 4: Tell the reader why we are sending the email
- Step 5: Think about timing

How this guide can help you

This guide will help you apply ideas from behavioural science to write emails that are more likely to encourage people to either:

- Take action (e.g. “fill out this survey”, “complete this online course”)
- or
- Take note (e.g. “remember your computer is going to updated tonight”, “there is a bake sale this Thursday”).

Who is this guide for?

Anyone who sends emails

1. While this guide focusses on mass emails, many of the tips and steps can be applied to emails sent to a single person

Why do people often ignore the emails they receive

Understanding what peoples' inboxes are like will help understand why many emails get ignored and put some of the steps in this guide into context.

- People get a lot of emails
- People are busy and don't have time to read everything closely
- When they see a wall of text full of jargon it is hard to find the key point(s) (like the example on the bottom right).



Typical Mass Email

Below is an example of the types of emails we often receive. Some of the common problems we see with emails are:

- Too many words
- Unclear what the key message is/unclear what the reader has to do
- Unclear why this email is important

In this guide we will use this example to demonstrate the steps to use behavioural science in our emails

FW: Please complete a feedback survey about the PMS



Pickett, Jared

To Seminar Participants



Mon 15/02/2021 4:04 pm

Kia ora everyone

Thank you for participating in the project management seminar the other week. Since the course finished, we hope that you have had a chance to apply and demonstrate some of the techniques we worked on in your day to day work. Some of the skills take time to learn so don't worry if they seems confusing and confronting now, and you always have your workbook to refresh yourself on some of the concepts covered if needed.

We have been running this course for the past three years now and we are always looking for ways we can improve and make it a more valuable learning experience. One of the best ways to do this is to get feedback from people who have gone through the course. So, if you could please fill out the survey by going to our webpage and clicking "course survey" at the top of the page it would be very useful.

Once again thank you for taking the time to participate in this seminar. We hope to see you at future courses.

Ngā mihi

The Projects and People team

Step 1: Identify what you want the reader to do

1.1 In one sentence what is the key message you want the reader to know?

In many mass emails, the key message is hard to find. Getting clear about what the key message is will make it easier to communicate to the reader what should they know.

It might seem like a small amount of effort to read an email and understand the key message, but it only takes a small amount of friction to put the breaks on a behaviour. For example, a study in the US found that people were less likely to apply for social welfare when the forms to complete were complex (Bhargava & Manoli, 2015).

1.2 Take the key sentence and put it in the subject line.

The subject line is the first thing readers will see. Slotting the key message in the subject line will make it more likely people will understand what we are asking of them. A clear key message will also make it easier for people to find the email again if they search their inbox later.

Box 1 gives some examples of before and after subject lines.

Box 1: Before and after subject lines

Before	After
Windows Version Update – Pre-Requisite Step	What you need to do to prepare for Windows 10
Office update – Change to screen timeout settings Wednesday, 9 September 2020	Your computer will now automatically lock after 5 minutes of inactivity
Windows 9 Precache Update – Action Required	Leave your computer at work tonight for the Upgrade
IT Request Confirmation ITd327810 – FLA Bundled Order – 1x Install Software Request, 1x Strata Office Analytics Access Request	Your request for Strata has been submitted for approval

Please complete a feedback survey about the Project Management Seminar

Pickett, Jared
To Seminar Participants

Kia ora everyone

Thank you for participating in the project management seminar the other week. Since the course finished, we hope that you have had a chance to apply and demonstrate some of the techniques we worked on in your day to day work. Some of the skills take time to learn so don't worry if they seems confusing and confronting now, and you always have your workbook to refresh yourself on some of the concepts covered if needed.

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Once again thank you for taking the time to participate in this seminar. We hope to see you at future courses.

Ngā mihi,
The Projects and People team

1.2. Subject line has been replaced with the key message

Step 2: Simplify the email *

2.1 Have a clear call to action

Tell the reader what you want them to do early on in the email, preferably in the top 3rd of the email. You can use the key message you created in step 1.

2.2 Remove jargon

Many of your team's day-to-day vocabulary and abbreviations may not be known to those outside your business unit or organization. Remove them.

2.3 Be concise and use plain English

Make sure the comprehension of sentence constructions resembles language and punctuation that would be recognised by the large part of the population. Or in plain English: make sentences simple and concise so that most people can understand what you are trying to say.

You can check if you are using plain English by testing the reading level of your messaging in Outlook by following the steps below:

Click: "File" → "Options" → "Mail" → "Editor Options" → "Proofing".

Underneath "When correcting spelling in Outlook" check the following boxes:

- Check grammar with spelling
- Show readability statistics

Once you've saved these changes, press F7 and Outlook will check the spelling and grammar of your document and show you the readability level. A good aim is for your email to have the reading age of a 12 year old (i.e. a Flesch-Kincaid Grade Level of 6.0 or 7.0) or less**.

2.4 Group key information together

The key points here are:

1. Chunk key information together
2. Make it easy to find information using headers

This breaks the text up and makes it easier to read, it also allows the reader to find the part they most want to read.

The screenshot shows an email from Jared Pickett to Seminar Participants. The subject line is "Please complete a feedback survey about the Project Management Seminar". The email body contains a call to action, a header "Why your feedback is important", and a closing. Red arrows point from text boxes to specific parts of the email:

- A box labeled "2.2 Jargon (PMS)" points to the subject line.
- A box labeled "2.1 Clear call to action, highlighted in bold to stand out" points to the bolded sentence: "If you could please complete this survey about the project management course by going to our webpage and clicking "course survey" at the top of the page".
- A box labeled "2.4 Headers make information easier to find" points to the header "Why your feedback is important".

*The Behavioural Science Aotearoa team has created a guide about how to simplify a document. We present an overview of some of the key details here, however, for more information see the full guide on our website: <https://www.justice.govt.nz/justice-sector-policy/key-initiatives/behavioural-science-aotearoa/>

** While reading level tests can be a useful way to get an idea if your email could be written simpler, there are some limitations to using these tools and therefore they should be viewed as a helpful indicator not the final word.

Step 3: Make it easy

One of the biggest predictors of behaviour is ease: the easier it is to do a behaviour the more likely people will do it.

3.1 Reduce friction

Make it as easy as possible for the reader to take an action. For instance, if you want the reader to do a course, send them a link which takes them directly to the course. Pre-populating information where possible can also reduce friction. For instance, one study compared two groups of students who applied for legal aid. One group had the form partially completed and received advice on how to complete the rest. The other group had to fill out the form themselves. Those in the first group where the form was easier to complete had higher rates of students who submitted an application (34%) compared to those in the second group (26%) (Bettinger, 2009).

Also, make it easy for the reader to know who to contact if they have questions. This is particularly important if the email is from a 'do not reply' mailbox.

3.2 Send the reader a reminder

People often forget to do a behaviour. However, reminders can be an effective way to prompt people to act. For instance, one study found that participants were more likely to get their flu vaccination when they received a text reminder, compared to people who didn't receive any reminders (Herrett, 2014).

3.2 Continued

Reminders can be automated to reduce effort on the sender's part.

We can apply this idea to our emails by embedding a reminder in our email. To set this up follow the instructions below:

As you are typing your email → message → Follow up (under 'Tags') → Custom → flag for recipients

Here you can set up a time you want the reader to be reminded.

For instance, if you want the reader to leave their computer at work overnight, setting a reminder for the end of the workday might be helpful. You can send this reminder in the email so the reader gets a prompt that goes off at 4:50 pm.

Please complete a feedback survey about the Project Management Seminar



Pickett, Jared
To: Pickett, Jared

Reply Reply All Forward ...

Thu 18/03/2021 5:42 pm

Follow up by Friday, 19 March 2021 4:00 pm.

Kia ora everyone,

3.2 Automatic reminder used

If you could please complete this survey about the project management course. The survey is found [here](#).

Thank you for participating in the project management seminar the other week. Since the course finished, we hope that you have had a chance to apply and demonstrate some of the techniques we worked on in your day to day work. Some of the skills take time to learn so don't worry if they seem confusing and confronting now, and you always have your workbook to refresh yourself on some of the concepts covered if needed.

Why your feedback is important

We have been running this course for the past three years now and we are always looking for ways we can improve and make it a more valuable learning experience. One of the best ways to do this is to get feedback from people who have gone through the course. So, if you could please fill out the survey it would be very useful. Thanks to those who have already completed the survey.

Once again thank you for taking the time to participate in this seminar. We hope to see you in future courses.

Ngā mihi,

The Projects and People team

3.1 Make it easier to get to the survey

Step 4: Make it Social

4.1 Include testimonials

Our behaviour is influenced by the behaviour of others, and thus testimonials can be a compelling way to cue people to adopt a behaviour. For instance, one study found that when Reddit users saw positive testimonials from people who had donated bone marrow, readers may be more likely to donate themselves (O'Donnell, 2020).

Therefore, our emails may be more effective when we add a quote from someone well known and respected who endorses the message or mention others have already acted. For instance, say you want people to complete an online module, you could add in a quote from a manager saying how they found the course helpful.

4.1.1 Use testimonials from people the reader can most relate to

Testimonials are particularly effective when the endorsement comes from someone who bears a resemblance to the reader (Yamin, 2019). For example, farmers were more swayed by calls to adopt sustainable agriculture practices when the message came from a farmer of the same gender (Kondylis, 2016).

Therefore, if our email is targeted to frontline staff, new starters or another group, then infusing our emails with testimonials from similar people could enhance their effectiveness.

4.2 Personalise the email

A quirk of human nature is that people are less likely to take responsibility for an action when they feel they are a small part of a large group (Beyer, 2017). The larger the group, the less responsibility they feel. Therefore, when people feel they are 1 of 2000 people that received the email, it is easy to feel like a dime in a dozen and ignore the email. Below are some suggestions for how to avoid this trap:

4.2.1 Address the email to a single person rather than a mailing list

One study found that readers were more likely to respond to emails that were addressed to a single person rather than multiple people (Barron, 2002). The authors argue that this is because when an email is addressed specifically to you it is harder to justify to yourself that someone else will respond compared to when you are one of many recipients.

4.2.2 Use the readers name

If you can, address the email to a specific person rather than using a more generic greeting. For example, "Kia ora Jared" rather than "Kia ora everyone".

4.2.3 Personalise the email sign off

Sign off the email from a person rather than a team: "Ngā mihi Jared", as opposed to "Ngā mihi Delivery team".

The screenshot shows an email from Pickett, Jared to Pickett, Jared. The email content is as follows:

Please complete a feedback survey about the Project Management Seminar

Kia ora Jared,

If you could please complete this survey about the project management course. The survey is found [here](#).

Thank you for participating in the project management seminar the other week. Since the course finished, we hope that you have had a chance to apply and demonstrate some of the techniques we worked on in your day to day work. Some of the skills take time to learn so don't worry if they seem confusing and confronting now, and you always have your workbook to refresh yourself on some of the concepts covered if needed.

Why your feedback is important

We have been running this course for the past three years now and we are always looking for ways we can improve and make it a more valuable learning experience. One of the best ways to do this is to get feedback from people who have gone through the course. So, if you could please fill out the survey it would be very useful. Thanks to those who have already completed the survey.

Once again thank you for taking the time to participate in this seminar. We hope to see you in future courses.

Ngā mihi,

Rog
The Projects and People team

The email interface includes a 'Reply' button, a 'Reply All' button, a 'Forward' button, and a timestamp of 'Tue 16/02/2021 2:31 pm'. A 'Follow up by Tuesday, 16 February 2021 4:00 pm.' notification is also present.

Annotations on the screenshot:

- A box labeled "4.2.1 Address email to a single person" points to the recipient name "Pickett, Jared".
- A box labeled "4.2.2 Use the readers name" points to the greeting "Kia ora Jared,".
- A box labeled "4.1 Indirectly mention that other people have completed the survey" points to the paragraph "We have been running this course for the past three years now...".
- A box labeled "4.2.3 Personalise the email sign off" points to the sign-off "Rog The Projects and People team".

Step 5: Tell the reader why you are sending the email

Why does this email matter? Why should a reader do this survey, or complete this e-learning course? Answering these questions can help motivate the reader to act on your email.

5.1 Tell the reader why this email is important

When we send an email, we know why it's important. It's crystal clear why the computer update is necessary, why this online course is a must or why this engagement survey should be completed right now. However, to the reader why an email is important can be a source of mystery. It's tricky to encourage someone to act when they don't know why they should. Therefore, it is crucial to make it clear why your email is important. For example, if their computer does not update will some applications stop working? Is it mandatory to complete an online course because it is essential for compliance?

5.2 Tell the reader how acting on the email will benefit others

People can be motivated to act when we highlight how their actions will help others. For instance, in one study doctors were more likely to wash their hands when bathroom signs stressed how handwashing helps keep patients safe compared to signs that highlighted the benefits of handwashing for the doctors' own health (Grant, 2011).

We can apply this idea in our emails by emphasising how acting on an email will help someone. By filling out a survey will that contribute to a culture we all want to work in? Will leaving our computers at work make it easier for Jared who works in IT to do their job?

5.3 Use reciprocity

Reciprocity is this idea that if you help me, then I will often feel the desire to return the favour (Gächter, 2017). We can use this idea by stressing how we are doing something to help the reader. For instance, we are asking you to complete this survey because we want to use the feedback you give us to make this organization a better place to work.

5.4 Give the reader a glimpse into the work you do behind the scenes

When organisations give customers a glimpse of the behind the scenes work that goes in to provide a product, they value the product more (Buell & Norton, 2011). This effect, called operational transparency, has been demonstrated in several organisations. One study for instance, found that when customers at a restaurant could see the food being cooked they perceived that more effort went into cooking the food and they valued the service more than when the same food was cooked behind closed doors (Buell, 2017).

How can we use this idea when we write our emails? If you want the reader to fill out an employee survey for example, explain how you plan on using their information, or detail the work that went into creating an online course, such as how long it took to create.

Please complete a feedback survey about the Project Management Seminar



Pickett, Jared
To Pickett, Jared

Reply Reply All Forward ...

5:48 pm

Kia ora Jared,

If you could please complete this survey about the project management course. The survey is found [here](#).

Thank you for participating in the project management seminar the other week. Since the course finished, we hope that you have had a chance to apply and demonstrate some of the techniques we worked on in your day to day work. Some of the skills take time to learn so don't worry if they seem confusing and confronting now, and you always have your workbook to refresh yourself on some of the concepts covered if needed.

Why your feedback is important

5.2. Explains how completing the survey will help future participants

Every time we run this course we change some part of it due to feedback we get from previous participants. We add sections people say would be useful, drop sections people don't feel are as valuable and clarify parts so people can better understand the key points. Your feedback will help us do the same for the next course. So, if you could please fill out the survey it would be very useful. Once we have the feedback our team will meet and discuss how we will use the results to inform future courses. Thanks to those who have already completed the survey.

Once again thank you for taking the time to participate in this seminar. We hope to see you in future courses.

Ngā mihi,

Rog
The Projects and People team

5.4 Explains how the results from the survey will be used

Step 6: Timing

It matters not only what you say, but also when you say it. Below are some principles to follow when thinking about when is a good time is to send an email

6.1 Send an email when the reader will most likely be able to act on your email

If you want someone to take an action after reading an email (e.g. do this online course) then you want them to act soon after reading the email before they forget.

If this is your goal, then you might consider sending the email first thing in the morning. This way the email is right at the top of their mailbox and it is hopefully before the reader has got busy with other tasks.

6.2. Reduce the time between when someone learns something in an email and when they have to remember it

One of the fundamental principles of memory research is that the greater the delay between learning something and recalling that information, the more likely you are to forget it (Murre, 2015).

We can take advantage of this quirk by reducing the distance between learning and recall, by sending the email close to when people need to remember it. For example, If we want people to remember their computer is updating Tuesday evening, we can send an email on Monday that has a reminder that will prompt them at 4:50 on Tuesday.

Summary of the key points

Step 1: Identify what you want the reader to do

- 1.1 In one sentence what is the key message you want the reader to know?
- 1.2 Take the key sentence and put it in the subject line.

Step 2: Simplify the email

- 2.1 Have a clear call to action
- 2.2 Remove jargon
- 2.3 Be concise and use Plain English
- 2.4 Group key information together

Step 3: Make it easy

- 3.1 Reduce friction
- 3.2 Send the reader a reminder

Step 4: Make it social

- 4.1 Include testimonials
 - 4.1.1 Use testimonials from people the reader can most relate too
- 4.2 Personalise the email
 - 4.2.1 Address the email to a single person rather than a mailing list
 - 4.2.2 Use the readers name
 - 4.2.3 Personalise the email sign off

Summary continued

Step 5: Tell the reader why you are sending the email

- 5.1 Tell the reader why this email is important
- 5.2 Tell the reader how acting on the email will benefit others
- 5.3 Use reciprocity
- 5.4 Give the reader a glimpse into the work you do behind the scenes

Step 6: Think about the timing of your email

- 6.1 Send an email when the reader will most likely be able to act on your email
- 6.2. Reduce the time between when someone learns something in an email and when they have to remember it

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