



Tips for When to Call, Email, or Chat

Our remote/hybrid teams' success depends on our willingness and ability to use various modes of communication and set clear expectations of when to use them. In addition to setting clear expectations about the frequency of communication, it is essential to establish guidelines for the mode of communication that is most appropriate and effective in each situation.

Managers: Co-create these expectations with your teams. This will help everyone take ownership and follow through on them.

Below are tips that might be helpful as you co-create the expectations for the modes of communication.

When You Should Call or Video Call

Level of urgency: Very Important (usually)

Purpose: Immediate two-way conversation, usually discussing details or issues

In instances where the message is complicated or has the potential of being misinterpreted, a phone call works best. The complexity or delicateness of communication may not be apparent at first. If an email or chat needs more than three email exchanges for clarification or follow-up, it is best to move that conversation to a phone or video call. If the tone of an email suggests confusion, frustration, or urgency, offer a phone call as an option to discuss the issue.

Provide feedback that is sensitive or related to behavioral issues in person. If this is not possible, choose a phone call or video conference call. If feedback needs to be given in a timely way and not previously scheduled, ask if the person can get on video. Be careful not to require it for impromptu conversations. A benefit of remote days for many employees, especially for people of color, is that they don't have to conform to the Eurocentric expectations of work-appropriate attire. In a recent *Business Insider* article, many Black women noted that working remotely gives them greater flexibility in expressing themselves.

That said, it is okay to set expectations of when a webcam is required. For instance, teams might decide that everyone will be camera-ready for all team meetings or talking with clients or members from different departments. For small gatherings of one to three people, let each group determine if a camera is necessary.

When to Have a Face-to-Face Meeting

Being intentional about face-to-face meetings is critical for remote/hybrid teams. There is no replacement for connecting with team members in person, at least occasionally. As we move to a small/hybrid environment, some teams will be challenged to be on site together on the same days. While using video conferencing, phone meetings, and collaboration tools will help with daily communication, it is important to schedule times to

have face-to-face meetings focused on team-building, performance reviews, or when in-depth interaction is crucial for success.

When to Email

Level of urgency: Intermediate

Purpose: Initiating a dialogue, documentation

Email remains the most popular form of business communication, taking up nearly a quarter of the average employee's workday. Not only is email the quickest way to get a message out there so you can get back to work, but it's also the safest.

Each message you send creates a paper trail if you need documentation about something important. However, email can be time-consuming, and unfortunately, tone can easily be misinterpreted. If you notice an email exchange starts to go astray, keep that in mind and either moderate your tone or pick up the phone and call.

Marking an email as "Priority" or communicating its urgency via subject line typically means you should consider another form of communication.

When to Chat

Level of urgency: Varied

Purpose: Quick exchanges, clarifications

Increasingly, businesses are relying on internal chat solutions to facilitate communication, especially if any team members work remotely. Chat can be time-consuming, though, because it can be challenging to get away once a conversation starts. As long as you're good at speaking up when you need to cut a chat short, you can make the most of messaging software. Chat also gives you the immediate back-and-forth of a phone call without having to talk on the phone.

Adapted from the article titled, "[Ultimate Rulebook for When to Chat, Email, or Call](#)," *CBT Nuggets* - Team Nuggets, July 28, 2017