



Plan2go – Communications Policy & Procedures

Plan2go is committed to ensuring that both face to face and digital communications reflect an attitude of excellence.

For any Telephone interactions:

It is the responsibility of all staff of Plan2go to answer telephone calls efficiently and politely imparting accurate information.

Plan2go Standards for telephone communication:

- Greet the client with “Good morning/afternoon/evening, this is....., thanks for calling Plan2go, how can I help you?”
- Clarify the purpose of the phone call.
- Use the client name where possible.
- Ensure that your tone of voice is confident and professional.
- When closing the call, ensure that you thank the customer.

Digital communications:

Staff are encouraged to use email as a standard form of communication, however be aware that when an email message is sent or received in the course of a person’s duties, that message is a business communication and therefore constitutes a record belonging to the business.

Employees should be aware that electronic communications could be forwarded, intercepted, printed and stored by others. Staff also need to be mindful of Privacy Legislation and are accountable for emails sent in their names or held in their mailbox, and are expected to use electronic communications in an acceptable and ethical manner and limit the exchange of personal emails.

Procedures

- All digital communications need to be professional and follow the guidelines relating to the transmitting of sensitive or controversial information.
- Ensure that all digital communications are clear, concise, correct and courteous
- All emails are to be responded to within 24 hours
- Use email for all internal correspondence where possible

Email Style Guidelines

- Use appropriate punctuation and grammar
- Spell check and proofread emails before sending
- Check email addresses
- Use Font Calibri 11pt
- Avoid the use of contractions

Netiquette

- Do **not** type in capitals when communicating digitally
- Use a positive and polite tone
- Use non-discriminatory and gender-neutral language
- Use **Kind Regards** to end an email (before you add your name).

Email Signature

Your email signature should include:

- Your **first** and **last name**
- Your **Position**
- **Plan2go**
- Your **email address**

(example below)

Justin.Hart
Administration Assistant
Plan2go
Justin@plan2go.com

Returned Email

- If mail is returned, check the addressee's email address with the client list. If correct, contact the recipient by telephone. Use appropriate interpersonal skills to problem solve
- If the addressee's email is incorrect, resend the email

Security & Dangerous/Suspicious Emails

- For security, ensure macros are disabled
- Set security levels and/or filters for incoming digital communications as instructed by your Supervisor.
- Delete suspicious or dangerous emails and report this to IT Department

Email Housekeeping

- Regularly delete unwanted emails
- Store emails in relevant folders

Group Distribution Lists

- Distribution lists are to be used to define staff in a group

Confidentiality

- All electronic confidential information should be protected via firewalls, encryption and passwords.
- Employees should clear their desks of any confidential information before going home at the end of the day.
- Do not leave confidential information visible on computer monitors when you leave your work stations.
- All confidential information, whether contained on written documents or digitally, should be marked as "confidential."
- All confidential information should be disposed of properly (eg shred confidential information)

- Avoid using digital communications to transmit commercial sensitive or controversial information. Examples of commercial sensitive information includes: operational data; work obligations; revenue and cash flow data; and employee information.

Responding to online posts/bulletin boards or communications

- Avoid jokes or sarcastic comments – it is easy to be misinterpreted (due to the absence of visual cues such as gestures and facial expressions).
- Always adhere to the principles of netiquette – be polite, respect other people’s privacy, don’t use jargon, and don’t send offensive material, be professional and only answer questions if you have something useful to say.
- As you are representing your workplace you can ask your Supervisor to check your message before posting – if in doubt.
- All policies and procedures in place for dealing with discrimination, harassment, intimidation and abuse in the workplace also apply when collaborating online with others as part of your work role.
- When collaborating online please advise your Supervisor if you experience any inappropriate digital communication so that the appropriate action can be taken.
- Do not post any personal information in forums that could be used including: home address; phone number, mobile number; personal email address.

EMAIL PROCEDURES

Incoming Email

- Identify urgent or confidential mail and respond promptly
- Be alert to the problems of importing viruses and delete any suspicious mail immediately including hoax or chain emails
- Staff are encouraged to store emails with attachments in appropriate departmental folders
- Inboxes are to be cleaned up periodically and emails archived or permanently deleted as required
- Archived messages and attachments can be converted to a PDF file and stored appropriately on your computer
- Returned mail – after checking the email address is correct, contact the recipient by phone to advise that their emails are being returned

Outgoing Email

- Ensure that the following privacy and confidentiality message is attached to your signature on all outgoing e-mails

This message is intended for the addressee named and may contain privileged information or confidential information or both. If you are not the intended recipient please delete it and notify the sender

- Reply to emails promptly
 - Arial 12pt and single spacing should be used.
- Identify if your message is urgent
- Before sending emails check you have the following:
 - Correct email address
 - Relevant Subject line
 - Your message is clear, polite, accurate, complete and has correct spelling, grammar and punctuation
 - Attachments are included and are no larger than 4GB due to server requirements
 - Your signature with privacy information is at the bottom of the email.
- Mailing lists can be created for sending group emails
- Only forward emails with permission of previous senders

Don'ts

- Don't broadcast junk messages
- Don't send messages (or jokes) likely to promote feelings of sexual, racial or other harassment in the mind of the recipient
- Don't assume your message is private. It may be held on the system for some time or re-transmitted
- Don't send an email message if a face-to-face discussion would be more appropriate

NOTE: The organisation regularly monitors e-mail messages.