

BEST PRACTICES FOR COMMUNICATION

Effective communication is at the heart of every organization. In today's world, we send, receive, and process numerous messages every day. As we work to quickly respond to all the requests, we may forget to be cognizant of how we are communicating.

In our U-M research administration community, we communicate daily via our eResearch Proposal Management (eRPM) system, by phone, and email whether within or among our units and central offices.

These best practices were collectively compiled by representatives from units, from the Office of Research and Sponsored Projects, and from Sponsored Programs.

Remember:
People who communicate effectively create less friction and experience fewer misunderstandings, which saves time and reduces mistakes.

Tips

- Be a good listener.
- Always watch tone in voice and writing.
- Set a communication reply goal. If you know you cannot respond within that goal, let the asker know that you will follow up, and estimate when.
- Draft questions in the active voice for clarity.
- Minimize redundant communications (e.g., an e-mail to indicate that something has been posted in eRPM).

UTILIZE THE 5 Ws.

Include info on:
**Who? What?
When? Where?
Why?**

UTILIZE THE 5 Cs.

Be
**Clear, Concise,
Complete,
Correct, and
Courteous.**

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"In a world of constant change, the fundamentals are more important than ever." - Jim Collins

@ WHEN TO EMAIL

Tips on best ways to use email

- When you want to document information for later support and clarification.
- When documentation in eRPM is not necessary.
- When clarification is needed before documenting in eRPM.
- For correspondence with a sponsor.

... & HOW

Always:

- Include good contact information in your signature, including your phone number.
- Include relevant U-M reference information as available:
 - Proposal Approval Form (PAF) number
 - Project Grant (P/G)
 - UFA (Unfunded Agreement) number
 - SSP (Special Sponsored Project) number
 - PI (Principal Investigator) name
 - Sponsor name and detailed contact information (if requesting that a central office contact them)
- Direct your email to the person you're requesting response from (use "To" line appropriately).
- Copy interested parties when necessary (use "cc:" line and "Reply to All" wisely).
- Proofread for content *and* tone.
- When forwarding an email to reference, summarize and include the action requested.
- Re-iterate subject of text in the first line of an email.
- Put as much key information in the subject line as possible and include your question.

📞 WHEN TO PHONE



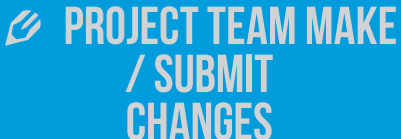
Tips on when to pick up the phone

- When you need a quick confirmation or to speak with someone directly.
- When you are experiencing miscommunications (e.g., still not clear after writing back and forth).
- When you need to discuss complex situations or when multiple issues need resolution.
- When you don't need physical back-up of resolutions.
- When you're required to speak directly to a person.
- When routing a same day submission request.

... & HOW

Always:

- Identify yourself and why you are calling.
- Check to be sure if this a good time to talk and indicate how long you need.
- If you leave a voicemail, concisely leave all relevant information.

	eRPM Communication Method	eRPM Communication Method	eRPM Communication Method
	 <p>PROJECT TEAM REQUEST ORSP ACTION Use judiciously</p>	 <p>POST A COMMENT</p>	 <p>PROJECT TEAM MAKE / SUBMIT CHANGES Use judiciously</p>
This eRPM activity is available...	...after the PAF is submitted to sponsor	...as soon as a new PAF is created	...once a PAF is submitted for approval (until it is routed to ORSP), and when ORSP returns PAF from its approval queue.
When to use	<p>Proposal Award Form (PAF) status change</p> <p>Forward Award Docs</p> <p>Use for all Post-Award Change Requests (require Form)</p> <p>Pre Award changes</p>	<p>To create a permanent record in the system</p> <p>To relay information</p> <p>To attach documents to PAF</p> <p>When instructed by ORSP</p> <p>Request ORSP to return PAF to unit for changes prior to submission</p> <p>Hints: Opt to <i>not</i> select email recipients if you are just attaching a document for the historical record.</p> <p>If you <i>do</i> select an email recipient, <i>modify the default subject line</i> and/or the comment.</p> <p>Tip: Include all necessary information.</p>	<p>To make and submit changes to a PAF in the approval process</p> <p>Tips: Include all necessary information</p>
Results	Each action request moves the PAF into the ORSP Project Representative's (PR's) and staff member's eRPM inbox	<p>This activity updates information to PAF; the individual posting the comment controls whether emails are sent by checking/unchecking recipient boxes.</p> <p>Note: All who have access to the PAF are able to see it</p>	Generates "acknowledgment request" emails to all units that have previously approved the PAF
Does it trigger email?	No	Not necessarily. It's user-directed. An email is sent if a recipient is selected, otherwise, no.	Yes, in every instance used, to everyone with approval access to the PAF
Examples & Scenarios	<p>PI indicates proposal has been turned down, use to update PAF Award docs sent to PI, request to process</p> <p>Requesting a no-cost time extension (NCTX), a re-budget, or any other categories available on Post Award Change Request form</p> <p>Sponsor requests a pre-award rebudget from PI</p>	<p>Explain why the PAF is being routed late</p> <p>Upload requested documents after routing the PAF</p> <p>ORSP requests PI to indicate award acceptance.</p> <p>Share communications from the sponsor</p> <p>Upload final technical report at the end of the award</p>	Budget revision, indirect cost rate change, effort change, or other event requested by unit

eRPM COMMUNICATION BEST PRACTICES MATRIX

Before you use any method, confirm whether the information you need is already available in eRPM and/or your award terms and conditions.

For further information on eRPM System Notifications, please consult: http://umich.edu/~eresinfo/erpm/docs/Email_Notifications.pdf