Effective communication is at the heart of any organization. In today’s world, we send, receive, and process numerous messages every day. We work quickly to respond to all the requests. Factor in stress and the remote work culture of the pandemic, and we may forget to be cognizant of how we are communicating.

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

**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:

### 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:
  - Award number (AWD)
  - Proposal Approval Form (PAF) number
  - Project Grant (P/G)
  - UFA (Unfunded Agreement) 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:**

- Leave a voicemail.
- 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

<table>
<thead>
<tr>
<th>Method</th>
<th>Description</th>
<th>When to use</th>
<th>Results</th>
<th>Does it trigger email?</th>
<th>Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>REQUEST ACTION/MODIFICATION</td>
<td>Use judiciously</td>
<td>...after the PAF is submitted to sponsor</td>
<td>Each action request moves the PAF into the ORSP Project Representative's (PR's) and staff member's eRPM inbox.</td>
<td>No.</td>
<td>Tip: All who have access to the PAF or AWD can see it. Not necessarily. It's user-directed. An email is sent if a recipient is selected, otherwise, no.</td>
</tr>
<tr>
<td>POST A COMMENT</td>
<td></td>
<td>...as soon as a new PAF is created, and is available on active Awards.</td>
<td>This activity updates information to PAF or AWD; the individual posting the comment controls whether emails are sent by checking/unchecked recipient boxes.</td>
<td>Yes, in every instance used, to everyone with approval access to the PAF.</td>
<td>Yes, the PI and the Primary Post-Award Contact will receive an email notification that a PACR was submitted.</td>
</tr>
<tr>
<td>SEND TO PROJECT TEAM FOR CHANGES</td>
<td>Use judiciously</td>
<td>...once a PAF is submitted for approval (until it is routed to ORSP), and when ORSP returns PAF from its approval queue.</td>
<td>Generates &quot;acknowledgment request&quot; emails to all units that have previously approved the PAF.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AWARD CHANGE REQUEST</td>
<td></td>
<td>...on a processing or active Award.</td>
<td>This activity will go directly to the ORSP Project Representative.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Tips
- Use the Request Action/Modification for requests that will not result in a formal modification to the Award.
- 1. ORSP Action Request: request that ORSP send a document to the sponsor.
- 2. A Post-Award Change Request (PACR) for changes that may result in a formal modification to the Award, e.g., request a no cost extension, a re-budget, or any other items available on the PACR form.
- Do not use Post a Comment to request changes to an Award.
- Use the ITB Step-by-Step Guide at: [http://myumi.ch/3qRdG](http://myumi.ch/3qRdG)
- For further information on eRPM System Notifications, please consult: [http://myumi.ch/BoRnl](http://myumi.ch/BoRnl)

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**This eRPM activity is available...**
- After the PAF is submitted to sponsor
- As soon as a new PAF is created and is available on active Awards.
- Once a PAF is submitted for approval (until it is routed to ORSP), and when ORSP returns PAF from its approval queue.
- On a processing or active Award.

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**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://myumi.ch/3qRdG](http://myumi.ch/3qRdG)
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