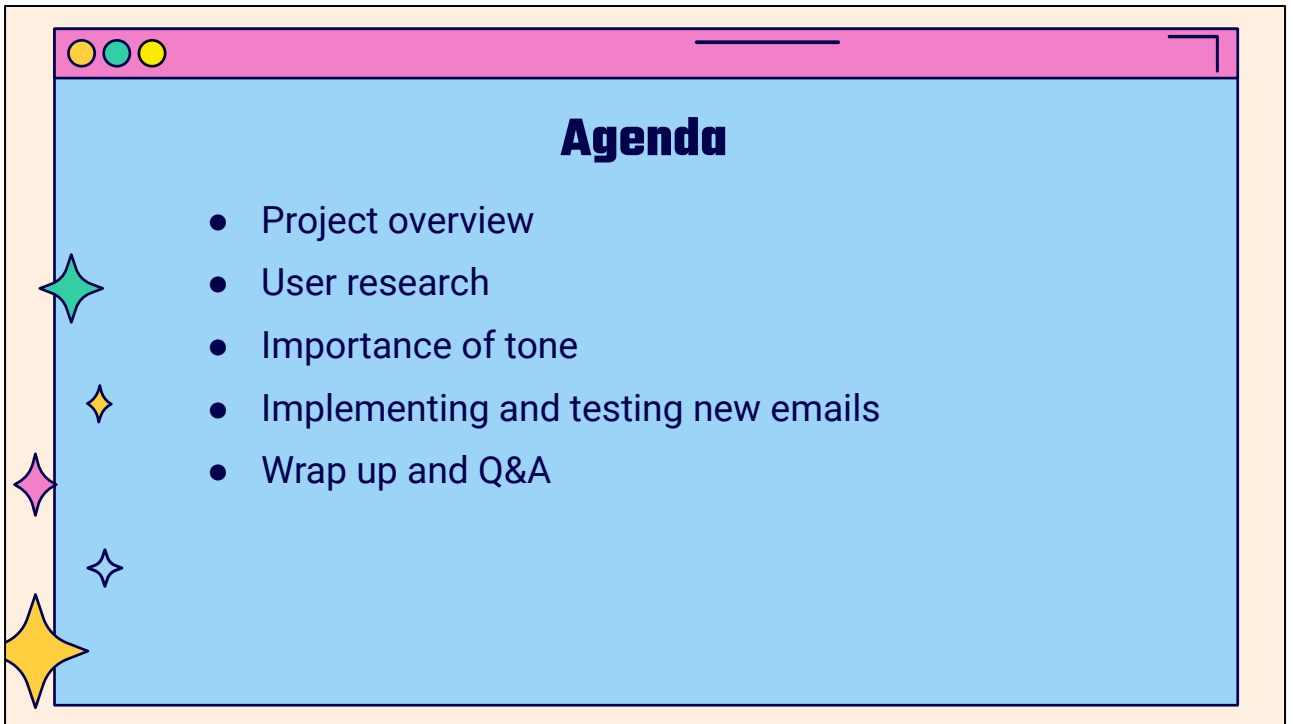Robin: Hi, and welcome to our presentation, Emails Are UX, Too: How to Make Better Overdue Notices & Other Communications. I'm Robin Davis, and my pronouns are she and her. I'm a User Experience Librarian, and I do user research and coordinate content strategy at NC State University Libraries.

Silvia: Hi, my name is Silvia Sheffield and my pronouns are she and her. I'm a library technician at NC State, where I manage the day to day operations of one of our branches, as well as wearing various other hats around the Libraries.

Agenda

- Project overview
- User research
- Importance of tone
- Implementing and testing new emails
- Wrap up and Q&A

Silvia: Here's how we're planning on spending our time here together. We'll present for about 25 minutes and then leave some time for Q&A at the end.
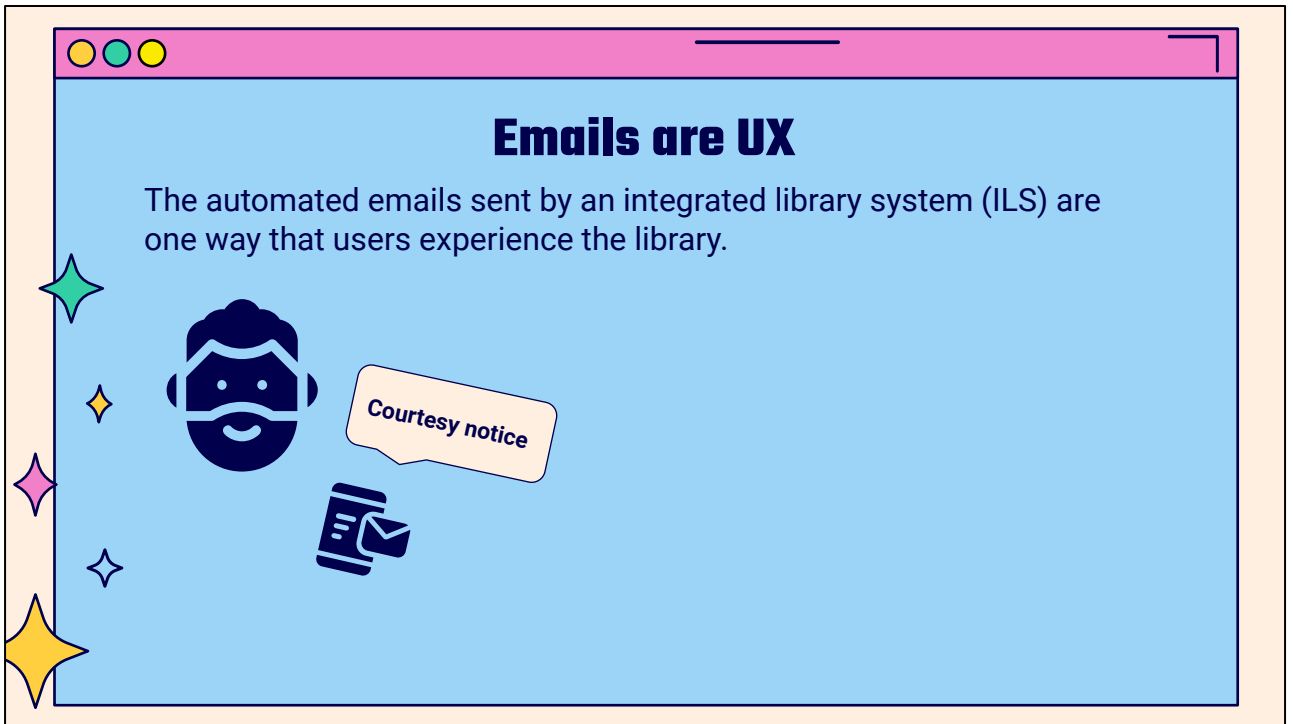
Robin: [read slide text]
In other words, emails fall under the umbrella of UX, or user experience, just as the website does.
These emails might be overdue notices, billing emails, hold notices, and so on.
All of those emails should reflect the character of the library.
For some library users, like those who don't drop by the reference desk or attend events or use your website very much, those automated emails might be the only voice of the library.

Robin: [read slide text]
Last time templates were updated: 2012. We were due for a review.
I should note that our library sends a lot of emails, like ILLiad notifications and newsletters — our project focuses only on those sent through our ILS.

Our Team

Mia Partlow
Resource Sharing Librarian

Robin Davis
User Experience
Librarian

Dawn Pearce
Technology Support
Specialist

Silvia Sheffield
University Library Technician

Silvia: Though it's just Robin and me presenting today, we are only half of the core team. Mia Partlow was lead both for this email update project and for the more broadly scoped Communications Infrastructure Project Team that this project came out of. Dawn Pearce was another contributor and did all of the work to implement our new templates in our ILS.

The four of us brought different kinds of expertise and perspectives to the project. Mia and I had first-hand experience providing service at the desk and on chat and interacting with our circulation procedures. Robin brought the UX perspective, and Dawn knew the limitations and capabilities of our ILS.

Beyond the core team, our colleague Cole Hudson also contributed to our user research, and the Web Content Team did final edits and approvals on the new email language.

Example:

Before & after
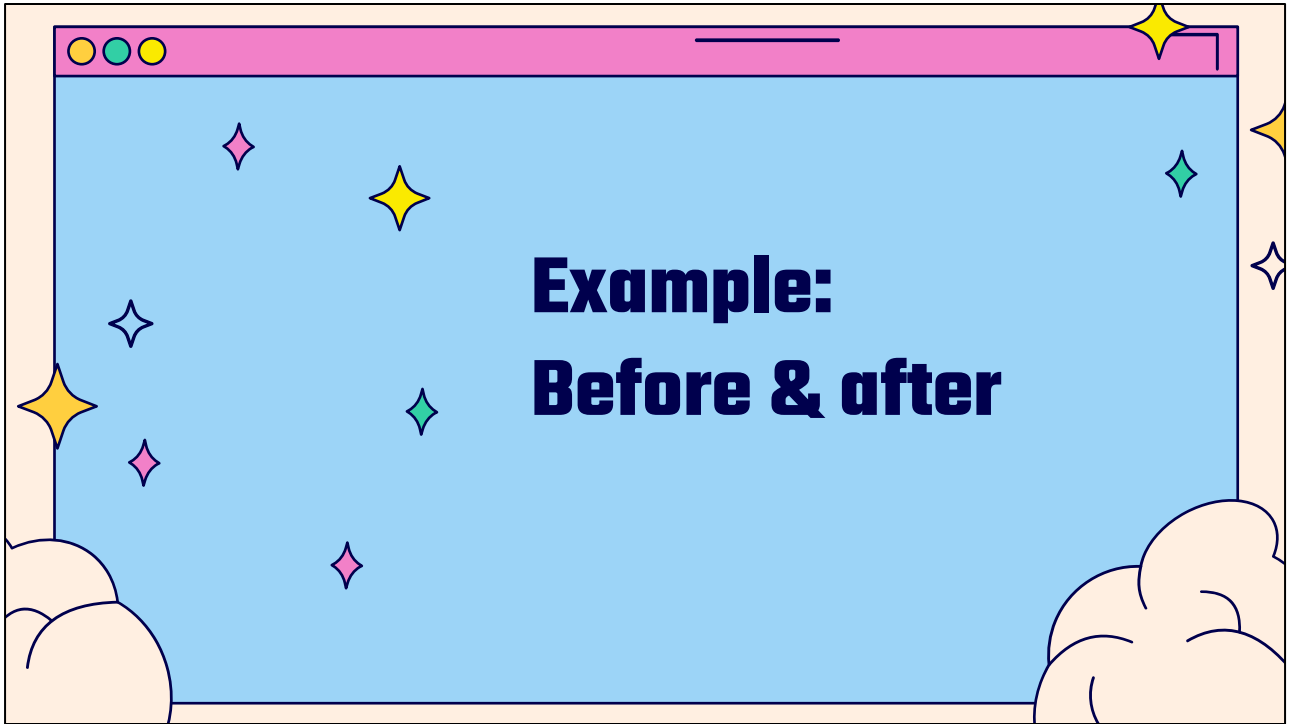
Robin: As an example of a change we made, we want to show you how we improved our emails for short-term loans.
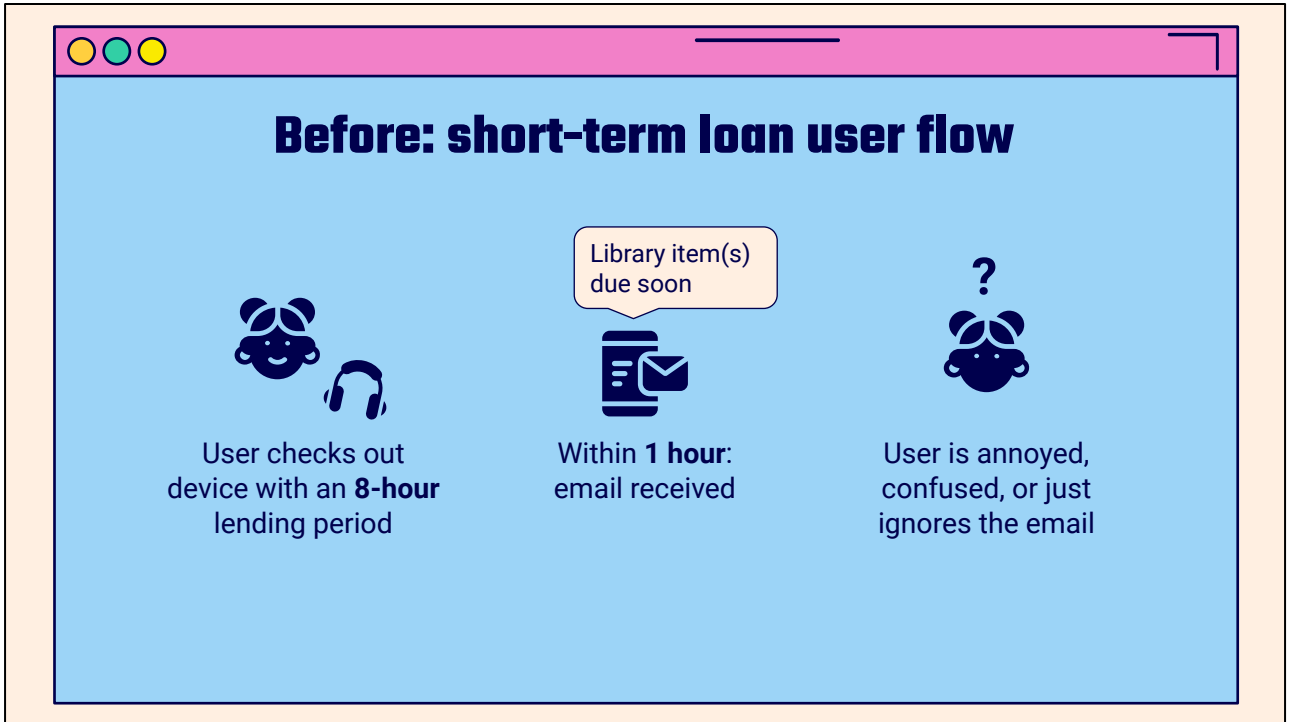
Robin: Here's the user flow before we changed the email. [describe slide]
We knew that this was a pain point, and this particular email template was one we wanted to tackle first.
Let's take a closer look at the actual email users were receiving.

Short-term loan courtesy notice: before

Subject: Library item(s) due soon
Tuesday, July 16, 2019

Vague, jarring subject

James B. Hunt Library
1070 Partners Way
Raleigh, NC 27606

Business letter format holdover: why do we need physical addresses in an email?

ROBIN DAVIS
BOX 555
RALEIGH, NC
27695
555-555-5555
RCDAVIS6@NCSU.EDU

Dear library user,

"Dear" :/ cked out the following items. Please return them by the time indicated below. If you have already returned them, you can disregard this message.

To renew, go to: https://myaccount.lib.ncsu.edu
To return, drop them off at an NC State University Libraries service desk.

(continued)

1 call number:MACBOOK AIR 13"
   ID:S029396994
   Apple Laptop
   due:7/16/2019,17:21

2 call number:APPLE 45W MAGSAFE 2 ADAPTER
   ID:S03266900Q
   Apple Laptop Power Adapter
   due:7/16/2019,17:21

If you do not return or renew these item(s) by the time specified, you may be fined.

Thank you for taking care of this matter promptly.

NC State Univ
(919) 515-336

Overly formal, almost punitive tone

Robin: 1. The subject, Library items due soon, is vague (which items, how soon?) and doesn't actually make sense when it's received one hour into an 8 hour loan.
2. Business letter format holdover: why do we need physical addresses in an email? Maybe the library address would make sense at the very bottom of the email, but there's zero reason we need to print the user's address.
3. Our project team rejected "dear" as being too formal. But interestingly, some millennials and generation Z folks may view the "dear" salutation as too intimate! Like you're calling the addressee your darling. (See Gretchen McCulloch's tweet)
4. Overall, the tone of the email was too formal, and this last bit is too punitive-sounding: [read].
So here's how we changed it.

Short-term loan courtesy notice: after

Subject: Thanks for checking out these items. Here's when they're due.

From an alert to a confirmation

Body:
May 1, 2020

Hello,

You just checked out some item(s). Please return them on time to an open NC State University Libraries service desk. Thanks for using the Libraries!

Friendlier tone

1 call number:MACBOOK AIR 13"
    ID:S029396994
    Apple Laptop
    due:7/16/2019,17:21

——

(continued)

Can these items be renewed?
  No, these items cannot be renewed.

Where should you return these items?
   Technology devices that are borrowed for short-term periods, like laptops, can be returned to any open Libraries service desk.

What are the Libraries' hours?
   View library hours at lib.ncsu.edu/hours.

FAQ section with policies

___

If you returned these items more than an hour ago, or if you have other questions, please contact us to let us know:
  Email library_askus@ncsu.edu
  Call (919) 515-3364

Robin: 1. Because the user would get this email about an hour into their 8-hour loan, we changed the email from an alert to a confirmation. It's no longer an urgent alert, it's now a helpful confirmation.
2. The email begins, [read]. We took a friendlier tone, even daring to use a happy exclamation point.
3. Closer to the bottom of the email, we added an FAQ section based on user research, which we'll get into later.
There are some things we couldn't change, which Silvia will describe further into our presentation. But we worked within our limitations to improve the email as much as we could, where we could, and we think it made a big difference.

Robin: So we did that process 18 times.

We took a similar approach to all of our email templates, ending up with a 20-page collaborative Google Doc covering all of our templates: overdue notices, billing notices, holds, recalls, and more.

Now that you know what our before & after look like, let us dive deeper into how we got there.

Silvia: We conducted several rounds of user research throughout this project to make sure we were on the right path.

Round 1: Patron Survey

- Overall, our respondents said emails were already clear and useful
- Common suggestions
  - Put important info in the subject and at the top of the email
  - Improve styling and branding
  - Include more details about the item and relevant policies

Dear library user,

The following item is available for you at the library listed above. Please come by and pick it up.

To view your library account, go to https://myaccount.lib.ncsu.edu

==============================
How can we improve this email?
Please, let us know by filling out this short survey. You will have a chance to win a portable phone power bank! https://go.ncsu.edu/first-pickup-notice.
==============================

NC State University Lib
(919) 515-3364 | libra

1 Staff record: Roku
   only
   Pearce, Dawn.
   call number:PS360
   Pickup by:11/2/20

This email makes me feel...

- [ ] Purposeful
- [ ] Reminded
- [ ] Confused
- [ ] Irritated
- [ ] Other

Silvia: Our first round of user research was to get information about how patrons perceived our current emails. We inserted links to Qualtrics surveys in 5 of our email templates and incentivized participation with a drawing for a portable power bank. We kept the surveys open for a few weeks and got around 45 responses.

We included some multiple choice questions like, "How clear was this email to you?" and "How useful was this email to you?" as well as a few open ended questions like "How could we improve this email?" Those questions were the same across all of the survey, but we also included more context specific questions based on the email template. For example, the survey linked from the expired hold email asked "Do you feel that you received adequate notice that your requested item would be removed from the hold shelf?"

Overall, patron email were Very Clear or Somewhat Clear and Very or Somewhat Useful, which honestly surprised us a little. Our courtesy notice for short-term loans, the example Robin just showed, was the least useful. The respondents also gave some constructive feedback. Some of it confirmed our own thoughts about the emails, that the important content should be in the subject line and top of the email and that better formatting and branding would make them more readable. But they also gave feedback that we hadn't anticipated: they actually wanted more info about the item and any relevant policies.

This survey data was useful as we started to think about updating our emails. But it had a major limitation: all of the respondents were people who opened our emails and

read them closely enough to see the survey link. In that way, they were not necessarily representative of all patrons.

Round 2:
Tiny Café (Pop-up)

- Showed participants printed-out mockups of emails
- Positive responses
- Desire for *more* info in due-date emails:
  - Late fine policies
  - Info about returning items to different library locations
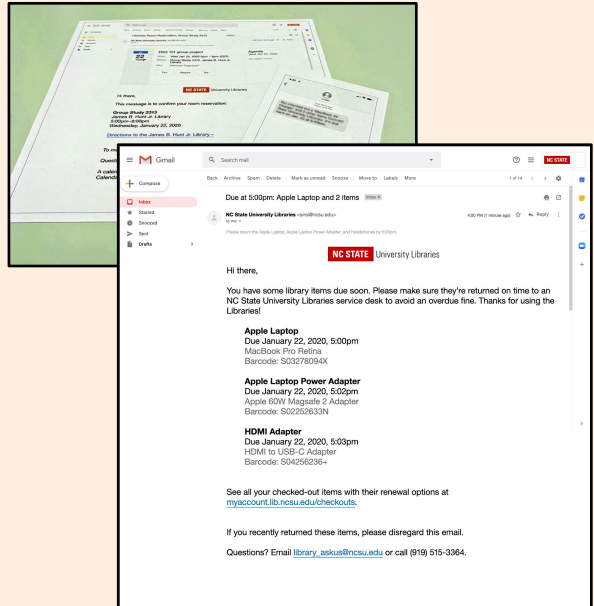
Robin: Once we knew that there were some things users wanted to change, we started to mock up what those changes could look like so we would know specifically where our work was needed.

For that, we held a Tiny Café, a pop-up table in the lobby of our library where we offered free coffee & muffins to passing students in exchange for their feedback.

We showed 35 participated printed-out mockups of emails, which you can see on the right here.

Overall, we got positive responses, but interestingly, participants told us that they wanted *more* information, including late fine policies and info about returning items to different library locations.

The original email and the mockup on the right there didn't have any of that info, but students said it would be helpful to include.

By the way, if you're admiring the formatting of the email mockups, just know that this was before we came to terms with our ILS's formatting limitations.

—

Tiny Café: borrowed from the libraries of University of Arizona, University of Houston, and from Penn State University.

User research report: communications tiny café

Round 3: Ask Us
Student Employee Survey

- High marks for clarity
- Wish for better formatting
- Helpful feedback with patrons in mind

Is the important stuff at the top of the email?
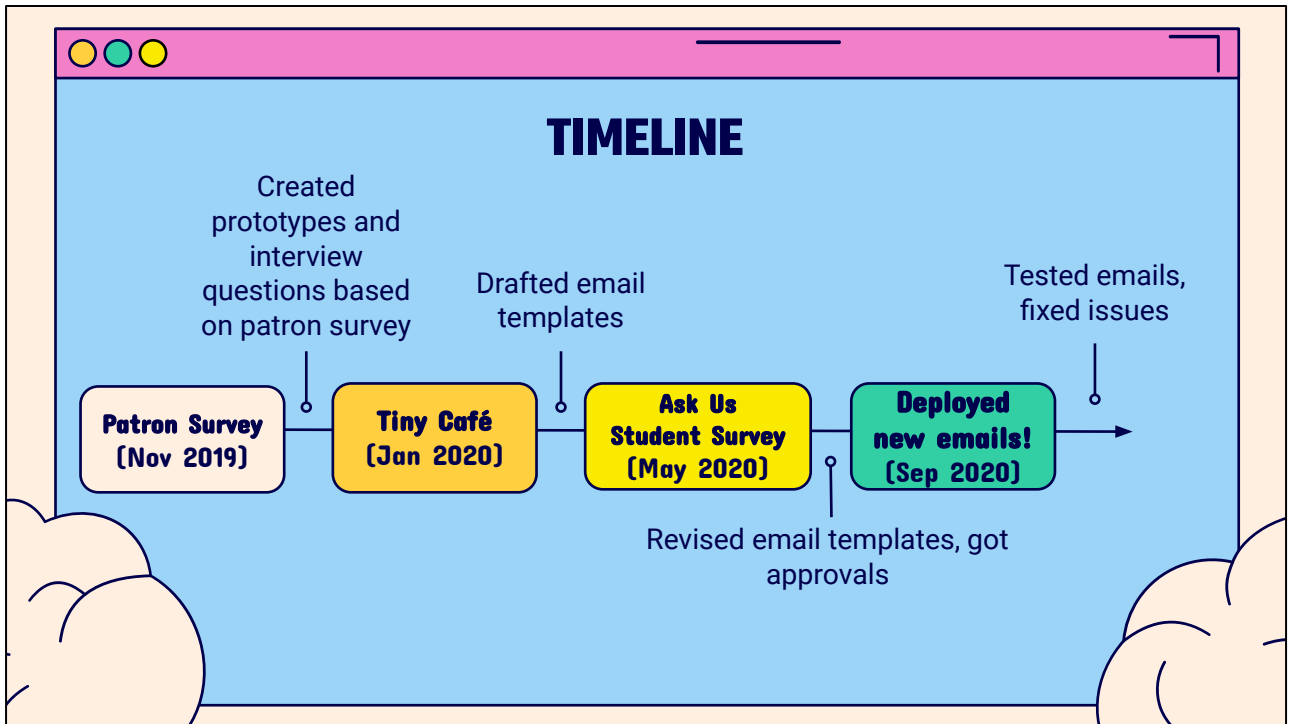19 responses

- Yes
- No

94.7%

Ask Us

Silvia: After drafting our new email templates we invited 60+ Ask Us student employees to take part in a survey. These are students who work at the service desks at our main libraries and have a unique perspective. They are students themselves and they also have many direct interactions with our patrons. 19 of them completed the survey and they were paid for 30 minutes of work.

The survey included both multiple choice and open-text questions. It focused on three email templates:
- Due date email sent after checking out short-term tech items
- Overdue notice sent right after the due date and time
- Billing notice sent 3 days after due date

The respondents found all three emails to be clear and the tone to be respectful, though they shared our desire for better formatting. They also gave some helpful feedback with patrons in mind. For example, they suggested adding language to the billing email to clarify that patrons can still return items marked "lost" and get the replacement fees refunded.

TIMELINE

Created prototypes and interview questions based on patron survey

Drafted email templates

Tested emails, fixed issues

Patron Survey (Nov 2019)

Tiny Café (Jan 2020)

Ask Us Student Survey (May 2020)

Deployed new emails! (Sep 2020)

Revised email templates, got approvals

Silvia: All in all, this iterative process of doing user research and refining our templates took almost a year. (But of course, the process of updating emails doesn't have to be this involved! I doubt we will do this many user research activities next time we revisit our emails.)

The importance of tone

Robin: With the first two rounds of user research done, we felt ready to tackle the actual rewriting of email templates. To do that, we focused primarily on tone.

Writing for email


```
☐  NC State University.                                    Jan 15
   FYI, the items you requested are going back on our shel…   ☆
   Friday, January 15, 2021 ROBIN DAVIS BOX 7111 RALEI…

☐  NC State University.                                    Jan 11
   Your library item is available for pickup                  ☆
   Monday, January 11, 2021 DH Hill Jr. Library ROBIN DA…
```

- The **subject line** should communicate the gist without needing to be opened
    - Good example: "Your library books are due in 3 days"
    - Bad example: "Library notice"
- Consider the **snippet**
    - Can you add helpful info into the first 60 characters of your email?

Robin: Writing for email has some structural implications.

How does your user see your email? Usually, it's on their phone, glancing quickly at their inbox.

Subject: [read] In other words, your subject should be so good, that the user doesn't even have to open the email to understand what it's telling them.

Snippet: [snippet] We were constrained by our system, sadly, so we couldn't insert a snippet, but ideally, you would do this for automated emails.

Voice

Our organization's voice is business casual: professional but not stuffy.

(Shout-out to GVSU, UIUC, & Courtney McDonald for inspiration)

Our web style guide

Web Style Guide

Quick Tips
Writing for the Web
  Content Organization
  Links
  Word List
Forms
Drupal 101
Logo usage
Style guide for the style guide
APIs

Writing for the Web

Writing for the web is different from writing a brochure or guidebook. We read web content differently:

- We skim text rather than reading it deeply.
- We read a web page on our way to accomplishing another task.

Voice

The Libraries' voice is our overall personality: business casual. We are professional but not stuffy.

Keep it brief

Write in short paragraphs with lots of headings (see Content Organization). Use bulleted lists where it makes sense.

Why aim for brevity? When confronted with a "wall of text," users tend to comprehend about 20% of it.

Use plain language

The goal of our website is to help users get what they need quickly. Simple language lowers the user's cognitive load. Plus, plain language is easier to understand for users whose first language is not English.

✗ Please don't:	✓ Please do:
Submit your request no later than December 12.	Submit your request by December 12.

Robin: Writing for the web and email is different from writing academic papers, particularly when it comes to voice.

Over the last decade or so, we've seen a shift across the web to a more informal voice, even in serious services.

I don't mean using emojis right and left, but I mean get comfortable with using contractions and not sounding so stiff.

We say that our organization's voice is "business casual, professional but not stuffy."

As we rewrote our email templates, we referred to our library's Web Style Guide for guidance on voice and other best practices for writing for the web.

Changing the tone of our emails

"Dear library user,"
→ **"Hello,"**

"Requested library item available for pickup"
→ **"Great news! Your library item is available for pickup"**

"Please renew or return them immediately."
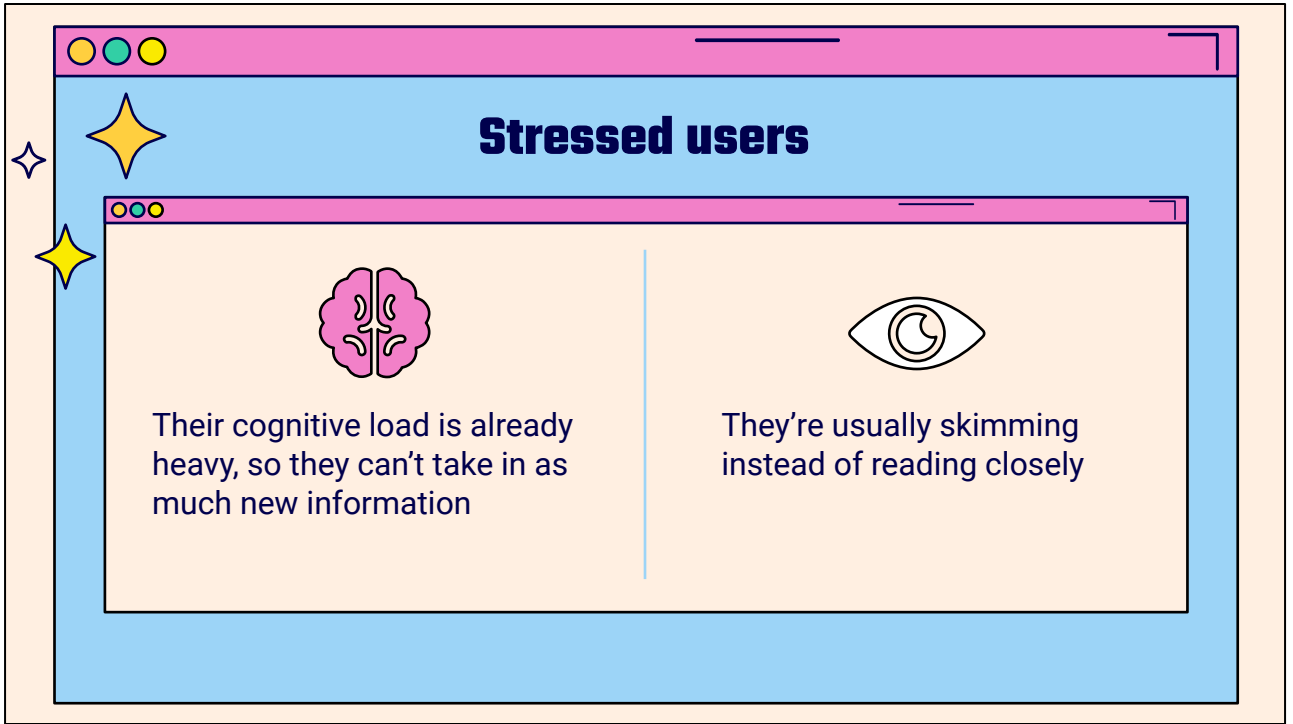→ **"Please return them soon to any Libraries location."**

Robin: With that voice in mind, we changed the tone of our emails, shifting more toward informal tones. [Examples…]
1. For the greeting, we nixed Dear Library User and replaced that with "Hello." We'd originally drafted "Hi there," but we changed that to "Hello" since the same greeting would be used for more serious billing notices, too.
2. [read] Avoid the stiff, formal, robotic voice
3. [read] We aimed to sound less punitive and less urgent, so we removed "immediately" from the last example. In general, we don't want to imply that we assume the user is about to do something wrong.

Writing for stressed users
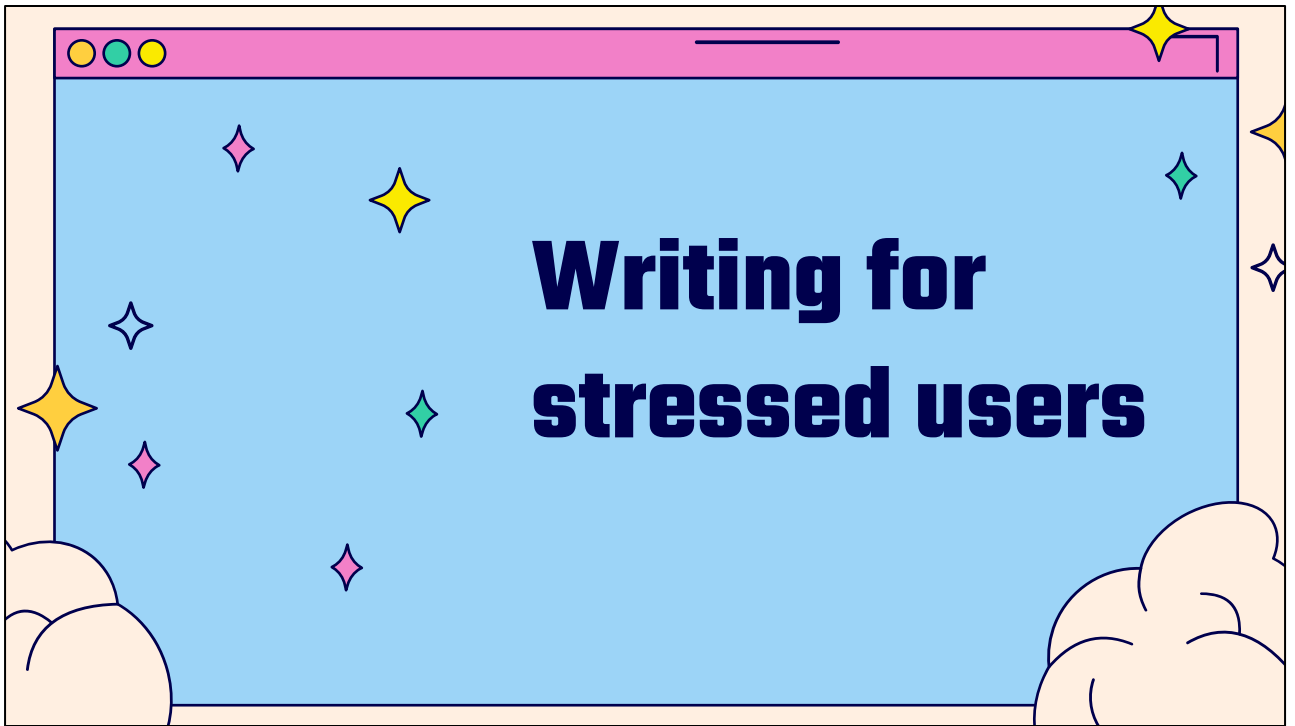
Robin: With voice and tone in mind, we discussed who we imagined the audience for these emails to be. We focused on writing for stressed users.

Stressed users

Their cognitive load is already heavy, so they can't take in as much new information

They're usually skimming instead of reading closely

Robin: [Read slide]

Why write for stressed users?

When you improve usability for users in crisis mode, you improve usability for all users.

Your content needs to be so good that even stressed users can understand it quickly.
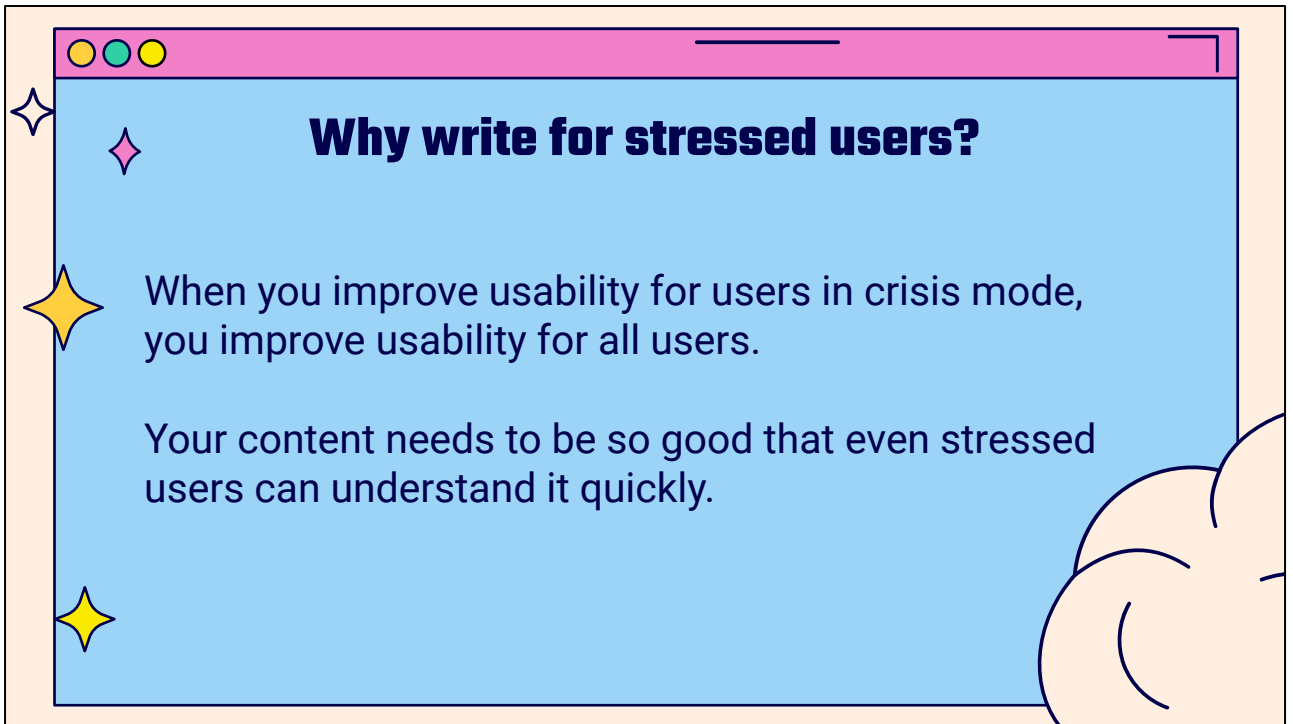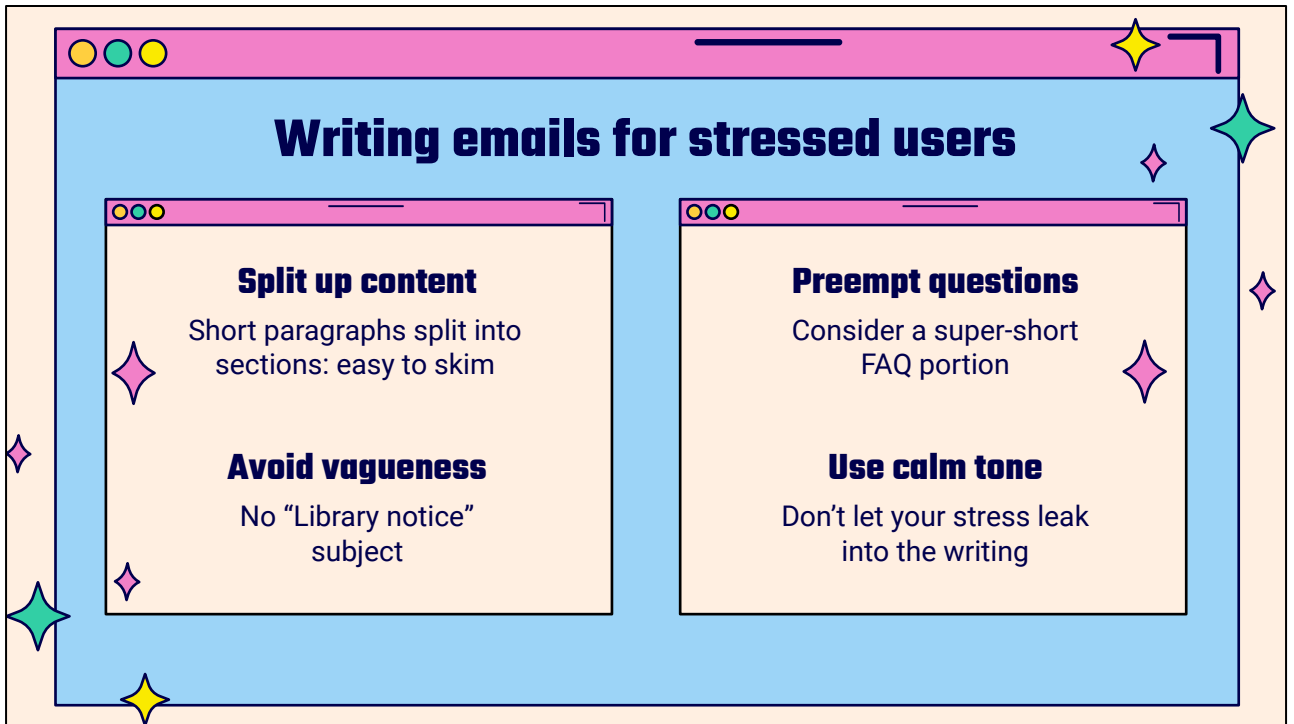
Robin: Why did we focus on stressed users? Well, first of all, in the middle of this project, the pandemic began, so we all became stressed users.
But also, it's a good idea to focus on stress cases (rather than the ideal user) when designing for the web.
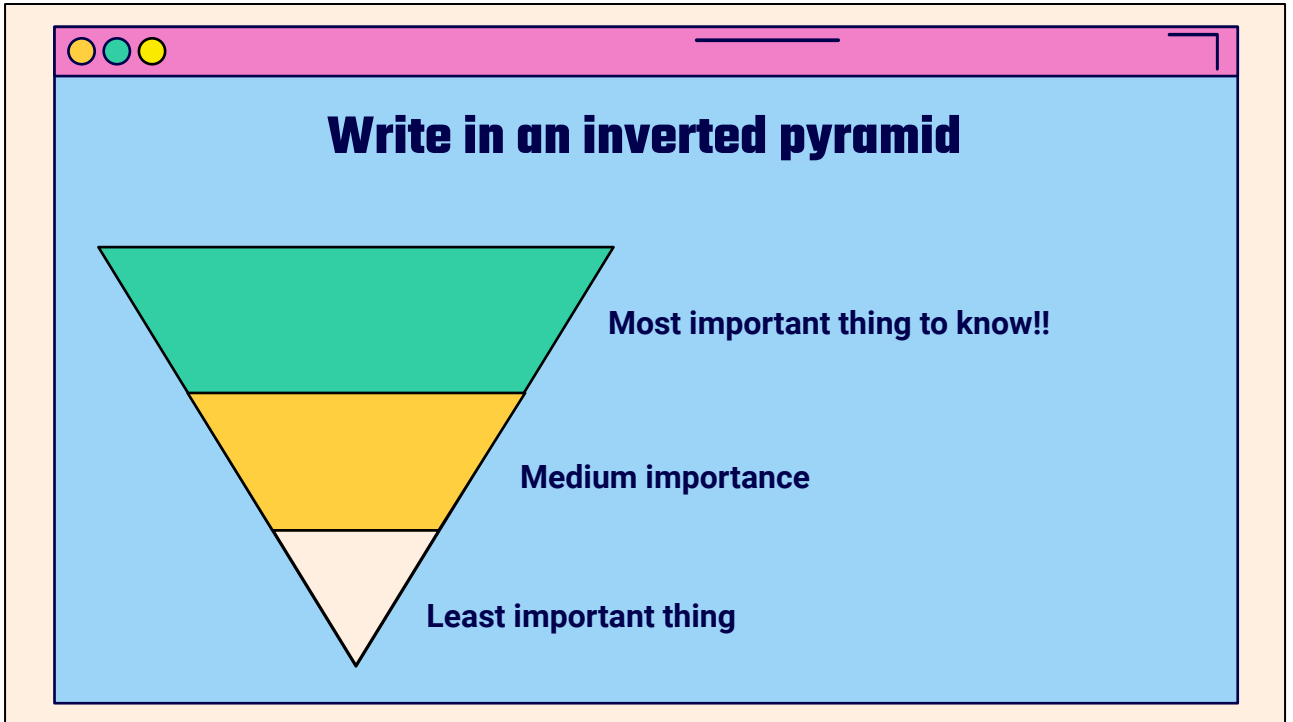When you improve usability for users in crisis mode, you improve usability for all users.
Your content needs to be so good, that even stressed users can understand it quickly.

Writing emails for stressed users

Split up content
Short paragraphs split into sections: easy to skim

Avoid vagueness
No "Library notice" subject

Preempt questions
Consider a super-short FAQ portion

Use calm tone
Don't let your stress leak into the writing

Robin: How do we write for the stressed users? Here are our top 4 tips.
1. [read]
2. [read]
3. [read] Users will be reading this email in the middle of, well, life! If they get an overdue notice, they might be on the other side of town or traveling and wonder, Am I getting fined for this? Can I just drop it off at the nearest library instead of the one I got this book from?
4. [read] Don't let your stress leak into your writing — no all caps, no negative exclamation points, no paragraphs labeled "Important!" Good UX and good writing lets your users know what's important.

Write in an inverted pyramid

Most important thing to know!!

Medium importance

Least important thing

Robin: And how do they know what's important? The order of your content. You might be familiar with the inverted pyramid. [read]
This is especially relevant for emails, which often go unread or half-unread.
—
Inverted Pyramids in Cyberspace from nn/g

Write in an inverted pyramid Example

Your items are overdue   **Most important thing to know!!**

Which items   **Medium importance**

FAQ   **Least important thing**

Robin: [read]

Implementation and testing
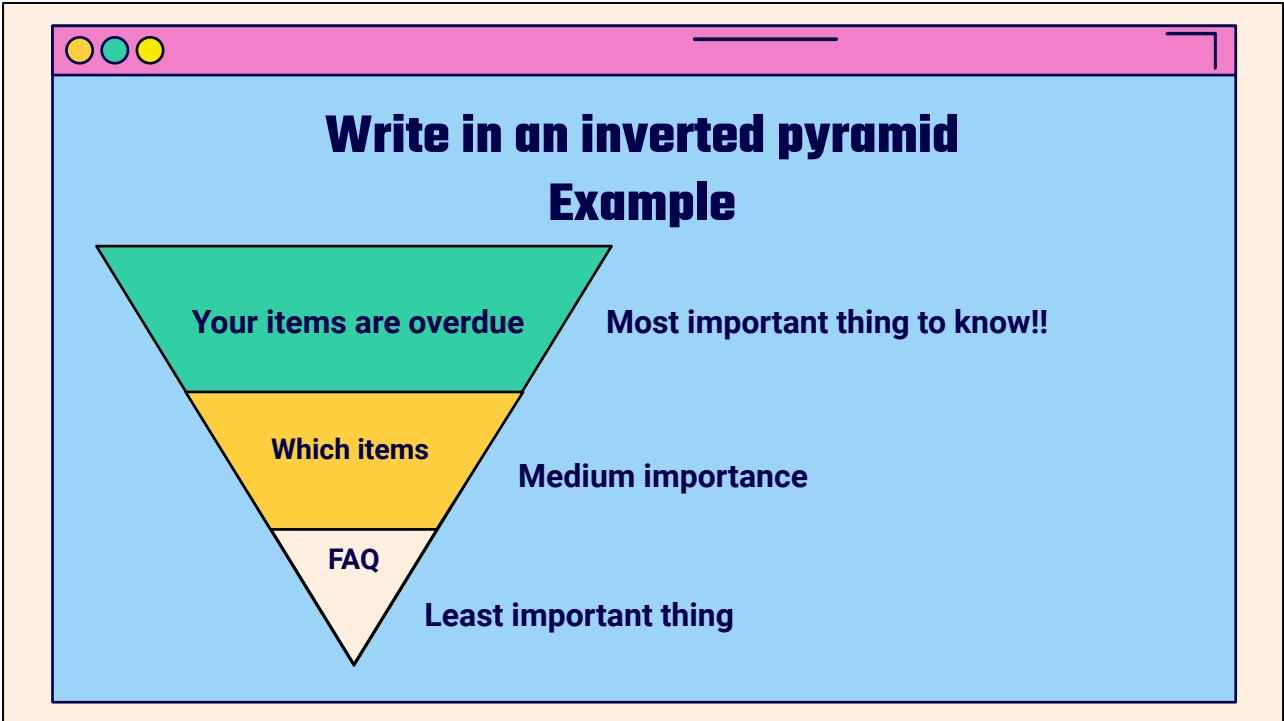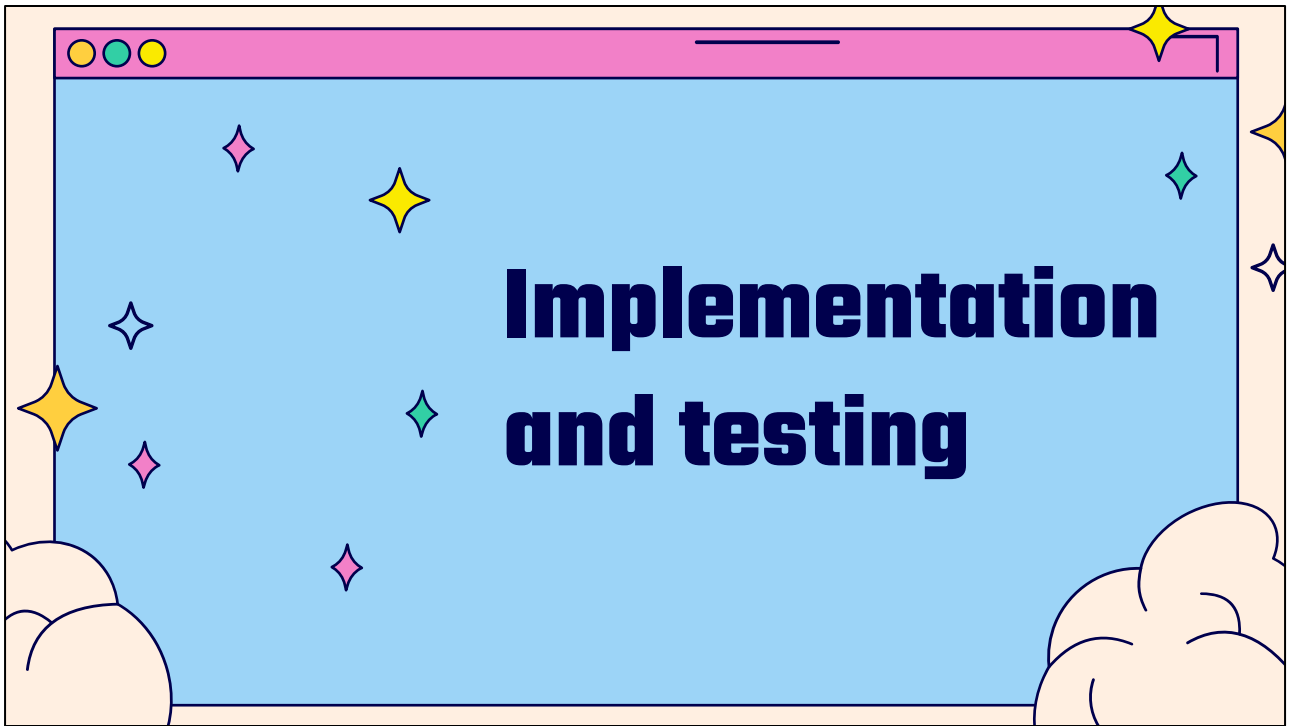
Silvia: So after doing all that research and finalizing the templates, we implemented the new emails in September 2020. And by we, I mean our colleague Dawn Pearce, who is the expert in our ILS, SirsiDynix Symphony.

ILS Limitations

◇ Timing

◇ Content that can't be removed
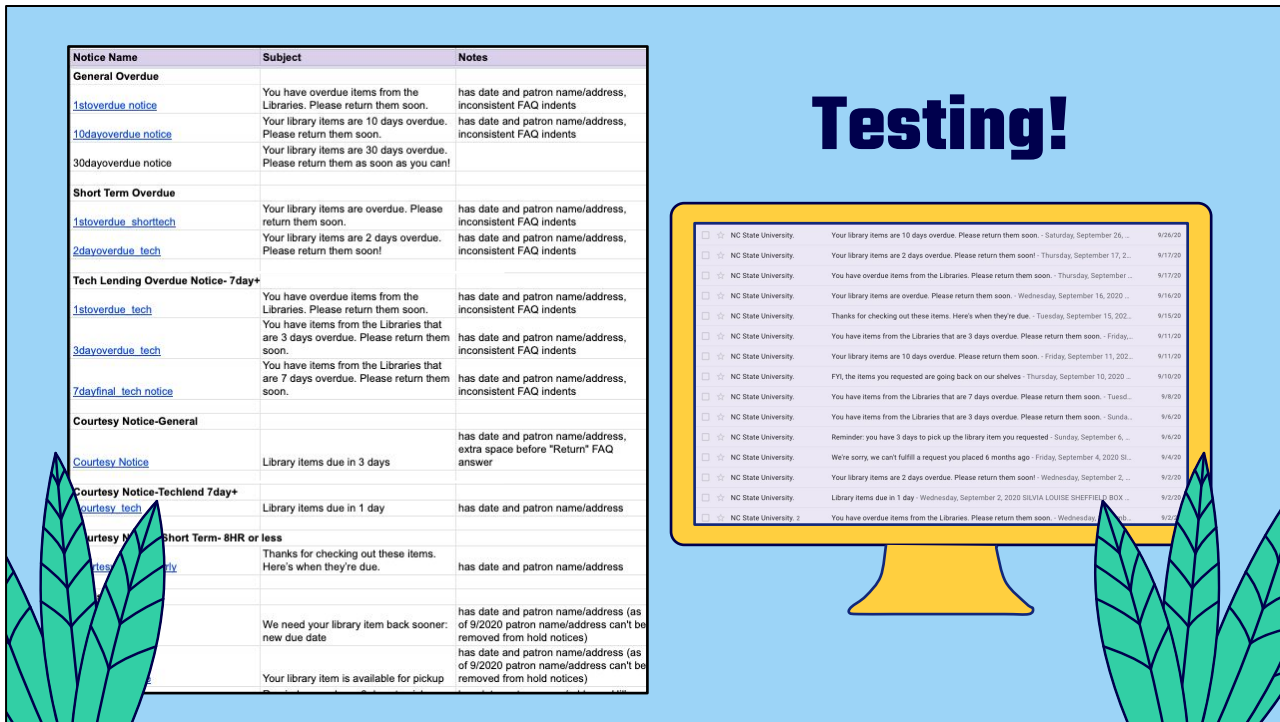
◇ Very limited formatting options
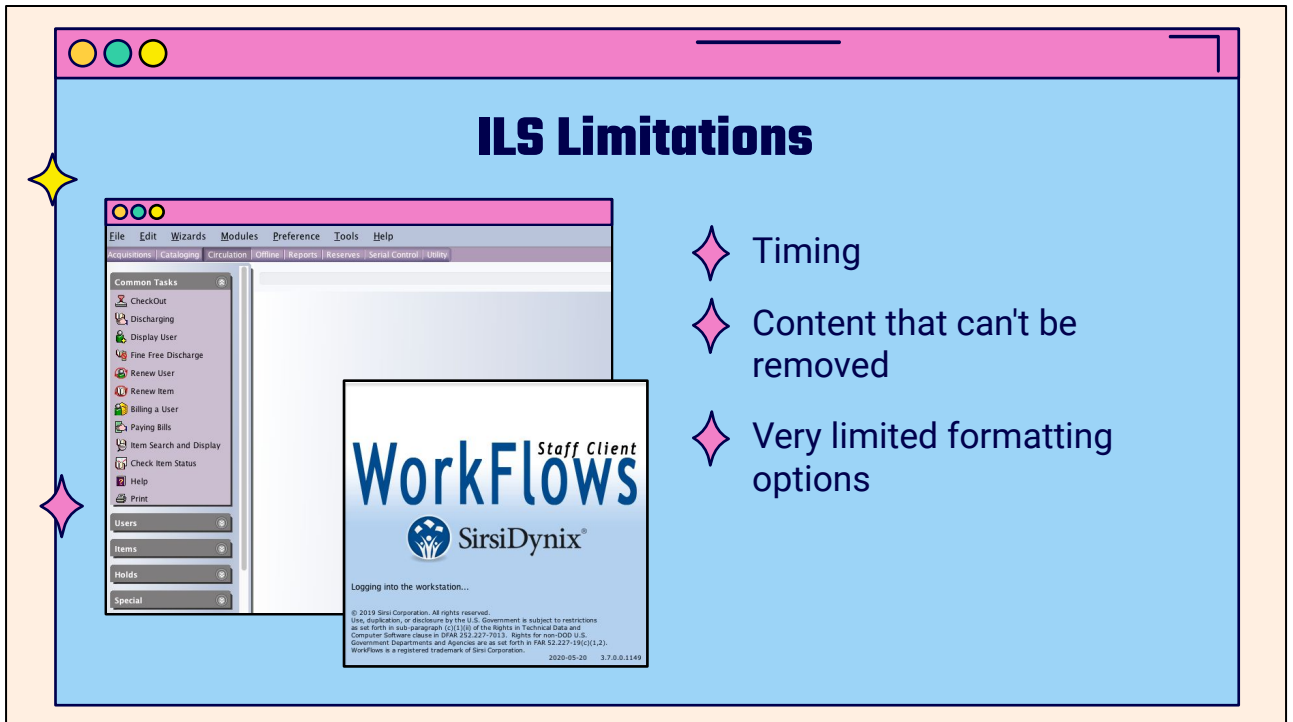
Silvia: Throughout the process, Dawn was our resource on what could and couldn't be done with Sirsi. As Robin mentioned earlier, we weren't able to change the timing of our short term notices. And despite our desire for nice formatting, we had to live with plain-text emails with weird line breaks.

Other things we would have liked to do were changing due dates from 24hr time to am/pm and removing extraneous information like the date the email was sent. And while we were able to remove patron addresses from many notices, they had to stay at the top of any emails about holds.

We also would have liked to been able to use dynamic subjects like "due at 5pm" and to have an informative snippet that patrons could see from their inbox.

But even with those significant limitations, our new emails are much better than what we had before and reflect some creative problem solving on Dawn's part. Updates to the templates involved a fair bit of fiddly work in the back end, which does limit how often we can feasibly do these kinds of updates.
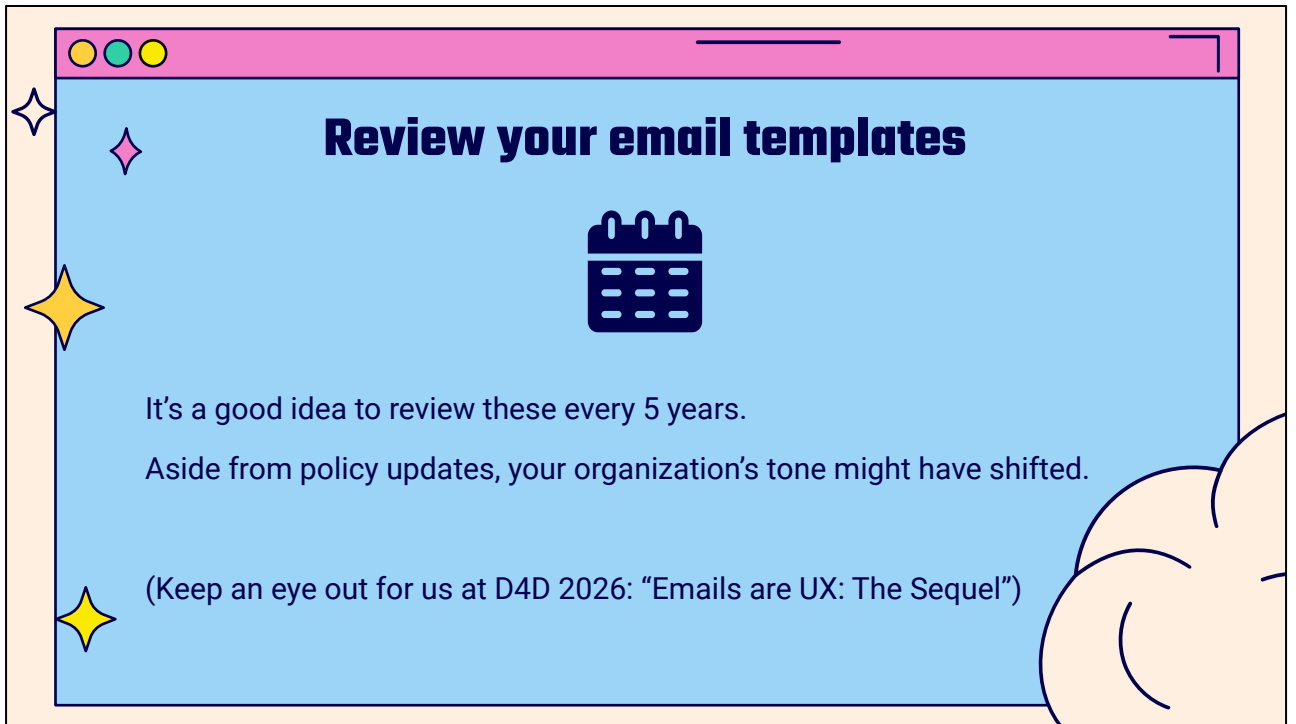
Notice Name	Subject	Notes
General Overdue		
1stoverdue notice	You have overdue items from the Libraries. Please return them soon.	has date and patron name/address, inconsistent FAQ indents
10dayoverdue notice	Your library items are 10 days overdue. Please return them soon.	has date and patron name/address, inconsistent FAQ indents
30dayoverdue notice	Your library items are 30 days overdue. Please return them as soon as you can!	
Short Term Overdue		
1stoverdue_shorttech	Your library items are overdue. Please return them soon.	has date and patron name/address, inconsistent FAQ indents
2dayoverdue_tech	Your library items are 2 days overdue. Please return them soon!	has date and patron name/address, inconsistent FAQ indents
Tech Lending Overdue Notice- 7day+		
1stoverdue_tech	You have overdue items from the Libraries. Please return them soon.	has date and patron name/address, inconsistent FAQ indents
3dayoverdue_tech	You have items from the Libraries that are 3 days overdue. Please return them soon.	has date and patron name/address, inconsistent FAQ indents
7dayfinal_tech notice	You have items from the Libraries that are 7 days overdue. Please return them soon.	has date and patron name/address, inconsistent FAQ indents
Courtesy Notice-General		
Courtesy Notice	Library items due in 3 days	has date and patron name/address, extra space before "Return" FAQ answer
Courtesy Notice-Techlend 7day+		
ourtesy_tech	Library items due in 1 day	has date and patron name/address
urtesy N... Short Term- 8HR or less		
...tes... ...rly	Thanks for checking out these items. Here's when they're due.	has date and patron name/address
	We need your library item back sooner: new due date	has date and patron name/address (as of 9/2020 patron name/address can't be removed from hold notices)
	Your library item is available for pickup	has date and patron name/address (as of 9/2020 patron name/address can't be removed from hold notices)

Silvia: After Dawn implemented the new email templates, we had to make sure they were going out as designed. The only way to do this was to trigger each of the 18 variants. I did this by checking different types of items out and letting them get overdue, sometimes manipulating the due date. I also placed holds for pickup at various locations and let some expire on the holds shelf. All in all, I think it was about 30 emails.

And it was good that we checked, because there were some things that needed to be fixed. This spreadsheet on the left is how we kept track of the different notices and any notes about their content. As the emails came it, I took screenshots and linked to them from this document so that the whole team could easily see them.

Our other informal way of getting feedback on the new emails was that we asked our public services staff to tell us about any issues they or patrons encountered. We didn't get any reports, so we took that as a good sign.

Review your email templates

It's a good idea to review these every 5 years.

Aside from policy updates, your organization's tone might have shifted.

(Keep an eye out for us at D4D 2026: "Emails are UX: The Sequel")
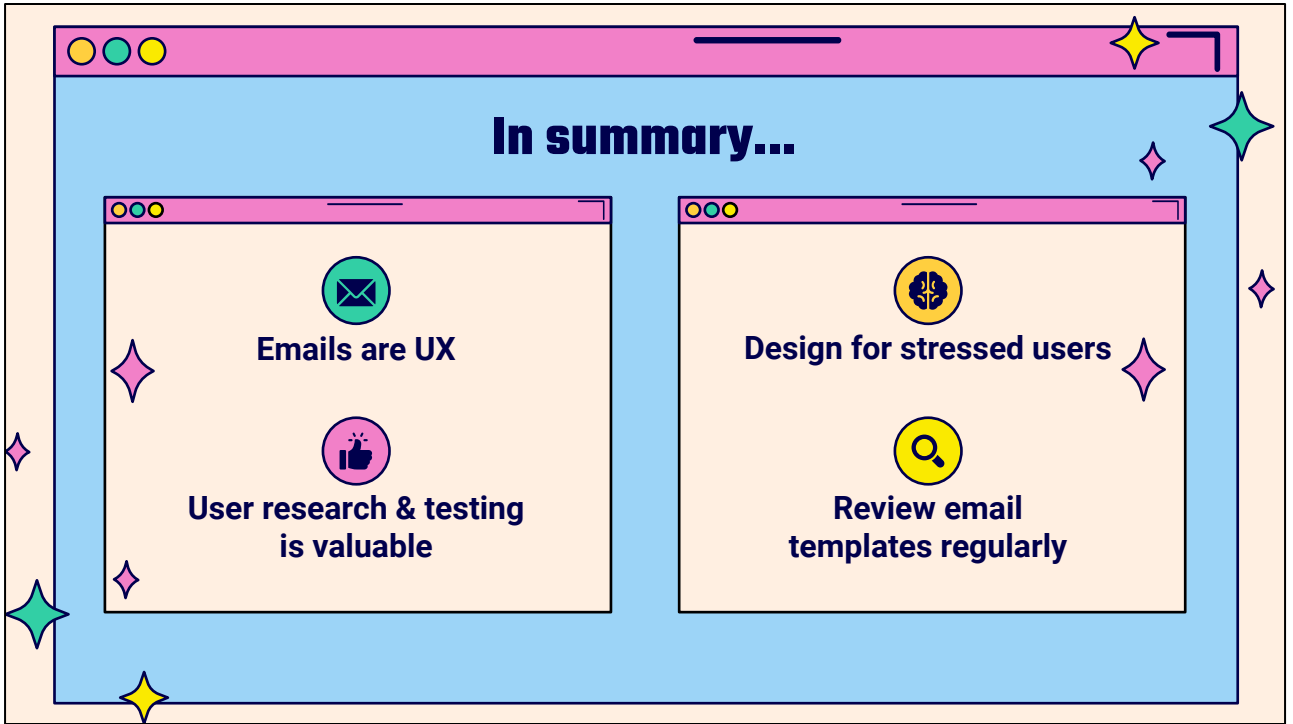
Robin: One thing we learned from this process is that it's a good idea to review your email templates every 5 years.
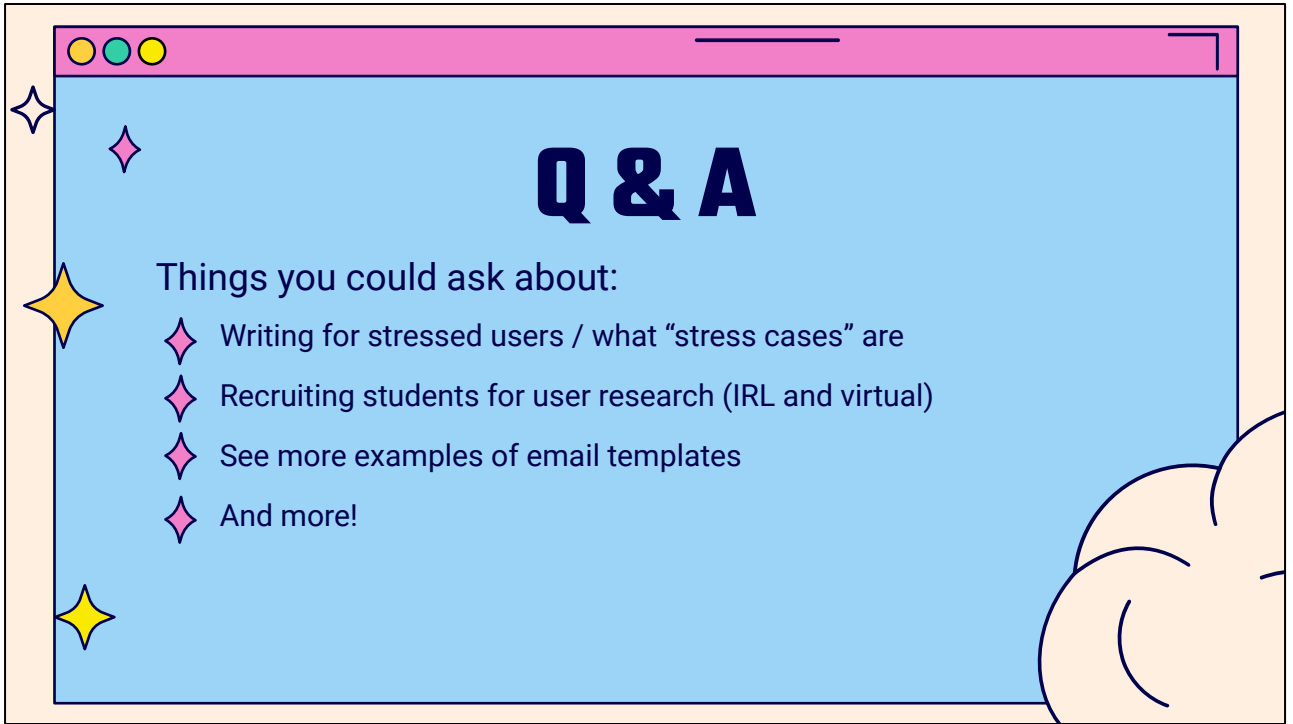
Aside from policy updates, your organization's tone might have shifted.

Maybe there's new leadership or a new style guide.

For us, we found this project to be enjoyable and fruitful, and it made a big difference — and we know that we'll want to revisit our emails in 5 years to see if we need to make any updates then.

In summary...

Emails are UX

User research & testing is valuable

Design for stressed users

Review email templates regularly

Robin: So, in summary, here is what we hope you will take away from this presentation... [read]

Q & A

Things you could ask about:

- Writing for stressed users / what "stress cases" are
- Recruiting students for user research (IRL and virtual)
- See more examples of email templates
- And more!

Silvia: That concludes the scripted part of our presentation, now on to Q&A! Are there any questions in the chat?

Thanks!

Robin Davis
rcdavis6@ncsu.edu
Twitter: @robincamille

Silvia Sheffield
slsheffi@ncsu.edu
Twitter: @silviasheffield

Extra slides

In case these topics come up in Q&A

Recruiting students for remote user research

- Request sample of 5k students from OIRP

- Send a 1-question survey to all 5k students: Want to participate in Libraries research in exchange for free lunches, etc.?

- For the 300ish students who say *Yes!*: email calls for participation for 3–5 things each semester

- For usability studies & interviews, we offer a $20 Grubhub meal delivery: very popular

Margaret Peak, Head of Library Impact Analysis, requests a sample of 5k students from Institutional Strategy and Analysis (fka OIRP)

First overdue notice

Subject: You have overdue items from the Libraries. Please return them soon.

Body:
[Send date]

Hello,

You checked out some item(s) from the NC State University Libraries, and they are past their due date. Please return them soon to any Libraries location. If you have already returned these items, please note that items may take up to a week to be removed from your account due to our current safety procedures. Thanks for using the Libraries!

1 Bring up the Bodies
    Due January 22, 2020 at 17:00
    PS 2000 .A6 199
    Barcode: S03278094X

——

(continued)

Can these items be renewed?
  View all your checked-out items and any available options to renew them at myaccount.lib.ncsu.edu/checkouts

Where should you return it?
  Return your items to any NC State University Libraries service desk or bookdrop. You can also return items by mail without having to come to campus in person. To request a mailing label to ship items back to the Libraries at no cost, please send an email to library_tripsaver@ncsu.edu. Include your name, email address, and your current shipping address.

What are the Libraries' hours?
  View library hours at lib.ncsu.edu/hours.

What are the overdue fines?
  Some items are considered "lost" if they're overdue by a certain number of days. View our lost item fines and policies at lib.ncsu.edu/borrow/lost.

___

If you returned these items more than a week ago, or if you have other questions, please contact us to let us know:
  Email library_askus@ncsu.edu
  Call (919) 515-3364

Robin:

Billing due notice

Body:
[Send date]

Hello,

Since we did not receive the following item(s) back on time, you have been fined for them. NC State students can pay fines and fees online through MyPack Portal at mypack.ncsu.edu. Learn more about how to pay fees online at go.ncsu.edu/onlinepayment. Payments submitted online will be reflected in your NC State University Libraries account the following day. Credit card and check payments can also be made in person at the Hill or Hunt Library. The Libraries does not accept cash payments.

Apple Laptop Power Adapter
Due January 22, 2020 at 17:02   accrued fine to date: $10.00
Apple 60W Magsafe 2 Adapter
Barcode: S02252633N

(continued)

An Appeals Committee appointed by the University Library Committee considers cases that involve extraordinary circumstances. See Petition/Appeal Process at lib.ncsu.edu/borrow/appeal. For more detailed information, view the Rules on Overdue Materials at lib.ncsu.edu/borrow/overdue.
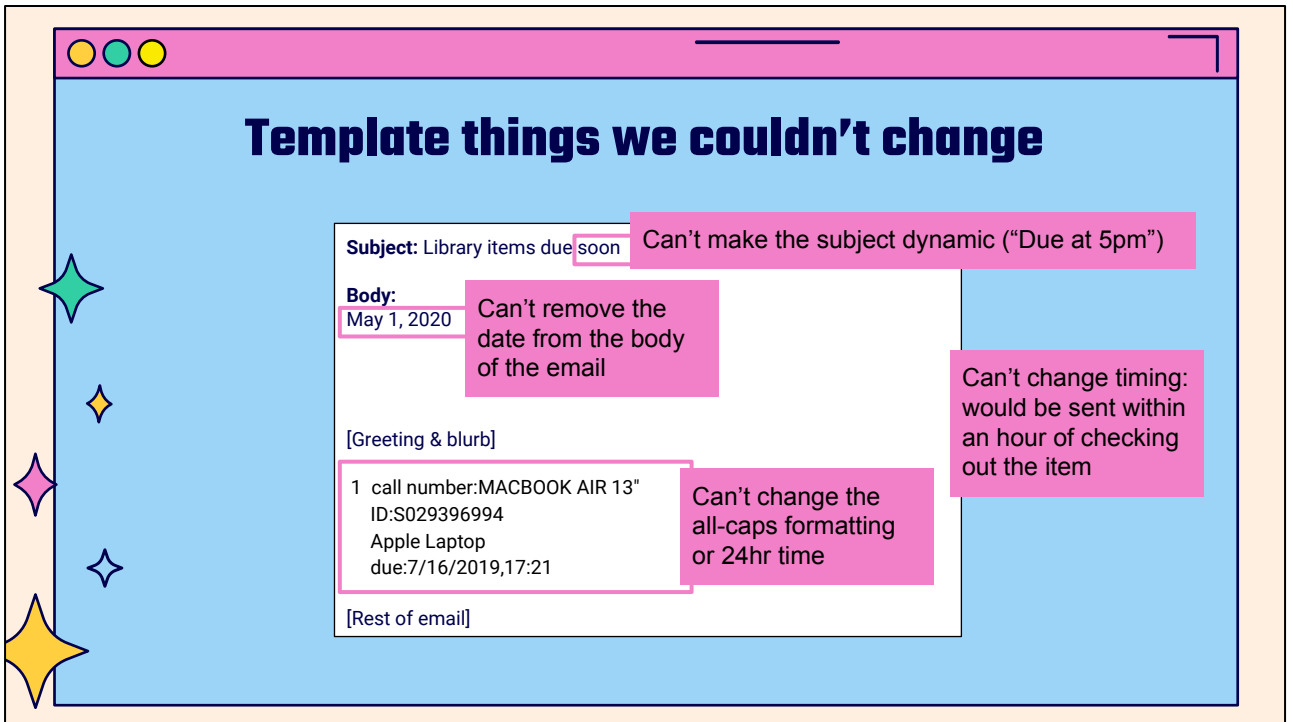
To view your library account, visit myaccount.lib.ncsu.edu.

Detailed information on fines can be found at lib.ncsu.edu/borrow/fines.

Thank you for taking care of this promptly.

NC State University Libraries Ask Us
(919) 515-3364 | library_askus@ncsu.edu

Robin:

Template things we couldn't change

Subject: Library items due soon

Can't make the subject dynamic ("Due at 5pm")

Body:
May 1, 2020

Can't remove the date from the body of the email

[Greeting & blurb]

Can't change timing: would be sent within an hour of checking out the item

1 call number:MACBOOK AIR 13"
   ID:S029396994
   Apple Laptop
   due:7/16/2019,17:21

Can't change the all-caps formatting or 24hr time

[Rest of email]

Robin:
Can't really change order of things (template)
Could not change timing, so turned it from a reminder into a confirmation
User research, which told us that user preferences re: timing were all over the place

Stress cases

"If someone comes to a site or an app in a moment of crisis, we bet they have a genuine need to be there—and that is the exact moment we don't want to let them down."

—*Design for Real Life* (2016), Eric Meyer & Sara Wachter-Boettcher

See also: *Technically Wrong* (2017) by Sara Wachter-Boettcher

Stress case scenario

It's 6pm. Sasha just drove home from her part-time job.

She has a paper due in 2 hours.

She gets an email: "You have overdue items from the Libraries. Please return them soon."

—

How should the ideal email be worded in this scenario?

We want to avoid a "day ruiner" — an action that would ruin someone's day.
Does Sasha have to return the materials to the library right now? If she doesn't, will she be fined?
The email should answer those questions as clearly as possible.