Enterprise Instant Messaging:

Ethics, Etiquette, and Best Practices

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Instant messaging has grown up. What was once just a toy for teenagers is rapidly becoming a mission-critical tool for business people to communicate more easily, and much, much more quickly. There are many factors that are propelling instant messaging into broad use in the business context: an increasingly mobile workforce, geographically distributed teams, and the widespread adoption of wireless devices. These are collectively spurring the uptake of synchronous, real-time collaboration tools by information workers. Perhaps more than any other single factor, the rapid expansion of instant messaging is being driven by the power of presence: the constantly updated status information linked to every user that tells us whether our instant messaging contacts are online, and available to chat.

At the same time, there are a host of questions that must be addressed as this innovative communication medium is adopted into the business setting. In a sense, the protocols for all communication media are very much alike, and as a result, many of the aspects of productive instant messaging (IM) use will follow the norms already in place for email, web conferencing, telephone, and other indirect and electronic forms of communication. However, IM is unique enough that it warrants this in-depth exploration of the emerging best (and perhaps worst) practices for its application.

"IM Etiquette" is perhaps too frivolous a characterization for what we are hoping to achieve, and perhaps suggests an obsessive regulation of social minutiae. We are seeking to provide a practical, situation-by-situation guide to IM use that addresses the interpersonal dimension that surrounds the use of this innovative communication medium, not merely an over-generalized list of dos and don'ts. As a result, we will motivate our recommendations with something more than social convention, exploring both the business value and ethical choices underlying IM's expanding role in the enterprise.

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The Case for Instant Messaging: A Tool for the Information Worker

Instant messaging has been adopted by hundreds of millions of users worldwide, and is en route to becoming a staple of modern business life. Today, over 65 million business people use instant messaging: analysts estimate that as many as 70% of businesses acknowledge IM use, today, and many of the remainder may be simply turning a blind eye to unregulated and unmonitored IM use. The challenges associated with managing this explosive growth will reverberate through corporate IT management for some time, since projections suggest that business IM use could expand to more than five times of today's levels by 2007, reaching 330 million in the next three years.

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Why is instant messaging taking off in business?

- IM is a fast, "low friction" form of communication, where the participation costs of sending or getting a message is small.

- IM is a way to avoiding the delays of email or voice mail when you need to convey important or time-sensitive information.

- IM is a simple way to stay connected with the members of a project team whether co-located or geographically distributed. This is true over the course of a day, a week, or over the lifetime of a project.

- IM is built on presence: because you can see whether contacts are online and available, you can choose to communicate when a response is possible. And unlike email, which is generally sent under the assumption that the recipient will read it at some later time, IM is built on the premise of synchronous communication: messages can be responded to immediately, and action can be taken more quickly, as a result.

- IM is inexpensive relative to telephone calls, especially long distance and international calls, even when the increasing likelihood of winding up in voicemail is not factored in. Fully 40% of business telephone calls lead to voice mail today, on average, and so productivity surrounding telephone use is plummeting while costs are rising.

- IM has spread to nearly every sort of communication device: from PCs, to pagers and wireless PDAs, and even cell phones. As a result, reaching a contact en route to the airport is just as easy as getting them at the PC in the office or home. The ubiquity of IM is a major factor in uptake.

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- IM is increasingly integrated with a range of other synchronous forms of person-to-person and group communication, such as voice, video, application sharing, and full-scale group conferencing. These media, collectively, are revolutionizing the way that

business people are 'meeting,' leading to enormous savings in travel costs as well as redefining the notion of what a 'meeting' is.

Business people are communication hungry, and have driven the adoption of many of the now-traditional media because of that seemingly insatiable hunger for more efficient communication. The penetration of the business world by telegraph, telephone, telex, fax, email, and wireless communication in business has been the result of eager adoption by individuals, often at a rate and through methods not officially sanctioned by management. As with the rise of email in the '80s, management must look at both sides of the IM equation, and balance them:

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- The potential increase in productivity and decrease in communication costs are likely to be a net positive, and will influence management to adopt IM aggressively.
- The threat to information security and the possibility for organizational and IT disruption that IM poses has influenced management negatively toward IM adoption.

Treating the technical issues surrounding IM security is out of scope for this report; however, we believe that the critical issues – identity management, information security, and managing the on-going IT impacts of instant messaging – are tractable, and these risks have been handled. Today, as opposed to only a year or so ago, the positive economic benefits associated with instant messaging far, far outweigh the negatives. This report is intended to help management deal with the everyday, on-the-ground issues of integrating instant messaging into the daily flow of business so that these benefits can be realized.

While acceptance of IM is growing quickly in the business population, the way that it is emerging in the business setting has created some concerns. IM has been largely a grassroots phenomenon, with individual users bringing consumer IM products into the business context, sometimes with dangerous consequences. The initial introduction of instant messaging in many businesses has been – depending on your perspective – an indicator of the potency of the medium or proof that uncontrolled adoption of communication tools can create serious risks. As businesses shift to an enterprise-wide deployment of instant messaging technology developed with the needs of the enterprise in mind, the overwhelming majority of the IT issues surrounding instant messaging have been handled, but the human side of the equation remains.

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Instant Messaging: from Effect to Cause

The long-term effects of new communication media are difficult, perhaps impossible, to predict. As sociologist Robert Putnam pointed out in the bestseller **Bowling Alone**,

> "The astounding series of poor predictions about the social consequences of the telephone is a deeply cautionary tale. Alexander Graham Bell himself originally expected the telephone to serve the sort of broadcasting function that would later become the province of radio – "music on tap." Well into the twentieth century telephone executives were so convinced that that their primary customer was the businessman that they actually discouraged "socializing" by telephone."

Ultimately, as we now know, everyone (even telephone executives) appreciates that telephones have had a huge social impact – even when only viewed within the business context – and one much greater than would be expected from the mere business information appliance as originally planned.

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> "First, the full possibilities of a new [communication] technology are hard to foresee. Therefore inventors and early adopters are likely to emphasize the planned uses and underemphasize second-level effects.
>
> Second, unanticipated consequences usually have less to do with efficiency and more to do with changing interpersonal interactions, ideas about what is important, work procedures, and social organization.
>
> Third, these second-level effects often emerge somewhat slowly as people renegotiate changed patterns of behavior and thinking.
>
> Fourth, second-level effects are not caused by technologies operating autonomously on a passive organization or a society. Instead they are constructed as technology interacts with, and is shaped by the social and policy environment."

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Getting the Effect: Agreeing to IM

Like other communication media, the value of instant messaging is a function of the number of people forming the communication network. As more people join, the possibilities for interaction increase in two ways. First, the aggregate number of potential person-to-person communications increases based on the number of people, as defined by the now well-known Moore's Law. But secondly, as Internet theorist David Reed has pointed out, the actual value of any communication network increases at an even higher rate because of the simple fact that people become members of multiple groups and the number of groups is therefore larger (and potentially much, much larger) than the number of people.

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In the final analysis, though, no value is created until people join and use the IM network. That means, in simple terms, to get any of the value from instant messaging, people have to join. On a daily basis, they have to log in and communicate through the network. Getting this initial commitment to simply use IM is the first and perhaps hardest barrier for many who are not already IM users. Familiarity with the concrete 'how tos' of the specific IM technology being used is an aspect of this issue, but this turns out in general to not be significant if the real desire to use IM is present. There are other, more significant factors that slow adoption for those unfamiliar with IM.

- IM is generational

  Familiarity with instant messaging technology is much more likely with younger people who have grown up using it. As a result, older staff and others unfamiliar with IM will be less eager to immediately begin using IM, and less proficient when they start.

- Like email, this transition will take time

  Even with those who are not reluctant to try new things, becoming accustomed to initiating or accepting communication through IM may take a long time: weeks, months, and in some cases, even years. Be patient.

- IM is viral

  The nature of instant messaging leads to viral adoption. One project team leader asks members of the team to use IM as a way to stay in touch, and to coordinate. All the members adopt it, with the usual distribution: from early adopters and

those less avid. Several team members, taken with the ease and flexibility of IM, recommend the use of the technology in other projects, and so on.

Because of project-to-project 'hopping', IM can spread through a large organization very quickly. If unmanaged – for example, when individuals download and install consumer IM technology from the Internet – this viral growth could be looked at by IT staff as a plague, when appropriate safeguards are not put in place. However, when the core IT issues have been resolved, this project-to-project adoption model can be very beneficial, and may allow IT to stagger training, client installation, and initial support instead of being confronted with a massive, all-at-once enterprise-wide roll-out.

- Evolution, Not Revolution

While innovative and perhaps unfamiliar to some, IM is 'just' another medium for communication. Like the telephone, instant messaging provides an electronic analog of face-to-face conversation, and therefore the same conventions and corporate policies that govern people's existing communications can almost always apply to instant messaging. In this regard, instant messaging represents an evolution in business communication, not a revolution.

Just as with telephone and email, corporate policies regarding personal use of instant messaging should balance expense to the company with an awareness of the needs for the individual to maintain personal contact with family and friends. Instant messaging is likely to remain lower in direct costs that telephone and even email, so if anything, a given interaction via IM is likely to cost less than alternatives. While there are many anecdotal examples of IM abuse (where IM obsessed twenty-somethings chat with dozens of friends non-stop during office hours), we believe that existing corporate policies that stipulate reasonable and normal limits on personal communications during business hours and through company media (telephone, email, and now IM) should prove sufficient to stipulate their appropriate use, and that IM will not necessarily require new policy development.

Likewise, we believe that the norms of business communication will translate to this new media, as a general rule. We think that there is a real-world analog of nearly all aspects of IM use, and that the social conventions that apply in face-to-face interaction will generally transfer into the IM domain. For example, as a general rule, it is helpful to start any instant message with a question about a person's true availability (such as 'got a sec?' or 'got a few mins to chat?') just as you might if you were knocking on a colleague's office door. IM use is just like other communication media: be polite and conscientious about minimizing interruptions.

However, for personal and business application, there are certain IM-specific issues that need to be highlighted and addressed. As just one key example, the company should publicize that it plans to archive all instant messaging traffic or not, so that questions about IM archival are not an issue. In any case, existing company policies about appropriate subject matter, language use, politeness, and management of confidential information, and the company's policies regarding possible inspection of physical and electronic documents should all remain in force. As a result, employees should be held to the same standards for IM content as is the case for other spoken or written communications.

- Structuring Expectations

Simply letting prospective users know what's expected, and why, can be one of the most effective techniques to get people on board with IM. People are aware of the headaches involved with email and voicemail, but sometimes quantifying just how bad things are can make IM seem a very attractive alternative.

Fully 40% of business phone calls go to voicemail today, on average, and a not atypical business email user can receive dozens (if not hundreds) of emails every day. When positioned as a way to avoid "getting stuck" behind the spam and the voice mail queue, instant messaging, instant messaging becomes a very attractive channel of communication.

Many studies show that IM adoption leads to a marked decrease in email traffic, perhaps as much as 10%-15% less once IM is deployed. Bill French is credited with the observation that email is "where knowledge goes to die" and as email has increasingly become the replacement for postal mail, filled with spam, faxes, appointment reminders, news alerts, and a seemingly infinite stream of memos, status reports, and project updates, the truly critical and time sensitive information can in fact get lost and even die in the email inbox.

At the same time, getting buy-in on instant messaging is best accomplished through grassroots and project-level approaches, even when there are corporate savings in the mix. Avoiding push back can best be accomplished by allowing the person-to-person, viral spread of the technology to take place, as opposed to a mandate from on high.

Inbox and Identity

We have all become habituated to the activities that surround our involvement with the world through email. We start Outlook (or other email client), and even as our incoming email is being downloaded we begin to assess the subject lines and the senders, relating the information flowing past with on-going projects and activities. Many people say that they 'live in email,' negotiating a stream (or barrage) of messages throughout the day. This has become even more the case with widespread adoption of wireless devices that enable us to read and write email wherever we are. In fact, many detractors of instant messaging say "I have email already (and phone, fax, pager, etc.), so why do I need IM?"

We have already touched on presence: the capability that underlies instant messaging that constantly updates others about your status and availability. When you start to shift to IM as one of your principal forms of communication, it is the presence aspect that changes things most dramatically. Starting an IM is not like writing an email; in some ways, despite being a computer-mediated form of communication, its much more like a telephone call or a face-to-face conversation than email is.

Some have characterized email as 'dueling memos' and that may be a fair characterization in many ways. Email is generally written under the premise that the recipient is not going to read it immediately. It is not conversational, at least not in the way that a face to face interaction is, except in that occasional circumstance that many of us have experienced, when we send an email to someone and they respond while we are still reading and writing email. That form of email interaction can feel something like IM, except that the form factor is all wrong: the conversational 'strokes' are isolated in different emails, and the flow of the conversation is impeded by the overhead of replying, message headers, and signatures. Email's structure and protocols are really derived from the increasingly archaic etiquette surrounding postal mail, another medium that is built around long delays between sending and receiving.

However, many long-time users of email may feel a strong sense that email is the 'right' medium for many sorts of business communication, and that face-to-face or telephone communication is the 'right' way for all the rest. By process of elimination, this might wind up leaving no room in their worldview for IM.

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In truth, there is a wide spectrum of business communication where instant messaging is clearly the 'right' way to go:

- Mission-critical and time-sensitive information

  Instant messaging can be a good way to 'jump the queue' and get critical, time sensitive information in front of someone, and avoid the lag time associated with email and voicemail.

- Coordination

A short IM chat with a colleague to resolve a time for a meeting or a call is generally much easier than an email exchange, and certainly better that recourse to voice mail.

- Close-ended Q&A

Sending a quick IM to answer a short question – "Hey, what's Josie's home number?" – can be the least intrusive and fastest way to resolve an easily handled question. This is especially true when one or more of the people involved are otherwise occupied – on the phone, in a meeting, or attending a web conference.

- Ongoing Conversation

While it may seem contrary to the 'short and sweet' nature of instant messaging, leaving open an IM session with a colleague that you plan to 'talk' to several times during the course of the day can be a very effective technique. The thread of the discussion remains in context, even when the interaction is punctuated by hours of inactivity, which makes it easier to keep track of the course of the discussion. And of course, leaving the IM session open on your PC desktop is a constant reminder to check in with your colleague, periodically. The naturalness of longer, even day-long chats may seem almost a paradox when contrasted with the shorter, 'bursty' sort of coordinative or short Q&A oriented IMs that are generally considered the most appropriate; however, in those settings where IM has been in use the longest both styles of IM use are prevalent.

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Presence and Privacy

The power of presence is the major factor in the value that instant messaging brings to the enterprise. Presence – by allowing you to know if someone you want to talk to is available – is the breakthrough latent within instant messaging: without presence, IM is just a lightweight sort of electronic messaging. However, someone once said that the brightest lights cast the darkest shadow: presence casts a very bright light into our workplace, and as a result, this powerful illumination may arise some concerns about an intrusion into our privacy.

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Like other communication media, instant messaging can be intrusive, but the subtle and silent intrusion that presence makes into your privacy can create concerns for many. As a result, it is critical that presence information be thought of, and used, in appropriate ways.

Since we know that the value of instant messaging is pegged to people actually logging on, we want people to do so. As a result, people should become comfortable with logging onto IM as a

matter of course, and to set their availability to indicate their true status to the degree that is possible.

People will want to maintain a balance between providing presence and availability information and maintaining personal privacy and boundaries on the intrusion of work into private life. Just because you have IM support on your cell phone does not mean that you need to be on call 24x7, unless of course, that is a requirement of your job. In some companies, junior staff feel that they need to arrive earlier and leave after the senior management, in what has been sometimes referred to as the 'facetime game.' The same sorts of behavior can take place with IM unless management provides clear guidance as to what is expected.

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As instant messaging technology becomes more sophisticated, finer-grained control on presence and availability will mean that individuals will be able to better control of who can gain visibility to their presence and availability, and can limit availability differentially by identity or by group. You may always want to remain available to your boss, while turning availability off for everyone outside of an inner circle of contacts when you are really time pressured.

As we become more consistent users of instant messaging, we will find that our circle of IM contacts will grow. Managing your contact list will require both adding new contacts, and removing older ones as projects come and go and people are redeployed. Anthropologists tell us that human beings are naturally wired to be able to remain on a first name basis with 150 people, more or less – to know what that number of people is up to, and how they are connected to and relate to others in the group – but beyond number, we cannot keep it all in our heads. As a result, an instant messaging contact list that is more than that size is likely to include names that you don't communicate with very frequently. As a rule of thumb, your contact list should list those that you speak with at least weekly.

Note that there are system costs for keeping names on your contact lists – presence is being polled, and sent through the network for each of your contacts. So there are cost factors to be considered with keeping someone on your IM contact list.

On the other hand, there are real social benefits in keeping track of the online status of those with whom you are closely involved. There is a virtual IM analog of the handshake and 'good morning' that we share in the real world. When you notice that one of your coworkers has logged in for the first time, sending a brief 'Good morning, how's things?' message can maintain a sense of social connectedness and camaraderie even in a geographically dispersed group, and can create opportunities for serendipitous innovation just as a chance conversation over coffee can when people are collocated. There is a great sense of social involvement that can arise from simply remaining aware of your social circle's presence and availability, which is the virtual analog of remaining aware of someone's real world comings and goings. Although this can create a dynamic tension with regard to privacy, it can spark a great deal of social cohesion.

Attention and Availability

Perhaps more than any other communication tool, instant messaging seems to lend itself to "continuous partial attention" (as Linda Stone famously called it), a mode of operation that leads to us splitting our attention into a larger and larger number of threads, if we don't manage it.

Many people think that the most practical way to work is to take a single task and grind away until it is done, and then (and only then) look around to determine what is the best next piece of work to do. Increasingly, however, we are living in a time-sliced world, where we are unable to (even if we in fact wanted to) dedicate ourselves to working on a single project or activity at a time. The average person is involved in over seven projects at any time, and during the course of any day may be shifting from one project to the next from hour to hour or even from minute to minute. As a result, we may find that the periods of time when we fully, and completely, concentrate on a single issue are becoming more and more infrequent.

Today, we are shifting toward a mode of attention management where we constantly scan the horizon for events that are worthy of our attention. We can't a afford to stay heads down for hours or days at a stretch when critically important events may be occurring that could require an immediate response. We are in an increasingly real-time environment. So, while first-in-first-out is a workable discipline for some situations (like super market check out lines), it fails drastically in some circumstances (like hospital emergency rooms). Our work lives are increasingly like the ER and not the supermarket.

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So, for better or worse, continuous partial attention is becoming the normal state of affairs, offset by short periods of time where we focus our attention exclusively on critical issues in a very concentrated fashion. Managing attention is a critical issue for everyone today, and instant messaging is both a help and a hindrance in this daily struggle.

One of the psychological traps that nearly all of us fall into is a optimistic belief in our own capabilities: for example, the average driver believes that they have above average driving abilities.

Flex, Slack, and Interrupts

We all operate under the (quite reasonable) assumption that nearly everyone we work with is extremely busy, and at any given time is likely to be focused on getting something accomplished. At the same time, we are aware that people build in some degree of flex or slack into their planning, so that in general people are able to turn their attention to other, unplanned issues for at least short chunks of time during the course of the day.

Depending on the person, their role, the issue, their current circumstances, and their relationship to whoever is asking for a moment of their time, the response to an interruption can vary widely. Many of the social cues that we rely on in face-to-face interactions are not directly available in instant messaging, and so we have to work hard to create analogs. People who are busy or who are attempting to focus on some time critical activity will close their door (if they have one).

The instant messaging equivalent of closing the door is to turn your status to 'unavailable' but in general this may lead to too much privacy. After all, if you are really not 'unavailable' but simply 'busy' you may be sending the wrong message, and this can lead to time sensitive or truly critical information not getting to you in a timely fashion. Better to actually adopt an approach to IM that is more like face to face interaction. In general, even when you are busy on a task, you don't post a 'do not disturb' sign on your door. So your colleagues may knock on your door to see if you can spare a few minutes on some critical issue, even if your door is closed.

Just as in the face to face context, the person knocking on your virtual 'door' should operate under the assumption that you are busy, and that you would like to decide whether this is a good time to deal with the issue, or not. As a result, the most commonly used expression in business IM should be something like 'got a sec?', so that the parties can quickly gauge availability, and if it is a bad time to set a later time to chat. In this way, we can accommodate the interrupt-driven world without becoming interrupt-enslaved.

Meetings meet IM

The business meeting is the segment of business life that is being most drastically impacted by modern communication media. Web conferencing software and the widespread availability of broadband Internet access means that the notion of a 'business meeting' has changed forever. Prior to web conferencing solutions like Live Meeting, remote meeting attendees were often limited to participation in meetings through (at the best) a speakerphone, and perhaps an email attachment with a presentation. Now, remote attendees are first class members of the meeting, with access to presentation, application sharing, and sophisticated conference collaboration capabilities, including instant messaging.

Even when web conferencing software is not being used, instant messaging is still having an impact on meetings. One of the bits of conventional wisdom about ubiquitous web access and the widespread adoption of collaboration tools is that these will collectively lead to a reduction in the number of meetings being held (which, according to all objective measures and all subjective surveys, would be a massively productive idea). It has not turned out that way. What has happened is that we seem to be having just as many meetings

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(maybe more), but while attending meetings those most advanced in the use of IM tend to remain in contact with remote coworkers during the meeting.

We know that there is a wide spectrum of meetings: from very long to very short; meetings with many attendees, to meeting with only two people; meetings that deal with a single, critical topic, to meetings that have dozens of issues of various levels of criticality, and so on. As a result, we do not believe that there is a single, absolute approach to the use of instant messaging in meetings, but a corresponding spectrum of alternatives that are appropriate depending on the circumstances:

- Deviceless Meetings

  There are certainly some meetings that are focused and critical enough to warrant a complete turning off of all devices for all attendees. This is – despite a perhaps natural tendency of many meeting organizers to believe the contrary – not the general rule, as we shall see in the following cases.

- Large and Long Meetings

  Meetings that include a large number of people with different degrees of involvement or varying levels of responsibility and meetings that run longer than an hour or so are likely candidates for allowing instant messaging. For many who have been asked to attend meetings with many attendees, their involvement may be quite limited: for example, sitting in on a project review for something in which you were only peripherally involved. Likewise, when groups are locked up for an all-day or multi-day meeting, it may be essential to remain available during the meeting.

  The longer or larger a meeting, the more likely interruptions become. Instant messaging is significantly less obnoxious than many alternatives: such as actual interruption of a meeting by knocking on the door or walking in to get an individual from a meeting, or taking cell phone calls during a meeting.

  The longer or larger a meeting, the more likely interruptions become. Instant messaging is significantly less obnoxious than many alternatives: such as actual interruption of a meeting by knocking on the door or walking in to get an individual from a meeting, or taking cell phone calls during a meeting. Even when a phone is set to vibrate you will have to leave the room (or should leave the room) to actually take an urgent call. Physically leaving a meeting is quite disruptive, especially when the individual leaving is perceived as critical to the progress. It's far better to respond with an IM, and then to call back during a break if an IM exchange is insufficient.

  It is increasingly likely that large or long meetings will involve remote participation of partners or customers through web conferencing tools, in which case many of the participants will have access to instant messaging to interact with other meeting participants, as well.

- Meetings and Sidechat

  "Sidechat" is one of the more interesting terms that has emerged from the diffusion of instant messaging: it is used to describe IM chat that goes on in parallel with the main interaction of a meeting or conference. Sidechat has taken

on a somewhat negative connotation since it can take the form of quiet heckling in a conference setting. As with all other communications, sidechat should not devolve into name calling, heckling, or other offensive activities. However, in many meeting situations, sidechat can be quite productive. For example, members of a proposal team can sidechat during a meeting with a prospective client, in essence, conferring among themselves without actually breaking away from the meeting. Any two (or more) individuals can sidechat during a meeting, and these side exchanges of comments can enrich and accelerate decision making. Because of these benefits, we recommend sidechat as a useful support for conventional meetings, so long as it is not abused.

Whether in meetings or out, instant messaging helps counter the old saying, "you can't be in two places at once," since you *can* be involved in IM while talking on the phone, sitting in a meeting, or managing several multiple IM sessions at the same time. In an era that seems to demand multitasking of everyone, IM can be a significant productivity boost and can counter disruptive habits (like taking phone calls in meetings). But there are practical limits to our ability to divide our attention no matter how advanced our IM tools become. While people's ability to productively split their attention will vary across the population like any other trait, in general we are less adept at it than we would like to admit, so we should err on the side of restraint.

The Forms of Informality

For many reasons, instant messaging feels less formal than other sorts of communication. First, IM got its start in the consumer space, with teenagers typing in an abbreviated and very slangy style, with strong influence from 'texting': IMing using cell phones has led to terms like 'ttfn' (ta ta for now), 'otp' (on the phone), 'l8r' (later), and dozens of other acronyms becoming quite common.

But while instant messaging can have a breezy and informal feel it should not be perceived as abrupt or rude. In particular, when IMing anyone, always assume they are busy (no matter what their availability), and ask if they have time for an interruption. Always set context – how much you think you will need of their time, the topic, how critical it is, and so on – so the other person can assess whether they can afford to take time right now or whether they should postpone the conversation to a later time. This is especially true when communicating with customers, or with colleagues with whom you have a less well-established relationship.

Because text instant messaging is a conversation without any voice, face, or body cues, it is very easy to misinterpret the emotional state associated with what is being said. Irony and sarcasm, for example, is very easy to misunderstand, for example. As a result, the practitioners that use text IM extensively have developed a certain arch and almost vaudevillian writing style, including additional text over and above the basic message, almost like stage directions, that indicate that jokes are indeed jokes and sarcasm is indeed sarcasm:

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> John Jones: So, how're things going on the McGillicuddy acquisition?
>
> Betty Wu: Just wonderful (wink).
>
> John Jones: Heard that the CFO there is calm and relaxed (ha!)
>
> Betty Wu: But I think we will still get done before Memorial Day on the doc review so I won't have to work over the weekend (hooray!), and things look good for a 4 July close (fingers crossed)

Along similar lines, consumer-oriented IM services introduced so-called 'emoticons' – graphical representations of facial expressions – which were derived from text versions: where "<;-]>" might be used to represent a wink and a smirk (you have to imagine a head turned sideways to the left). Emoticons are an IM fixture at this point, and many users rely on them daily, to help counter the otherwise flat and expressionless text that IM is based on. To some extent they are useful, but they do require that the recipient be able to interpret a iconic wink in the appropriate way, which may be a skill that many new users will not have learned.

Even though the two conversing operate without verbal cues to represent irony or sarcasm, the use of 'winks' and 'laughter' can go a long way toward establishing a more natural, non-robotic form of communication. Of course, the gradual introduction of voice and video into messaging will provide those missing face, body, and verbal cues, but today's bandwidth and device limitations limit the penetration of those tools. That means that we can anticipate the ongoing use of 'wink' and 'LOL' (laughing out loud) for some time to come.

IM is a conversational medium, much more so that email. Although we may not be aware of it, those of us who have listened to transcripts of conversations know that people do not really converse in full, grammatical sentences. Our normal form of conversation has a lot of fragmentary interaction, with people 'talking over' each other – which is a transcriptionist's nightmare. We shouldn't obsess too much about the grammar of instant messaging, at least no more so than we do when interacting face to face by speaking. Most important is to accomplish whatever is motivating the IM in the first place, and to do so in an economical fashion. After all, one of the driving reasons for IM rollout in the enterprise is that it helps us response more quickly, with less overhead, to pressing issues. We shouldn't impose linguistic self-censorship on IM, editing and reediting IM 'strokes' until they are grammatically perfect. We should approach it more like spoken language, where self-correction and afterthought are quite common. This is not meant to be a license for lack of clarity, profanity, or a retreat into jargon, but on the other hand, if we all waited to have grammatical sentences completely formulated in our heads before we spoke, all our conversations would be very slow, and very, very artificial.

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Place and Placelessness

Like other electronic communication media, instant messaging can cut across time zones and geography. IMing a partner in India takes the same effort and no more than it does to ping him when he is down the hall, or in the next cubicle. Like using the telephone, it is easy to forget that the person on the European 'end' of the conversation is not about to go to lunch with you, but is in fact responding to your inquiry at the end of a long day.

Instant messaging is not a cure for the problems, then, inherent in Internet time shifting. If anything, the low cost and presence foundations of IM make it a more reliable means to communicate with those out of immediate reach. And therefore, it has rapidly expanded in use as a replacement for international long distance.

Text IM has the added benefit of flattening issues associated with accent, and a wide variety of automatic translation solutions offer at least the promise of IM conversation with speakers of other languages. But, the use of IM does not hurdle the barriers to communication posed by cultural differences, and may introduce new ones, as well.

Just as with the telephone, different cultures are adopting instant messaging in different ways, and with different social conventions. For example, Asian cultures show much greater deference and reticence in business situations than do Americans and as a result are less likely to use IM with those that they have only met once or twice, viewing it as an impolite intrusion, like showing up unscheduled or unannounced at your office. Likewise, some Asian cultures are unlikely to directly answer a request for assistance with a direct 'no', but instead may more subtly indicate unwillingness or difficulties in acceding to the request. Instant messaging – because of its natural sparseness and brevity – does nothing to counter this cultural 'impedance mismatch' and may exacerbate misunderstanding.

Therefore, when using instant messaging across geographical and cultural borders, be cognizant of likely cultural disconnects. Americans can easily be considered rude because of an informality and breeziness that other cultures may perceive as disrespectful and self-centered. So, especially for Americans communicating with non-Americans, our recommendation is to be unfailingly (perhaps even overly) polite by US standards. Do not suggest "cutting to the business issues" early in a conversation, which is generally considered rude. The pleasantries – asking after your contacts' health, the state of his business, and inquiring about others from your contacts'

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company – can be just that, pleasant, so long as you restrain the impulse to get on with the 'real' purpose of the call.

Likewise, cultural norms can lead to misunderstanding when what one person considers 'obvious' does not even occur to the other. When in doubt, leave nothing unsaid.

Differences in international laws and ethics surrounding privacy and security is a factor that should be considered by management long in advance of any individual IM conversations. Logging of instant messaging conversations may be covered by completely different statutes than email, and may in general be treated more like telephone calls in other countries. European countries, for example, have strict laws surrounding privacy of employees that may prohibit archiving or logging their IM conversations, even when they are employees of US companies.

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Time and Timelessness

Instant messaging is a real-time communication tool, allowing us to connect with people instantly, and therefore to accelerate the overall pace of business. Paradoxically, the close, conversational interaction that IM provides us – to remain in contact with geographically scattered teammates or clients – allows us to avoid much of the time burden typically linked to remain in contact. We can drastically reduce travel and time costs, while retaining a sense of involvement and camaraderie with those we work with, remotely.

> **Emily Post's recommendations for upwardly striving New York hostesses in the 1920s about the wearing of veils and gloves, or the appropriate way to place a calling card onto the butler's tray, now seem hopelessly out of date.**

By allowing us to instantly communicate with others – either across the building or across the globe – instant messaging seems to be undoing the costs of time itself, just as the telegraph and the telephone did before.

The world has been radically changed by the connections that these time-straddling technologies create, and instant messaging is the newest wave of technology making the world a small place. McLuhan wrote in *Understanding Media*,

> "Our specialist and fragmented civilization is suddenly experiencing an instantaneous reassembling of all its mechanized bits into an organic whole. This is the new world of the global village."

Leaving aside McLuhan's hyperbole, instant messaging will certainly change our perception of global time, influencing productivity in the enterprise and social interaction in society. This medium may ultimately have as significant an impact as the telephone did in the last century.

Reflecting on time, it's instructive to consider how much in fact things have change under the pressure of these new technologies and means of communication. Emily Post's recommendations for upwardly striving New York hostesses in the 1920s about the wearing of veils and gloves, or the appropriate way to place a calling card onto the

butler's tray, now seem hopelessly out of date. But behind the minutiae of etiquette – the apparently random or arbitrary social conventions that channel human interactions into conventional forms – there is a timeless truth. Underlying the myriad rules and restrictions of etiquette are a few core principles, ethics that can guide us in our interactions, in real-time just as in more conventional communication.

It is easy to forget at times that social conventions are not an arbitrary collection of regulations designed to distinguish those that know from those that do not. In fact, the central principle of all etiquette is to avoid causing offense.

- First, Do No Harm

  It is easy to forget at times that social conventions are not an arbitrary collection of regulations designed to distinguish those that know from those that do not. In fact, the central principle of all etiquette is to avoid causing offense. While we can make light of the evening wear of 1927, here at the start of the twenty-first century, we are no less defined by our conventions and norms than our grandparents, although the styles have changed. If we hold on to the basic notion of causing no harm, then the myriad tactical decisions about deploying and exploiting instant messaging will fall into place.

- Consider Others

  Conversation is an exchange of views and information, tempered by the regard that those speaking have for each other. Hardly any conversation is made less effective by being considerate of the others point of view, goals, and feelings. The golden rule applies here, as in nearly every social setting. If you approach every IM by being considerate of the others involved, it will likely prove to be a useful and productive tool for you.

- Take Time to Make Time

  While instant messaging is intended as a labor saving device, maintaining productive relationships is strongly influenced by the quality and depth of the relationship, not just the nature or importance of the information being communicated. Asking "got a sec?" only takes a few seconds, and establishes that you care about the other person's time. Following up a request for some information by asking about someone's new baby or what their weather is like may seem contrary to the drivers of efficiency and productivity that underlie the company's adoption of instant messaging in the first place, but in any time period longer than the immediate near term social relationships require everyone involved to make these social time investments, if communication is to lead to productive work getting accomplished.

Close

Instant messaging is increasingly a commonplace in business and in the immediate future is likely to reach near ubiquity. The value that instant messaging represents will only increase as more users come on line, instant messaging technology advances, and as more users become acquainted with productive techniques to apply instant messaging to business and personal communication.

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In some ways, instant messaging is 'just' another communication medium, and as we become more familiar with its features and form factor we will learn when and how to use instant messaging as a alternative to other, more well-established communication media. Viewed from another perspective, instant messaging is a breakthrough, and is fundamentally different from other communication tools. In particular, instant messaging presence represents a quantum step forward in productivity relative to email and voicemail, which are the media most likely to be displaced by IM use.

As management surveys the pros and cons of instant messaging, and reflects on how to get the biggest value from any investment to be made, what lessons we learned from email's impacts on the organization is likely to be the best indicator of what is to come:

- Even the biggest advocates of instant messaging, who are focused on its most obvious applications, are unlikely to understand the longer-term, second-order impacts.

- These longer-term impacts will not be about efficiencies – doing what we already know how to do more quickly – but will be about doing new things. The second-order effects are about changes in interpersonal interactions, and developing new ideas about what is important, work procedures, and social organization.

- These longer-term effects emerge slowly, as people adopt new behaviors and ways of thinking, even though the technology spreads virally.

- Kenneth Bouldin once said, "we make our tools, and then they shape us." As we channel communication through a new medium, we change more than just how we are talking: all the surrounding context is changed by the new medium, as well. This is not the technologies acting on us, but us actively changing how we manage ourselves.

In the final analysis, we know that instant messaging will change things – after all, if it didn't make a difference we wouldn't use it at all. We have examined many of the ways in which IM can be applied – or *not* applied – to hold onto what is best in the ways we are interacting already, and to exploit the speed, power, and focus that instant messaging can bring to enterprise communications.

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