

# Messaging And Formality: Will IM Follow in the Footsteps of Email?

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**Abstract:** This paper discusses instant messaging in the context of a tension between informal communication and the benefits of having a record of an exchange. IM exchanges are generally informal. As messaging is used more in work settings, being able to review an exchange can occasionally be helpful. However, knowing that a communication will be saved can lead to greater formality. We start with a case study of IM use that illustrates this transition. In several respects, messaging may be paralleling the path of email use. The effects of recording are particularly significant because of the rapidly growing ease of archiving digital information of all kinds.

**Keywords:** Instant messaging, informal communication, email, computer mediated communication, CSCW

## 1 From Field Notes

**Setting:** "News International," a media company.

**Participants:** Joan, a Director whom one of us was shadowing; two of her colleagues; and her boss.

Joan was locked out of IM. She hadn't upgraded to the new client that she was supposed to have installed weeks ago. The old client solely allowed conversation between employees of her company, the new client allowed conversation with external companies that adopted it. As a co-worker helped her install the new IM client, he talked about the changes. Joan was surprised and seemed alarmed when he mentioned that IM conversations were now automatically saved. Directly following this interaction Joan went to a team meeting. The first thing she did was ask her boss if she was aware that the new IM saved all conversations. Her boss said yes, and that as a consequence her communications via IM were now far shorter than previously, because she was much more careful about what she wrote, knowing that someone could review them. There was consensus among the 3 women in the room that prior to this upgrade, email had been used for formal communication and IM was used for more informal chatting. They felt that now IM would become more like email, more formal communication.

## 2 Messaging & Informal Interaction

Text messaging and instant messaging are primarily used for informal interaction. Obviously true for teen and student IM exchanges, it is also reported in studies of IM use in workplaces such as News International. Nardi, Whittaker and Bradner (2000) wrote "the tenor of instant messages is typically casual, informal, and friendly. One user contrasted it with email: 'It's more casual so you can be more quirky.' Relaxed grammar and spelling are the norm. Standard capitalization is often ignored though caps may be used for emphasis. Multiple exclamation points and question marks are sprinkled liberally throughout Instant messages. This informality lends Instant messages a kind of intimacy that is often absent from other types of mediated communication." Similarly, Isaacs et al. (2002) concluded "IM is often used for informal workplace communication," although they found a stronger work-related focus than had been generally reported.

## 3 Saving IM Conversations

Text messaging and instant messaging have historically not been archived. This could change. Especially when IM is used for work purposes, people may wish to save the occasional interesting exchange or retrieve a URL or other information. For IM use between enterprises or with customers, corporations may log it for protection, to monitor for

quality, or to send a transcript to a customer to reduce the likelihood of a follow-up call.

Server-side logging as at News International is likely to be built into all IM systems. Some IM clients now allow a user to save exchanges automatically or with a Save command. Other clients force copying and pasting. Efforts to integrate communication—email, fax, voice mail, IM—will lead to the archiving of once ephemeral discussions.

For a moment, return to News International:

*Setting: Later the same day.*

*Participants: A Vice President and 15 people from around the company are brainstorming on how to boost morale.*

*The VP wanted the air of the meeting to be casual, informal and comfortable. When one of us asked if we could take pictures or tape record the meeting, the VP asked us not to, explaining that if people knew they were being recorded they would be less likely to speak their minds freely.*

The VP viewed recording as formal, stifled and less comfortable, whereas an absence of recording promoted casual, informal and comfortable communication. From this perspective, the new IM policy promoted formality. And given the public perception that IM is heavily used for social chatting with friends and relatives, management may see this a welcome step toward more disciplined IM use.

## 4 The Evolution of IM

We have been studying IM use in large enterprises. IM, and text messaging where it is used, fill the need for informal asynchronous communication. Email Regardless of the communication medium involved, there are times when it is useful to record an interaction. To provide recording capabilities is technically straightforward. We can decide to restrict or ban recording, as some states do for telephone calls. As we decide whether or not to provide and use recording mechanisms, it is important to reflect on the consequences of our choices.

Why avoid a recording mechanism? What is gained by making it more difficult to review messages? How do we benefit when exchanges disappear, when there is no certainty of or accountability for what transpired?

The answer is that ephemerality is conducive to greater informality. One can relax, there is less need to consider how one's words or actions might be interpreted by other people, in other contexts.

There is no strict correspondence between recording formality. Recording does not inevitably lead to formality. Nor does formality in interaction require that it be recorded.

For example, if a recording seems unlikely to be used, behaviour is unaffected. Our knowledge that cameras record cash machine transactions and monitor public places does not affect us. Even when aware an employer could be recording email, people use it carelessly, as subpoenaed email archives in court cases have revealed.

Conversely, transient face-to-face exchanges can be formal. Cultural and social conventions govern the formality of much interaction.

Nevertheless, if IM recording becomes commonplace, IM use is likely to grow more formal. Whether an exchange is recorded on a server by the organization or on clients by the people involved, knowing that messages could surface unexpectedly in the future may lead people to be less casual. Improved indexing and search tools will amplify this. In addition, if IM is easy to save, people will use it more often for formal matters where a record is needed. In this way, recording and accessing past exchanges will become common.

The transition may not be as dramatic as at News International—and even there, employees may relax if time goes by without evidence that logged IM is being examined. The desire for informal channels can lead us to ignore known risks, as in the case of the senders of subpoenaed email.

With other media, early examples of saving and forwarding communication that had been transient were startling. Unexpected forwarding of voicemail or email can still be disconcerting. The unveiling of *deja news*, the searchable newsgroup archive (now Google Groups), was a sensation. Although someone always could save or print a posting, newsgroups felt ephemeral, around for several days, an informal conversation among a number of like-minded individuals. Suddenly comments were immortal, easily retrieved by anyone at any future time.

As noted by Nardi et al., users often distinguish casual IM from formal email. It is interesting that email began as a casual alternative to more formal typed or written correspondence.

## 5 The Evolution of Email

In a plenary address at the first CHI conference in 1983, John Seely Brown (Brown, 1983) said that a Xerox executive had told him that embarrassment about spelling kept him from using email and asked whether PARC could develop an automatic spelling

corrector for email. “We could,” Brown reported telling him, “but we won’t. Instead, we’ll build a spelling de-corrector!” He argued that email was and should remain an informal communication medium. A tool that inserted random spelling errors would help keep it informal.

Some early email users treated it like written correspondence, starting each message with “Dear...” and closing with “sincerely” or “yours truly.” But “put it in writing” or making something permanent is associated with formality, and no one was recording email. Disk space was too limited, too expensive. So most early email use adopted a conversational model, with heavy use of exclamation points, repeated question marks, and capitalized words.

In the 1980s, email was regarded with suspicion by management, even in high tech firms (Perin, 1991). Known to be used mainly by students, would it distract employees from productive work? Even in the early 90s some researchers thought organizations would abandon email once they measured productivity losses (Pickering & King, 1992).

As disk sizes increased and email was saved, senders could be held accountable for what they had written. As email became more integrated into work practices, there was greater likelihood of referring back to some of it.

Attitudes and technology changed. Employees who may have initially used email for social purposes as students found ways to leverage it in the workplace, where both informal social interaction and quick business exchanges are important. Strings of exclamation points disappeared. Tools came along to help people fix spelling and grammar. Email has become acceptable for more formal correspondence, such as letters of recommendation.

But we still need casual channels for unpolished ideas, exaggeration, sloppiness, letting off steam, gossiping, flirting and so forth, without fear that such remarks will return to haunt us.

## 6 The Evolution of IM

We have been studying IM use in large enterprises. IM, and text messaging where it is used, fill the need for informal asynchronous communication. Email was faster than formal memos and letters, messaging is faster than email. As with email, messaging was first embraced by students. Even younger this time, with hardware and connection cost lower.

As with email, management is often suspicious of workplace use of IM, despite growing evidence that it has been converted to work purposes in

organizations (Isaacs et al, 2002). Messages bear the capitalization and exclamation marks that once marked email as conversational. Spelling and grammar are ignored, as was once true of email. (Email programs now have spelling correctors.)

As with email, we see young people bringing messaging to the workplace, applying it to work activities, and causing it to spread. We have found it heavily used in IT departments of large enterprises.

Email and IM history differ in some respects. An email standard emerged. This could happen with IM. Business use could motivate an IM standard or a unified portal. Without interoperability IM will develop differently.

Interoperability among vendors is one issue, differentiation between enterprise and consumer IM is another. Some organizations would like to keep IM “inside the firewall” for security reasons, to allow more powerful collaboration features, or to escape advertising and other distractions of consumer products. Similarly, until the mid-90s many large companies limited email to an intranet. This broke down as the need for external business and personal communication was accepted. Just as few organizations have phones that only work internally, few now have internal email systems. IM seems likely to follow that path, but it is not certain.

Managers are adopting IM more quickly than they adopted email twenty years ago. This is not surprising. Many more managers are experienced hands-on users today. IM provides them with specific benefits, such as enabling communication while stuck in a large meeting.

Managerial use can lead to more rapid dissemination—we have seen examples of top-down mandated use. Nevertheless, a lot of IM adoption is bottom-up or peer-to-peer, started by younger peers.

Although pressure for a company to adopt email twenty years ago often came from new hires who had used it as students, mail systems were expensive and required top management approval. IM does not, so grassroots spread can be rapid. IM availability does not have to be system-wide—unlike email and most collaboration technology, it is designed for and used by groups of friends or colleagues.

Server-side archiving of IM is being provided in response to enterprise demand. Where and how this facility will be used remains to be seen. Client-side saving of exchanges has been introduced in some clients. Not in demand by teens (Lextant, 2003), this feature could be more popular in corporate settings. If it comes to be used it is likely to affect the formality of IM use, as it did email.

There is a tension between the usefulness of IM for brief casual exchanges that people do not expect to be recorded and the benefits from the technically simple and occasionally useful ability to save, search, and retrieve these quick exchanges. Design can influence how this is resolved, but over time design is subject to the desires of users.

IM falls between email and phone use in terms of directness and immediacy. In many places, society has made “client-side” recording of phone conversations illegal—one cannot record a conversation without informing the other party. IM could follow the phone model. IMers could see a “not recorded” checkbox, which would make archiving difficult. This seems unlikely to be made a legal requirement, as with the phone, but software could make saving difficult. Digital rights management architectures could make such a feature very difficult to bypass.

Alternatively, IM could follow the email model, greater recording and use becoming more formal. In an experiment with a visibly archived chat system, people were observed correcting spelling errors (Grudin, 2001). Possibly not coincidentally, they were not enthusiastic about the system.

If IM follows this path, people in organizations will still need informal, casual, ephemeral communication channels. These serve work purposes. Work is about relationships as well as efficiency. Informal channels can support both. They establish and maintain important ties, help us inform, persuade and motivate colleagues.

Toda (Toda, 1991) discusses the importance of ephemeral communication in establishing and maintaining social networks. IM (along with phone and face to face communication) has served this purpose. If people perceive IM as being a matter of record, they will switch to other channels when greater informality is required.

If IM loses its informality, people may return to telephone audio even when it is less effective. If phones are integrated digitally and calls routinely recorded, people may bring personal cell phones to use in the office.

In this paper we have described how rapidly changing use of IM could push it along the path toward greater formality travelled by email over a

decade earlier. We are simply arguing that history repeats itself, with some differences. We are observing a tension that is central to our era of easily recorded digital communication, the tension between the usefulness of such records and the need for communication channels outside the digital record. Our designs and social practices must support both of these needs as effectively as possible.

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