Bananatag

The Ultimate Guide to

Employee Distribution Lists in Outlook

How to segment your employee lists in Outlook for more effective internal communications

Employee distribution lists should make your job easier—not harder.

For many, creating employee distribution lists in Outlook is a necessary evil.

It's time-consuming, restrictive, and annoying to manage.

But waiting for IT to build you all of the relevant lists you need to segment and target your internal communications could also take millenia.

We're here to show you that **there's an easier way.**

In this guide, we'll walk you through **everything you need to know** about creating effective employee distribution lists in Outlook, including:

- What are distribution lists? And how do they work?

- The most useful distribution lists for internal comms

- Creating, updating, and maintaining distribution lists

- Comparing the best distribution list tools

What are Outlook Distribution Lists?

Outlook Distribution Lists, also called 'Distribution Groups' or 'Contact Groups' depending on which version of Outlook you're running, are groups of email recipients that are addressed as a single recipient.

They're generally used to send emails to groups of people (in your case, employees) without having to manually enter every single email address—which is a big deal when you work for a large organization and are managing communications for more than one location, department, or business unit.

When you're looking at your contact list in Outlook, your Distribution Lists will show up as contacts as well, so they're easy to find and use. They will also appear in your Address book, when you press the 'To:' button.

What's the difference between Distribution Lists, Distribution Groups, and Contact Groups in Outlook?

Mostly, these terms can be used interchangeably when you're referring to them in the Outlook / Microsoft technology ecosystem.

Distribution Lists are managed centrally for the entire organization. The emails sent to these lists are usually sent from an associated email address that internal communications or human resources owns, rather than a personal email address.

Contact Group is a newer term than Distribution Lists, and was likely updated to be a bit more self-explanatory so as to not confuse users. Contact groups can be created personally in an individual email account in Outlook, so you can build custom contact groups.

The most useful employee segments to create for internal communications

There are lots of different kinds of distribution lists you could create based on your unique employee population.

Heck, you could group together dog-lovers or pescatarians if you really wanted to. Provided your HR team tracks dog-loving status, that is. (You never know.)

But based on our experience working with hundreds of organizations around the world, **we recommend you start with these 7 distribution lists:**

1. Office locations

This may seem like a no-brainer, but having a separate list for each office location is pretty important.

The ability to target a specific city or group of office locations will enable you to reach only those employees in specific locations when needed, rather than communicating localized information to your entire all-staff list.

Tip: We've also learned first-hand from our customers that location-based lists are not only important for timely and location-specific communications, but are also critical for communication in the event of a crisis.
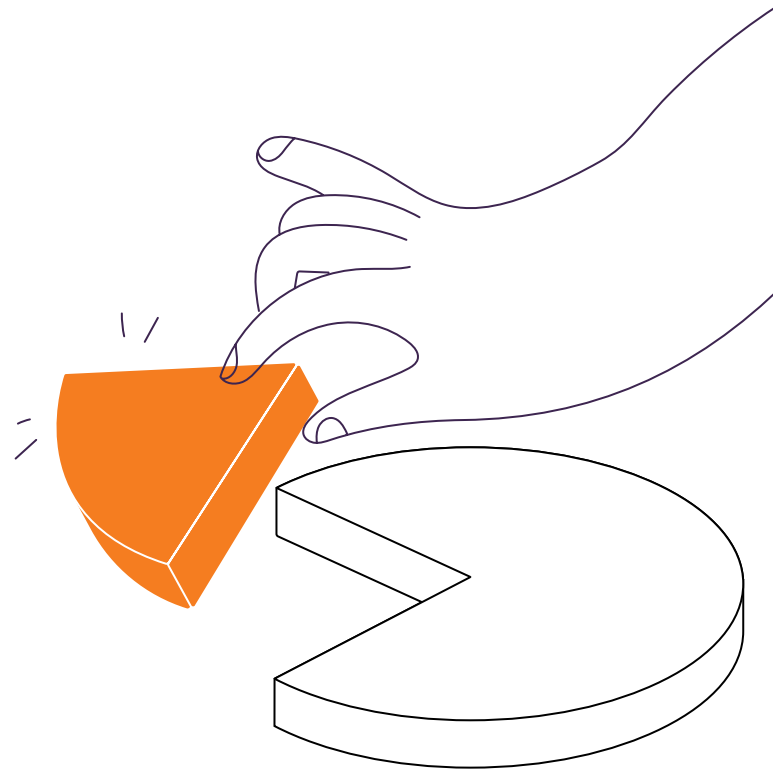
2. Working style

If your organization now has **hybrid workers**, you may wish to communicate with these groups independently, especially if you send communications such as facility updates that are only relevant to employees who are working in the office.

3. Leadership teams or managers

Need to prep your leadership team in advance of sensitive company-wide communications?

To make sure you're sending the right messages to leadership, break down your employee list by seniority or leadership level.

We've also seen organizations where managers may have company email addresses but individual employees do not, like in retail or manufacturing. In cases like that, we recommend building a distribution list of managers who are responsible for sharing corporate communications with their particular teams.
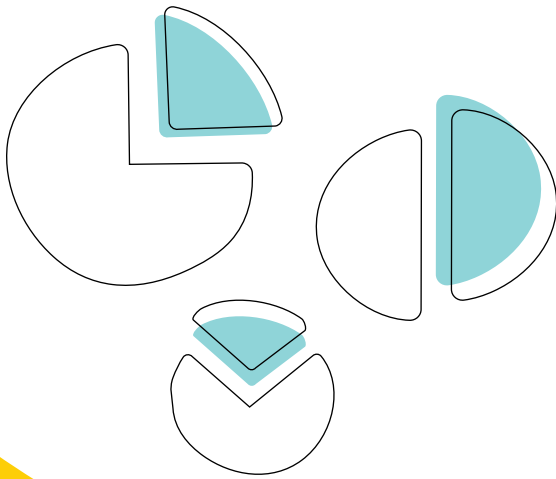
4. Job function or department

The experience that employees have in your organization is inherently linked to the team or department they work in.

Reaching employees with targeted emails based on their job function or department will enable you to send relevant information to large groups of similar employees, and be more responsive to any issue that affects specific teams or departments.

5. Specific business divisions or units

Similar to segmenting employees based on their job title or department, targeting communications to larger business units, divisions or specialized groups, allows you to cut out information from your all-staff communications that are only really important to these specific groups.

How your organization is structured will inform what kind of groups or divisions you target. For example, you could group together all employees on the East Coast, all manufacturing teams, or all customer-facing departments.
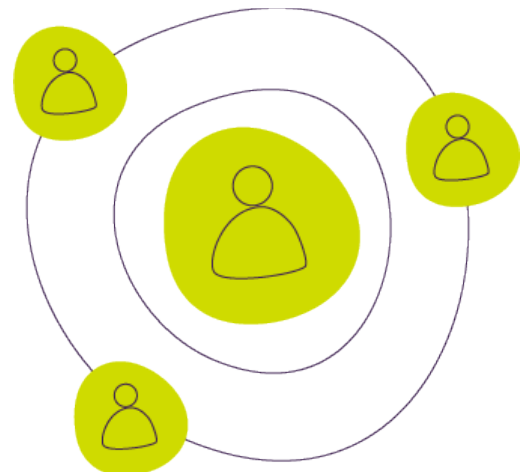
6. Primary language

For enterprises with offices around the globe, having an employee distribution list for each language can help you make sure your messages resonate.

By targeting employees in their preferred or primary language (regardless of their physical location), you have the opportunity to translate or adapt important messages to ensure they are understood.
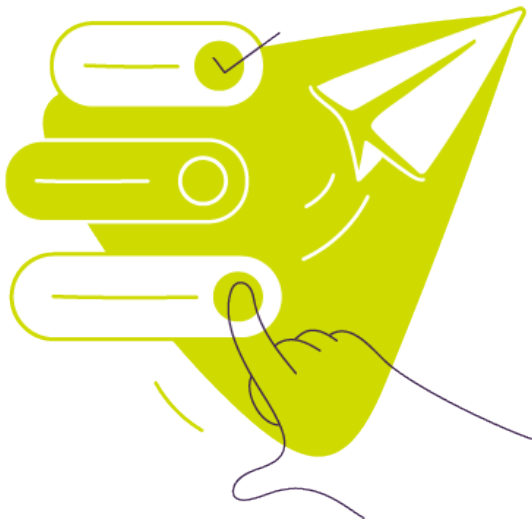
7. Tenure

Many organizations have different benefits and perks available to their employees based on how long they've worked at the company.

If you want to share information about benefits that are exclusive to long-time employees, you may want to segment your comms to avoid confusion.

How to create employee distribution lists in Outlook

Note: Microsoft calls these distribution lists 'Contact Groups', but they function in the same way.

Disclaimer: **Building Distribution Lists for Outlook versions released prior to 2013 and Outlook for Mac**

The instructions that we outline below only apply to versions of Outlook versions released in 2013 or later.

We're not going to cover anything before 2013, so if you're stuck using an ancient version of Outlook, we're sorry (for everything).

Also, keep in mind that if you work at a large organization and you're using Outlook for Mac, making a custom distribution list is pretty impractical. While it's possible to create distribution lists in Outlook for Mac, you'll have to manually find and select each individual user and add them to your custom list.

Step 1: Create a Contact

First, open Outlook and navigate to the 'People' tab using the people icon in the folder pane. You'll find the folder pane on the left-hand side of your Outlook screen.

Next, click 'New Contact Group' in Outlook's main ribbon, located at the top of your screen.
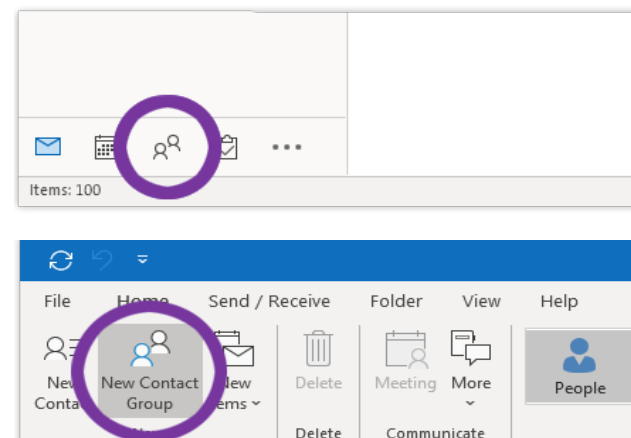
Step 2: Name and populate your Contact Group

Once you're in the New Contact Group window, enter a name for your group. Your group name should be useful, relevant to the group, and easy to find amongst your other Contact Groups. We recommend naming the group after the people who will populate it.

For example, let's create a group for Bananatag's Kelowna office.


Now it's time to add some members from your address book.

You can select members manually, or you can search by fields such as location or title if you have this information linked to your address book. Remember to select 'More Columns' before searching for an additional attribute.

Next, you can select as many contacts as you want before clicking the 'Members' button followed by 'Ok.'
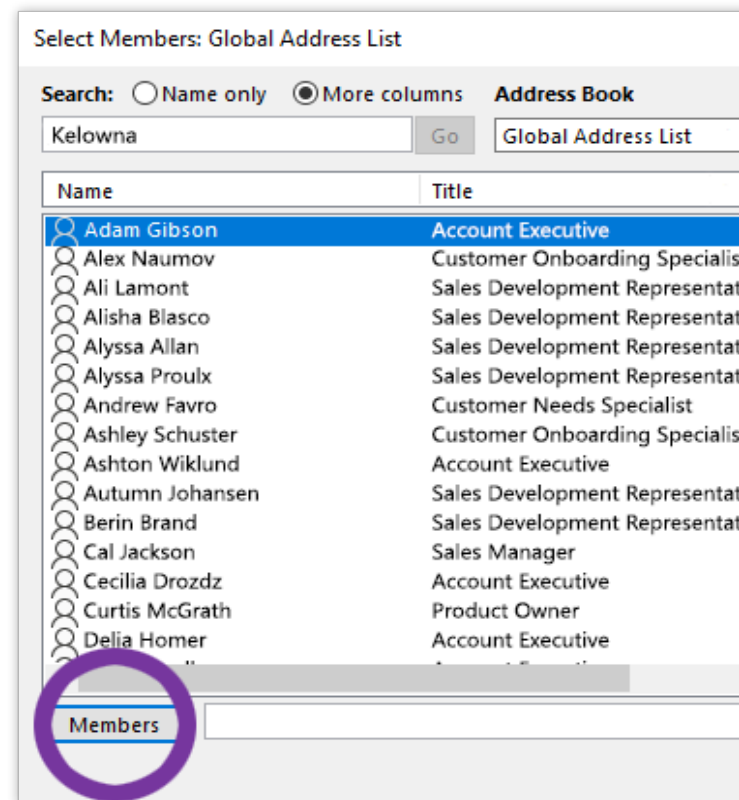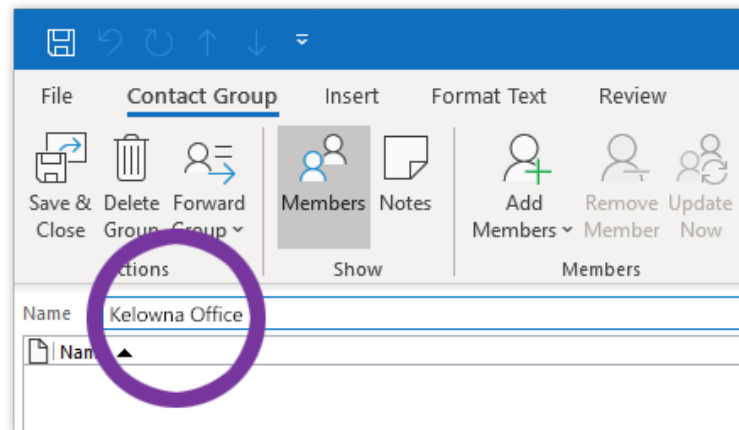
Step 3: Don't forget to save!
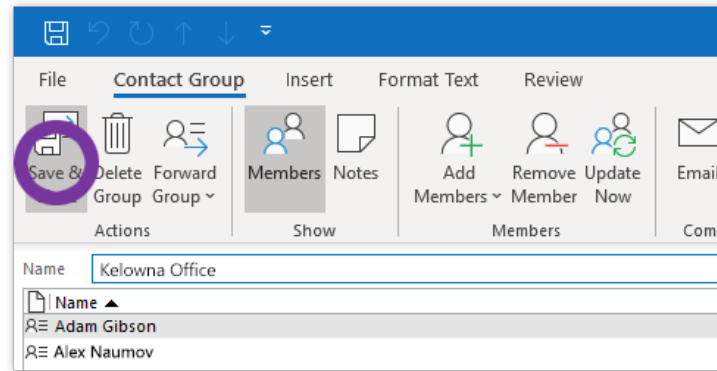
Step 4: Use your new list

Congrats! Now you have your very own segmented distribution list that you can send to using the same emailing process you're used to.

No complicated workarounds needed and no change in workflow.

Next time you want to send an email that's relevant or targeted to your new group, you can simply enter your new group name in the 'To' field and you're all set!

How to update distribution lists in Outlook

Updating the distribution lists you create in Outlook is pretty straightforward.

Simply create a new email, enter the list name in the 'To' field and right-click on it.

From there, you can reopen the contact group window and add or remove members.
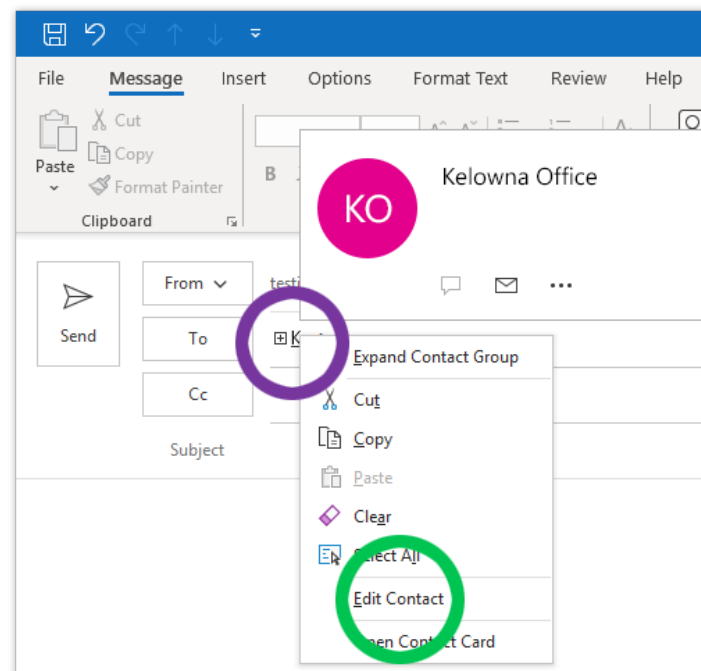
Best practices to ==maintain== employee distribution lists in Outlook

Here are some best practices you can use to make sure your employee distribution lists are well-maintained:

Create a system

To make sure things run smoothly, set up a process for how you're going to use employee distribution lists across your organization:

1. Decide whether you want to separate internal audiences and external stakeholders who might also receive your internal communications. Sometimes when you're measuring the engagement of these audiences or if you have to tweak information you send to each group, you'll want to separate them out. Stakeholder engagement might also impact your email engagement rates, which won't give you an accurate picture of what's really resonating with employees

2. Next, [create lists](#) for every relevant department, team, location, and business unit.

3. Then create rules or protocols for when an email should go to an all-staff distribution list and when communications should be more targeted to specific lists.

> **Tip:** These are just the first steps in creating a good employee distribution list system. Every organization and internal comms team is unique, so keep building until you've fleshed out processes and systems that cover all of your bases.

Keep it consistent

1. Develop a naming structure or descriptive system so no matter which user needs to send to which list, they can easily find the correct list.

2. Decide which email address your different communications are going to come from.

This may not seem like a big deal, but **having emails come from a consistent source is a best practice because it helps to ensure that emails don't get missed by employees.**

If it's always coming from the same address, they'll expect it and know emails coming from that address are important. Sender trust is key to increasing and maintaining open and click engagement rates.

Keep lists up-to-date

Updating your distribution lists regularly is crucial to ensuring that the employees receive your messages. If you don't keep your lists up-to-date, three big problems will arise:

1. If you're tracking email metrics like opens, clicks, or read time (which is a very smart and cool thing to do), **sending internal communications to people who have left the company and, as a result, can't open the email will send your engagement metrics into the ground.**

Tip: Don't forget to keep your sending addresses short and easy to identify so they don't look like scam addresses or spam.

Not only will it be a false indicator of how well your content is actually performing, you'll likely have to justify the engagement crash to leaders.

And if you have to explain that the numbers are off because of out-of-date lists, it **may be a struggle to get stakeholders to trust the data you're collecting, hurting your ability to influence the strategy for the channel.**

2. If you're targeting a [specific segment of employees](#) by something like location or department with important information like policy or health and safety protocols, **important people could be left out of the loop.** That would not be good.

3. Finally, if an employee has left, their manager is likely going to get their forwarded emails. **If your lists don't stay up-to-date, managers are going to receive your emails twice.** This will not only be heckin' annoying but it will skew your metrics as well, bringing us back to the initial point about bad data.

> **Tip:** If you have the option, [opt for dynamic list creation](#) that syncs with your HR system or other employee records program.

Decide on ownership

If IT doesn't need to have ownership over the lists, decide who else can and should manage the lists, and how they'll get the information they need to create new lists and update existing lists.

This may mean working with IT, HR and other internal departments that communicate to the whole organization. Developing these procedures and relationships early are the key to avoiding issues like inaccurate, out-of-date lists.

Build a relationship with IT

In most cases, you won't have [control over distribution list creation](#), so it's important to communicate with IT about:

- What lists you need
- How often you'll need them updated
- And the process for requesting updates and changes

Determining these needs at the outset will help you avoid headaches and conflict in the long run.

Tip:

We have heard a lot of grief from internal communication professionals who don't have the best relationship with IT or fear asking them for things because the process seems long and arduous. And we get it. Sometimes it is a pain. But investing in your team's relationship with IT will have tremendous returns.

Avoid reply-all drama

Every once in a while, someone receives an all-staff email, decides to reply and ends up sending an email to [every single person](#) on the list.

That's why **it's key to create moderators for your distribution lists** if you're using Outlook. Messages sent to a moderated distribution list are screened by a designated moderator before being sent to all members of the group, stopping reply-alls in their tracks. Hallelujah.

If you own a list, you can set up moderation rules for the list by going to the settings of that list and adding moderators in the 'Message Approval' settings.

14

The ==pros and cons== of using Outlook distribution lists

The Pros

- The **quickest way** to build a distribution list if your organization has flawless contact data in Outlook.

- You likely **already have access** to create them.

- They're straightforward for the **tech-savvy** user.

The Cons

- You can't get analytics comparing email performance across different lists.

- Potential for reply-all drama.

- Requires updating frequently.

- Earlier versions of Outlook have limits on the number of addresses you can include, typically between 50-70 contacts.

- Emails that have a lot of recipients are more often marked as spam by the recipient's email provider.

- Even though Outlook 2010 and later versions allow unlimited addresses in distribution lists, your corporate environment, server, or even internet service provider **may limit the size of your groups and block emails** that have more recipients.

- If you send to a Contact Group or Distribution List using the 'To' or 'CC' field, **Outlook may expose all of the recipients' email addresses** to each recipient. This can take up a lot of space at the top of the email and also may be a privacy issue. While you can 'BCC' a Contact Group, this is an easy step to forget if you send a lot of emails.

- Can be **difficult to get support** if you're having issues. You'll likely have to go through your own IT team or wait for community responses on their support forums. When something isn't working, this may mean **your communications are delayed while you wait** for help.

After reading all this, you may be thinking that **Outlook Distribution Lists are more trouble than they're worth. And you're not entirely wrong.** But in most large organizations, email clients are standardized across the entire company for security and operational reasons.

So what are your options?

The good news is **that there are other workarounds and alternatives— including Bananatag.**
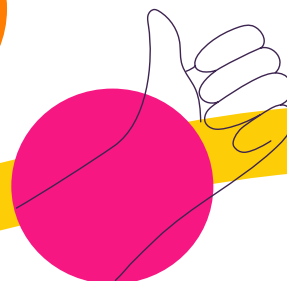
The ==best== alternative: Bananatag's Custom Distribution Lists

Unlike Outlook, Bananatag was purpose-built for internal communications and is upgraded frequently based on feedback from internal communication professionals.

[To create a distribution list](#), users just have to open up the Bananatag web-app at app.bananatag.com and navigate to our Directory tab.

The Pros

- Super **user-friendly interface** that works quickly.

- You **don't need IT** to create new employee distribution lists.

- You can create dynamic distribution lists that **sync with Azure Active Directory**, and other HRIS systems, so you always have accurate, up-to-date lists.

- You can upload and update lists using a **simple CSV**.

- You can **schedule** your communications.

- You can segment your email stats based on **location, department, or other attributes** stored in your HRIS.

- You can gather **accurate engagement data** across shared workstations and digital workspaces.

- You can **follow-up with only those employees that didn't open your email**, without seeing individual-level data, keeping employees' privacy at the forefront.

- You can view a breakdown of **email stats by segment**, so that you can compare how the same message is received by different audiences.

- You get **access to Bananatag's awesome features** like our collaborative email designer, pulse survey features, metrics and more.

- An **amazing support team** has your back if you need help with everything from technical difficulties to strategic advice.

- You can also [upload your Microsoft 365 Groups](#) to Bananatag, unlocking all of these great features for both your existing and shiny new custom lists.

- If you're sending to more than 500 employees, there **isn't a more flexible or convenient option**.

The Cons

- Bananatag is an **enterprise product** and is typically used by organizations with 500+ employees.

- You have to **purchase a Bananatag subscription** (which is definitely not a bad thing).

- You'll be kicking yourself because you didn't switch sooner.

Start Sending More Effective Employee Communications

Bananatag

As an internal communications pro, you deserve a tool that's built for your unique needs. We designed our platform by listening to what internal communication professionals really need from an employee email solution. And in the end, having something purpose-built that's always being improved will save you headaches, energy, and countless hours.

Want to learn more about how Bananatag can help improve your internal communications? When you're ready to see all of our awesome features in action, click the button below to connect with our team and book a quick product tour.

Get started

Looking for more resources?

Be sure to check out:

bananatag.com   Product Overview   Bananatag Blog