



SOFT SKILLS SERIES

ANATOMY OF AN EMAIL

LEARNING GUIDE



DRAFTING AND SENDING
COMMUNICATIONS AND
MANAGING YOUR INBOX

ABOUT EMAIL COMMUNICATIONS & THIS GUIDE

Mastering the art of drafting sharp, clear emails and keeping your inbox in check is like being the conductor of a symphony—when done right, everything flows in harmony!

A well-written email is your digital handshake, your elevator pitch, and your problem-solver all rolled into one, while a tidy inbox is your mission control, keeping chaos at bay. Let messages pile up, and suddenly you're Indiana Jones dodging a boulder of unread notifications. But get it right, and you become a communication ninja—swift, smart, and respected. After all, in the fast-paced world of work, those who write well and reply on time don't just survive—they *thrive*.

This learning guide offers helpful tips for drafting and proofreading email communications and it suggests ways to manage your inbox and tame the flow of information.

"Email is like laundry - it piles up faster than you can keep up with it." - *Anonymous*

"Email is both a curse and a blessing. It's fast, cheap, and easy - which is exactly why it's so dangerous." - *Anonymous*

"Inbox Zero isn't a destination. It's a philosophy." - *Merlin Mann, the original champion of Inbox Zero*

"You are what you forward." - *Erica Jong*



STEP 1: DRAFTING



DRAFTING

- When drafting an email message, begin with the end in mind. Start by asking, “Is an email **appropriate**?” If your communication contains sensitive information, if the message could be emotionally charged (in the eyes of the recipient) or if the message contains complex concepts or detailed content, email may not be the best form of communication.
- Recognize **who** needs to see the message. And, more importantly, who doesn’t. Limit the recipients to only those who need to know. Sometimes, less is more. Use the “To” field for anyone who needs to take action or who is the primary audience. Use the “cc” field for anyone else who needs to know.
- Ensure the **subject line** is appropriate. It should be specific and concise. Use words that support finding the message later, using a key word search.
- Be polite and professional. Start with an appropriate **greeting** such as Dear [Name], Hello [Name], Hi [Name], [Name], Greetings, Good morning! or Good afternoon!
- Monitor for message **clarity** and readability. Be concise, focused, use short paragraphs and leverage bullet points when appropriate.

“Your emails are ALWAYS clear to you—or you wouldn’t have written them as you did. Clear in the mind of the reader is what counts.”

–Dianna Booher, from *Faster, Fewer, Better Emails*



DRAFTING

- Call out any due dates or **action required** by underlining or bolding text, using a different color font or by highlighting key information. Due dates or a call to action should not be a needle in a haystack. The information should be prominent.
- Be **respectful and polite**. Monitor for any unintended tone. Be neutral.
- Say enough but not too much. **Balance** is key!
- If your message references **website links or attachments**, ensure the links are functional and the attachments are included. If sending an attachment, monitor for size. Some company email servers will not accept messages with attachments larger than 10 MB. Many companies allow messages with attachments that are up to 20 MB.
- Include a professional **closure** to your message. Consider options such as Thanks, Thank you, Best, Best regards or Sincerely.
- When sending messages outside of your organization, use your **signature block**.
- **Emojis** are unnecessary in business communications. They should be used sparingly.

"There is no great writing, only great rewriting."

–Justice Brandeis

"As with subject lines, keep your signature block informative, useful, and brief."

–Dianna Booher, from *Faster, Fewer, Better Emails*

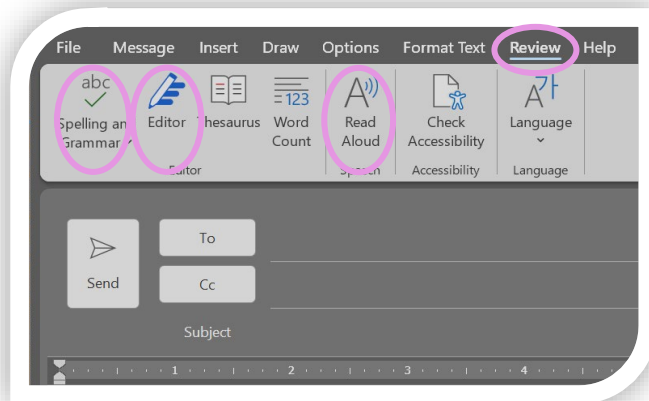


STEP 2: PROOFREADING



PROOFREADING

- Again, monitor for **tone** and ensure your message is **clear and articulate**.
- Use the “**Spelling and Grammar**” tool (for basic spelling and grammar checks) or the “**Editor**” tool (for more advanced suggestions regarding writing style, clarity and other refinements) of Outlook to help identify edits.
- Verify the correct **recipients** appear in your “To” and “cc” fields.
- Ensure any **attachments** are included and any **links** are functional.
- If your message will be sent to a large audience or to executives, consider using the “**Read Aloud**” feature from the Review menu. It is amazing how many edits the function can detect – items that spell check may not catch.



“There’s a life and death in every email.”

–Bill Gates

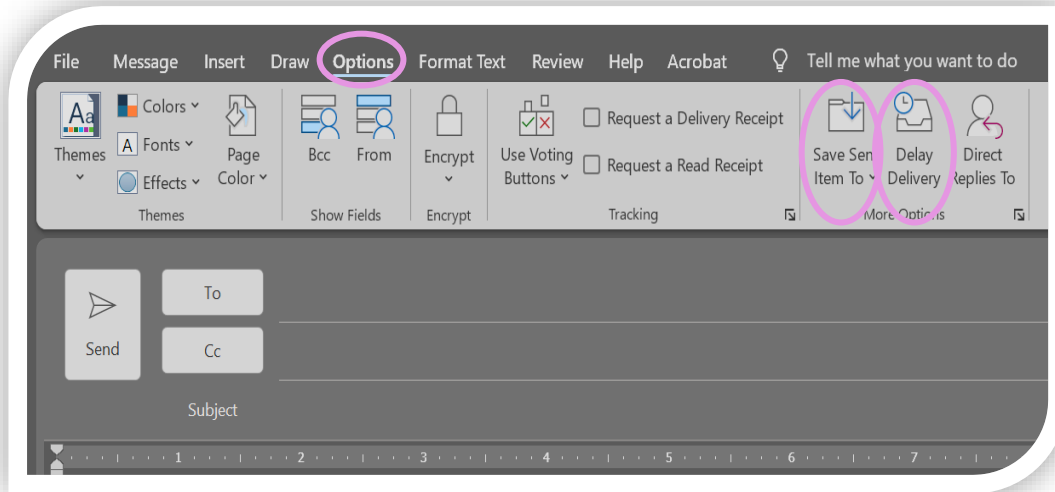
“Be bold. Be fast. Get to the point right away. The best email communication is simple and clear.”

–Constance Hale



PROOFREADING

- Before sending your message, select the **folder** where the message should be saved if something other than the “sent mail” folder is desired. Within the Options menu, click on the “Save Sent Item To” option then navigate to the appropriate folder where your outgoing message will be retained.
- If you would like your message sent later, use the “**Delay Delivery**” feature within the Options menu. However, use caution. Delayed messages will not be sent unless you are logged on when the message is scheduled to be delivered. Otherwise, the messages will not be sent until the next time you log on.



“To write is human, to edit is divine.”

–Stephen King

Proofreading

(v.) We do it best after we’ve hit “send.”



STEP 3:
MANAGING
YOUR INBOX



MANAGING YOUR INBOX

- Experiment with an **Inbox Zero** approach. The concept, developed in 2006 by Merlin Mann, aims to keep your inbox empty or almost empty.
- Avoid reviewing messages in your inbox multiple times. **Review once and make a decision**: File, delete, delegate it, take immediate action or add an item to your to do list. Effectively triage incoming messages then implement timely follow up with next steps. Email management is a discipline.
- Consider using **folders** to help organize messages that need to be retained. To create a folder, right click on the "Inbox" label in the left navigation area of your Outlook window and select "New Folder." Or, from the menu at the top of your Outlook window, select "Folder" then "New Folder." Tip: If you include the year in your folder name (e.g., "Annual Conference - 2025") it is easier to identify folders to be archived at the end of each year. Your *inbox* is not for archiving emails, *folders* are. Your inbox is for messages in need of review and triaging.
- Establish a system for **email management** that works for you. While the approaches are endless, consider reviewing emails at certain times of the day and consider devoting the last half hour of your day to email management. Quickly make decisions on every item in your inbox. Delete messages that are not needed. File messages that do not require additional action but should be retained for future reference. Delegate, or add to your to do list, messages that require action.

"For every minute spent organizing, an hour is earned."

–Merlin Mann, *pioneer of the "Inbox Zero" concept*

"Clutter is nothing more than postponed decisions."

–Anonymous



MANAGING YOUR INBOX

- Consider creating a “**Travel**” folder to add travel confirmations, itineraries and receipts. It’s helpful to have everything in one place when you are away from the office. Such organization can also streamline your expense reporting later.
- Consider creating a “**Temporary Items**” folder that can be used to file messages that should be saved in the short term (i.e., up to 90 days). Contents in the folder are low hanging fruit when it’s time to clean up older messages and reduce the size of your email file.
- If you are not able to respond to an email within **24 hours**, acknowledge receipt of the message and indicate when you plan to respond. This simple action is not only professional (and takes little time), it pays dividends since it avoids the need to process additional follow ups or reminder messages from the sender.
- **Unsubscribe** from senders who offer content that does not provide value to you. The small investment in time pays dividends later.
- If you desire less email, limit the number of recipients included in the **cc and bcc fields** of messages you send.
- When responding to a message, **read thoroughly** and answer all the questions to avoid more email in the form of future follow-up messages.

“Email is a system that delivers other people’s priorities to your attention.”

–Chris Brogan

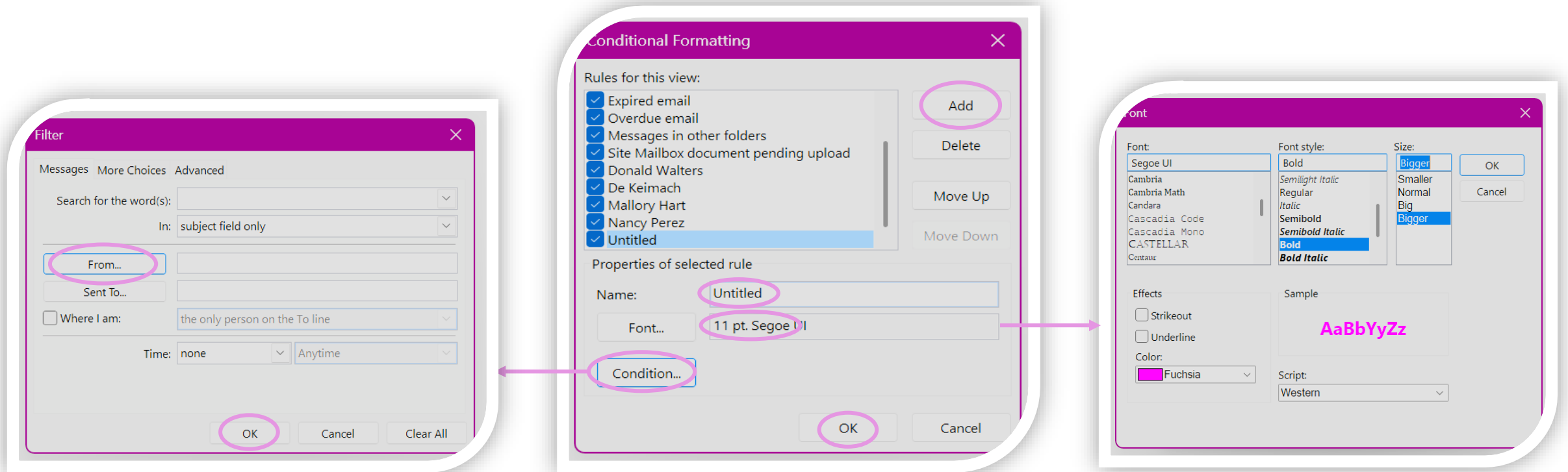
“The more you check your email, the less you actually accomplish.”

–David Allen



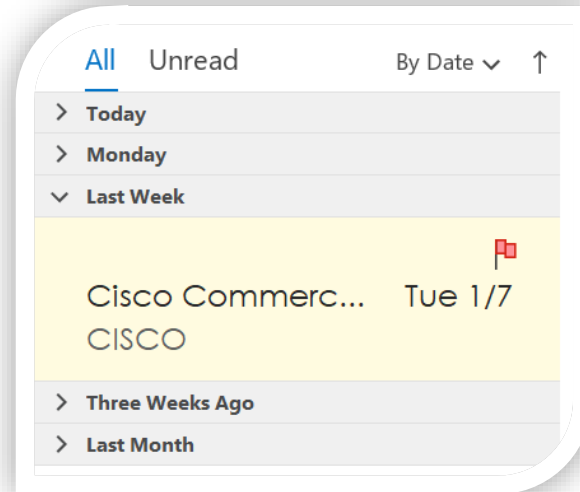
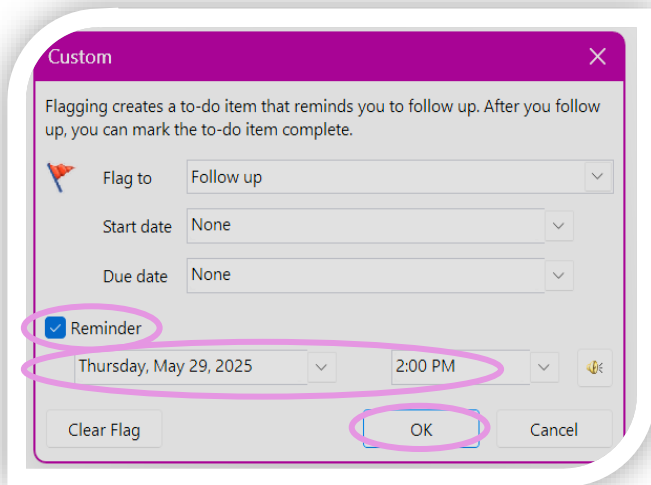
MANAGING YOUR INBOX

- Consider **color coding messages** from select senders. From the "View" tab, select "View Setting," then "Conditional Formatting." Select "Add." Name the rule (for example, the rule name could be the sender's name) and select "OK." Set the condition and select the font, style, size and color before selecting "OK."

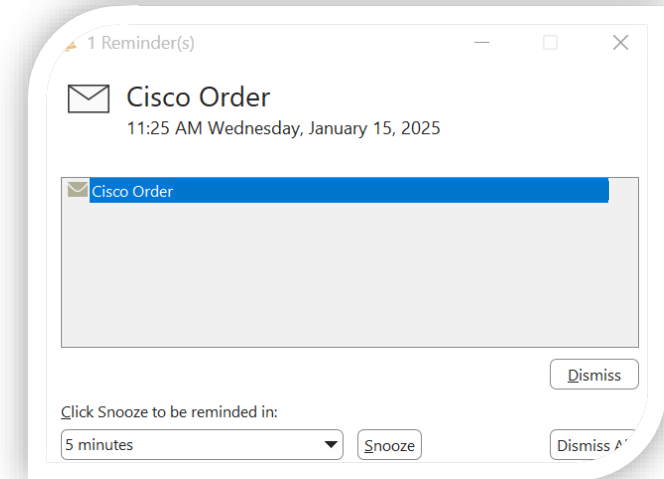


MANAGING YOUR INBOX

- **Flagging messages** for additional review may be an effective tool when managing your inbox. From your list of email messages in Outlook, right click on a message you would like flagged. Select "Follow Up" then select the option you prefer. The "No Date" option works well. Selecting that option will add a visual red flag to the message in your inbox list and it will add a light-yellow background to the email in your list of messages.



- Alternatively, if you select "Custom," you can set a date and time to receive a reminder alert/pop-up. Doing so will result in a visual alert (akin to a meeting reminder notice) on the date and time you specified.



OUT-OF-OFFICE ETIQUETTE

- If you will be away from the office for a day or more, use an out-of-office message to alert senders of your status. When others are aware you are away, they may be less inclined to send follow-up messages. They may even seek help from other individuals within your organization, in your absence.
- To set up an out-of-office message, select “File” then “Automatic Replies.” Choose the date range when your out-of-office message should be sent and draft the text of your message. Keep in mind there are two tabs- one for messages received from within your organization and one for messages received from individuals outside of your organization. You may want to use the same or different messages for each audience.
- When crafting your out-of-office message, it’s often helpful to indicate when you will return.
- If you have someone supporting you while you are away, you may want to reference their contact information in your out-of-office message.

A Few Out-of-Office Options

“Thank you for your message. I’m currently out of the office with limited access to email. I will respond as soon as possible after [insert date].”

“I’m currently OOO and will return on [date].”





THAT'S A WRAP!

BE SURE TO REVIEW THE RESOURCES IN THE
APPENDIX THAT FOLLOWS FOR MORE INFORMATION

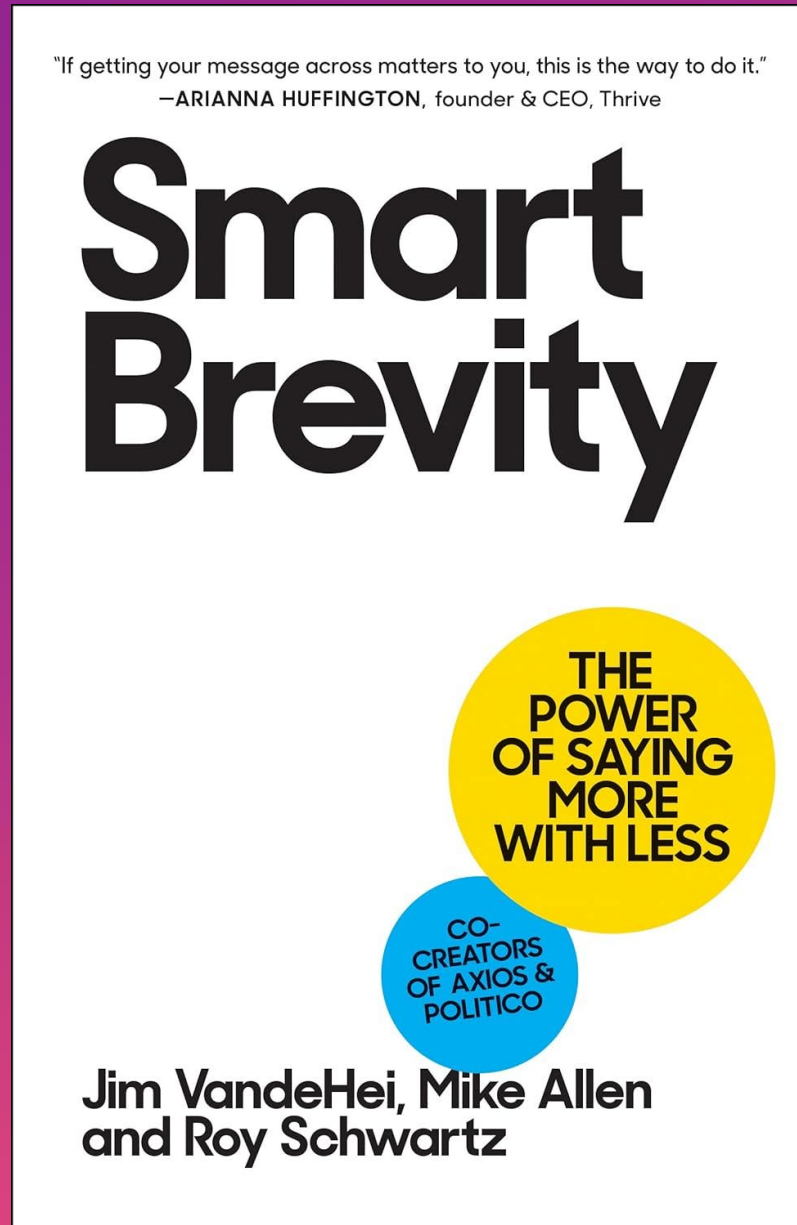
APPENDIX: ADDITIONAL RESOURCES



ANATOMY OF AN EMAIL

A Quick Read

- If you are looking for helpful tips on crafting effective messages, consider reading the book *Smart Brevity*. It's a fast read that offers a specific format for promoting efficient and effective communications.



The Smart Brevity Approach:

[Greeting],

[Strong lede - one sentence.]

WHY IT MATTERS:

[Add short, succinct content.]

THE DETAILS

[Be crisp and articulate; use links and bullet points.]

[Signature]



THE FORUM THAT CONNECTS.