



This extended excerpt includes all the leader guide's introduction pages, and sample pages for leading lessons from ***E-Mail: A Write It Well Guide***.

**E-Mail: A Write It Well Guide**  
How to Write and Manage E-mail in the Workplace  
A Training Program

**LEADER'S GUIDE:**

**Extended Excerpt**



**Write It Well**

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This Leader's Guide is to be used in conjunction with the book E-mail: A Write It Well Guide. To order the book or additional copies of this guide, please contact Write It Well.

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# Introduction

## How to Use This Guide

This leader's guide is designed to accompany E-Mail: A Write It Well Guide—a reader-friendly book full of practical information, strategies, and techniques to help people improve and manage their e-mail communications. You can use the book in workshops, for small-group study, or in individual coaching programs. Please note that neither the book nor this guide provide software training. The focus of this training program is on how to write clear, effective e-mail messages not on how to use specific e-mail applications.

Although it's helpful for a trainer to have a background in writing or teaching written communication skills, it is not essential for success with this program. E-Mail: A Write It Well Guide along with this leader's guide and the accompanying PowerPoint slides provide the content and activities you will need to conduct a successful e-mail training program.

The guide is organized into three major units: introductory guidelines to help you prepare for training; step-by-step lesson modules; and an appendix containing checklists, resources and frequently asked questions. The five lessons outlined in this guide are designed as modules that can be taught as five units in a full-day program or as independent, 1–1.5 hour segments.

Each lesson in the guide has an easy-to-follow layout complete with color-coding and icons for quick reference during training. Each lesson is also designed so that it can be taught in a workshop or coaching setting. See the Lesson-by-Lesson Guide that follows for a detailed explanation of how to work with the lesson plans.

### Preparation Equals Success

Ideally, as a trainer or coach, you should spend at least ten hours preparing for a full day of training when working with new materials. To insure training success, please read both the primary text for this training program, E-mail: A Write It Well Guide, as well as this leader's guide in full. Then, follow the step-by-step recommendations for how to prepare for training provided in the next section. As a general guideline, plan on at least two hours of preparation time for each lesson module.



At Write It Well, we are not only instructional designers but also trainers. We're sensitive to the limited time that workplace trainers have for preparation. But over 25 years of experience has taught us that the more time you spend preparing, the more successful your training program will be. So please read on. In the following pages, you'll find suggestions on how to plan, deliver, and follow up a program to meet the needs of different audiences in different situations.

### HOW DO YOU SPELL IT?

There are different ways to spell e-mail. The common forms are "e-mail," "email," and "emails." Because the word means "electronic mail," we've used the singular form with a hyphen: "e-mail" and "e-mail messages."

## Characteristics of a Successful Learning Program

Learning programs differ in terms of the number of participants, the length of time available for training, and the needs of both the organization and participants. But all successful learning programs share these characteristics:

They engage participants in the learning process.

Few people learn new skills simply by reading or listening to a lecture. They learn by thinking about the concepts and information in terms of their own situations and by trying out the new techniques. For writing, that means providing plenty of opportunities for participants to discuss the issues, practice new techniques, and apply the learning to writing projects of their own.

- They are based on clear, relevant behavioral objectives.

Objectives that specify what people will be able to do when training is complete serve as a road map for designing the learning program and for measuring its effects. The objectives for a given program depend on the needs of the audience and the organization, and on what you can reasonably accomplish in the time available. If possible, ask participants to begin thinking about their objectives before the workshop begins and then share those objectives (if participants are willing) as part of your opening activities.

- They build on what people already know and recognize their experience.

People in the workplace already write e-mail messages daily. What they need are tools and techniques that help them write more easily and effectively. Encourage participants to draw on their own experience so they can identify what they are doing well and develop the skills they need to improve.

- They use relevant examples and help people apply what they learn to their “real world” e-mail challenges.

People need to see how what they are learning relates to the e-mail writing they do on the job. In addition to the examples in E-mail: A Write It Well Guide, consider providing additional examples that are similar in terms of content and format to participants’ job-related writing. Also provide opportunities for participants to apply what they learn to the work they are engaged in with the organization.

## Planning a Training Program

Planning a successful training program requires some time and attention. In the following section, you’ll find suggestions and guidelines that will get you started. Here is an overview of the steps:

- Learn about your audience.
- Review E-mail: A Write It Well Guide.
- Assign pre-work.
- Choose the type of training.
- Review participants writing.
- Follow up on training.
- Review facilitation guidelines.

### Learn About Your Audience

Everyone can learn to write more effective e-mail messages. Experienced writers need strategies and techniques that build on what they are already doing well, while novice writers need structured processes and clear guidelines so that they can develop their skills and increase their confidence.



Begin planning your learning program by finding out as much as you can about what participants already know and what they need to know. Here are some steps to take:



- Talk with key people in the organization to identify the issues that come up when people use e-mail.
- Use interviews or a questionnaire to gather information about participants' objectives for training.
- Review representative samples of the e-mail participants write to identify the kinds of problems that need to be addressed.

## Review E-mail: A Write It Well Guide

Even if you are an experienced writing skills teacher, begin by going through E-mail: A Write It Well Guide as if you were a workshop participant. Do the exercises and assignments so you will know first hand what you are asking the participants to do. Keep track of the time it takes you to complete each exercise. Although this guide includes approximate times for the lessons, you might want to refer to your own times as you plan your program. After you are familiar with E-mail: A Write It Well Guide, study the Lesson-by-Lesson Guide on the following pages. You'll see that the Lesson-by-Lesson Guide refers you to specific pages and practice exercises in E-mail: A Write It Well Guide. Keep the following in mind:

- The workbook icons in the Guide indicate the pages of E-mail: A Write It Well Guide your participants will need to use. 
- When the Guide asks you to READ ALOUD a portion of the workbook text, you can ask for volunteers to read. In some cases, you can also summarize the text in your own words as long as you convey the message accurately.
- Practice exercises in each lesson are indicated by a "practice" icon. Be sure that you are familiar enough with the practices so you can give participants clear instructions and answer their questions. 

## Assign Pre-Work

Depending on the amount of training time you have available and the nature of your group, you might ask participants to complete some pre-work assignments. Pre-work might include:



- Drafting an e-mail message on a specific topic and bringing it in to revise in class.
- Reading selected material or completing selected exercises in E-mail: A Write It Well Guide.
- Whether or not you assign pre-work, it's helpful to ask participants to bring 2–3 writing samples to the workshop. Ask them to choose samples that have not been edited by anyone else. Explain that the samples will remain confidential—participants will use them from time to time to check their own writing for concepts covered in class (appropriate subject lines, tone, etc.).

## Choose the Type of Training

You can use E-Mail: A Write It Well Guide in different types of learning programs, including:

- Workshops and other classroom training
- Small-group training, such as study groups
- Individual coaching programs or tutorials

The type and duration of the program will depend on your audience's needs and learning preferences, and on the time that participants have available.

### Workshops and Other Classroom Training

E-Mail: A Write It Well Guide can be used as the primary text in a course on e-mail communication, but it can also be used as a supplementary text in any writing skills class. A classroom setting gives you the opportunity to explain and expand on the material, and allows students to learn from each other through discussion and group practice. When planning your classroom program, consider these issues:

#### Schedule the Workshop

- Be realistic about time. It takes a full day (6 hours of training) to cover all five lesson modules outlined in this guide while giving participants sufficient opportunities for discussion and practice. If you have less time, focus on the topics that are most important for the group. If you try to cover too much in too little time, you'll spend most of your time talking, and people will learn very little.



- Workshop or class sessions should be at least 1 hour long, and the entire program—not including follow-up activities—should be completed within four weeks.
- You can conduct an effective learning program for groups as large as 20–25 people. But the larger the group, the more difficult it is to manage discussions and give people individual attention while they work on their own exercises. If possible, keep class sizes to a maximum of 15–16 people.

### Prepare the Workshop Environment

- To facilitate discussion and learning, avoid the traditional classroom setting, where everyone faces the instructor. If possible, seat people informally at tables in groups of 3–5 (the tables create natural discussion groups). Arrange the tables so that participants can easily see each other, you, and the visual aids.
- Arrange for the room and the equipment you'll need well ahead of time: i.e., a laptop and/or slide projector; two flip chart easels with pads and marking pens; a white board; pens; masking tape; writing tablets; reference books; and name tents. If possible, provide refreshments, especially for classes that begin early in the morning.
- Prepare visual aids—a PowerPoint presentation or flip chart pages—to illustrate the key concepts you'll be teaching. This Leader's Guide includes a PowerPoint presentation that you can use as slides or print out on overhead transparencies. Add any others that you think might be helpful.
- The Appendix of this Leader's Guide includes master copies of some supplementary handouts. You can also download PDFs of these checklists and worksheets from our website [www.writeitwell.com](http://www.writeitwell.com). Be sure to add any others you might find useful.

Arrive at class early enough to set out the materials, make sure the equipment is working and the room is set up properly.

### Manage the Workshop Curriculum

- If your organization has an e-mail policy, include a review and discussion of that policy in your learning program; then show your participants how information in the book is related to the policy. If there are any significant differences between the lessons in the book

and your organization's policy, be prepared to discuss them.

- Ask participants to do their reading between class sessions so you can use class time for such activities as explaining and reinforcing key points, discussions, and practice.
- Expect participants to raise issues and ask questions that are not covered in the book. Before the class begins, you might want to do some additional reading and research on your own. And always feel comfortable saying, "I don't have a good answer to that question, but I'll find out and get back to you."

## Study Groups

Study groups are small groups (usually 3–7 people) who meet for 1–2 hours at a time to work together on a learning program. Study groups facilitate the learning process by providing a structure, mutual support, and encouragement. They are excellent ways for team or department members to explore the issues involved in using e-mail effectively and efficiently.

Here are some points to consider about study groups:

- Study groups work best if one person—a group member, a manager, or a training representative—takes on the responsibility of scheduling meetings, reserving meeting space, etc. When possible, study groups should have a private place in which to meet.
- Group members should do most of the reading and application exercises on their own, using the meeting time to discuss their experiences and observations. The reflection questions in the book can be used to trigger discussion.
- If the study group members are from the same team or department, they can use meeting time to develop e-mail standards or discuss the organization's e-mail policy and how it relates to the work of the department/team.

Study group meetings should be held at least twice a week, for a minimum of one hour, and attendance should be required (with exceptions made only for real emergencies). At the end of each meeting, members should agree on specific assignments to be completed by the next meeting. The entire program should be completed within 4 weeks.

The group should use the first meeting to establish objectives and set up a schedule, both of which should be written down and distributed to all participants. The group can also use this meeting to discuss the



relationship of the learning program to their day-to-day work and career goals.

One or two follow-up meetings 4–6 weeks after the end of the learning program can help reinforce what people learned and give them opportunities to share ideas for continuing to improve their use of e-mail.

## Individual Coaching Programs (Tutorials)

Individual coaching programs, or tutorials, are a more structured version of a self-study program. They can be supervised by a manager, a training specialist, or even a colleague who has gone through the book and has a good grasp of the material. Coaching programs work best when they are completed within a 4–6 week period and then followed up periodically.

The person who is supervising the coaching program usually does the following:

- Works with the participant to clarify the objectives, agree on assignments, and establish a schedule.
- Remains available to answer questions while the participant completes the assignments.
- Checks in periodically to discuss progress, review the participants' work, etc.
- Follows up in 4–6 weeks to help reinforce the learning and discuss remaining issues.

## Review Participants' Writing

A review of participants' writing when you are planning the learning program helps you determine how to focus the program on their needs. Reviewing their writing during and after the program allows you to evaluate their progress and give them useful feedback.

When you review printed copies of participants' writing, make your comments in pencil, not pen—and certainly not red pen. Also, be sure to write legibly. If you review the writing online, you can use Word's "track changes" feature to insert your comments.

You can use the checklists at the end of the book as a guide for reviewing participants' writing samples. Keep the following in mind:

- Focus on key issues, such as these: Is the topic appropriate for e-mail? Does the message make sense? Is the main point clear? Does the e-mail answer the reader's questions? Is the tone appropriate? Is the subject line useful? Are there grammar or punctuation errors?
- Make your comments specific. Instead of "confusing" or "not a good subject line," ask, "What's your main point?" "Why does the reader need to know this?" "How could you revise this subject line so the reader knows exactly what to expect?"
- Resist the impulse to edit the writing. Instead, explain what works and what doesn't and ask the participant to make the revisions.
- Keep all writing samples confidential. Never show any participant's writing to their colleagues as either a good or bad example without the person's express permission.

## Follow up on Training

Learning shouldn't stop when the learning program is over. Extend the benefits of the training through these kinds of follow-up activities:

- Periodically check in with participants by e-mail or in person to see how things are going and answer any questions they might have.
- Give participants an assignment to complete within two weeks of the last scheduled program activity.



- Four weeks and eight weeks after the program, ask people to send you something they've written and return the document with your comments.
- Three months after the program, meet with participants to review key learning points, discuss issues, and let them ask questions.

## Review Facilitation Guidelines

A successful learning program is one that engages participants and helps them apply what they learn. Below are some suggestions for ways to help the participants get the most out of training and keep the class running smoothly.

- Encourage questions and discussion. People learn by asking questions and discussing the way the techniques they're learning apply to specific situations. Encourage discussions, but manage them so they do not go on too long or veer off track. Bring them to a close when the points have been made, people begin to repeat themselves or go off on tangents, or when the time is up for that topic.

Be prepared to respond to issues and questions that are not addressed in E-mail: A Write It Well Guide. You might want to do some additional reading and research on your own so that you feel comfortable with questions. (See the Bibliography at the back of the workbook.)

If someone asks a question you can't answer, you might turn the question back to the class—someone else might have an idea. And you should always feel free to say, "Sorry, but I don't have a good answer to that question. I'll do some research and get back to you."

- Explain what is not covered in the workshop. People may come expecting to learn the nuts and bolts of specific e-mail applications. When you review the objectives at the beginning of the workshop, explain that the focus of this workshop is not how to use e-mail software, but on how to write and manage e-mail more effectively.
- Vary the way that participants do the exercises. Instead of asking participants to do all the exercises individually, suggest that they work with a partner or in groups of 3–5 to complete some of the activities. Rotate the pairs and groups so people have an opportunity to work with others.
- Watch the time. The times indicated in this Leader's Guide are approximations. The actual time it takes to run a training session

depends on such factors as whether you cover all the material and do all the practice exercises, the size of your group, and how inclined the group is to ask questions.

Be sure to leave extra time so that you do not have to rush through anything, leave out the interaction that is crucial to the success of training, or skip over any important content. If you finish a section early, you can always add an activity.

- Practice. Before running a training program for the first time, go through each section carefully. Decide which exercises you will ask the group to do in class, which you will use as pre-work or between-session assignments, and which you will leave for people to do on their own. Practice delivering the introductions and explanations, and time yourself. See how long it takes you to do the exercises yourself.
- Remember that people work at different rates of speed. Some participants will finish the practice exercises quickly. Others like to take lots of time and are usually still working when the time runs out.

The best you can do is to try for the middle. Provide additional activities for those who finish early and explain that those who don't have a chance to finish will have an opportunity to complete the assignments on their own (one of the advantages of a self-study program). Explain that it's not always important to finish an exercise to get the full advantage.



# Lesson-by-Lesson Guide

This section provides five lesson modules that can be taught together as a full course or individually. The entire course requires a full day of instruction (5–6 hours, not counting breaks). Each individual lesson module requires approximately 1–1.5 hours of instruction.

Think of this guide as menu of lessons that you can choose from to meet the needs of your organization. Lessons 1 & 2 provide the foundation for the full course and for each individual lesson that follows. Therefore, we recommend that you always begin with Lessons 1 & 2. After that, you can choose to include or omit Lessons 3, 4, & 5 based on your organization's training needs.

Keep in mind that these lesson plans are suggestions for teaching the curriculum; we recommend that you adapt them to your own teaching style and to meet the needs of the group or individual you are training.

## About the Slides

This facilitator package contains a full set of PowerPoint slides to accompany each lesson module. Icons appear in the script to alert you that it's time to advance to the next slide.

You may be wondering why the slides are so text heavy. It's true that the general rule of thumb is that slides should contain visual elements, charts and graphs, and short bits of text to communicate information and supplement a presentation. While we agree with this in principal, these guidelines are less applicable to writing training. To teach people how to write more effectively, a trainer must show examples of writing that works and doesn't work. From a teaching standpoint, it's better to have a group's attention on a piece of writing that is projected on a screen rather than having them looking down at a piece of paper. When all eyes are up, the trainer can better gauge the participant's understanding of and response to the lesson. We encourage you to view these slides as essential components of the curriculum rather than just visual aids.

## Sample Courses

Below you'll find suggestions for sequencing lessons based on the number of hours available for training. On the following page, you'll find outlines of each lesson.

---

### Single Lesson Sessions (1–1.5 hours each) Lessons 1, 2, 3, 4 or 5

Each lesson can be taught as a 1–1.5-hour module. We highly recommend, whenever possible, covering Lessons 1 & 2, which lay the groundwork for the remaining lessons, before moving on to Lessons 3, 4 and 5.

If you can only teach a single 1-hour module, we recommend spending 15 minutes giving an overview of the material in Lessons 1 & 2 before moving on to the curriculum for Lessons 3, 4 or 5.

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### Short Session (2–2.5 hours) Opening & Lessons 1 & 2

In a two-hour workshop, we suggest including Lessons 1 and 2, which cover composing messages from a reader's point of view, organizing messages for readability, and managing the common features of an e-mail message (address line, salutation, closing, signature file etc.)

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### Half-Day Session (4 hours) Opening & Lessons 1, 2 & 3

For a half-day session, we recommend including the first three lessons since they cover the larger issues of composing and managing e-mail messages.

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### Full-Day Session (6 hours) Opening & Lessons 1–5

In a full-day session, you can cover all 5 lessons in this guide, which will give your participants a solid overview of how to write and manage e-mail as well as some useful practice.

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# Lesson Outlines

LESSON	ESTIMATED TIME
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## Opening

30 minutes

The opening exercise gives you the chance to introduce yourself, the participants and the content of the course as well as go over the agenda (so that participants will know what will be covered, the running time for the course and when to expect breaks).

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## Lesson 1: Think Before You Write

90 minutes

Lesson One corresponds with Chapter 1 of E-mail: A Write It Well Guide. This lesson covers how to plan and organize a successful e-mail message, develop a clear main point, and write with the reader in mind.

Topics Covered:

- Choosing E-mail as a Communication Channel
  - Discovering the Purpose of a Message
  - Writing with the Reader in Mind
  - Organizing a Message Around a Main Point
  - Organizing the Content
- 

## Lesson 2: Launching Your Message

60 minutes

Lesson Two corresponds with Chapter 2 of E-mail: A Write It Well Guide (Launching Your Message). This lesson covers: tone, salutations, closings & signatures, subject lines, addressees, and proofreading.

Topics Covered:

- Tone
  - Formatting for the Screen
  - Salutations
  - Closings
  - Signature Files
  - Subject Lines
  - Addressing E-mail Messages
  - Proofreading
-



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### Lesson 3: Managing Your E-mail

60 minutes

Lesson Three corresponds with Chapter 3 of E-mail: A Write It Well Guide. This lesson covers how to manage your e-mail so that it's an effective tool. The lesson covers the major topics in Chapter 3 including how to reduce e-mail interruptions, control your e-mail habit, consider your responses, keep your inbox clean, and create an electronic filing system.

Topics Covered:

- Reducing E-mail Interruptions
- Controlling Your E-mail Habit
- Considering Your Response
- Keeping Your Inbox Clean
- Creating an Electronic Filing System

---

### Lesson 4: Presenting a Professional Image

60 minutes

Lesson Three corresponds with Chapter 4 of E-mail: A Write It Well Guide. This lesson covers how to write clear, concise, jargon-free prose so that the messages will be well received. While Chapter 4 goes into some detail about issues of grammar including subject and verb agreement, pronoun reference and punctuation—this lesson does not cover those issues. Covering those issues effectively requires a longer training schedule than we've outlined here. If you are looking for a comprehensive business writers' grammar course, visit our website at [www.writeitwell.com](http://www.writeitwell.com). There you'll find information about our workbook, Grammar for Grownups, and the accompanying facilitator package.

Topics Covered:

- Proofreading Review
- Active vs. Passive Voice
- Plain English
- Jargon
- Abbreviations
- Colloquialisms
- Clutter
- Specificity



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## Lesson 5: Reducing E-Mail Risks

45–60 minutes

Lesson Five corresponds with Chapter 5 (Cautionary Tales) of E-mail: A Write It Well Guide. This lesson focuses on e-mail as a public medium and how to reduce risk through careful, critical use.

### Topics Covered:

E-mail is Public

E-mail is Permanent

Your Organization Owns Your E-mail

E-Mail is Not Secure

---

## Closing

20–30 minutes

This closing exercise will bring the lesson or course to a close, summarize key strategies, and encourage participants to apply what they've learned.

## About the Icons

The **green text** in each lesson script indicates what you should say. The black text indicates what you should do. The **purple text** indicates that a participant should read from the book or a slide. **Note text** is in blue.

---

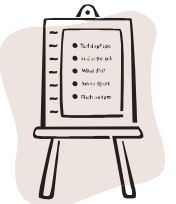
**READ ALOUD** The facilitator or a participant should read from the book or slide.

---



pp. 21–22

Turn to the indicated pages of E-mail: A Write It Well Guide.



Record items on a flip chart page or whiteboard or refer to a flip chart page that you have already posted.



Ask participants to do a practice exercise.



Read a note or caution.



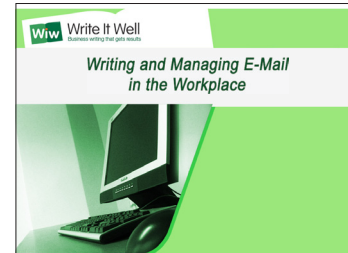
SLIDE

Show a specific slide.

## Opening

Purpose: The opening exercise gives you the chance to introduce yourself, the participants and the content of the course as well as go over the agenda (so that participants will know what will be covered, the running time for the course and when to expect breaks).

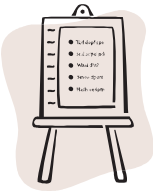
Estimated Time: 30 minutes



SLIDE 1



Be sure to place a copy of *E-mail: A Write It Well Guide* and a name tent at each seat before the session begins.



### INTRODUCE YOURSELF AND THE COURSE

- I When participants enter, Slide 1 should be on the screen.
- II Greet the participants as they enter and ask them to write their names on the name tents you've provided at each seat.
- III When everyone is seated, introduce yourself and write your name and title on a flipchart page or whiteboard.

### IV OPENING ICE-BREAKER & INTRODUCTIONS

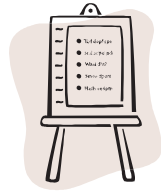
Ask participants to take out a piece of paper and jot down three ways e-mail simplifies their lives at work and three ways it complicates their lives at work.

Give participants 3–5 minutes to complete these lists.

When participants have completed their lists, go around the room and ask each one to introduce himself or herself (if participants come from different departments, they can include this information in their introductions). After they've given their names and departments, ask them to share with the group one of the ways e-mail simplifies or complicates their work lives.



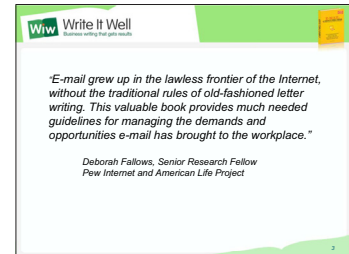
SLIDE 2



As each participant shares an item from the list, record it on a flipchart page or whiteboard. Keep the lists organized in two opposing columns. If a participant repeats an idea previously stated by someone else, place a tally mark next to that item, so you can track any trends in the group.

After everyone has had a chance to speak, introduce the content of the course.

As you can see, we all feel that we benefit from e-mail, but it can also be a source of frustration. Our goal today is learn how to write and manage e-mail effectively, so we can alleviate at least some of these burdens. (Point to list on flip chart.)



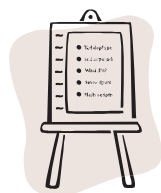
SLIDE 3

**READ ALOUD** Read from Slide 3 as you hold up your copy of the book: E-mail: A Write It Well Guide:

Our course today is based on this book and our focus will be on how to write effective e-mail messages. This is a course about writing and communication, not about how to use specific e-mail applications.



Be prepared to field questions about how participants can learn to use e-mail applications more effectively. Consider coming prepared with a list of courses that participants can take. There are many good ones offered online. Keep this conversation very brief.



Introduce the agenda for the course. This should be a brief list of the topics you'll cover and when participants can expect breaks. Have this prepared ahead of time either as a slide you've inserted into the deck or as a flipchart page.

## Lesson One: Think Before You Write

Purpose: Lesson One corresponds with Chapter 1 of E-mail: A Write It Well Guide. This lesson covers how to plan and organize a successful e-mail message, develop a clear main point, and write with the reader in mind.

Estimated Time: 1.5 hours

READ ALOUD Ask someone in the class to read the e-mail message in Slide 4.



SLIDE 4



Then ask the group what works and doesn't work about the message. Record their responses on a flipchart page or white board. Have a brief discussion about the weaknesses of the message. Emphasize the fact that the main point of the message is buried and that there is a lot of unnecessary information.

Brad did not think about what Maggie needed to know before writing and sending the message. The result is that Maggie will have to work harder than she should to find Brad's point.



Be prepared to discuss the fact that not all writers plan before they write. Some write drafts as a way of getting their ideas out. These drafts look much like the message from Brad to Maggie. But, successful writers always consider the message from the reader's point of view and make the appropriate revisions before sending it on to a reader. The recipient shouldn't have to read an unedited first draft.

Next, point to Slide 5 and discuss the questions that Brad should have asked himself before writing.

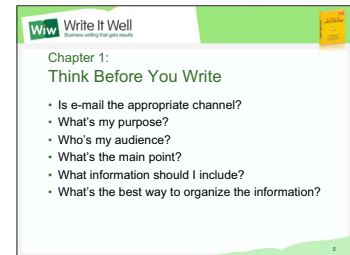
Brad would have written a more readable message if he had asked himself the following questions before writing the message to Maggie.

## READ ALOUD

Read the questions on Slide 5:

The next section of the lesson will be dedicated to discussing each of the questions listed on the previous slide.

Let's look at these issues one at a time.  
Is e-mail the appropriate channel for my message?



SLIDE 5

## READ ALOUD



p. 9

Ask your participants to turn to page 9 of E-mail: A Write it Well Guide. Ask someone in the group to read the third example on the page:

Billie,

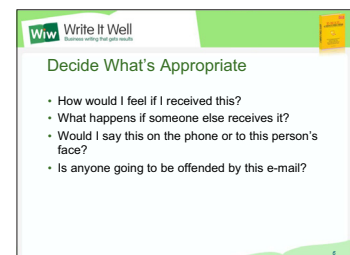
I know how you feel about that invoice. I almost lost it and screamed at the finances woman, because she kept telling me she didn't have it. There seems to be some sort of vortex of doom around it because I can't find my copy either, and I know you sent me at least two of them. I feel like shooting myself in the face! I'm afraid to go down to Financial Services myself because at this stage I'd get in a fistfight. There is no reason this should be happening. Could you please fax me copies ONE MORE TIME? This will get solved today, or I start building a death-ray laser gun out of office supplies. I would rather quit than deal with this problem any more! It's become emblematic of my struggles with this organization's bureaucracy and with certain people's incompetence.

Sorry for the tirade,

Parker

Use the questions on Slide 6 as guidelines for a critique of Parker's message to Billie. Ask your group the following questions. Discuss their answers to each briefly.

- How would you feel if you were Billie and you received this message from Parker?
- What would happen in someone else in the company received this message by mistake?
- Do you think Parker would say the same things if he were talking to Billie



SLIDE 6



on the phone or face-to-face?

- Would anyone be offended by this message? Why?

## CHOOSING E-MAIL AS A COMMUNICATION CHANNEL

Review the guidelines on Slide 7 for choosing e-mail as a communication channel.

- E-mail is a public medium. Messages can easily end up in the hands of someone other than your intended recipient. As a rule of thumb—never put anything in an e-mail message that you wouldn't feel comfortable publishing in the newspaper.
- E-mail is not an effective way to communicate sensitive information (anything that might create an emotional response in the recipient). It's better to call a face-to-face meeting where you can have a back and forth conversation and respond immediately if someone becomes upset. E-mail doesn't allow the recipient to hear tone of voice or see body language, so the intent of the message can be more easily misinterpreted.
- Because e-mail is so often casual and conversational, it's easy to forget that jokes and funny stories can be inappropriate. What seems funny to you may not be funny to other people.
- The body of an e-mail message is not the best way to convey complex information, the kind that you'd find in a detailed report. It's usually best to attach a document in these cases.



SLIDE 7

If you have time, consider opening the conversation up to the group to discuss cases of inappropriate e-mail and how they responded to it.



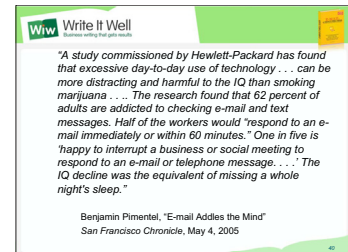
## Lesson Three: Managing Your E-mail

Purpose: Lesson Three corresponds with Chapter 3 of E-mail: A Write It Well Guide. This lesson covers how to manage your e-mail so that it's an effective tool and includes these topics: how to reduce e-mail interruptions, control your e-mail habit, consider your responses, keep your inbox clean, and create an electronic filing system..

Estimated Time: 1 hour

Begin by asking the group members to take the quiz on page 76.

Before we talk about the content of Lesson Three, please turn to page 76 of your books and take the quiz at the top of the page.



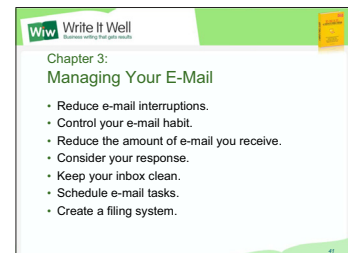
SLIDE 40

Poll the group to see how they responded. Discuss.

What did you discover about your e-mail habits from taking this quiz? Is e-mail taking up too much of your time? Is it helping you do your job or has it become a job of its own? Why is it so difficult to manage?

Give the group a chance to talk about their own experiences for about 5 minutes.

Chapter 3 of [E-mail: A Write It Well Guide](#) covers how to manage your e-mail. Here's what we'll cover today. Point to Slide 41.



SLIDE 41

There are two options for the remainder of this lesson.

Option 1: Your participants will break into groups and then present sections of the chapter. The advantage of this approach is that it keeps your participants active and engaged. They will be able to learn a lot by synthesizing the information, comparing it to their own experiences and reporting it back to the larger group.

Option 2: You'll use the same slides, but instead of group work, you'll provide a brief lecture about each topic and then invite discussion. Option 2 is color-coded in brown.



The information in Chapter 3 doesn't lend itself to a straight lecture. In both the Option 1 and Option 2 lessons, you'll be asking your participants to read a few pages and then discuss or present the information. If you want to reduce the amount of in-class reading, assign this chapter before your training session. Ask your participants to come prepared with a list of questions about the material and a list of strategies they will use in the future to manage their e-mail. Then, use the slides and their notes as points of reference for your discussion or their presentations.

Be sure that as a facilitator you have read and understand this chapter well since the lesson requires you to speak extemporaneously.

For this part of the lesson, you'll break your group into 4 teams and assign each team one of the previous subtopics to research.

Direct the teams to the pages in E-mail: A Write It Well Guide where their topics are covered. Ask each team member to first read the section on his/her own. Then, the teams should come together to discuss the information and take notes. Each team is tasked with understanding the material and reporting back to the group what they've learned.

Ask each team to choose a facilitator to keep them on track, a note taker to write down their ideas and a speaker to present the information.

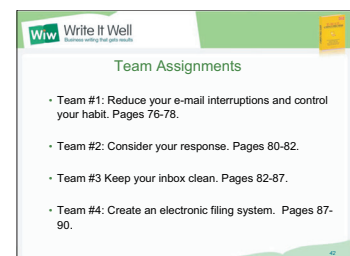


If you have time and want to add some fun to your training, you can encourage the groups to present their sections in the form of a funny poem, song or dramatic scene. At this point in the day, a little humor will help keep everyone engaged.



pp. 76–90

For this lesson, we'll take a slightly different approach. You'll organize yourself into 4 teams. Each team will take one of the topics in the chapter. You'll each read the pages assigned to your team on your own first. Then, you'll come together as a team and discuss the information. Once you've discussed it, decide how you'll present the information to the whole group.



SLIDE 42

Refer to Slide 42 and break the group into teams:

Team #1: Reduce your e-mail interruptions and control your habit. Pages 76–78

Team #2: Consider your response. Pages 80–82

Team #3: Keep your inbox clean. Pages 82–87

Team #4: Create an electronic filing system. 87–90



## Sample Introductory Letter and Questionnaire

Below is a sample of a cover letter and questionnaire you can send to people who are enrolled in the writing workshop. The cover letter introduces the workshop, and the questionnaire asks for information that will help you to tailor training to meet participants' needs.

Asking people to think in advance about the “what and why” of training creates a positive and productive framework for the workshop. The questionnaire helps participants do the following:

- Tell you what they hope to accomplish in the workshop
- “Buy in” to the training
- Think about their own writing—what they have trouble with and/or would like to improve

Notice that the cover letter and questionnaire also ask people to submit samples of their writing. Those samples provide you with valuable information about the kinds of writing participants do and the issues to focus on in the workshop.



TO: Participants, How to Write and Manage E-mail Workshop

FROM: [NAME], Instructor

As you know, I will be conducting a writing workshop for [ORGANIZATION] on [DATE]. The workshop is designed to provide practical concepts and techniques that will help you write write and manage e-mail more effectively.

So I can make sure this course meets your needs, please take a few minutes to complete the enclosed questionnaire. Please give the completed questionnaire to [INSTRUCTOR OR COORDINATOR] along with two or three examples of e-mail you write for work. [NAME] will send the questionnaires and writing samples to me. (If you prefer, you can mail or fax them to me. If you fax the questionnaires, please use dark ink and write legibly.)

If you have questions about this training program, please include them on the questionnaire, send me an e-mail at [YOUR E-MAIL ADDRESS], or call me at [YOUR PHONE NUMBER]. I look forward to meeting and working with you.

[YOUR SIGNATURE]



## HOW TO WRITE AND MANAGE E-MAIL WORKSHOP

1. Please answer the questions below.
2. Attach two or three sample e-mail messages. These samples help me see the kinds of writing you do, and I will keep them confidential. Please select samples that have not been edited by anyone else.
3. Return the questionnaire and writing sample(s) to [NAME] by [DATE— USUALLY AT LEAST TWO WEEKS BEFORE THE WORKSHOP]

Your name: \_\_\_\_\_

Your position: \_\_\_\_\_

Please describe the types of writing you do on the job:

What skills would you like to improve and what information would you like the instructor to cover?

Please list any questions you have about this workshop:

Thanks for your help!



## Materials and Equipment Checklist

- E-mail: A Write It Well Guide for each participant
- A laptop computer and projector for showing slides or an overhead projector for showing transparencies
- A screen for projecting slides or transparencies
- Two flip chart easels with writing pads
- A white board [optional]
- Masking tape for posting flip chart pages
- Colored marking pens for the flip chart pages and white board
- Writing tablets and pens or pencils
- Name tents
- Reference books (i.e., dictionary, thesaurus, grammar book)
- Other



## The Writing Process

% of Time	Activity
5%	Think about readers
5%	Think about purpose
5%	Identify main point(s)
20%	Select information to include
20%	Organize information
20%	Write quick 1st draft
20%	Revise & edit
5%	Proof & correct



## Guidelines for Reviewing Participants' Writing

You will have opportunities to review participants' writing before and during the class. There is a Writing Evaluation Worksheet on our web site to help you evaluate the writing samples.

When you review people's writing, keep the following in mind:

- Keep all writing samples confidential. Never show an individual's writing to the class as either a good or bad example without the person's express permission.
- Reviewing samples of participants' writing before a workshop is an excellent way to identify specific issues you need to address. You can ask for samples when you send out the questionnaires. Explain that these writing samples will remain confidential. You will use them only to plan the class, and you will return them with your comments at the end of the training program.
- Whenever you review someone's writing, use pencil, not pen—and certainly not red pen. Be sure to write legibly.
- When reviewing assignments, focus on specific issues. If the assignment is to use the writing plan to write a first draft, ignore mechanical problems, such as typographical errors or awkward sentence structure.
- Be specific in your comments. Instead of saying, "This message is confusing," show the participant exactly what is confusing. Ask questions: "What is your main point?" "Is your primary purpose to inform or to influence?" "Does the reader need this information?" "What happens next?" "Can you revise this sentence so that it is active?" "This paragraph seems very long—can you break it up or use a list?"
- Wait until the end of the workshop to return the writing samples to participants. If you return them too soon, participants might not understand some of the terms you use in the comments. Also, at the beginning of the workshop they might not feel comfortable receiving "criticism." Instead of simply handing the annotated samples to the participants, try to find a few minutes to go over your comments with each person privately.



## Optional Content and Activities

Depending on the needs of your group and the time you have available, you might want to use some of the optional content and activities described below.

### OPENING

Without identifying the writers, mention some of the problems you saw in participants' writing—unclear pronoun references, missing or buried main point, too much passive language, etc.

To save time during the Opening, prepare a flip chart page with the list of what participants write and post it before you begin the workshop. Then all you need to do is ask whether anyone writes something that is not on the list.

Also to save time, prepare a flip chart page with the list of participants' objectives (from the questionnaires) and post it before you begin the workshop. Then ask participants what objectives they would add to the list.

Give participants a few minutes during the opening to talk about their objectives with a partner or in small groups. When the time is up, ask each group to share two or three of their objectives.

Ask participants to come prepared with some ideas of e-mail messages they need write, so they can work on them during the class. As an alternative, give them a handout with some scenarios, drawn from the types of writing they ordinarily do.

### LESSONS

Each lesson outlined in this guide contains exercises. If your participants want more practice, consult the end of each chapter in *E-mail: A Write It Well Guide*, where you'll find additional activities and exercises.

Bear in mind that these exercises do not have to take place during your training session. Feel free to assign "homework." Ask participants to either bring their assignments to the next session or e-mail them to you for feedback. Consider the limitations of your training schedule when making this choice.



## READINGS AND RESOURCES

See our Web site for checklists, helpful links, and other resources, including writing tips and training guides.

## ABOUT WRITE IT WELL

Write It Well began business in 1979 as Advanced Communication Designs, Inc., a training company that specialized in helping people communicate clearly and work together effectively. Our focus has always been on providing practical information, techniques, and strategies that people can use immediately. Our books and training programs are used by individuals, teams, training specialists, and instructors in corporations and businesses of all sizes, nonprofit organizations, government agencies, and colleges and universities.

The Write It Well series currently includes Just Commas and the self-paced training workbooks, Professional Writing Skills, How to Write Reports and Proposals, Grammar for Grownups, and Writing Performance Documentation. For more about our company and detailed descriptions of our publications, visit our Web site, [www.writeitwell.com](http://www.writeitwell.com)



## OTHER WRITE IT WELL RESOURCES

### Professional Writing Skills

This self-instructional workbook provides a step-by-step process for planning letters, memos, e-mail, and other business documents that persuade and inform clearly, concisely, and professionally.

### Grammar for Grownups: A Self-Paced Training Program

Designed for people who write in the workplace, this self-instructional workbook answers nagging questions about the use of grammar and punctuation.

### How to Write Reports and Proposals: A Self-Paced Training Program

The techniques and information in this book will help you plan and write reports, proposals, and other documents that communicate complex information clearly.

### Just Commas

Commas are the most often used and often misused punctuation marks. This handy little book collects the basic rules of comma usage into an easy-to-use guide.

### Writing Performance Documentation

This easy-to-use book includes examples and exercises for ensuring that performance-related writing achieves the organization's highest standards.

### Report and Proposal Writing for Environmental Professionals

Designed specifically for people who work in environmental fields, this self-instructional workbook provides an easy-to-follow process for documenting document field investigations, presenting the results of site assessments and environmental impact studies, describing projects, and responding to RFPs

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