

Email Checklist

Be clear. Be complete. Be done.



Before You Write

- Do you need email for this?** If it's urgent or complex, pick up the phone. If it's a quick confirmation, a text may be enough.
- Who needs to act, and who just needs to know?** Act → To field. Know → CC field.

Writing It

- Subject line is specific and searchable.**
"WO #4521 Parts order status"
- First line states your purpose.** The reader should know exactly what this email is about before they scroll.
- Details are concrete.** Part numbers, quantities, dates, deadlines & task ownership
- Action steps are clear.** If someone needs to do something, say who, what and by when.
- It's short.** Most emails should be five lines or fewer. If you're writing more, you may need a phone call instead.

Before You Send

- Read it from their side.** Would you know what to do next if you received this email? If not, revise.
- Check spelling, grammar, and names.** Misspelling a customer's name or company undoes the professionalism of the rest.
- To and CC are right.** Reply All only when everyone needs the reply. Don't train people to ignore your messages.
- Professional closing.** Sign off with your name and contact information.

After You Send

- When the issue is resolved, close the loop.** Send a short "resolved" message so everyone copied knows they can move on.

The 6 Cs of Clear Email

Courteous

Professional greeting. Request, don't demand.

Considerate

Read it from their side before you send.

Concrete

State your purpose. Provide specific details.

Concise

Keep it short. Use paragraphs & bullets to separate information.

Clear

Stay on topic. State actions needed.

Complete

All details included. Action steps and dates given.