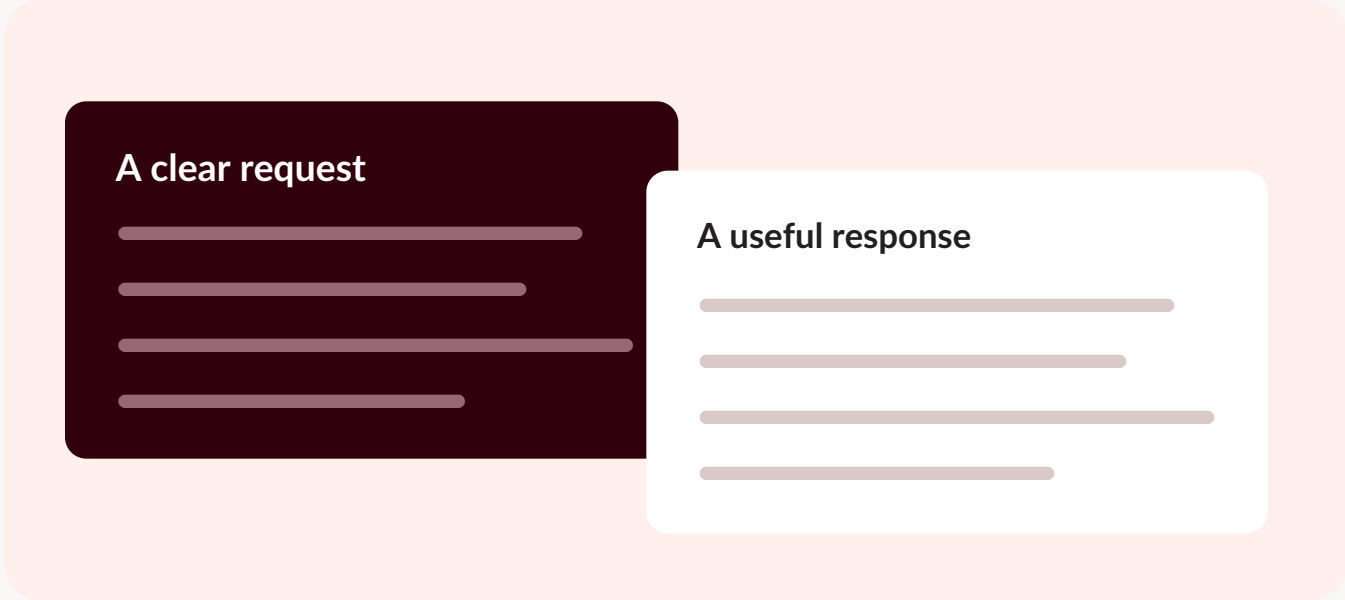
STEPHANIE HAMMER
Hammer Learning Experiences

22 email templates to make work easier

Practical messages for real workplace situations



Download, adapt and put to work

Use the templates directly or give them to your AI as reference material

A note from Stephanie

I created these templates after talking with people who wanted to use communication skills in the middle of their busy working days rather than wait for the next course or workshop

Make the reader's job easier

Each template is built around a real workplace outcome: making a request, getting a decision, building relationships, sharing an update, or resolving a difficult situation. Start with the result you want and adapt the details to your audience and your context

Use these templates with your AI

1 Download this PDF and attach it to a new AI conversation

2 Copy the workplace communication prompt at hammerlearning.co

3 Give your AI the receiver, outcome, context and key facts

The PDF becomes reference material for that conversation
It does not retrain the underlying AI model
Do not upload confidential workplace content without approval

About the author

Stephanie Hammer works with individuals, leaders and teams on strategic communication, influence, facilitation and learning experience design
She is a Certified Design Thinking Coach (HPI d-school, Germany), and holds degrees from LSE and Bryn Mawr College

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About Stephanie

Communication · Influence · Learning design



I work with individuals and teams on influential communication, facilitation and learning experiences built around real workplace challenges.

My background includes more than 25 years in international business and communication, followed by a practice focused on people who work with complex knowledge and responsibilities.

I am a Certified Design Thinking Coach through the Hasso Plattner Institute / HPI d-school in Germany. I hold an MSc from the London School of Economics and a BA from Bryn Mawr College.

I created these email templates to make the principles of effective workplace communication easier to use in everyday work. I hope they make your working day a little easier.

Read the examples, adapt the templates and try them at work

Find more resources and ways to work together at hammerlearning.co

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Foreword

Just as the pandemic started, one of my students asked me if there were an easier way to transfer what she learned during my training back to her "real life" at work. Life during a pandemic was just too hectic; the situation was changing was too fast. Things were far too uncertain for her to concentrate on applying key learnings from a training - no matter how useful she found them. She had more important work to do!

Eager to please a student at one of my largest corporate customers, I jumped into action and created gorgeous visual notes and reminder stickers. But my students admitted that despite their best intentions to keep them visible on their desks, my cheat sheets were gathering dust in desk drawers. Disheartened, I went back to the drawing board.

I interviewed dozens of former students. And I got two very interesting insights from the interviews:

- **Not surprising:** *Virtually everyone I interviewed* wanted to be perceived as leaders when they spoke.
- **Surprising:** *Not a single one of them* mentioned that it was important for them to sound like a leader in email.

What a disconnect! People all over your company are likely reading your emails (as the direct recipient, if they're on CC, or if someone forwards it to them). In fact, the reach of an e-mail can be much, much wider than that of a meeting.

In parallel to my interviews, my bookings for presentation skills boomed, while those for email writing dried up. My income was secured but I found this troublesome. Why? Because written communication is still an essential leadership skill – especially in today's work from home/hybrid world where employees get less one-to-one quality time with their managers. As the German saying goes, Wer Schreibt, bleibt or Who writes, remains.

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When one person said to me over a Zoom coffee “It would be amazing if you could just write my e-mails for me” it was a watershed moment. Although I had heard that comment many times before, this time a lightbulb went off in my head. I suddenly saw things clearly. I decided that I would have to design something that would teach people during their daily business so that they learn without extra burden.

It came to me in the middle of the night, while I was experiencing my own pandemic-induced insomnia.

If I could design a library of content-filled templates for them, I could make it easier for my students to learn and instantly write top-quality emails.

I started with one template and the reaction from students and their managers was extremely positive. People said that my templates enabled people to sustain their new effective communication skills long after attending a training with me. Native English speakers and those speaking/writing English as a second or third language were equally enthusiastic!

After talking to my family and friends about my template project, many of them asked if they could have a copy. After reflecting on it, I decided that I should give my templates to everyone. After all, during these crazy times we could all use a helping hand to **do more than just get to “zero inbox.** ” This ebook will help you harness email to get more work accomplished, build your brand and further enhance collaboration @work.

I hope that you find these templates useful for you. I’d love to hear what topics you’d like me to cover in the future.

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Templates

Affirmation
17 Create/maintain strong relationships and a positive culture

bad news
18 Inform stakeholders something is delayed

boundaries
19 Set up best practices for how you want to work with others
20 Remind people to respect your work-life balance
21 Say no to additional work

change management
22 Inform your team(s) about upcoming change
23 Inform your team(s) about a new process/procedure (or a change to an existing one)
24 Motivate someone to adopt a change

complaints & criticism
25 Ask someone to stick to the approach (that they should have followed)
26 Deliver constructive criticism

deliverables
27 Get them to deliver exactly the information you need & in the format you want - on-time
28 Get someone to contribute an article/social media post
29 Follow up with someone when they have not delivered on time

escalations
30 Escalate when someone has failed to deliver something despite repeated follow-ups

ideas
31 Get “buy-in” on your draft proposal to (do this action).

miscellaneous
32 Get approval to attend a conference or event
33 Get approval to take a training

money
34 Get budget to purchase/fund something for work (even when budget is tight)

prepared
35 Get members of your team to come prepared to a meeting

36 **take credit for your accomplishments**
Show your stakeholders that you’ve been busy accomplishing important things

resources
37 Persuade someone to consider hiring an extra resource (even when budget is tight)

responsibility
38 Tell someone you can’t cover for them

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10 ways these templates benefit you

1. Save your valuable time & get more done
2. Get input from others when you need it
3. Get decisions quicker
4. Make a great, and lasting impression
5. Be in control of how stakeholders perceive you
6. Effectively persuade stakeholders
7. Ensure your stakeholders see your hard work & expertise
8. Get more opportunities when more people notice your talents
9. Ensure that your ideas get attributed to you
10. Solve problems quickly

Solve problems quickly & your stakeholders remember you & your message

This book is about emails. *But not really.* It's really about effective, positive and solution-focused written communication. *It's about using written communication to ensure that your ideas, proposals and achievements are understood and remembered* **by the people who matter to you.** It's also about helping your colleagues and other stakeholders process, understand and retain complex information, which helps you too. And it's about building stronger relationships with your colleagues so that you can collaborate better together, and produce better outcomes.

Email is the format that I chose for this ebook because so many people use it. You can use all or parts of these templates for Slack, Hangouts, or whatever tool you use.

In today's crazy world, your colleagues and stakeholders are busy, distracted and stressed out. Help them out by using written communication. It helps them process information more easily, understand complex things better and remember them longer.

In today's crazy world, much of your corporate life is spent in online meetings, *verbally discussing*, and *verbally deciding* on many important and unimportant things. Verbal interaction is great.

Yet research shows that most (up to 100%) of what is said in a conversation is forgotten just minutes after the conversation ends.

Think about what that means for you and your career. You are dedicating most of your time and effort to preparing for and participating in online (or live) meetings - and most of it is being forgotten by your colleagues, your managers, and your stakeholders!

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Well done if you and your organization use a collaboration tool that enables you to keep track of what happens during your meetings.

- *Do you use it to support you every time you're talking to someone online?*
- *Are you sure that your stakeholders proactively check the tool?*
- *If not, you need to get yourself and your ideas in front of your audience and email is still a very practical way to do it.*

Of course, written communication isn't the only communication skill you need. It's a first step. In fact, once you've begun to use these templates, you'll notice a pattern in each one that builds relationships, gets straight to the point on content and motivates readers to action. You can use this same successful pattern to further enhance your verbal communication skills.

Help achieve the work-life balance you want

These templates enable you to be more efficient during your working hours. You'll get more done, which makes it easier for you to achieve the work-life balance you want.

Obviously, emails work at all times of the day or night.

These templates make it easier for you to get complex issues solved across time zones and get more real work done whenever you prefer to work.

These templates help you get complex issues solved in a "one and done" email, rather than starting a long and unproductive back-and-forth email chain.

Not everything has to be solved in a meeting! Get more issues resolved with email and reclaim more of your valuable time.

In the increasingly results-driven world, writing effective emails will keep you and your accomplishments fresh in your stakeholder's mind.

Make your personal brand even stronger than it already is

Most people dismiss email as busywork that distracts them from real work. Congratulations to you for being smart enough to realize that they're mistaken! *You will stand out when you consistently write effective emails. Your stakeholders will notice that you have leadership skills.*

Of COURSE, you already use email well. You've gotten far in your career without my templates. The goal of this book is to make it easier for you harness the power of written communication to positively influence how your stakeholders perceive you.

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Hybrid and Work from Home environments are wonderful for many people. BUT when you're out of sight physically, you MUST ensure that you stay visible.

And while you may be live online in meetings, you may not get the opportunity to share your ideas often enough!

By making it "quick and easy" to write important emails, these templates encourage you to use them as often as possible. The result is that over time, you create a lasting impression as a leader who is concise, professional, collaborative and solution focused. Like any kind of branding campaign, consistency is the key to getting the right people – your stakeholders - to notice you and your talents.

The templates in this book will certainly make your job much easier. But they were designed to do much more than just make writing emails easy. They will enable you to *strengthen your personal brand through consistency*.

These templates will empower you to be an effective communicator consistently. Especially when you have very little time. Especially when you're overworked and stressed out. Especially in tough situations.

Use these templates to send effective emails when it really matters. Use them when you're stuck in a tricky, complex or political situation, like having to deliver constructive criticism, or get people to deliver materials when your project just isn't as high on their priority list as it is on yours.

During your typical workday you send emails (or other forms of communication) all throughout your organization.

Every email that you send represents you and your brand. Use these templates often to ensure that more people all throughout your organization see your talents.

It's a great way to build your own brand awareness and increase your career development opportunities. You should take as much care in writing an email to the IT helpdesk as you do to the CEO of the company. You never know, they might be relatives.

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When to use which communication channel

There are no hard and fast rules that determine when you should use chat, email, live/video meetings or even telephone. What you choose depends on you, your experience and you intuition.

Use these self-coaching questions to help you decide which channel, or which combination of channels to use:

- *What does your company culture expect? Do you want to go with the flow or stand out in this situation?*
- *Is the topic important enough to you (and your career development) that you would like to have a written record of it, e.g., like your big new idea, or a proposal that you worked hard to create?*
- *How would you like to receive this information if you were the recipient? Would you like to have time to think it over? Is it surprising or possibly upsetting?*
- *Is the recipient and/or issue important enough to you to take the time to do something that will take you extra work?*

How to use this ebook

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Find the email template you need in the table of contents.	Read the scenario and example e-mail.	Select the entire plug & play version and copy/paste it into your e-mail program.	Make small edits to your-mail *(wherever you see italics)* so that it meets your own needs.	Send it!

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Before & after examples

Notice the differences in the before & after e-mails in the chart below.

- *Just looking at the subject line, which e-mail would you open first?*
- *Which emails are more effective?*
- *Which emails would you like to receive?*

Example #1

Send something, like a document or proposal, you worked hard on to someone for their review

When this might be a good idea:

- When you want to show someone that you've done a lot of work
- You want a track record that it's your idea

Before

Subject New concept: effective reporting strategies for new hires

Hi Anna,

I have developed a new training concept for us based on the negative feedback from the onboarding survey. The training covers reporting strategies. Please read through my draft and provide me with your feedback by the end of next week.

I know that you are overloaded and have no capacity to deliver the training. I think Maggie could do it if we train her.

Kind regards,
Stephanie

After

Subject Your review needed by 7/23 on course for New Hires

Hi Anna,

Thanks for highlighting the negative feedback from the employee onboarding survey on new hire communication. I totally agree with your idea to add this as a training module in the onboarding process. Managers, especially Rafa, will love it!

To enable us to get this implemented quickly, I have designed a draft training plan that we can use as a basis for discussion.

- The training covers the basics of reporting both in person and via digital tools.
- I have designed it to be delivered in 6 hours via Zoom, with hands-on scenarios and role-plays.
- I need your expertise especially on how to help new hires and managers implement key learnings.

I would appreciate if you would review the document by next Tuesday, July 23rd. Then, let me know when to schedule a call so that we can discuss your ideas to further enhance the draft.

I look forward to collaborating with you to get a much-needed training up and running!

Best regards,
Stephanie

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Example #2

Tell stakeholders there's a problem and you're working on it

When this might be a good idea:

- When it's not that urgent and no meeting is required
- You want a track record that you've informed people AND are you're working towards a solution

Before

Subject Microchip supply concerns

Andreas,

I hope this mail finds you well.

Last week I was discussing microchip supplies with one of our producers in China. She mentioned that they are experiencing new capacity problems related to Covid-19. Depending on the length of the delay, we are in danger of being short on supply for the holiday season.

I think that a cross functional approach might be the best way to tackle this. What is your opinion about addressing this with our colleagues at next week's meeting? Or would you prefer that we set up a separate meeting to handle this? In my opinion, I think it would be more efficient to tackle about this issue as a group.

If you agree, we can set up a Teams meeting to talk about it. I am available tomorrow from 15:30 – 16:00.

Stephanie

Important note: If you're working in a global context, please try to use a greeting and a closure because many cultures prefer to be addressed as "Dear" or "Hi" and they often prefer a polite closing like "Best," "Best regards", "Cheers" or something similar.

After

Subject Request to add microchip shortage for Model X to 3/17/21 meeting agenda

Hi Andreas,

Our primary microchip producer, Company Z, has informed us that they are experiencing new capacity problems related to Covid-19. Depending on the length of the delay, we are in danger of not having enough microchips to produce enough Model X for this holiday season.

To enable us to jointly develop a plan with key stakeholders to mitigate a potential supply shortage, I propose that we add this topic to our meeting agenda for this Friday, March 17, 2021.

- All relevant stakeholders have already confirmed their attendance.
- Tina from the sales team will also be joining as a guest and is the right person to escalate this.
- I have attached a pre-read with the relevant facts. Pending your agreement, I will distribute it to attendees.

Please confirm that you agree to add this to the agenda and that I should distribute the attached pre-read to attendees.

I appreciate your support in ensuring that this issue gets solved quickly.

Best,
Stephanie

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Example #3

Get people to prepare for your meeting

When this might be a good idea if:

- You have limited time, and you NEED a decision
- You're frustrated that meetings waste too much time bringing people up to speed

Before

Subject Pre-read for Steering Committee meeting on 8/13

Dear Steering Committee Member,

Please find attached the pre-read on the Project B timeline for the upcoming Steering Committee meeting on 8/13.

If you have any questions, please do not hesitate to contact me.

Best,
Stephanie

After

Subject Pre-read for 8/13 Steering Committee on Project B Timeline

Dear Walid, Ruchi, and Charlotte,

To enable you to reach a decision during the meeting on whether to approve the new release date for Project B, please read the attached short one-page executive summary before the meeting. It includes:

- An explanation of the delay
- A comparison of internal cost savings vs. missed revenue estimates
- A communication plan

I look forward to answering your detailed questions during the meeting and to communicating your decision back to the team so that we can adjust our plans.

Best,
Stephanie

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Example #4

Get someone to deliver input on a document

When this might be a good idea if:

- You have to follow up with this person/people regularly
- You want to save yourself time by getting people to submit changes in the format you want
- You want to split up work among a team

Before

Subject 2/14 Deadline for feedback on final marketing plan

All,

Great job on getting the draft marketing plan done!

I need you to submit your input on the final draft by the end of the week. It would be great if each of you focus on your own areas of responsibility. I'll be discussing it with Sunika next Tuesday, so that he can get final sign-off at the monthly budget meeting.

You can find the document here.

I'll be available if you have any questions.

Stephanie

After

Subject Your expertise needed by 2/14 on final marketing plan

Dear Tim, Scott and Cassandra,

I really appreciate your putting together the draft marketing plan two weeks ahead of schedule. The extra time will enable us to run an additional social media campaign before launch. Great job!

To enable us to get the sign-off on the final plan at the monthly budget meeting on Feb. 20, I will need to show it to Tom on Monday, Feb 18th to get his verbal OK.

Please submit your final review of the final plan Final_Plan_V7.2

- I have included all your changes, so it should only take each of you 30 minutes.
- @Tim, please review only your social media section.
- @ Scott, please review only our calculations on pp. 7-10.
- @Cassandra, please read through the entire document for consistency and typos.

I look forward to implementing this creative campaign and to exceeding sales' expectations in terms of the new warm leads we generate!

Thx,
Stephanie

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Example #5

Ask someone to contribute more during meetings

When this might be a good idea if:

- You're dealing with an introvert
- You're dealing with someone from another culture or from a different time zone

Note: I would write this on paper and use it as a script. I would call (telephone) them instead of sending an email or video. They might take it personally and it gives them some space to react.

Before

Subject Your contribution during our weekly status meeting

Lee,

I hope that this email finds you well. Great job on fixing the bug last week.

I am writing because I wanted to raise a concern that I have about your participation during our weekly status update.

Your work is top-notch, but ever since you joined team you have rarely participated in the discussions and the team and I are worried that you are not engaged in the project.

The point of the weekly status meeting is to get everyone's thoughts on how to attack common problems.

Is there a problem on your side? We all understand that the hybrid environment is challenging.

Please let me know that you understand our expectations.

Stephanie

After

Subject Your expertise needed during our weekly status meeting

Hi Lee,

Well done fixing the bug last week! It enabled us to release a test version to the sales group earlier than expected, which made us look great. I appreciate your extra effort.

- I am writing because it would be great if you would share your expertise more often during our weekly status meetings.
- That way, we can all learn from your experience, like how you managed to fix the bug so quickly.
- Your comments during last Monday's stand up are exactly what we'd like to see more of.

If you'd prefer to participate electronically via chat, that would be an option we could look into as well.

We look forward to hearing your insights next Wednesday.

Thanks,
Stephanie

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STEPHANIE HAMMER

22 email templates

Practical messages for real workplace situations

Affirmation

Create/maintain strong relationships and a positive culture

When to use this template

To create and/or maintain strong relationships and a positive culture

Why this works

Thanking someone for something specific makes it much more meaningful to the recipient. They can also repeat what they've done well – because they know exactly what it is! So, instead of saying a generic "great job!" go into detail about what they did and why it was so great!

Your plug & play template

Subject Outstanding *(description of the work, e.g., presentation or proposal or report)*

Dear *(Person's name)*,

Your *(action or work product)* was outstanding!

Your *(action or work product)* enabled *(this positive outcome)*. It was so important because it enabled *(us to achieve this positive outcome)*. Plus, *(another reason why it was so great)*. Well done!

I look forward to *(seeing, reading, etc.)* your next work.

Best,
(Your name)

Example email

Subject Outstanding job on your presentation to Gigi

Dear Latrice,

Your presentation to Gigi yesterday was outstanding!

Your slides presented a clear comparison of the pros vs. cons of adopting the new testing procedure. Your clarity was key in persuading the entire Project Team to agree to adopt our recommendation. Plus, the insights that you provided on the voice line gave just the right amount of context without overwhelming people. Well done!

I look forward to seeing you present this way again soon.

Best,
Stephanie

More ways to use this template

- You could use this to praise "daily business". It doesn't have to be for something out of the ordinary.
- You could use this to prepare to give positive feedback during a review/check-in.
- You could modify this to praise a team.

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Bad News

Inform stakeholders something is delayed

When to use this template

To inform stakeholders something is delayed

Why this works

When you tell stakeholders the problem and tell them at the same time what you're doing to solve it, you look competent and proactive. Managers care that something's being done to solve a problem.

Note: Do not write that you're sorry because you might be blamed later. In work, sh# happens and it's rarely someone's fault. If it is your fault, apologize on the voice line, not in writing where it could potentially be used against you some day.*

Your plug & play template

Subject *(Name of project)* pushed back to *(new date)*

Dear *(Person's name or Team name)*,

To ensure that you're informed *(about this issue)*, this e-mail is to update you on the problem we've run into - and what we're doing to solve it:

- *(Describe the problem).*
- *(Describe the impact of the problem on business).*
- *(Describe specifically what you are doing to solve it).*
- *(Describe who you have informed or who you are collaborating with to solve the problem).*

I will update you on *(this specific date)* so that you are *(informed/prepared for something, or some other reason).*

Optional: I propose that we meet with (person or team) to get their expertise on (solving the problem, how to manage customer expectations, etc.)

Best regards,
(Your name)

Example email

Subject Project Snapper Release pushed back to September 15th

Dear Sandra,

To ensure that you're informed about the situation in Project Snapper, this e-mail is to update you on the problem we've run into - and what we're doing to solve it:

- We've found a large bug that causes incorrect customer accounts data to be displayed in the Overview and Detail screens.
- The software engineering team estimates that they need two weeks to solve the issue, which would push back the release date to September 15th.
- We've informed all relevant teams (Marketing, Sales and Operations) so that they can reprioritize their work while they wait for us.
- In addition, Deborah's team has lent us two additional engineers so that we can get additional resources and "fresh eyes" working on finding and fixing the bug ASAP.

I will update you on June 25th so that you are prepared for your management committee meeting on July 1st.

Best regards,
Stephanie

More ways to use this template

- Use this to ask another team or department for their assistance/insights to help you solve the problem.
- Use this to inform your team who's working on what.
- Modify this as a starting point for client/user communications.

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Boundaries

Set up best practices for how you want to work with others

When to use this template

To set up best practices for how you want to work with others

Why this works

By asking your colleague what their preferences are, you look very collaborative. At the same time, you are gently reminding this person that optimal collaboration should be discussed, not assumed. You are offering them the chance to safeguard their own work-life balance.

Your plug & play template

Subject Request to create our own Collaboration Best Practices

Dear *(Person's name)*,

I really enjoy working with you because *(insert something you genuinely appreciate about them or their work).* For example, *(something they did)* was very valuable because *(the reason it was so valuable).*

To enable us to continue building on what we've accomplished, I propose that we create our own Best Practices for Collaboration. That way, it's easier for you and I to plan meetings, etc. when we're both most productive, and I can be sure to respect your work-life balance.

- What are your set working hours? Mine are: *(insert your hours).*
- When are you most productive? I prefer to do collaboration work *(at this time) (optional: for this reason).*
- What are your "no go" hours? I block *(insert time frame)* for *(reason)* .

I look forward to getting more clarity from you on your preference and co-designing a solution that will enable us to deliver great work - and to balance work-life. Once you've had time to think about this, let me know and we can schedule a *(insert how you want to meet)* to discuss both of our preferences and cement our plans.

Best,
(Your name)

Example email

Subject Request to create our own Collaboration Best Practices

Dear Berto,

I really enjoy working with you because your attention to detail ensures that we deliver the best quality work! For example, your taking the time to triple check the source data ensured that we caught and fixed our calculation error in the forecast we submitted last week for Ayesha.

To enable us to continue building on our great track record so far, I propose that we create our own Best Practices for Collaboration. That way, it's easier for you and I to plan meetings, etc. when we're both most productive, and I can be sure to respect your work-life balance.

- What are your set working hours? Mine are from 6:30 a.m. – 3:30 p.m. CST.
- When are you most productive? I prefer to do collaboration work after 11:00 CST, when I've cleared my desk/put out any fires.
- What are your "no go" hours? 12:30 – 1:15 CST is my block for lunch/personal time.

I look forward to getting more clarity from you on your preferences and to co-designing a solution that will enable us to deliver great work - and to balance work-life. Once you've had time to think about this, let me know and we can schedule a Zoom to discuss both of our preferences and cement our plans.

Best,
Stephanie

More ways to use this template

- You could request to create best practices for anything. For example, how to run a meeting.
- You could use this to ask your staff to prepare for a project kick-off.
- You could modify this to show that your team already established best practices and list the positive results you achieved by doing it.

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Boundaries

Remind people to respect your work-life balance

When to use this template

To remind people to respect your work-life balance

Why this works

While it is legitimate to say, “Respect my private life!” sometimes people can interpret that the wrong way as aggressive, which may damage your reputation and or/your working relationship with that person. Focus on your making it clear how you will respond to the never-ending chats and mails they send.

Your plug & play template

Subject Ensuring you get *(some specific benefit)*

Dear *(Person’s name)*,

Thanks for always keeping me up to date on the latest developments. I appreciate your wanting to keep me in the loop real-time on issues as they come up.

- So that you’re not waiting around for my response after hours, I wanted to let you know that I dedicate the time from *(time slot including time zone)* to go through important messages like yours and respond thoughtfully.
- Responding to your messages *(at this specific time)* enables you to get a better response, since *(something about why this works for you).*
- I turn off my message alerts after *(time frame). (Optional: …. so that I can focus on (this thing.))*
- If you need an urgent answer, please *(follow these instructions).*

If you need an answer off hours, please *(follow these instructions).*

Thanks again for making sure that I stay informed.

Best,
(Your name)

Example email

Subject Ensuring you get a timely response to issues

Dear Rob,

Thanks for always keeping me up to date on the latest developments. I appreciate your wanting to keep me in the loop real-time on issues as they come up.

- So that you’re not waiting around for my response after hours, I wanted to let you know that I dedicate the time from 8:00 – 8:30 am EST to go through important messages like yours and respond thoughtfully.
- Responding to your messages in the am enables you to get a better response, since I’m focused an energized!
- I turn off my message alerts after 6:00 p.m. EST so that I can focus on family.
- If you need an urgent L3 answer, please text our group # and one of us will answer you.

If you need an answer off hours, please contact Ruchi in our Indian office @ +91 80 xxxxxxx.

Thanks again for making sure that I stay informed!

Best,
Anne

More ways to use this template

- You could use this for reminding someone to follow a set process, like submitting an online form before they can get reimbursed for travel.
- You could use this to introduce a new procedure.
- You could modify this and use it as talking points to deliver this message on the voice line.

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Boundaries

Say no to additional work

When to use this template

To say no to additional work

Why this works

You are annoyed because you've been asked to take on too much additional work, and you're having trouble fitting it all in. You'd like to tell them "NO!" but are worried that doing so will make you look bad.

Instead, thank your colleague for their belief in your talents! Tell them where your focus must be right now, and then quickly shift to offer them an alternative, like your time when your workload decreases. Only offer a colleague if you've spoken to them first to clear it with them!

Your plug & play template

Subject Ensuring you get *(some specific benefit)*

Dear *(Person's name)*,

Thank you for thinking so highly of my work that you'd like me to take over *(name of task/project)*. While I appreciate your confidence in me, I cannot take on the additional task right now. I need to focus on *(doing this)* in order to *(achieve this goal for the team or the department or the company)*.

Optional 1: As I already confirmed with (person's name), they want me to focus on (doing this) in order to (achieve a specific goal).

Optional 2: I appreciate your belief in me. I'll come back to you when I have additional capacity.

Optional 3: To enable you to move forward, I checked with *(person's name) (She/He/They)* have spare capacity and mentioned that *(he is/she is/they are)* looking for *(exciting work, a new project, etc.)*.

Best,
(Your name)

Example email

Subject Duane has capacity for the CRM project

Dear Samira,

Thank you for thinking so highly of my work that you'd like me to take over the new CRM project. While I appreciate your confidence in me, I cannot take on the additional task right now. As I already confirmed with Tim, he wants me to focus on generating new leads in order to help the team meet sales targets in Q2.

I appreciate your belief in me. I'll come back to you when I have additional capacity.

To enable you to get up and running quickly on the CRM project, I checked with Duane. He's got spare capacity and mentioned that he's looking for a new project to lead.

Best,
Stephanie

More ways to use this template

- You could use it to decline a speaking invitation.
- You could modify this and use this decline attending an in-person meeting.
- You could modify this to ask someone to take over a project, e.g., "Dear Samira, I think so highly of your work that I'd like to ask you to…"

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Change management

Inform your team(s) about upcoming change

When to use this template

To inform your team(s) about upcoming change

Why this works

When you announce the change in advance (when possible) and follow up with small (or even one-on-one meetings) it enables people to digest the news, get their emotions in check, and come up with valid questions.

Note: If/when you hold a change meeting, sow a simple slide with 3 columns: old way/new way/how it impacts/ benefits you.

Your plug & play template

Subject *(Name of change) & how it affects you*

Dear *(Person's name or Team name),*

To enable us to *(achieve some advantage),* we will be *(doing this new thing going forward).* The changes will be effective starting *(on this date).*

The three main things for you to know are:

- *(Briefly describe the major change here).*
- *(Briefly address what you think they are worried about).*
- *(Briefly list what you will do to get them prepared to implement the change).*

To find out how this change specifically affects you and enable you ask questions, you will be invited *(by this date)(by this person)* to *(some kind of meeting or conversation).*

We look forward to *(achieving some kind of benefit for the reader)* and *(some kind of benefit for the team/department/organization).*

Best regards,
(Your name)

Example email

Subject New department structure coming in Q3 & how it affects you

Dear Team,

To enable us to be more efficient in responding to incidents, we will be restructuring our department into squads. The changes will be effective staring in Q3. With the new organizational structure, it will be easier for you to locate the right talents & skills and team up quickly to solve problems.

The three main things for you to know are:

- We are NOT reducing headcount.
- We will engage in teambuilding activities before the change goes into effect so that you can develop closer relationships with the entire team before you are expected to work with them in self-driven teams.
- View the new org chart here (link).

Your team lead will be inviting you to a one-on-one meeting within the next two weeks to discuss how the changes will affect you.

We look forward to being more agile going forward and further decreasing our incident response times. We're very excited to implement this change, which so many (68%) of you suggested in your end of year reviews!

Best regards,
Stephanie

More ways to use this template

- Use this/part of this as an invitation text for a meeting invitation.
- Use this as a script when you open a meeting.

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Change Management

Inform your team(s) about a new process/procedure (or a change to an existing one)

When to use this template

To inform your team(s) about a new process/procedure (or a change to an existing one)

Why this works

When you focus on explaining the changes clearly as well as the benefits they bring.

Note: If/when you hold a change meeting, a simple slide with 3 columns is helpful: old way/new way/how it impacts/benefits you.

Your plug & play template

Subject *(Name of change) & how it affects you*

Dear Team,

To enable us to *(achieve some advantage)*, we will be *(doing this new thing going forward)*.

The three main changes to the way we currently *(do this task)* are:

- We will *(do this)* instead of *(this)*. This will enable us to *(get this benefit)*.
- We will *(do this)* instead of *(this)*. This will enable us to *(get this benefit)*.
- We will *(do this)* instead of *(this)*. This will enable us to *(get this benefit)*.

(Optional: Please ensure that x person/people are informed about this change and prepared to implement it starting the week of October 12, 2022).

We look forward to *(achieving some kind of benefit for the reader)* and *(some kind of benefit for the team/department/organization)*.

Best regards,
(Your name)

Example email

Subject Change to exit interview procedures & *how it affects you*

Dear Team,

To enable us to get more insight on why employees are leaving the helpdesk, we will introduce a new procedure to encourage more employees to fill out the exit questionnaire before they leave.

The three main changes to the way we currently do exit interviews are:

- You can now perform the exit interviews at any time. You do not need someone from HR on the interview, which will reduce the scheduling hassle for you and employees.
- Please hand departing employees the attached worksheet instead of sending them the link, which will make it easier for them to fill it out on the spot.
- You no longer have to type in the answers. To make it easier for you, now you can send us a picture and our intern will enter the responses into our database.

Please ensure that your Helpdesk team leads in all global locations are informed about this change and prepared to implement it starting the week of October 12, 2022.

We look forward to collaborating with you to create a plan to retain more Helpdesk staff.

Best regards,
Stephanie

More ways to use this template

- Use this to introduce any new way of working to a team or project.
- Use this as a message to internal customers to let them know what changes are coming and how they will help them.

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Change Management

Motivate someone to adopt a change

When to use this template

To motivate someone to adopt a change, such as taking on a different role.

Why this works

Assume that the person you are writing to is "on board" and say thank you for it! This is flattering for them, especially depending on your position relative to them.

Note: Although it's more work for you, writing an individual e-mail to each person will be much more effective.

Your plug & play template

Subject A personal thanks for your support

Dear *(Person's name)*,

I really appreciate your *(commitment to, open mind about, etc.)* on *(description of the change)*.

Instead of having to *(having to do this less important task)*, you'll now *(get to do this more exciting task)*. It will be an important step *(for some reason that is important to that person or to the company)* .

(Name of some important person) and I have noticed that you excel at *(doing this important job/task)*. This is exactly the skillset we need to make this change a success and drive the organization forward.

If you'd like to have a virtual coffee to discuss how I can support you and the team, please reach out.

I look forward to seeing you thrive in your new role!

Best regards,
(Your name)

Example email

Subject A personal thanks for your support

Dear Malcolm,

I really appreciate your open mind abour our decision to outsource first-level customer support to Company Z.

Instead of having to answer straightforward and relatively uninteresting questions, you'll now be collaborating across teams to solve larger, more fun challenges. It will be an important step in your career development.

Tim and I have noticed that you excel at this more sophisticated troubleshooting. It was very impressive how quickly you and John were able to find an alternative solution to the 2nd level issue last week.

If you'd like to have a virtual coffee to discuss how I can support you and the team, please reach out.

I look forward to seeing you thrive in your new role!

Best regards,
Bob

More ways to use this template

- Use this to praise someone or a team after they've successfully implemented a change.
- Modify this to address an entire team that's taking on a new project.

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Complaints & criticism

Ask someone to stick to the approach (that they should have followed)

When to use this template

To ask someone to stick to the approach (that they should have followed)

Why this works

Focus on getting the other person to change their future behavior – because no one can change the past. Even though you might be annoyed at what happened (or didn't happen), it doesn't help anything to dwell on the past. If you keep bringing it up, the other person will feel attacked, and it might damage your relationship (although they may be good at hiding their resentment!)

Your plug & play template

Subject *(Name of change) & how it affects you*

Dear *(Person's name)*,

I really appreciate *(something positive that you appreciate). Note: Dig hard, you can find something to appreciate - even if it's just answering your call)*

- In the future, please *(do this or follow this procedure).*
- That way, you'll be able to *(list one or a couple benefits that they, or the company or customer will get when they do this).*
- Plus, *(describe another benefit).*

Please confirm that you'll *(describe what you want them to do).*

I look forward to working with you to *(achieve some mutual benefit).*

Best regards,
(Your name)

Example email

Subject Please talk to me before you contact Acme, Inc.

Dear Rob,

I really appreciate your getting back to our important customer, Acme, within 4 hours of their complaint call. My Acme contact praised your rapid response time.

- In the future, please call me before you answer them directly. When it's urgent, contact me here: xxx xxx xxxx.
- That way, you'll get insights on key political issues with the company that impact how/how fast we provide service levels.
- Plus, you and your team will have an easier time since I can direct you to the decision maker on the Acme side.

I look forward to coordinating our teams more closely in the future. I'm convinced that working with you will enhance our approach.

Best regards,
Stephanie

More ways to use this template

- Use this to introduce a new procedure.
- Use this to communicate a change to internal customers.

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Complaints & criticism

Deliver constructive criticism

When to use this template

To deliver constructive criticism.

Why this works

Focus on getting the other person to change their future behavior – because no one can change the past. Plus, it's more productive to focus on the behavior and NOT on the person's perceived "mistakes." After all, you might not have all the background information.

Your plug & play template

Subject Request to *(do something in a different way in the future)*

Dear *(Person's name),*

I understand that you *(did some action)* because you want to *(get this specific result) (Optional: by this specific date).*

- In the future, I would greatly appreciate if you *(would do this) (instead of this).*
- When you do this, then *(describe the good result that will happen).*
- Plus, *(describe another benefit).*

Optional: I agree with you that we need to consider (doing this new thing). I've just sent you a calendar invitation for (specific date) so that we can discuss our ideas for achieving (this benefit).

I would greatly appreciate your cooperation on this since it will enable us to *(achieve this benefit).*

Best regards,
Your name

Example email

Subject Request to co-design a more efficient approval process for partnership agreements

Dear Scott,

I understand that you sent around a working draft of the partnership agreement to the team for review because you want to get the document finalized before Conference X next month.

- In the future, I would greatly appreciate if you would get my clearance first. As our legal counsel, I know that the draft you sent for comment has several paragraphs that must be adjusted before I can approve the agreement.
- If you and I agree first - before you send legal documents around for Level 2 review - we can avoid having to duplicate work, e.g., telling busy reviewers that they have to review additional versions.
- Plus, we'll save time in the long run.

I also sense that you want to shorten the timeline for producing new agreements. I agree with you that we need to consider a new approach. I've just sent you a calendar invitation for next Tuesday, March 3rd, so that we can discuss our ideas for speeding things up.

I look forward to designing a more efficient process with you.

Best regards,
Stephanie

More ways to use this template

- Use this to prepare your talking points for verbal performance reviews.
- Use this to manage a conflict.
- Use the middle 3 bullet points to deliver simpler forms of constructive criticism, e.g., when someone always arrives late.

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Deliverables

Get them to deliver exactly the information you need & in the format you want - on-time

When to use this template

To get people to deliver exactly the information you need, in the format you want.

Why this works

Most people ask for generic things like “feedback” or “opinion” or “buy in”. However, that leaves reader(s) possibly puzzled and confused as to what they are supposed to do. By telling them **exactly what to do,** how to do it, where to find it, the format you want in in, you reduce their mental load. You’re not “ordering them around” because you’ve thanked them up front and then again at the end of the email.

Your plug & play template

Subject Your *(action)* needed by *(insert date here)* to get *(this specific outcome THEY want)*

Dear *(Person’s name or people’s names)*,

Thanks so much for *(doing this specific thing)*.
It really helped us *(achieve this specific positive outcome)*.

To enable the us to get *(the next specific outcome)* by *(this specific date)* please *(do this action)*.

- The *(document, database, etc.)* is located here: *(link)*
- *@(Name)*, please *(do this action)*
- *@(Name)*, please *(do this action)*
- *@(Name)*, please *(do this action)*

Please make your changes *(where on drive, in which document or tool)*. That way, everyone will be able to see the changes that everyone else is doing.

I would greatly appreciate if you would make these changes by *(date)* so that I can *(do something with it)*.

I look forward to *(reaching a specific goal)* together with you.

Best regards,
(Your name)

Example email

Subject Your input needed by 6/30 to get our “go” from Management

Dear Christine, Tim & Andre,

Thanks so much to all of you for finalizing the Project X marketing plan. Your creative ideas, especially the suggestion to partner with Company Y, will really enable us to stretch our budget.

To enable the us to get formal approval for our new Project X marketing plan at the management meeting on Wednesday, June 30th, please send me your changes to the draft presentation that I created together with Derek.

- The presentation is located here: (link)
- @Christine, please double check the calculations on slides 4 & 7
- @Tim, please provide the 3 missing data points on slide 3
- @Andre, please look at the story/flow and give your opinion on how effective it will be to persuade Marita.

Please make your changes directly on the slide deck using the comments function. That way, everyone will be able to see the changes that everyone else is doing. Once we all agree, I’ll consolidate everything and publish the final version.

I would greatly appreciate if you would make these changes by Thursday, June 16th so that I can edit the document and send it out as a pre-read before the weekend. I look forward to getting a final OK from management - and to implementing all the creative measures we planned together!

Best regards,
Stephanie

More ways to use this template

- Use this to summarize a meeting or project kick off and get next steps on paper.
- Use this to make everyone aware of what each member of the team is doing, so that they can contact the right person about the right topic.
- This one is also super useful for admins and coordinators: get people to send you forms, hotel requests, meal preferences, etc. on time and in the right format!

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Deliverables

Get someone to contribute an article/social media post

When to use this template

To get someone to write an article/social media post

Why this works

When you tell the person what they get out of writing an article, they're more likely to want to do it. Yes, it should be obvious to people why they should write corporate social media posts, articles, etc. but go ahead and highlight those advantages in case they forgot/don't know.

Your plug & play template

Subject Your opportunity to get publicity for *(name of their project or achievement)*

Dear *(Person's name)*,

Congratulations on *(achieving something)! (Person's name)* told me that you *(are working on or have completed)* an exciting *(project, software, initiative)* and that more people should hear about *(it's potential, how to get involved, what you're doing for our customers, other).*

To enable the right people *(employees/customers/media)* to find out about your exciting *(project/software, etc.)*, I propose that you create a post for our social media account.

- Here's what you have to do: *(describe the steps, length, etc. and make it as easy as possible!)*
- *(Optional: Here's what we've done to make it easier for you…)*
- *(Name of important person within the company)* reads posts regularly and you'll get great visibility to senior executives.
- Plus, it's our shared company goal to *(increase employee postings or increase visibility on x issues).*

Please confirm by *(this specific date)* that you agree to contribute. I look forward to helping you spread the word about your exciting and valuable *(project, tool, etc.)!*

Best regards,
(Your name)

Example email

Subject Opportunity to get publicity for your knowledge sharing platform

Dear Shawna,

Ian told me about Megabrain, the knowledge-sharing platform that you just launched. Congratulations, I had a look and it's really compelling! He also mentioned that your goal is to get as many employees as possible to contribute their expertise.

To enable as many employees as possible to find out about your new platform and to get motivated to contribute, I propose that you write an article for our company newsletter.

- Roughly 6,000 of our employees world-wide read the intranet daily, including upper management.
- I only need one page and I've created a template that makes it as easy as possible for you to contribute.
- In order for you to make the next edition, the deadline for your contribution is the End of Business next Friday, February 15th,

Please confirm by this Wednesday, January 27th, that you would be interested writing for this edition of the newsletter. I look forward to helping you spread the word about your exciting and valuable new platform!

Best regards,
Stephanie

More ways to use this template

- Use this to get people to contribute ideas to an innovation platform.
- Use this to get people to volunteer/participate in projects.

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Deliverables

Follow up with someone when they have not delivered on time

When to use this template

To follow up with someone when they have not delivered on time

Why this works

When you simply state clearly and briefly what you need from them and ask them to commit, they won't feel attacked and will likely be more cooperative. (Chances are, they're feeling guilty already!.) This may not work, but you'll at least have it in writing that you reminded them. Also, follow up 15 minutes after you send the mail with a call and say, "What do you need to get this done by today?" They may need your help. Then, help them!

After the stress is over, talk about strategies to help them deliver on time in the future.

Your plug & play template

Subject Urgent request for *(this specific item)* due on *(this specific date).*

Dear *(Person's name)*,

To ensure that *(this important thing can happen)*, we must receive your *(input, feedback, approval, etc.)* by *(this specific date).*

- We're waiting on your *(data, review, etc.).*
- As we agreed, please deliver the following:
  - *(Description of item #1 you need from them.)*
  - *(Description of item #2 you need from them.)*
  - *(Description of item #3 you need from them.)*
- Please confirm by *(this specific time and date)* when you will deliver your *(data, review, etc.).*

I will call you this morning to follow up with you.

Best regards,
(Your name)

Example email

Subject Urgent request for status on data needed for Quarterly Sales Report (due 3/11/22)

Dear Bill,

To give Jim enough time to review the report before it gets submitted to the Board, we must send him the final version by tomorrow, March 9th.

- We're waiting on your data.
- As we agreed, please deliver the following for the Midwest region:
  - Number of sales
  - Total value of sales
  - Average transaction value
  - Number of upsells and add-ons
  - Number of outbound emails and calls
  - Average lead response time
  - Average length of the sales cycle
  - Number of current prospects
- Please confirm by 11:00 a.m. today when you will deliver the data.

I will call you this morning to follow up with you.

Best regards,
Stephanie

More ways to use this template

- Modify this to ask anyone to deliver something simple (the first time).
- Use this to remind people that a deadline is coming and mention you're looking forward to their contributions!

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Escalations

Escalate when someone has failed to deliver something despite repeated follow-ups

When to use this template

To escalate when someone has failed to deliver something despite repeated follow-ups

Why this works

Something has obviously been happening that your colleague has not delivered. (Maybe it's Covid? Stress? Family problems?) The fact is: you don't know. If you write a nastygram and cc important people, chances are you'll embarrass your colleague, and damage your relationship long term. This way, you address the problem and cut them some slack.

Your plug & play template

Rough talking points:

- Hi *(person's name), (some greeting).* How's it going right now? *(Stop & really listen for clues).*
- You know we're waiting for *(thing they should deliver)* for *(this important reason),* right?
- How's that going? *(stop & really listen for clues).*
- When can you deliver it?
- What resources do you need?
- Where can you get them?
- *Finally, if they can't do it alone, offer help.* How can I/my team help?

Example email

Rough talking points:

- Hi Ella, Good morning. How's it going right now?
- You know we're waiting for your analysis of X for our presentation next week, right?
- How's that going?
- When can you deliver it?
- What resources do you need?
- Where can you get them?
- How can I/my team help?

More ways to use this template

- Use this to talk about any problem, regardless of due date.
- Use some of these questions to coach someone.

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Ideas

Get “buy-in” on your draft proposal to (do this action).

When to use this template

To get “buy-in” on your draft proposal

Why this works

Asking for buy-in on a draft strategy is often advisable, since if you wait until your idea is done some stakeholders like to be involved early. If your stakeholder prefers more final proposals, wait until your proposal is more final.

Start by linking your proposal to some goal that your stakeholder has, or something you know that they like. Then, they are more likely to say yes because they see how your proposal benefits them. Then, try to make the e-mail as simple as possible. The proposal itself can be more complex but attach it! Do not try to fit the content of your proposal in an email!

Your plug & play template

Subject Your opportunity to get publicity for *(name of their project or achievement)*

Dear *(Person’s name)*,

I know that you’re really interested in *(achieving something beneficial for the team or company)*. That’s why I’d like to pitch an idea *(that will achieve this benefit) (Optional: by doing this)*.

I propose that we *(do this action) (to achieve this benefit)*.

- *(Briefly describe the action you want to do).*
- *(Briefly explain 2-3 concrete benefits that will come from doing this action).*
- *(Briefly list the costs or other resources needed to do this).*

Please *(do this action, e.g. read through it).* I would greatly appreciate if you would *(do this action) (by this specific date),* so that we can *(achieve this benefit/goal)*.

I look forward to hearing your insights.

Best regards,
(Your name)

Example email

Subject Proposal to hold a 2-day virtual workshop with Tony’s Team

Dear Omar,

I know that you’re really interested in ways to build more collaboration between our UX team and customer support. That’s why I’d like to pitch an idea to you that will get us working together closely on our new app.

I propose that we hold a two-day Design Thinking workshop to kick-off the new app project.

- Holding the workshop at such an early stage would enable us to generate innovative ideas together early in the project. And it will ensure that everyone feels involved and responsible.
- Using the Design Thinking methodology will help us get more innovative ideas that our customers would love (and help prevent us from corporate think).
- The 2-day workshop would cost US$6100 and can easily be run virtually across time zones so we can include our Asian colleagues too.

Please read through my attached proposal. I would greatly appreciate if you would send me a calendar invitation for next Thursday, June 16th, so that we can meet on Hangout to discuss in detail.

I look forward to hearing your insights.

Best regards,
Abby

More ways to use this template

- Use this to pitch a new way of working, a new procedure or new way to increase sales.
- Use this when you have to explain something technical. Make the email focus on the benefits and put the technical info in an attachment. That way, they will know the benefits of whatever you’re proposing before they get into detail. It will change their mindset.

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Miscellaneous

Get approval to attend a conference or event

When to use this template

To get approval to attend a conference or event

Why this works

When you list compelling reasons to attend, you're more likely to get a yes. Focus on benefits for the team/company.

Your plug & play template

Subject Your approval to attend *(conference/event name)*

Dear *(Person's name)*,

Good morning. Thanks for *(doing something you genuinely appreciate)*.

To enable us to *(achieve a specific goal)*, I would like your approval to attend *(name of conference/event)*.

- It takes place on *(date range)* in *(x location)*.
- *(x number of)* our biggest *(partners, competitors, target customers, other)* have already confirmed that they'll be attending.
- The costs are: *(currency)(amount)*.
- *(Name of person)* is taking over my responsibilities while I'm away.

Please confirm your approval by *(this date)* so that I can *(register before the price goes up, register before the cutoff date, book my travel before travel costs increase, set up meetings with name of person, other)*.

I look forward to updating you and the team on *(the most important trends, what competitor name says on the panel, meeting outcomes, other)* in a virtual meeting as soon as I return.

Best regards,
(Your name)

Example email

Subject Proposal to meet our top 30 warm leads in 3 days

Dear Sandra,

Good morning. I appreciate your constructive feedback on my sales proposal last week. I found your ideas on creative lead magnets very useful.

To enable the team to meet our Q2 sales targets, we need to face to face meetings with our warm leads. To do this in a cost-efficient way, I would like your approval to attend the SOCOM conference. That way, I can efficiently hold in person meetings with our top warm leads instead of having to take multiple trips to each reason.

- SOCOM takes place on April 13-15, 2022, in Las Vegas.
- 30 of our most promising warm leads have already confirmed that they'll be attending.
- The costs estimate is US$3700, including travel and predicted entertainment expenses
- Scott Petersen has agreed to cover my responsibilities while I'm away.

I would greatly appreciate if you would please confirm your approval by January 30, 2022, so that I can register before the price goes up and have enough time to set up meetings with our target customers.

I look forward to moving these warm leads into the hot category!

Best regards,
Stephanie

More ways to use this template

- Flip this to argue against attending an in-person event.
- Use this to attend a virtual conference or event.

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Miscellaneous

Get approval to take a training

When to use this template

To get approval to take a training

Why this works

When you focus on the benefits that the training will deliver to the entire team and your working style, managers are interested. Most people say that a training is "for their personal development." Of course, this is a fine argument, but it usually appeals less to your stakeholder.

Your plug & play template

Subject Request for budget/approval to *(achieve this benefit for the team)*

Dear *(Person's name)*,

(Greeting). (Mention it here if the person has told you or the group to enhance some skill.) I appreciate your *(comments/observations/coaching)* about *(this topic)* and I agree that this training would help *(me/us/all of us do this important thing better).*

To enable me to *(achieve this strategic goal for the team),* I would like your approval to attend a highly recommended training called *(name of training).*

- It takes place from *(specific dates), (online/in this location).*
- Taking this course now will enable us to *(achieve some important team goal in the near future).*
- The costs are: *(currency)(amount).*
- I would be happy to host one or more lunch and learn sessions so that everyone in the team can benefit from what I've learned.

Please confirm your approval by *(this specific date)* so that I can *(register before the price goes up, register before the cutoff date, etc.).*

I look forward to updating you and the team on the key learnings as soon as I complete the training.

Best regards,
(Your name)

Example email

Subject Request for US$3300 to help us promote our projects better

Dear Keisha,

Good morning. During our last team meeting, you mentioned that you'd like for the team to look for opportunities to promote our projects throughout the company. I appreciate your pushing me out of my comfort zone and I would like to be more proactive.

To enable me to represent our team more confidently and look more like an expert, I would like your approval to attend a highly recommended training called "Communicating with Impact".

- It takes place from April 27-29, 2023, online.
- Taking this course now will enable us to deliver a great presentation on Project X at the steering Committee on June 16th.
- The costs are: US$3300.
- I would be happy to host one or more lunch and learn sessions so that everyone in the team can benefit from what I've learned.

Please confirm your approval by Friday February 28th, EOB so that I can register before it is sold out.

I look forward to updating you and the team on the key learnings as soon as I complete the training.

Best regards,
Stephanie

More ways to use this template

- Use this to suggest that someone else in your team takes a training.
- Use this to make the case for trainings that may seem unconventional – as long as you show how what you learn will make the team/company more successful (e.g., improv training at Second City!)

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Money

Get budget to purchase/fund something for work (even when budget is tight!)

When to use this template

To get budget to purchase/ fund something for work (even when budget is tight!)

Why this works

When you show that the benefit is bigger, more important and/or more strategic that the expenditure, most stakeholders will consider approving budget.

Your plug & play template

Subject Proposal to *(achieve some benefit for the other person (1st choice) the company (2nd choice) or the customer (3rd choice)*

Dear *(Person's name)*,

Thanks so much for *(doing something that you genuinely appreciate).*

I know that you value *(describe something that is somehow linked with what you want to buy).* That's why I am proposing that we purchase *(this item)* to do *(this strategic thing)* even *(faster, at a better quality, with more capacity, etc.)*

To enable us to achieve this, I would like your approval to purchase *(list the item you'd like to buy).*

- Buying this *(good/service/equipment)* will enable us to do this.
- It costs this much: *(currency) (amount).*
- Where the money could come from: *(a team, project or budget number).*

Please confirm that I can purchase *(the item/ service).* I look forward to *(achieving this shared goal.)*

Best regards,
(Your name)

Example email

Subject Proposal to further increase the quality of your videos

Dear Brad,

Thanks so much for the positive feedback on my last video. I really enjoy getting you and the organization increased exposure on social media. Your last video got 15,000 views last month!

I know that you and the organization value the warm leads that your videos generate. That's why I am proposing that we purchase the equipment we need to help you create even better quality videos much faster than we can now.

To enable us to achieve this, I would like your approval to purchase top-rated video editing software and a higher-powered computer.

- Buying the software and computer will enable me to produce the three videos that you requested for the annual sales conference on May 3rd.
- The costs for both together are US$2499 (Adobe Premier Elements US$99 and HP Computer US$2400).
- I used both in my previous job and thus can start right away (no learning curve.)

Please confirm that you agree that I can purchase both items through the IT department.

Best regards,
Stephanie

More ways to use this template

- Use this to purchase a good or service.
- Use this to hire a consultant or freelancer.

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Prepared

Get members of your team to come prepared to a meeting

When to use this template

To get members of your team to come prepared with ideas to a meeting so you can get down to business and use everyone's time more effectively.

Why this works

When you tell them how they/their team or the company benefit(s) from coming prepared, it's a good start. Plus, if you praise their past contributions, they are more motivated to bring their creativity!

Your plug & play template

Subject Please come prepared to *(list a specific action that can be accomplished during the time frame of your meeting)*

Dear *(Person's name/People's name or Team name),*

To enable us to *(achieve this outcome)* during *(name of meeting) (on specific date),* please:

- *(Describe an action you want them to do, e.g., read the pre-read.)*
- *(Describe another action you want them to do.)*
- *(Describe another action you want them to do.)*

(Optional: **It's essential that (we achieve this goal) during our meeting because (list an important business reason.** *)*

I look forward to hearing your insights and to working with you to *(achieve this specific goal). (Optional: This will be great for the team because it will….)* We have a lot to get through in the hour and I thank you in advance for ensuring we get the most out of the meeting!

Best regards,
(Your name)

Example email

Subject Please come prepared to discuss how switching suppliers will affect your timelines

Dear Team,

To enable us to reach a decision during our status meeting next Tuesday, April 3rd, please:

- Read the short 1-pager description of our 3 possible options
- Ask your production managers how this might affect them
- Bring a list of your team's top concerns about the switch + your first ideas on how we might solve them.

It's essential that we reach a decision on the alternative supplier to prevent a stock out in Q3.

I look forward to hearing your insights and to working with you to select the option that works best for us. We have a lot to get through in the hour and I thank you in advance for ensuring we get the most out of the meeting!

Best regards,
Stephanie

More ways to use this template

- Use this to ask people to prepare for any kind of meeting (large or small)
- Use this to ask people to prepare for a check in.

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Take credit for your accomplishments

Show your stakeholders that you've been busy accomplishing important things

When to use this template

To show your stakeholders that you've been busy accomplishing important things

Why this works

You're already sending chats and emails and participating in lots of meetings, so your stakeholders know that you're not just sitting around. However, use this when you'd like to highlight your accomplishments for a special reason, like you hit a big milestone, solved a big problem, etc.

This approach enables you to link your accomplishments to the value they have for your stakeholders. Because they see the value in it for them, they're more likely to pay closer attention. Your mail should focus on making what you accomplished relevant for them. Explain exactly how what you've done is useful *for them.*

Your plug & play template

Subject *(Something I have just done)* that *(will help them achieve something important for them)*

Dear *(Person's name)*,

Since you're working on *(something that's related to what you accomplished)* , I wanted to ensure that you know about (three) things that I accomplished recently that will *(deliver some benefit for them)*:

- I've finished *(this thing)*, which will enable you to *(achieve this)*.
- I also *(did this)*, which makes it easier for you to *(do some important thing)*.
- As soon as I have completed x, I'll send it to you so you can *(do some strategic thing)*.

If you're interested in more detail, please reach out.

I am excited to have accomplished these deliverables *(time period, e.g. this quarter)*, since it helps us *(achieve some benefit)*.

Looking forward to building on these milestones.

Best regards,
(Your name)

Example email

Subject New visual KPIs ready for your monthly Board report

Dear Liz,

Since you're working on finalizing your monthly report to the Board, I wanted to ensure that you know about three things that I finished this month, which will enable you to show that team is hitting KPIs ahead of schedule:

- I've finished the customer database, which will enable you to run reports on new leads.
- I also created visual charts for all regions, which makes it easier for you to show the board which regions show growth in different customer types.
- As soon as I have completed the communication announcing the upgrades, I'll send it to you so you can send it out to the regional heads.

If you're interested in more detail or have specific questions, please reach out.

I am excited to have accomplished these deliverables two weeks ahead of schedule since it helps us make the case for additional budget in time for budget planning season.

Looking forward to building on these milestones.

Best,
Stephanie

More ways to use this template

- Use this to highlight how articles that you read/research you've done is relevant for their project.
- Use this to show how your document contains insights to help them do something.
- Use this to say that knowing about your milestones will help them answer questions from their own management.

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Resources

Persuade someone to consider hiring an extra resource (even when budget is tight)

When to use this template

To persuade someone to seriously consider hiring an extra resource (even when budget is tight!)

Why this works

When you shift the focus away from "I need more, expensive staff" to "We can accomplish this critical benefit faster, better, etc. when we hire a skilled person" the stakeholder can rationally weigh the pros v cons instead of emotionally deciding.

Your plug & play template

Subject Proposal to *(state what you goal you will reach by hiring an extra person)*

Dear *(Person's name)*,

You mentioned that you *(want to achieve this goal)*. Hiring *(number of)* extra *(internal or external) resource(s)* will enable us to *(reach that goal more quickly, easier, or accomplish even more)*.

To enable us to *(do this thing better or faster)*, I propose that we hire *(x number of)* additional resource *(s)* for a *(this exact time period.)* That way, we can ensure that *(we accomplish this important strategic goal). (If possible, add how reaching this goal will look good to someone important, e.g., customers).*

- *(Describe exactly what goal will be reach with the additional staff.)*
- *(Describe where you can find appropriately skilled staff (ideally quickly!).*
- The costs for *(this # of staff)* for *(this time period)* are: *(currency) (amount).*
- *(Optional: Describe how much money can be saved somewhere else by hiring them).*

Please confirm that you agree with my proposal so that I can begin the process *(with this department, staffing agency or consultancy).*

Best regards,
(Your name)

Example email

Subject Proposal to make an additional 90,000 US$

Dear Thomas,

You mentioned that you are looking for creative ideas from us staff on how to speed up delivery times for our order tracking app.

To enable us to deliver the new order tracking app already in October instead of late November, I propose that we hire two additional resources for a limited 3-month time period. That way, we can ensure that our top customers have time to test the app before their busy holiday season starts – and we look good for delivering earlier than we originally announced.

- Two external consultants would enable us to speed up the delivery by three weeks.
- Top Talent Consulting, which we already use, has 6 candidates with expertise in the areas we need.
- The costs for two consultants for the three months are: US$72,000.
- Finance estimates that we could generate US$90,000 in the three weeks (if we deliver early).

Please confirm that you agree with my proposal so that I can begin the process with HR.

Best regards,
Stephanie

More ways to use this template

- Use this to ask for an intern.
- Use this to ask to borrow staff from another team/department.

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Responsibillity

Tell someone you can't cover for them

When to use this template

To tell someone you can't cover for them

Why this works

Even if you secretly want to say it, there's nothing for you to gain if you say/write to one of your colleagues, "I'm annoyed that you always ask ME!" Certainly, you do not need to justify saying no, but in a work setting it can be helpful to mention that you're focused on higher-priority things (or your own vacation!)

Your plug & play template

Subject Not able to cover for you

Dear *(Person's name)*,

Thanks for thinking so highly of my work that you'd like me to cover for you. It's a great compliment! Unfortunately, I *(cannot, or need to focus on another important task, or I am away)*.

To ensure that I can *(achieve this important goal) by (this specific date),* I really have to focus on that *(optional: during the time frame you asked)*.

Optional: If you do know someone else this person can contact, you can add that here, but don't do it unless you've talked to them first for their OK! Then you can write: "I've already spoken to (person's name + contact information) and they're available to help you."

Best regards,
(Your name)

Example email

Subject Kevin can cover for you

Dear Tim,

Good morning. Thanks for thinking so highly of my work that you'd like me to cover for you. It's a great compliment! Unfortunately, I cannot cover for you this time.

To ensure that Meghan gets the data she needs for the Board meeting this Friday, I really have to focus this week on getting that done.

I've already spoken to Kevin Smith, ext. 4444 and he's already agreed to cover for you this week while you're on vacation.

Have a great trip!

Best regards,
Kris

More ways to use this template

- Flip this/modify it to ask someone to cover for you, e.g., "To enable us to finish this during my absence, I would like to ask you to cover for me…"
- Decline additional project work
- Decline things that are not in your job description, "To enable me to focus on finishing this high priority task, I must focus on….."

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Keep the conversation going

I hope these templates make it easier to get things done, build good working relationships and make the value of your ideas visible.

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