Email Planning Checklist and Template

BEFORE I WRITE	✔
What is the purpose of this email? *Is it for information, for approval, for action?*	
Who do I need to send this to? *Beware of 'spamming' people who don't actually need this email!*	
Is there another way of sharing this? *Consider whether phone call/Skype, face to face meeting, or networking/collaboration software would be better than email.*	
Do I understand my audience's needs and what's important to them?	
Do I have all the information I need, and am I clear how much of this information is relevant to my audience? *Your audience might not want or need the same level of detail as you!*	
What are the main points I'm trying to get across? *Tip: Sometimes it's easier to write if you prepare the conclusion/actions first.*	
ONCE WRITTEN	
Does my email have a clear subject line? *This will help people prioritise opening it, and help with filing after reading.*	
Is there a clear structure? *Greeting, Introduction, Body, Conclusion/Action and Sign-off*	
Is it concise, with actions clearly flagged? *If your email is too long, you reduce the likelihood that people will read and absorb it all.*	
Does it include any extra information that my audience will require? *If you are using attachments, make sure you actually attach them!*	
Is there any unnecessary or repeated information that should be cut out? Any detailed information in the main body that would be better incorporated via a hyperlink or attachment? *Bear in mind the increasing number of users on mobile devices – multiple/lengthy attachments might cause them problems.*	
Have I used jargon?	
Do I really need to send it to all of these people? *Particularly relevant for CC – why do they need a copy?*	
Has it been proof read?	

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When using the template, always have in mind:

- Audience
- Aim
- Additional information (attachments, etc)
- Anything else?

Subject line
- Is your subject line concise and precise? Does it give the person a clear idea of what to expect and why they should open this email?
- Would it be helpful to include *'for information'* or *'for consideration'* or *'action needed'*?

Greeting
- What are the norms for this audience? How formal should you be?

Introduction
- Set the scene – why are you emailing?

Main body
- Give the information needed, but keep it as concise as possible – lengthy emails are less likely to be thoroughly read and absorbed.

Conclusion
- Summarise, and make sure that any actions and deadlines are clear.

Signoff