

EMAIL AND TEXT AWARENESS V2



Graham Taylor-Edwards

GTE TRAINING AND DEVELOPMENT

+64 21 246 8885 +61 404 190057

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MODULE INTRODUCTION

EMAIL AND TEXT AWARENESS (DESIGN AND DELIVERY)

Learn better faster

The concepts and ideas within each module are provided as suggestions and should be adapted to fit your unique environment, personality, and style, while still preserving the core value of the information presented.

Your workbook includes ample white space for you to jot down personal notes, thoughts, or ideas you may want to put into practice.

The workbook is designed to be completed in combination with the video.

Have fun and enjoy yourself.

To make sure you get the most out of this course, please ensure you're fully prepared to begin. Here's a quick checklist to help you get ready:

1. **Tools and Materials:** Have pens, and any required textbooks or resources organised and easily accessible.
2. **Time Management:** Schedule dedicated time for each module in advance. Block out these periods in your calendar to avoid interruptions.
3. **Distraction-Free Environment:** Choose a quiet space where you can focus solely on the course material, minimizing distractions from phone calls, emails, or other activities.
4. **Progress Tracking:** Consider keeping a checklist or journal to track your completion of each module or refer to your portal which will help keep you motivated and organised.
5. **Complete the quiz**

Remember, this learning platform offers resources that you can access anytime.

Don't hesitate to reach out to Graham anytime if you want to explore this topic further, clarify any questions, or share your thoughts. He's here to assist you!

graham@gtetraining.com +64 21 246 8885 +61 404 190 057

MODULE STRUCTURE

KEY CONCEPTS

In today's digital landscape, effective email and text communication is essential for success, and this module will equip you with the tools to create impactful emails and texts that engage your audience.

We will cover common mistakes in email design and setup, along with best practices to enhance your email and text effectiveness.

EXPECTATIONS

1. **Begin with basics:** Learn about key elements of good email design, including structure, personalisation, language and common mistakes.
2. **Identify Common Mistakes:** We'll review frequent pitfalls in email design, such as poor layout, unclear subject lines, and ineffective calls to action.
3. **Effective and clear language:** Understand the importance of phrases, embedded commands and meta modelling.
4. **Hands-On Activities:** Engage in interactive exercises to practice designing emails and texts.

WHAT YOU WILL ACHIEVE

By the end of this module, you will:

- ✓ Implement best practices to create visually appealing and effective emails.
- ✓ Set up emails for optimal engagement through segmentation and personalisation.
- ✓ Recognise and avoid common email and text design mistakes.
- ✓ Leave with practical tips and templates that you can apply immediately.

TIME TO COMPLETE

This module should take you approximately:

Workbook, Video and complete the Quiz

45 minutes approximately

We look forward to an interactive and productive session together!

Let's get started!

START WITH THE BASICS

ACTION	WHAT
CLEAR SUBJECT LINE.	The subject line should summarise the content of the email. It helps the recipient understand the purpose of the email quickly. When replying to an email thread, update the subject line to reflect the current topic of conversation, especially if it has shifted from the original subject.
PROFESSIONAL GREETING.	Begin your email with a polite greeting, such as "Hello <i>John</i> ," or "Dear <i>Mary</i> . Use the recipient's name if you know it. <i>Less formal Hi John</i> .
BE CLEAR AND SPECIFIC.	Clearly state the purpose of your email in the opening lines. Avoid long introductions or unnecessary details.
USE PROPER GRAMMAR AND SPELLING.	Ensure your email is grammatically correct and free of spelling errors. Use complete sentences and appropriate punctuation.
KEEP IT BRIEF.	Respect the recipient's time by keeping your email concise and to the point. If the email requires a lengthy explanation, consider attaching a document instead.
BE RESPECTFUL AND POLITE.	Use polite language and tone in your emails, even if you are addressing a disagreement or issue. Avoid using all caps, which can be interpreted as shouting.
USE PROFESSIONAL SIGNOFFS.	End your email with a professional closing, such as "Sincerely," "Best regards," or "Thank you," followed by your name. <i>You can soften with a simple Cheers</i> .
REPLY PROMPTLY.	Respond to emails in a timely manner, ideally within 24-48 hours, unless circumstances require a longer response time. If you need more time to provide a thorough reply, acknowledge the email and let the sender know when they can expect a response.
USE CC AND BCC APPROPRIATELY.	Appropriately: Only copy individuals who need to be involved in the conversation. Use "Cc" for recipients who are directly involved and "Bcc" for those who need to be informed but do not need to participate in the conversation.
REVIEW BEFORE SENDING.	Before hitting send, double-check your email for any errors and ensure that you have included all necessary attachments or information.
BE MINDFUL OF TONE.	Tone can be easily misunderstood in written communication. Avoid sarcasm or humour that may be misinterpreted. Use emojis sparingly to clarify your tone.
RESPECT PRIVACY AND CONFIDENTIALITY:	Avoid sharing sensitive or confidential information via email unless it is secure. Be cautious when forwarding or replying to emails with sensitive content.
FOLLOW COMPANY POLICIES:	Familiarise yourself with your organisation's email policies and guidelines, including rules regarding personal use, confidentiality, and security.
USE A PS	Draws attention to the call to action

EXAMPLE EMAIL STRUCTURE



Subject: Update on the Delivery of Your New Vehicle

Dear Bill and Sarah,

"I understand this may be difficult to hear, but I need to inform you about a delay in the delivery of your new vehicle, initially scheduled for (original delivery date). Due to (reason for delay, such as supply chain issues), we anticipate the delivery will now occur on (new estimated delivery date).

We understand that this delay may cause inconvenience, and we sincerely apologise. Please rest assured that our team is making every effort to expedite the process and ensure your new vehicle arrives as soon as possible.

If you have any questions or require further assistance, please call me personally at ...

Thank you for your understanding and patience.

Warm regards,

Maximillian Torquehammer

PS I will give you a call at 4pm this afternoon to answer any questions you may have if that is convenient.

Prime Drive Motors

Phone: +61 2 5550 7890 (Australia) / +64 9 555 7890 (New Zealand)

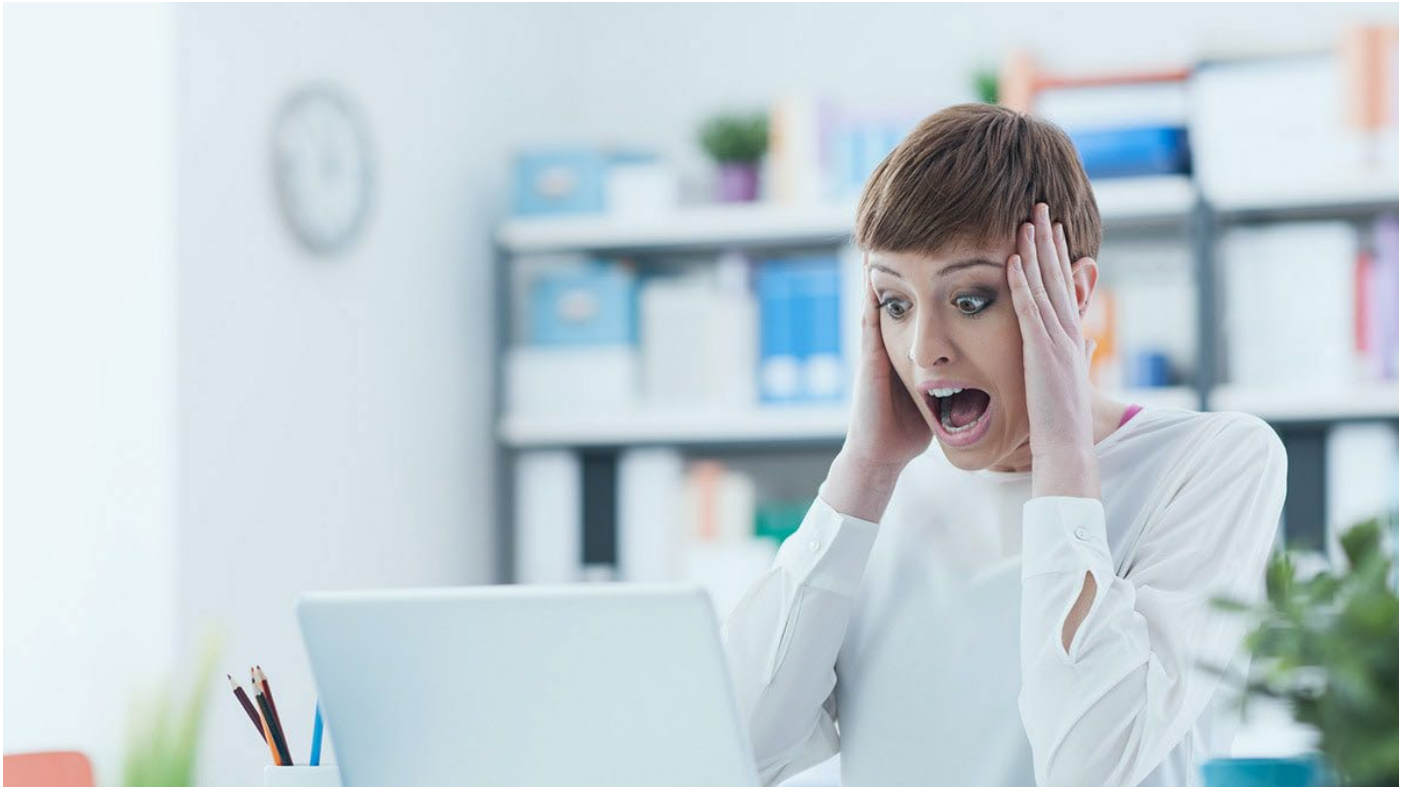
Email: maximillian.torquehammer@primedrive.com.au

Address: 123 Motorway Ave, Sydney, NSW 2000, Australia

456 Kiwi Rd, Auckland, 1010, New Zealand **CC** relevant parties.

NB It is preferable that email bad news should be a follow up after a face to face or phone call

COMMON MISTAKES IN SENDING EMAILS AND TEXTS.



ACTION	EXPLANATION
POOR SUBJECT LINES:	Vague or overly long subject lines can confuse recipients. Aim for clarity and brevity.
LACK OF PERSONALISATION:	Failing to address the recipient by name or neglecting to customise the message can make it feel impersonal.
OVERLY LENGTHY MESSAGES:	Long paragraphs and excessive details can overwhelm readers. Keep messages concise and to the point.
IGNORING TONE AND CONTEXT:	Misunderstanding tone can lead to miscommunication. Be mindful of how your words may be interpreted.
NEGLECTING PROOFREADING:	Typos, grammatical errors, and formatting issues can undermine professionalism. Always proofread before sending. Measure twice cut once.
INAPPROPRIATE USE OF EMOJIS OR ABBREVIATIONS:	Overusing emojis or using slang can be seen as unprofessional, especially in formal communications.
NOT USING CC/BCC CORRECTLY:	Misusing CC and BCC can lead to privacy issues or cluttering inboxes unnecessarily.
FAILING TO INCLUDE A CLEAR CALL TO ACTION:	Not specifying what you need from the recipient can lead to confusion and inaction.
NOT RESPECT WORK-LIFE BALANCE	Respecting personal time is important; avoid emailing after hours unless it is urgent.

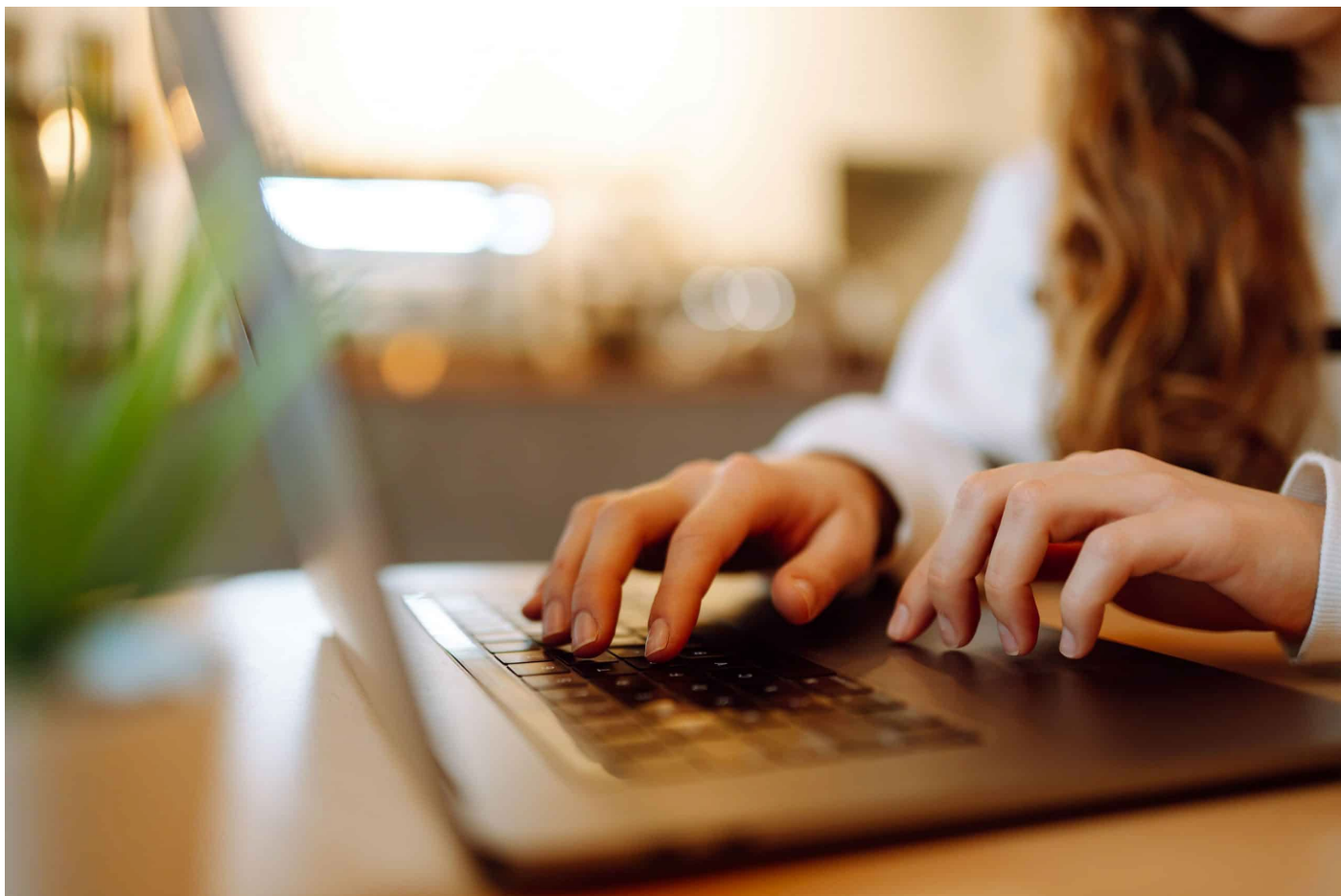
COMMON MISTAKES IN RECEIVING EMAILS AND TEXTS



ACTION	EXPLANATION
NOT CHECKING THE SENDER'S IDENTITY:	Failing to verify who the message is from can lead to falling for phishing scams.
IGNORING CONTEXT:	Not considering previous conversations can lead to misunderstandings. Always review prior messages for context.
OVERLOOKING ATTACHMENTS OR LINKS:	Missing important attachments or links can lead to miscommunication or delays.
RESPONDING TOO QUICKLY:	Rushing to respond without fully understanding the message can result in errors. Take time to read thoroughly.
USING INAPPROPRIATE RESPONSE METHODS:	Choosing to respond via text for a matter that is better suited for email (or vice versa) can be unprofessional.
FAILING TO MANAGE NOTIFICATIONS:	Letting notifications overwhelm you can lead to distraction. Set boundaries for when to check messages.
NOT FOLLOWING UP:	Failing to respond or follow up can signal disinterest or neglect. A simple acknowledgment goes a long way.
NOT CHECKING THE SENDER'S IDENTITY:	Failing to verify who the message is from can lead to falling for phishing scams.

By being aware of these common mistakes, you can improve your communication effectiveness and foster better relationships through email and text.

WRITING EMAILS



START YOUR EMAIL

FRIENDLY GREETING:

"Hi (Name), I hope you're having a fantastic day."

REFERENCING PREVIOUS INTERACTION:

"Hello (Name), it was great speaking with you last week. I wanted to follow up on our conversation."

EXPRESSING GRATITUDE:

"Dear (Name), thank you for your prompt response. I appreciate your help!"

INTRODUCING A TOPIC:

"Hi (Name), I wanted to reach out regarding (specific topic or issue)."

CASUAL CHECK-IN:

"Hey (Name), how's everything going? I've been thinking about our last discussion."

GIVING BAD NEWS: Empathy First. "I understand this may be difficult to hear, but I need to inform you about (specific issue)." "I wanted to reach out to discuss (specific topic). Unfortunately, I have some disappointing news to share." Offer solutions if possible.

APPEARANCE

2 -3 lines with a break

EXAMPLE OF A SALES EMAIL

Hi Bill and Sarah,

I wanted to touch base with you regarding your recent inquiry about the at **Prime Drive Motors**

We appreciate your interest and want to provide you with some additional information to assist you in your decision-making process.

Firstly, I wanted to reiterate that the **Aventra X5** you expressed interest in is still available and ready for a test drive when you're ready.

Please call me personally and I will arrange it for you. Personal mobile 0404 190 555

Furthermore, I wanted to highlight some of the standout features of the **Aventra X5** that make it a top choice among our customers.

1. Advanced safety technology
2. Impressive fuel efficiency
3. Stylish design,
4. A superior driving experience that is sure to exceed your expectations.

To make things even better, we're currently offering special financing options and exclusive discounts for our existing customers.

Whether you have questions about the vehicle, financing options, or anything else related to your car-buying journey, please just pick up the phone and call me directly.

Warm / Best regards,

Maximillian Torquehammer

PS I will give you a call at 4pm this afternoon to answer any questions you may have if that is convenient.

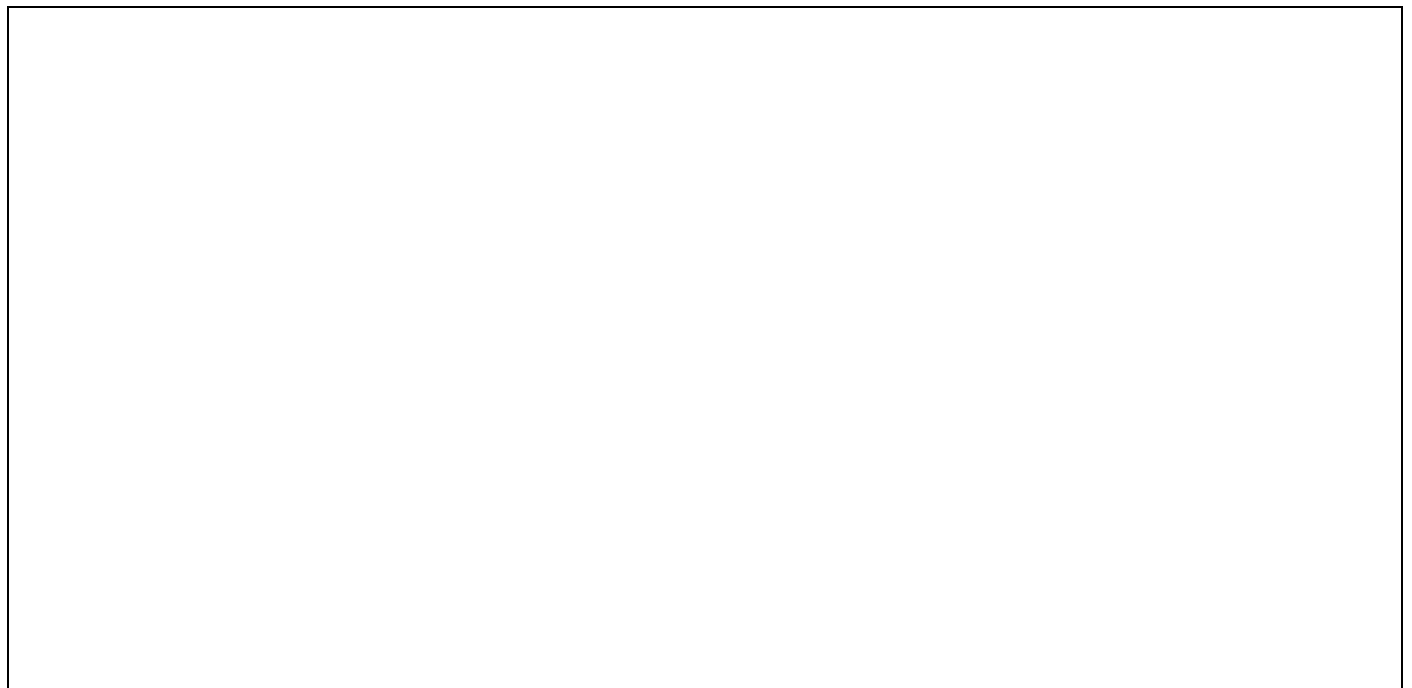
Prime Drive Motors

Phone: +61 2 5550 7890 (Australia) / +64 9 555 7890 (New Zealand)

Email: maximillian.torquehammer@primedrive.com.au

Address: 123 Motorway Ave, Sydney, NSW 2000, Australia

456 Kiwi Rd, Auckland, 1010, New Zealand





REVIEW THE EMAIL AND PUT YOUR TOUCH ON IT. KEEP IT INFORMATIVE AND MAYBE SHORTER AND A CALL TO ACTION AT THE END

Ok now have a go at a revised email



Originating from Neuro-Linguistic Programming (NLP), involves using specific questioning techniques to clarify, challenge, and expand someone's understanding or beliefs. By asking precise questions, meta-modelling helps uncover hidden assumptions, details, and meanings in communication.

META MODEL VIOLATIONS	META MODEL RESPONSE	EXPLANATION
GENERALISATIONS Statement: "Everyone in the office is unhappy with the new policy." Statement: "This solution is better."	"EVERYONE!" "Who specifically is unhappy with the new policy?" "Better than what?"	This question challenges the generalisation "everyone" by prompting the speaker to identify specific individuals, which often reveals that the situation might not be as widespread as initially stated.
DELETIONS Statement: "I'm upset about the meeting."	"What specifically about the meeting upsets you?"	This question seeks to uncover the specific details or aspects of the meeting that are causing the upset, which were omitted in the original statement.
DISTORTIONS Statement: "He made me feel incompetent during the presentation."	"How exactly did he make you feel incompetent?"	This question challenges the notion that someone can "make" another person feel a certain way, encouraging the speaker to explain the actions or words that led to their feeling of incompetence.

CAUSE AND EFFECT Statement: "If I don't work late, my project will fail."	"How does working late directly ensure the success of your project?"	This question examines the assumed cause-and-effect relationship, encouraging the speaker to think critically about whether working late is the only factor in the project's success.
MIND READING Statement: "She thinks I'm not capable of managing the task."	"How do you know she thinks you're not capable?"	This question challenges the assumption that the speaker knows what someone else is thinking, prompting them to provide evidence or reconsider their interpretation.
NOMINALISATIONS Statement: "There is a lack of communication in the team."	"What does a lack of communication look like in the team?"	This question transforms the abstract noun "lack of communication" into something more concrete, seeking examples or specific instances.
LACK OF REFERENTIAL INDEX Statement: "It needs to be fixed." Statement: "They said we need to improve our performance." Statement: "This is not working." Statement: "We need to go there soon." Statement: "We should have done it earlier." Statement: "It was a disaster."	"What exactly needs to be fixed?" "Who specifically said we need to improve our performance?" "What specifically is not working?" "Where specifically do we need to go soon?" "When specifically, should we have done it?" "What specifically was a disaster?"	This question seeks to identify the specific subject referred to by "it," they, this, we, clarifying what exactly the deep structure is.

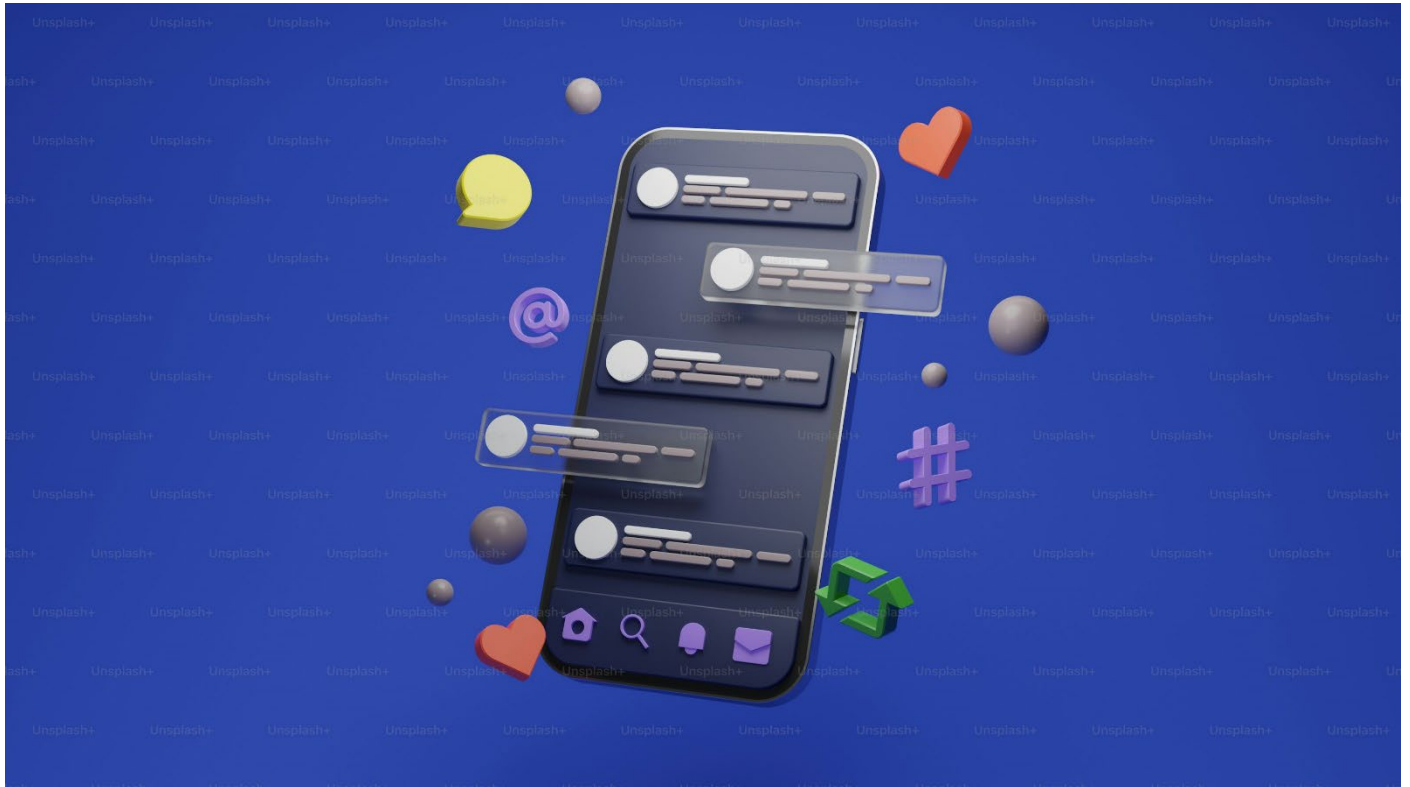
TIPS TO AVOID SENDING THE WRONG MESSAGE



Communicating effectively via email requires careful attention to detail to avoid misunderstandings and sending the wrong message.

ACTION	
DOUBLE-CHECK RECIPIENTS	Ensure you send the emails to the correct person or group.
SENSITIVE INFORMATION	Avoid including confidential or sensitive information unless necessary
REVIEW ATTACHMENTS	Verify that the correct files are attached. Ensure attachments are properly named and formatted.
AVOID AMBIGUITY	Be explicit about your requests and expectations. Use clear and unambiguous language. META MODEL your email to minimise misunderstanding.
TONE AND CONTEXT	Be mindful of how your words might be interpreted. Avoid sarcasm and jokes that might be misunderstood.
EMAIL BEST PRACTICES	
RESPOND PROMPTLY	Acknowledge receipt of important emails if you need more time to provide a full response. This helps to maintain clear communication lines.
USE TEMPLATES FOR COMMON EMAILS	For frequently sent emails, create templates to ensure consistency and reduce errors.
CULTURAL SENSITIVITY	Be aware of cultural differences in communication styles. Adapt your tone and language accordingly.
REQUEST FEEDBACK	If your email is complex or critical, ask a colleague to review it before sending it. This can catch potential misunderstandings or errors.
FOLLOW-UP	If you do not receive a response in a reasonable timeframe, follow up politely. This helps ensure your message was received and understood.

TEXTING



Here are some texting do's and don'ts tailored for the workplace environment where a relaxed yet professional tone is often appreciated:

DOS	
BE PROFESSIONAL YET FRIENDLY	<ul style="list-style-type: none">✓ Use a friendly, conversational tone, but keep it respectful. A little casual language is often fine but avoid being overly informal.✓ Start with a polite greeting, like "Hi Bill," or "Good morning, Sarah."
KEEP MESSAGES BRIEF	<ul style="list-style-type: none">✓ Get to the point quickly and avoid long messages, as people may be reading them on the go.✓ Bullet points or numbered lists can be useful for clarity, especially for messages with multiple points.
RESPOND PROMPTLY	<ul style="list-style-type: none">✓ Timely responses are important to maintain good relationships. Try to reply within a few hours during business hours or the next business day.
Use Clear Language	<ul style="list-style-type: none">✓ Avoid jargon and make sure the recipient understands what you are saying without too much interpretation.✓ Use proper punctuation to avoid misunderstandings.
Use Emoji Sparingly and Appropriately	<ul style="list-style-type: none">✓ Emoji can add warmth but use them sparingly to maintain professionalism. A smiley or thumbs up 👍 can work well to add a friendly tone.
Respect Work-Life Balance	<ul style="list-style-type: none">✓ Send texts during working hours. Respecting personal time is important; avoid texting after hours unless it is urgent.
Add a Polite Closing	<ul style="list-style-type: none">✓ Close with a short, friendly phrase like "Thanks for your time" or "Looking forward to hearing from you.."

DON'TS	
DON'T USE TEXTING FOR SENSITIVE CONVERSATIONS	✖ Avoid using text for disciplinary issues, constructive feedback, or anything that could be misinterpreted. These are better handled in person or over email.
AVOID ABBREVIATIONS AND SLANG	✖ Steer clear of text slang or abbreviations that might be misunderstood, like "u" for "you" or "omw" for "on my way."
DON'T BE TOO PUSHY OR PERSISTENT	✖ If you don't receive a reply, avoid sending multiple follow-ups. Give the person time to respond or consider trying another way to contact them if it's important.
AVOID USING ALL CAPS	✖ All caps can come across as aggressive or like you're shouting, even if the intent is to add emphasis.
DON'T OVERUSE EXCLAMATION MARKS	✖ While exclamation marks can add friendliness, too many can appear unprofessional. A single exclamation point for enthusiasm is usually enough.
AVOID SENDING TEXTS WITH TOO MUCH DETAIL	✖ If you need to communicate a lot of information, send a quick text saying you'll follow up with an email.
DON'T DISCUSS SENSITIVE INFORMATION OR PERSONAL DETAILS	✖ Texting isn't secure for confidential information; avoid discussing sensitive client details or other private matters.

Following these do's and don'ts can help maintain professionalism while adopting the more conversational style that's often appreciated in in our business culture.



REFLECTION

Now that you've watched the video and completed the workbook, it's time to reflect on what you've learned from this module.

Reflecting on and reviewing information helps solidify what you've covered, supporting a deeper and more lasting understanding.

To get the most from your learning, take your time as you complete the review section.

Engage fully with each question—whether you're writing, discussing, or creating a visual summary. This process will reinforce your understanding and make it easier to apply these concepts in the future.

Please complete these questions.

What did you learn from this module?

What behaviour will you change based on learning?

How can you apply this knowledge in your role?

THE QUIZ

The quiz is here for you to review before completing your course online, or to complete if you're not taking the course online. Tick your answer

Which of the following is the most appropriate greeting to use in a professional email?

- Hey there! ☐
- Yo! ☐
- Dear Bill, ☐
- Sup Sarah? ☐
- Greetings, my friend ☐

Which of the following should you avoid when texting in a business context?

- Being concise ☐
- Using full sentences ☐
- Using emojis ☐
- Sending a message within a reasonable time frame ☐
- Keeping it polite and professional ☐

You should avoid emailing after hours unless it is urgent.

- True ☐
- False ☐

Which of the following is the best way to ensure clarity in an email or text?

- Use long paragraphs without breaks ☐
- Avoid proofreading your message ☐
- Keep the message short and to the point ☐
- Use casual slang throughout the message ☐
- Leave out important details to keep it brief ☐

NOTES AND QUESTIONS

Use this section for any additional thoughts or information or if you have any questions that you would like to discuss.

ABOUT US

Graham (GTE) leads over 100 workshops annually, focusing on leadership, sales, fixed operations, and customer experience. He's the founder of Success Resources International, a Registered Training Organisation based in Brisbane, and the Managing Director of GTE Training and Development in New Zealand.

Originally from North Wales, Graham has spent 17 years in Australia (2001 – 2019) after more than two decades in New Zealand. His background includes service in both the Royal Navy and the Royal New Zealand Navy.

He's married to Shelley, a Kiwi from the Bay of Islands, and together they have two children Mackenzie and Gareth, along with four grandchildren: Hudson, Avyana, Reo and Vivienne.

Graham (GT) is a highly regarded coach and workshop facilitator specialising in leadership, sales, service and customer experience. He brings a wealth of expertise with the following qualifications:

- Advanced Diploma of Leadership and Management
- Diploma in Automotive Management
- Diploma of Training and Education and Design
- Certificate IV in Finance and Mortgage Broking
- Certificate IV in Business Sales
- New Zealand Certificate in Marketing
- NLP Practitioner



GRAHAM TAYLOR-EDWARDS

Graham's diverse skill set quips him to empower individuals and organisations to achieve their goals