



EMAIL POWERHOUSE FAST TRACK SWIPE FILE

This reference guide has examples of 4 different types of email you may use as a Project Manager:

1. Steering Committee Meeting Slides & Notes
2. Small Group Meeting Summary & Decision & Action Items
3. Global Project Update
4. Email to 1 person with an Ask/Request

For each of these 4 email types, this document gives options for each section and then a sample email. Any notes are *italicized and in blue*. And no, the links don't work :)

Please feel free to use any of the wording or techniques in this document. Everything here is stylistically accurate but has nothing to do with a real project.

(Note that we use a completely fictitious project (X-Magnet) from the also fictitious Big Magnet Corporation. All the names and email addresses that you see in this document are completely made up – anyone who happens to have the same name as the people in these examples is entirely coincidental!)

Steering Committee Meeting Minutes

To/CC/BCC

To: *(SteerCo Members who attended the meeting, plus those who attended the whole meeting, i.e. executives or a manager who was sitting in for another Steering Committee member)*

CC: *(SteerCo Members who were invited but did not attend. i.e. the SteerCo member who had someone attend in their place)*

BCC: *(Nope, don't use it!)*

Subject Line:

X-Magnet: Steering Committee Meeting Notes & Slides

Or

X-Magnet: SteerCo Meeting Notes & Slides

Greeting:

Dear Steering Committee Members,

Or

Dear X-Magnet Steering Committee Members,

Opening Sentence:

Thank you for attending today's X-Magnet Meeting. We covered a lot of ground! *(soft opening)*

Or

Thank you for attending today's meeting. Here are the slides and notes. *(subject opening. If I'm linking here, the Opening Sentence is the main part of the Body and I'd go on to the Summary Section.)*

Body:

Here are the notes and slides from today's meeting. *(link to each)*

Or

Here are the slides from today's meeting.

The topics discussed are: *(if minutes are not linked to a separate document)*

- Financials: Additional resources will be needed to backfill in customer support but remains in budget. Quarterly updates are due to Finance. **Veronica** will work with Finance and send the updated budget to this group when it is available (likely May 8th)
- Hardware: **Marc** is gathering information on the server upgrade. He'll have options available and will present at the next meeting for this team to make a decision on a path forward
- Testing: Ayun has been assigned as Test Lead. Testing will take place from October 20th-Nov 18th. Resources have been assigned. If you have an issue in your area during this time, please speak with Ayun *(Ayun's name isn't in bold for 2 reasons: he isn't one of the email's recipients and he doesn't have an Action Item)*
- Next Meeting Date: Tuesday, May 20th

Summary:

(none, if it's short. Definitely, if minutes were only a link.)

Or

Action Items:

- **Veronica** will work with Finance and send the updated budget to this group when it is available (by May 10th)
- **Mark** will gather server upgrade options and present at next meeting (May 20th)

Contact Sentence:

If you have any questions, please don't hesitate to reach out!

Or

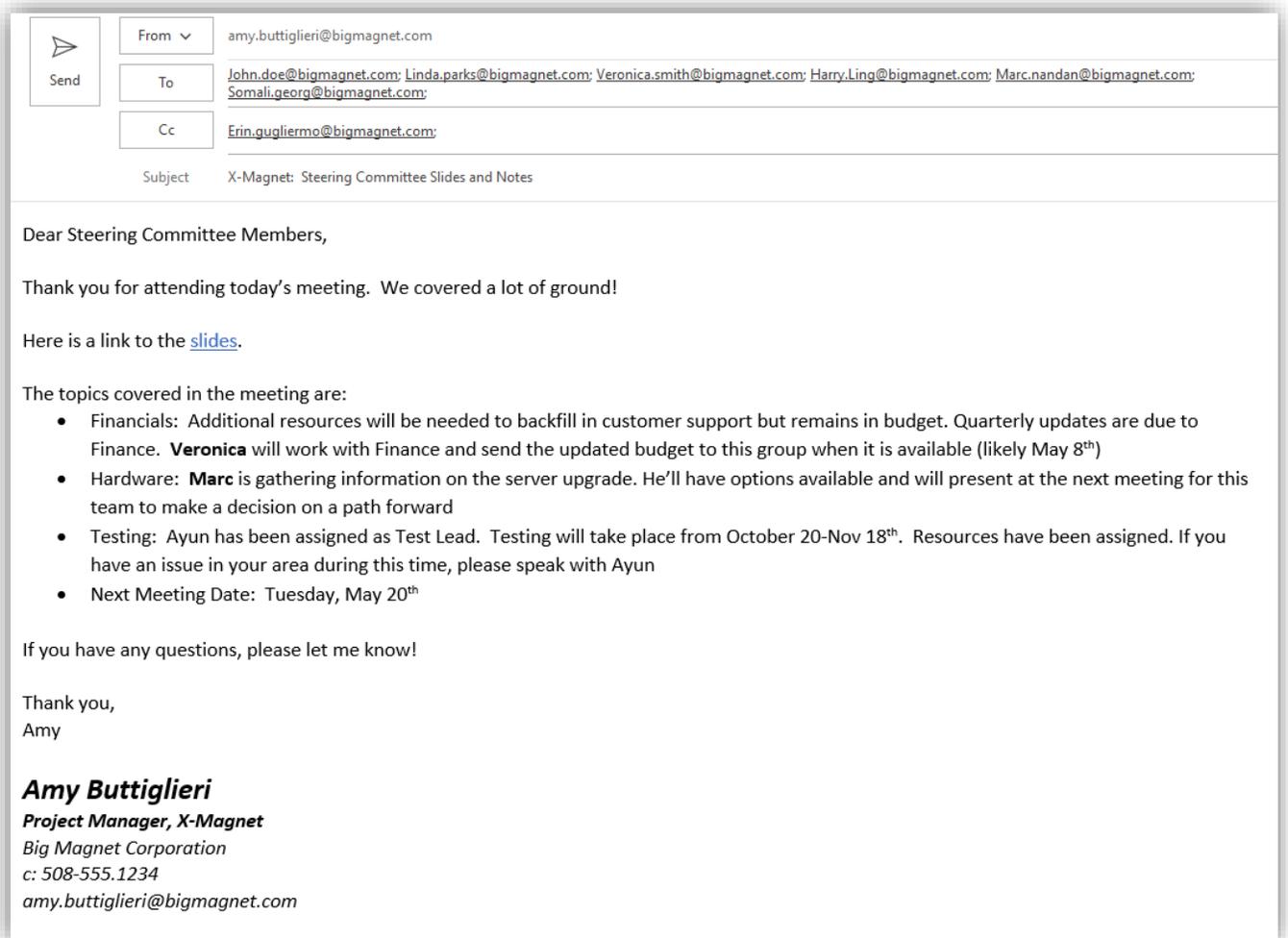
Please let me know if you have any questions.

Signature:

Thank you,
Amy

Signature Block:

Amy Buttiglieri
Project Manager, X-Magnet
Big Magnet Corporation
 C: 508.555.1234
 Amy.buttiglieri@bigmagnet.com



Small Group Meeting Summary with Actions

To/CC/BCC

To: *(Everyone at the meeting)*

CC: *(Anyone not at the meeting but who needs to know the info or who has a down-stream activity)*

BCC: *(Nope, don't use it!)*

Subject Line:

X-Magnet: Buffer Location Issue Meeting – Summary, Decision & Actions

Greeting:

Hi, Everyone

Or

Hi, Paul, Clara & Glenda

Opening Sentence:

Thank you for getting together this afternoon to work through the Buffer Location Issue. I appreciate that you carved out time so quickly! Getting over this hurdle helps us move forward with the next phase on time. *(soft opening)*

Or

Here is a summary of today's Buffer Location Issue meeting. *(subject opening)*

Body:

- Issue: Paulo found a discrepancy in the buffer location between the specs and the sample X-Magnet from the vendor. 2 cm shift to the left
- The vendor's equipment would need both a physical change and a re-qualification in order to move the buffer to our spec (est. 3 weeks)
- Option 1: vendor makes all changes on their end
 - Biggest concern is the timeline – 3 weeks eats up buffer for testing
 - No financial impact – this should have been done according to our specs
 - Thank you to Paulo for being diligent on this!
- Option 2: accept vendor's placement & update our specs
 - Glenda's team tested the X-Magnet with the altered buffer location. Impact is neutral
 - Per Clara, documentation changes would take 2 days – though approvals may take an additional 5. (Should not affect timeline as the team can continue to move forward with testing)
- **Decision: Option 2**
 - **Paulo:** call vendor and let them know the decision (21 May)
 - **Clara:** update documentation and send for approval (25 May)
 - **Amy:** update Risk Matrix & add to agenda for next SteerCo Meeting (22 May)

Summary:

(None, as it's specific to the team, and the action items are clear, with name & due date)

Contact Sentence:

If you run into any issues, please let me know ASAP!

Signature:

Thanks again for your help resolving this so quickly!
Amy

Signature Block:

Amy Buttiglieri
Project Manager, X-Magnet
Big Magnet Corporation
C: 508.555.1234
Amy.buttiglieri@bigmagnet.com

The screenshot shows an email client interface. At the top, there is a 'Send' button with a right-pointing arrow. Below it, the 'From' field contains 'amy.buttiglieri@bigmagnet.com'. The 'To' field contains 'Paulo.soares@bigmagnet.com; Clara.zanelli@bigmagnet.com; Glenda.molinario@bigmagnet.com'. The 'Cc' field contains 'ayun.patel@bigmagnet.com'. The 'Subject' field contains 'X-Magnet: Buffer Location Issue Meeting – Summary, Decision, & Actions'.

Hi, Paul, Clara & Glenda

Thank you for getting together this afternoon to work through the Buffer Location Issue. I appreciate that you carved out time so quickly! Getting over this hurdle helps us move forward with the next phase on time.

- **Issue:** Paulo found a discrepancy in the buffer location between the specs and the sample X-Magnet from the vendor. 2 cm shift to the left
- The vendor's equipment would need both a physical change and a re-qualification in order to move the buffer to our spec (est. 3 weeks)
- **Option 1:** vendor makes all changes on their end
 - Biggest concern is the timeline – 3 weeks eats up buffer for testing
 - No financial impact – this should have been done according to our specs
 - Thank you to Paulo for being diligent on this!
- **Option 2:** accept vendor's placement & update our specs
 - Glenda's team tested the XMagnet with the altered buffer location. Impact is neutral
 - Per Clara, documentation changes would take 2 days – though approvals may take an additional 5. (Should not affect timeline as the team can continue to move forward with testing)
- **Decision: Option 2**
 - **Paulo:** call vendor and let them know the decision (21st May)
 - **Clara:** update documentation and send for approval (25th May)
 - **Amy:** update Risk Matrix & add to agenda for next SteerCo Meeting (22nd May)

If you run into any issues, please let me know ASAP.

Thanks again for your help resolving this so quickly!
Amy

Amy Buttiglieri
Project Manager, X-Magnet
Big Magnet Corporation
c: 508-555.1234
amy.buttiglieri@bigmagnet.com

Global Project Update

To/CC/BCC

To: *(All stakeholders or whomever you and your Sponsor decide needs to be included)*

CC: *(Others who are so involved with the project they don't need an update. If the To field contains everyone, then just your Sponsor is cc'd. If certain stakeholders receive this, perhaps your Sponsor and Core Team is cc'd. This is a decision between you and your Sponsor, typically)*

BCC: *(Only use this if 100% of the recipients are on a distribution list because no one should have access to the email addresses. i.e. outside vendor partners are included in the distribution)*

Subject Line:

X-Magnet: Project Update - May

Greeting:

Hello, Everyone

Or

Greetings from the X-Magnet Project

Opening Sentence:

The X-Magnet Team has been hard at work this month as we approach our development milestone. Here is what we've been up to. *(soft opening)*

Or

Here is the Monthly X-Magnet Project Summary *(subject opening)*

Body:

Timeline

- The project is on track to hit the Development Gate on schedule in June
- Global Release schedule still in draft – stay tuned!

Scope

- Scope Freeze was achieved on May 15th. This means any new requests must go through the Change Request process and assessed by the Change Control Board for impact to time, resource, and budget

Financials

- The project is on track with the budget. Risks for additional spend are minimal

Marketing

- The Marketing Department has been engaged and is working on the marketing/advertising campaign based on the team's release schedule. The draft campaign will be ready for initial review in July
- Updates to the website, including product page on the BigMagnetPurchase site will begin in September

Technical

- Samples have been received from the vendor. Technical team has been testing. Pass ratio is 90% - team working with vendor

Testing

- Testing has been scheduled from October 20th-Nov 18th

Summary:

(None, because it's all summary and there should be no reminders or action items for a global update.)

Contact Sentence:

If you have any questions, please feel free to reach out to me directly.

Or

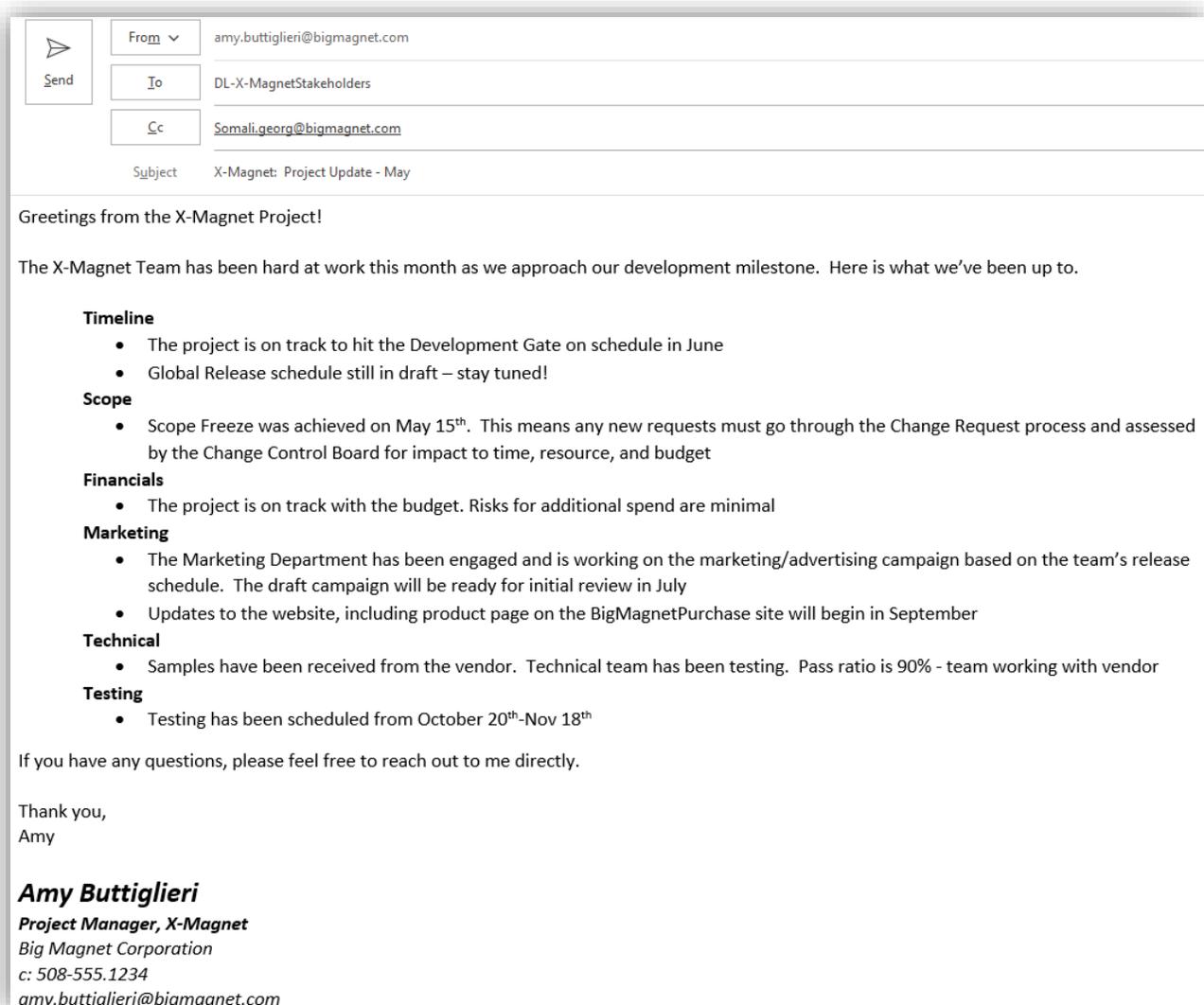
Please let me know if you have any questions.

Signature:

Thank you,
Amy

Signature Block:

Amy Buttiglieri
Project Manager, X-Magnet
Big Magnet Corporation
C: 508.555.1234
Amy.buttiglieri@bigmagnet.com



Email to 1 Person with an Ask/Request

To/CC/BCC

To: *(The 1 person you're talking to)*

CC: *(Generally, no one else is necessary. It's possible to CC someone else who needs the result of the ask)*

BCC: *(Nope, don't use it!)*

Subject Line:

X-Magnet: Ayun – list of users for testing

Greeting:

Hi, Ayun

Opening Sentence:

Happy Monday! I am reading the draft Testing Plan and I have a question...and a request. :) *(soft opening)*

Or

I have a question about the Testing Plan. *(subject opening)*

Body:

For the user testing schedule, I'm wondering how this fits in with the symposium in October. Are there any conflicts? Or did you take this into consideration when scheduling the testing timeline?

Also, I'm wondering if you spoke to Alice about the Success Criteria. I know she has some thoughts about it. If the two of you could get together and come up with the tier definitions and percentages, that would be great. I'd like you to be able to present it at the Core Team Meeting on June 17th. That way we can start planning with Paulo and the rest of the tech team.

Summary:

(None, as it's to one person)

Contact Sentence:

Let me know if you need any help getting the Success Criteria ready for the 17th.

Signature:

Thanks, Ayun!

Amy

Signature Block:

Amy Buttiglieri
Project Manager, X-Magnet
Big Magnet Corporation
C: 508.555.1234
Amy.buttiglieri@bigmagnet.com

