

# **E-Mail: A Write It Well Guide**

## **Training Guidelines**

### **INTRODUCTION**

*E-Mail: A Write It Well Guide* is more than an ordinary book. It is designed to provide practical information, strategies, and techniques in a user-friendly format that you can use in workshops, for small-group study, and in individual coaching programs to help people improve their writing.

These training guidelines provide suggestions for using *E-Mail: A Write It Well Guide* to conduct learning programs for the people in your organization. We've included ideas to help you plan, deliver, and follow up a program to meet the needs of different audiences in different situations.

### **Before You Begin**

You don't have to be an expert in teaching writing to use this book to conduct a successful learning program. Even if you are an experienced writing skills teacher, however, we suggest that you begin by going through the book as if you were a student. Answer the questions and do the application exercises yourself so you will know first-hand you are asking the students to do.

### **Characteristics of a Successful Learning Program**

These guidelines describe three kinds of learning programs: workshops, and other classroom programs; study groups; and coaching programs, or tutorials. Which program or programs you use depends on your audience's needs, the time available for training, and other factors. But all successful learning programs share these characteristics:

- *They engage participants in the learning process.* Most people do not learn new skills simply by reading or listening to a lecture. They learn by thinking about the concepts and information in terms of their own situations and needs, and by trying out the new techniques. For writing, that means providing plenty of opportunities for people to reflect on or discuss the issues, practice new techniques, and apply the learning to writing projects of their own.
- *They are based on clear, relevant behavioral objectives.* Objectives that specify what people will be able to do when training is complete serve as a road map for designing the learning program and for measuring its effects. The objectives for a given program depend on the needs of the audience and the organization, and on what you can reasonably accomplish in the time available.

- *They build on what people already know and recognize their experience.* People who want to be able to write and manage their e-mail more effectively already know how to write, and they already use e-mail. A successful program helps them draw on their own experience, identify what they are doing well, and develop the skills they need to improve.

## THE AUDIENCE

Everyone can learn to write more clearly, concisely, and effectively. Experienced writers need strategies and techniques that build on what they are already doing well. Novice writers need a structured process and clear guidelines so that they can develop their skills and increase their confidence.

Begin planning your learning program by finding out as much as you can about what participants already know and what they need to know. Here are some steps to take:

- Talk with key people in the organization to identify the issues that come up when people use e-mail
- Use interviews or a questionnaire to gather information about participants' objectives for training
- Review representative samples of the e-mail participants write to identify the kinds of problems that need to be addressed

## THE TYPE OF PROGRAM

You can use *E-Mail: A Write It Well Guide* in different types of learning programs, including:

- Workshops and other classroom training
- Small-group training, such as study groups
- Individual coaching programs, or tutorials

The type and duration of the program will depend on your audience's needs and learning preferences, and on the time that participants have available.

### Workshops and Other Classroom Training

*E-Mail: A Write It Well Guide* makes an excellent text or supplementary text for any writing skills class. A classroom setting gives you the opportunity to explain and expand on the material, and allows students to learn from each other through discussion and group practice.

When planning your classroom program, consider these issues:

- Don't try to do too much. It takes 12–16 hours to thoroughly cover all the material while giving participants sufficient opportunities for discussion and practice. If you have less time, focus on the topics that are most important for the group. Trying to cover too much in too little time means that you'll spend most of your time talking, and people will learn very little.
- If your organization has an e-mail policy, include a review and discussion of that policy in your learning program, and help people relate what they learn in the book to the policy. If there are any significant differences, be prepared to discuss them.
- Ask participants to do their reading between class sessions so you can use class time for such activities as explaining and reinforcing key points, discussions, and practice.
- Expect participants to raise issues and ask questions that are not covered in the book. Before the class begins, you might want to do some additional reading and research on your own. And always feel comfortable saying, "I don't have a good answer to that question, but I'll find out and get back to you."
- Workshop or class sessions should be at least 3 hours long, and the entire program—not including follow-up activities—should be completed within four weeks.
- You can conduct an effective learning program for groups as large as 20 or 25 people. But the larger the group, the more difficult it is to manage discussions and give people individual attention while they work on their own writing projects. If possible, keep class sizes to a maximum of 15–16 people.
- To facilitate discussion and learning, avoid the traditional classroom setting, where everyone faces the instructor. If possible, seat people informally at tables in groups of 3–5 (the tables create natural discussion groups). Arrange the tables so that participants can easily see each other, you, and the visual aids.
- Arrange for the room and the equipment you'll need well ahead of time: i.e., a laptop and/or slide projector; two flip chart easels with pads and marking pens; a white board; pens; masking tape; writing tablets; reference books; and name tents. If possible, provide refreshments, especially for classes that begin early in the morning.
- Prepare visual aids—a PowerPoint presentation or flip chart pages—to illustrate the key concepts you will be teaching.
- Download the checklists and worksheets to use as handouts.

- Arrive at class early enough to set out the materials, make sure the equipment is working, and make sure the room is set up properly.

### Study Groups

Study groups are small groups (usually 3–7 people) who meet for 1–2 hours at a time to work together on a learning program. Study groups facilitate the learning process by providing a structure, mutual support, and encouragement. They are excellent ways for team or department members to explore the issues involved in using e-mail effectively and efficiently.

Here are some points to consider about study groups:

- Study groups work best if one person—a group member, a manager, or a training representative—takes on the responsibility of scheduling meetings, reserving meeting space, etc. When possible, study groups should have a private place in which to meet.
- Group members should do most of the reading and application exercises on their own, using the meeting time to discuss their experiences and observations. The reflection questions in the book can be used to trigger discussion.
- If the study group members are from the same team or department, they can use meeting time to develop e-mail standards or discuss the organization's e-mail policy in terms of their own situation.
- Study group meetings should be held at least twice a week, for a minimum of one hour, and attendance should be required (except for a real emergency). At the end of each meeting, members should agree on specific assignments to be completed by the next meeting. The entire program should be completed within 4–6 weeks.
- The group should use the first meeting to establish objectives and set up a schedule, both of which should be written down and distributed to all participants. They can also use that meeting to discuss the relationship of the learning program to their day-to-day work and career goals.
- One or two follow-up meetings 4–6 weeks after the end of the learning program can help reinforce what people learned and give them opportunities to share ideas for continuing to improve their use of e-mail.

### Individual Coaching Programs (Tutorials)

Individual coaching programs, or tutorials, are a more structured version of a self-study program. They can be supervised by a manager, a training specialist, or even a colleague who has gone through the book and has a good

grasp of the material. Coaching programs work best when they are completed within a 4–6 week period and then followed up periodically.

The person who is supervising the coaching program usually does the following:

- Works with the participant to clarify the objectives, agree on assignments, and establish a schedule
- Remains available to answer questions while the participant completes the assignments
- Checks in periodically to discuss progress, review the participant's work, etc.
- Follows up in 4–6 weeks to help reinforce the learning and discuss remaining issues

## TYPES OF ASSIGNMENTS

You can draw on the reflection questions and application exercises in *E-Mail: A Write It Well Guide* to develop the assignments for your learning program. The numbers and types of assignments depend on the program objectives, the audience's needs, the type of program, and the time you have available for training.

Here are some suggestions for additional assignments:

- Ask participants to read specific sections of the book and answer the reflection questions, then discuss what they've read and their answers to the questions in class, with their study group, or with the person who is supervising their coaching program.
- Ask participants to complete the application exercises at the end of a chapter and discuss the results.
- Hand out copies of e-mail that contains problems discussed in the book. Ask participants to work individually or with others to identify the problems and determine what the writer should have done differently.
- Ask participants to work alone or with a partner to interview others in the organization about the use and misuse of e-mail, develop a list of issues, and determine how those issues might be addressed.
- Ask participants to imagine that they have been given the responsibility for preparing guidelines for the use of e-mail in their organization and work alone or with others to come up with those guidelines.
- Select a scenario that requires writing and ask participants to use the planning process individually, in teams, or in small groups to plan the e-mail. Then ask participants to write the e-mail and discuss the results.

- In a workshop or class, create a scenario in which two teams, Team A and Team B, are working from remote locations to make a decision. Team A sends the first message, Team B responds, and so on, until the decision is made or one team decides that the e-mail conversation is no longer productive.

**Note:** Never use group members' writing—or any other writing that is easily identifiable as belonging to someone in the organization—for practice exercises.

## REVIEWING PARTICIPANTS' WRITING

A review of participants' writing when you are planning the learning program helps you determine how to focus the program on their needs. Reviewing their writing during and after the program allows you to evaluate their progress and give them useful feedback.

When you review printed copies of participants' writing, make your comments in pencil, not pen—and certainly not red pen. Also, be sure to write legibly. If you review the writing on line, you can use Word's "track changes" feature to insert your comments.

You can use the checklists at the end of the book as a guide for reviewing participants' writing samples. Keep the following in mind:

- Focus on key issues, such as these: Is the topic appropriate for e-mail? Does the message make sense? Is the main point clear? Does the e-mail answer the reader's questions? Is the tone appropriate? Is the subject line useful? Are there grammar or punctuation errors?
- Make your comments specific. Instead of "confusing" or "not a good subject line," ask, "What's your main point?" "Why does the reader need to know this?" "How could you revise this subject line so the reader knows exactly what to expect?"
- Resist the impulse to edit the writing. Instead, explain what works and what doesn't and ask the participant to make the revisions.

**Note:** Keep *all* writing samples confidential. Never show any participant's writing to their colleagues as either a good or bad example without the person's express permission.

## FOLLOWING UP TRAINING

Learning shouldn't stop when the learning program is over. Extend the benefits of the training through these kinds of follow-up activities:

- Periodically check in with participants by e-mail or in person to see how things are going and answer any questions they might have

- Give participants an assignment to complete within two weeks of the last scheduled program activity
- Four weeks and eight weeks after the program, ask people to send you something they've written and return the document with your comments
- Three months after the program, meet with participants to review key learning points, discuss issues, and let them ask questions

**Contact us at *info@writeitwell.com* for more information  
about using *E-Mail: A Write It Well Guide*  
in your learning programs.**

**Available for purchase:  
A comprehensive trainer's guide that includes objectives,  
lesson plans, activities, schedules, and other detailed information  
to help you conduct a successful learning program.**