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MATERIALS NEEDED

Whiteboard markers

LEARNING GOALS

At the close of the workshop, students will be able to:

- Evaluate an email's audience and choose an appropriate strategy
- Adapt emailing approaches to audience and context
- Apply strategies to control politeness in professional correspondence

OVERVIEW

In this workshop, four primary activities take place:

- The facilitator introduces common purposes for crafting a professional email and helps students develop a set of criteria for analyzing the role of audience.
- As a group, students close read a model email and extract the function of key sentences.
- In pairs, students practice generating strategies of their own for a new scenario, noting how the elements of this new situation (purpose, audience etc.) shape the strategies they choose.
- Facilitator leads a discussion of concision, directness, and politeness when making a request.

LESSON PLAN

Introduction

Start by introducing the stakes of this workshop. **Ask students to imagine** that they are a professor teaching three large lecture courses, and **that they have received an email with no subject line from a Baruch email address.** It reads “When is paper #1 due???” Besides that, there is no information: no greeting, nothing about *which* course they are taking, and no sign-off.

Ask students: if you were the professor, how would you feel about this email? How might it color your opinion of the student? Elicit responses, gaining consensus that such an email may not be the most productive way to get information.

Discuss the difficulties of emailing. Acknowledge that we are all sending a lot of email—to friends, professors, recruiters, and potential mentors. This means that most people receive more email than they want to (hence the corporate world’s embrace of Slack). In the chaos of our own inboxes, it can be easy to forget that **each of these contexts requires a different strategy.** For example, you might email a friend a subject-less message confirming the date of an upcoming plan.

State that, today, **we will practice strategies for sending high-stakes emails** in academic and professional contexts. In particular, we’ll analyze the interactive variables that play into this process: **your purpose, your audience, and your relationship to that audience.** Based on that analysis, we will discuss expectations regarding **concision, directness, and politeness,** and introduce strategies for meeting those expectations.

Part One: Planning the Email (20 min)

1. **Ask students if they have ever had to send a stressful email.** What was the context?

Record responses on board. *Sample responses may include:*

- To ask a favor of someone you’ve never met
- To deliver bad news
- To set up a meeting with a potential advisor or mentor
- To explain several absences from a class
- To ask for an extension on a paper
- To inquire about the status of a job application

Note that, in many of these cases, **the purpose is to persuade your reader to take a specific action.**

- Tell students that, before writing an email, you should ask yourself: “What do you hope the recipient will do or say as a result of receiving this email?”
- Provide students with the following template: “As a result of this email, my audience will... *offer me an interview/ accept my invitation to the event.*”
- This will often become an explicit statement in your message: **“I’m writing to ask...”** or **“I’m writing in the hopes that...”**

2. Explain that the next step is to **analyze your audience**:
 - **Consider two broad factors: the audience's relationship to you, and the audience's relationship to the message.** Record on the board and elaborate:

Your audience's relationship to you

- Your position based on the hierarchy in the company, organization, school. Are you in a higher or lower rank based on your role?
- How well you already know your audience. Is it a distant or close relationship? Are you already friendly?
- Your **credibility** with your audience before writing the email. Do they already have a good impression of you?
- How you want your audience to perceive you and your request. How can you increase or maintain your credibility?

Your audience's relationship to your message

- How important is the message to them?
- How much are you asking them to do? Will it be difficult or easy for them to grant your request?
- They may have certain biases or preconceived notions about the content of the message. Try to anticipate what these may be.
- How do you think they'll feel (positively or negatively) about the message?

3. **Once you know your audience, think about how to persuade them:**
 - Emphasizing benefits ("what's in it for them?")
 - Drawing on your own credibility
 - Structuring the way you organize your message
 - Choosing an appropriate length
 - Being polite
4. **Segue to Part Two:** tell students that next, we'll look at an example to practice analyzing audience and choosing a strategy.

Part Two: Close Reading Emails (30 minutes)

1. **Pass out Handout 1: "Email 1."** Tell students that in this email, a student is requesting a phone conversation with a professional in their field. **Read the email aloud as a group.**
2. **Lead a discussion about Yousef's relationship to his reader** using the categories on the board (audience's relationship to you and audience's relationship to the message).
 - Note that Yousef is below Ms. Malhotra in the hierarchy of their profession, and that they have briefly met. **Ask: How would you approach a professional in your field? What would you be sure to do (or to avoid)?**
 - Elicit the understanding that Yousef's success depends on establishing his credibility politely.
3. Draw students' attention to information about the **overall organization** of the sample:

- Subject line states the purpose of the email clearly and concisely
 - He includes a polite opening and closing
 - The purpose of each paragraph is clear (*email can be skimmed*)
 - It's organized clearly into a couple of paragraphs (not one block of text)
4. **Ask: what other observations can you make about the writer's strategy in this message?** Have students identify specific sentences in the email that they think would persuade Ms. Malhotra to say yes.
- As students share out, discuss the function of each of the sentences:
 - Note that "Dear" is appropriate in professional settings, and that using someone's last name indicates respect.
 - Draw their attention to "Sincerely," and provide other sign-offs: "All the best," "Best," "Regards," "Thanks in advance," etc.
 - Emphasize the following:
 - **Yousef builds credibility not only** by stating his academic program of study and college affiliation but also by the professionalism and politeness of the message.
 - Email provides **background information** without including unnecessary details. For example, listing all the coursework he completed in finance would be unnecessary in the context of this email.
 - **Yousef states his request in the subject line.**
 - **Yousef prioritizes the reader, her time, and her expertise.** He makes it more about learning from what she has to offer, which shows an awareness of the audience's position in relation to him.
 - Ask students if there's anything they'd do differently. How could Yousef's message be shorter? Is there any additional information they'd want to provide?
5. **Pass out Handout 2: "Scenario for Email 2."** Explain that students will now practice adapting emailing strategies to a new audience and context.
- Ask students to imagine that they are the writer.
 - Read the scenario together, and then have students split up into groups of 2 or 3 to answer the questions below.
 - Give them 5 minutes to discuss the questions in the handout. They'll choose one person to record the strategies that they believe they should use.
 - Share out responses.
6. **Distribute Handout 3: "Email 2"** and introduce it as one response to the previous scenario. Ask students to imagine themselves as the professor now, and to decide if they're persuaded (and if so, why).
- As a group, read the email aloud. Pause at the end of each section and **ask students to identify the strategies they find most effective**, as well as the places where they would try a different strategy. **Encourage debate**, and note that there is no one strategy that is guaranteed to work: students must use their best judgment. In particular:
 - The subject line here is also **direct**, and lets Dr. Jones know right away why Ryan is emailing.
 - In Paragraph 1: **ask** students whether they would send this email on a Friday even though it contradicts the professor's policy.

- In Paragraph 2: **ask** whether Ryan should mention his situation with his roommate. Note that this would be more acceptable if the professor knows you well than if you have never spoken before. In addition, such information adds to the length of the email; since Ryan is already emailing out of Dr. Jones' regular hours, **a concise email may be more effective**.
 - In Paragraph 3: elicit the understanding that Ryan acknowledges he is asking for a favor. In an email where you are making a request, using **polite language** is key.
- Draw students' attention to Ryan's strategies and tone.
7. **Segue to Part Three** by acknowledging that this process is often unconscious—we don't write a plan for every message we send. But if a message is important, it's useful to start by analyzing audience and thinking about what a reader will find persuasive.

Part Three: Useful Language for Emails (20 min)

1. Tell students that next, we'll go over some **strategies for politeness**. Note that using a lot of language that seems polite at once can actually make you seem overly deferential or even afraid of your audience.
2. **State that ideas of "politeness" vary between cultures and contexts in terms of directness, concision, and word choice/phrasing.**
 - For example, research suggest that readers in U.S. business settings respond most positively to **direct requests** stated in the subject line or first paragraph of an email.
 - In other contexts, however, it may be standard to include requests only after some small talk, and therefore at the *end* of the email.
 - **This is why analyzing your audience is key.**
 - In addition, you've probably heard that being **concise** is important in professional writing. However, politeness in English **often requires using more words to "soften" your tone.**
 - **For example:** if you want to schedule a phone call with a friend, you might email, "Catch up on Friday?" To schedule a phone call with a potential mentor, however, it would be more appropriate to write, "Would you be free to talk on Friday? If so, please let me know a time that might work for you."
 - **Balance concision with sentence-level politeness.**
3. **Pass out Handout 4: "Strategies for Effective Email"**
 - Explain that these strategies can be used alone or in combination.
 - Give students a few minutes to read independently.
 - Elicit questions.

Part Four: Applying Strategies

(if time remaining)

1. Ask students to think of a professional email that they will need to write in the near future to a professor, colleague, boss, etc. (If students can't think of an upcoming email, provide them with **Handout 5: "Sample Email Scenarios"** and have them select one.)
2. Provide students time to write. Ask them to include a subject line, opening address, closing, and body paragraphs.
3. When they have a good start, have them pair up to share their drafts. Their classmate will act as their intended audience and provide feedback.
4. If there is an odd number of students, create one group of three. Partner up with a student if there is only one. Be available for questions as they arise.
5. **Answer remaining questions.** Wrap up.

EMAIL 1

Subject Line: Scheduling a Brief Phone Conversation

Dear Ms. Malhotra,

I hope you are well. It was a pleasure meeting you at the finance professionals' panel yesterday. I appreciate you taking the time to speak to me about your career path at Goldman Sachs, especially how you made the transition from non-profit management. As I had mentioned, I'm currently a junior at Baruch College majoring in finance, and I also recently interned as a summer analyst at Credit Suisse.

As someone who is looking at a career in finance, I'd be very interested in learning more about your career trajectory, which I found very inspiring. I wanted to reach out to ask if you'd perhaps be available for a brief 10-15 min phone conversation sometime over the next few weeks? My schedule is quite flexible during the day throughout the week.

I understand if this isn't possible as I imagine you must have a busy schedule this time of year. In either case, I want to thank you once again for taking the time to speak to me yesterday.

Sincerely,
Yousef

SCENARIO FOR EMAIL 2

1. You have to email your Corporate Restructuring professor to ask for an extension on your research paper. This is the first time you've ever asked for an extension in this class. You thought you'd be able to complete your essay on time, but your roommate has been having some personal troubles, which you've spent a lot of time helping him with this past week—the last week you had to write your paper. You're not sure whether to bring this up in your email.

You believe Dr. Jones has a good opinion of you—you always put good effort into revising your essays, and you always participate in class. You really enjoyed the last class unit on mergers and acquisitions, which is what you're writing your essay on. You believe that with one more day, you could write a strong essay that reflects your interest in the topic.

The essay is due on Monday morning. It's Friday evening now. Dr. Jones asks not to be emailed outside of general business hours. How should you proceed?

SETTING A STRATEGY

1. What is your purpose in communicating? As a result of this email, your audience will...

2. What do you know about my audience (my professor)? What is his relationship to the message?

3. How does my professor perceive me? What is his level of faith, belief, confidence in me? How can I emphasize my credibility? How can I earn more?

4. Take some notes on how you'd draft this request:

EMAIL 2

To: Ben Jones <ben.jones@baruch.cuny.edu>
Subject: Request for 1-day Extension on Research Paper

Dear Dr. Jones,

I hope this email finds you well. I was writing to see if there was any way you might be willing to grant me a one-day extension on my research paper—I know that this is not your usual policy. I wouldn't ask under ordinary circumstances and apologize for troubling you on the weekend.

I loved our last unit on mergers and acquisitions. It's a topic that I'm really passionate about, thanks to your lectures, and I've really enjoyed researching it. I extensively researched my paper topic last month, and I planned to complete a final draft of my paper this past week. However, due to an unexpected personal situation with my roommate that escalated in the past few days, I have not been able to complete my draft.

My personal circumstances are settling, and I believe with one extra day, I could complete a strong essay that reflects the depth of my research into M and A. If you'd be willing to grant me this extension, I'd be incredibly grateful. If an extension isn't possible, I understand.

Thank you so much.

Sincerely,
Ryan

STRATEGIES FOR EFFECTIVE EMAIL

When making a request in an email, begin by analyzing your audience and context. Based on those factors, you'll decide whether to be more or less direct. As you draft, try these strategies:

1. MATCH THEIR STYLE

If you know the person you are emailing, try basing your tone and style on theirs. Imagine you have already received the following email from a professional you met at a networking event, Linda Hu:

To: vanessa.chavez@baruch.cuny.edu
Subject: Re: Request an informational interview

Vanessa,

I'm very happy to speak with you. I'm usually available 10am-12pm EST on Tuesdays. When were you thinking? Let me know.

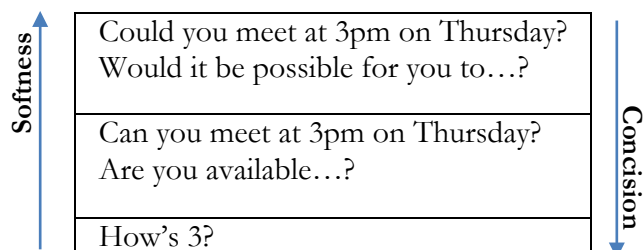
Best,
Linda

Because she signed off with her first name, you can probably address her as "Linda," though you can still write "Ms. Hu" if you'd prefer to be more formal. Follow her lead when it comes to concision: the length of her email suggests she is busy and she'd appreciate brevity. (But keep in mind that, when someone writes you with a one-word email, you might need to respond a bit more formally.)

2. SOFTEN TONE

To achieve an appropriate tone, you might "soften" your language. The conditional tense—"would"/ "could"—implies an outcome is uncertain, for example. This can convey politeness, since it leaves room for rejection. But if you do this too much, you may give the impression of being too unsure, wordy, or even fearful.

REQUESTING A MEETING:



MODIFYING CERTAINTY:

Very uncertain about a request	Is there any way that you could ...? Would it be possible for you to ...? Is there a chance that ...?
Uncertain	If possible, ... If you're not too busy ...
More certain	Will you ... ? Please ...

3. REUSE COMMON STRUCTURES:**TO GIVE YOUR AUDIENCE ROOM TO SAY NO:**

I understand if this isn't possible given the short notice.

No worries if you're not able to ...

I know this is a busy time of year; however, I hope ...

TO EXPRESS GRATITUDE:

Thank you for considering my request.

I would really appreciate your help with ...

I am grateful for the support ...

I want to thank you for taking the time to ...

TO MAKE EXPRESS AVAILABILITY:

I'm very flexible and would be available to chat at a time that is convenient for you.

If this does not work, I'm also available ...

4. EXPLAIN

If you're emailing someone you've never met before, you will want to spend at least one paragraph explaining how you became familiar with them and their work/position and why you hope they'll respond.

PROVIDE REASONS FOR THE REQUEST:

I am inviting you to our panel so that students can benefit from your wealth of experience...

Given my desire to work in finance, I wanted to ask your advice about ...

SAMPLE EMAIL SCENARIO

1. You just got back your English 2850 essay, and you received a C. Your professor—Dr. Forester—can be a really strict grader. You were really hoping for a B: you worked hard, visited the Writing Center, and wrote two drafts. You know your professor doesn't change grades, but you want to email him to ask to meet about the paper and discuss ways that you can improve your writing (you're not sure whether to bring up your grade).

2. You just interviewed for a position in Morgan Stanley's wealth management division, and need to send Ms. Lindslow, the person who interviewed you, a thank you email.