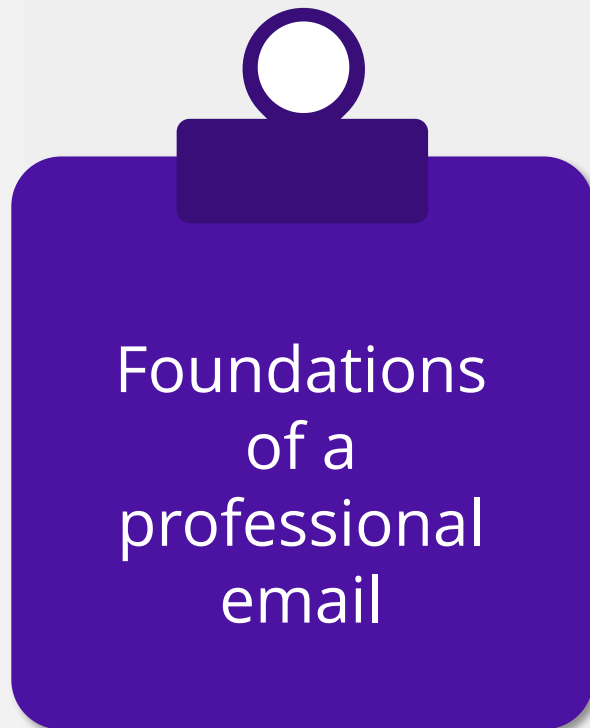


Effective Business Emails

Best practices for using *email in your role*

Session overview



Foundation of a Professional Email



Is email always the best choice?



✓ When email is the right tool

- Documentation
- Non-urgent communication
- Clear, simple requests
- Meeting preparation or scheduling
- Recipient is in different time zone
- Confirming conversations
- Getting your message to a wide audience

⊘ When a phone/video call is better

- You need a quick response
- Complex or detailed communication
- Tone could be misinterpreted
- There's disagreement or tension
- Relationship building is important
- Screen sharing/visuals helps in understanding

Best practice tip: combine both; call first, send email summary afterward

Write for the recipient



Role of Recipient

Your wording and tone should be appropriate for who you are writing. Do they understand your acronyms? Does relationship allow more casual writing?



Expectations

The recipient should understand why are you are sending the email. Are you providing information or is action required. Set clear expectations.



Level of Detail

While a senior leader may want a summary, a financial professional will require **clear, explicit details without** internal jargon.

Parts of a strong email



 Send	To	Comparison Agent
	Cc	
	Bcc	
Subject		Let's Simplify Life Insurance – Quick Call This Week?

Subject Line

Greeting

Hi (Agent's Name),

I know things are moving fast; it probably feels like you're drinking from a fire hose right now! No stress if we haven't connected yet.

You've likely started hearing more about life insurance and how it can be a **huge value-add** to your home and auto sales. That said, it can feel complicated - and that's where I come in.

Body

Let's make it simple:

- ✓ **Let's hop on a quick call this week** to walk through what you've been learning.
- ✓ I've re-attached the **(name of attachment)** - it's a helpful foundation for understanding the "WHY" behind life insurance.
- ✓ **Got questions?** Bring them! I'm here to help make this easy.

Closing

You've got a full team behind you - Protective, Comparison, and me! Let's tackle this together and get you feeling confident with life insurance.

Only a phone call away,

Signature

Internal Wholesaler

Protective 

Protective Life Insurance Company

Subject line



Use the tips we just went over to
improve the subject line:

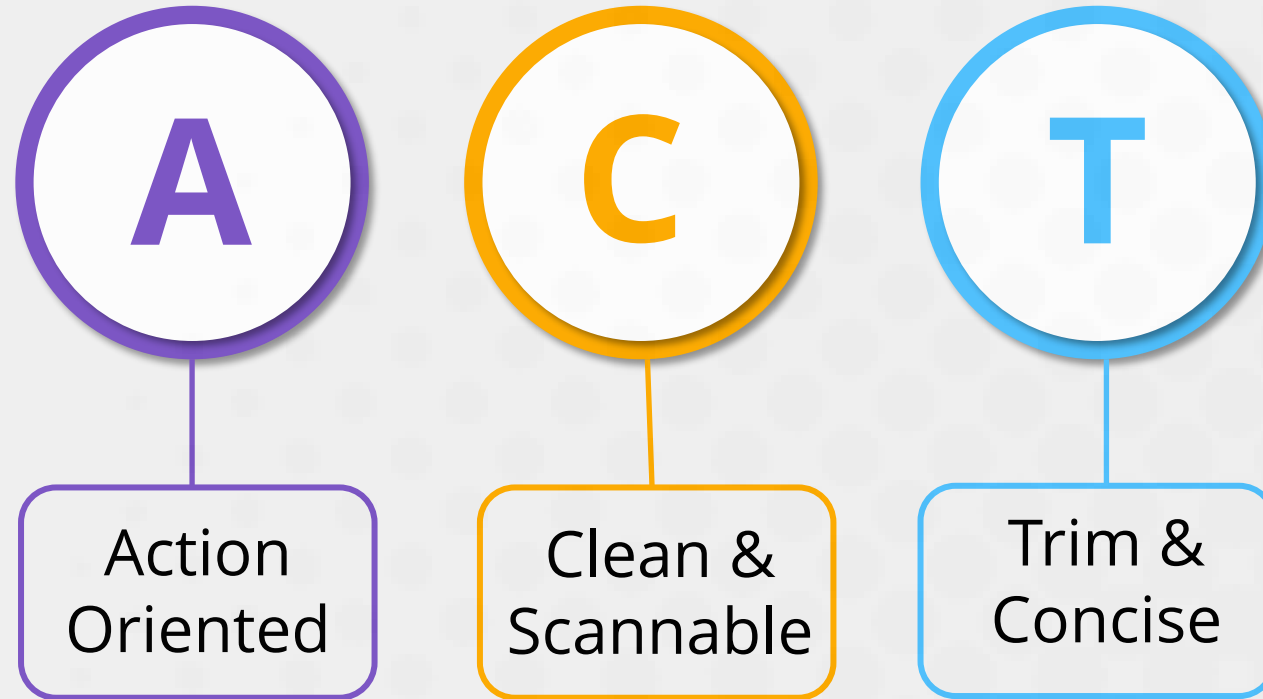
Super CE Event



Writing with Clarity & Impact



Simple Steps for Better Emails

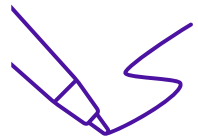


BLUF: Bottom Line Up Front



	Begin with the purpose of the email	Immediately tell the reader what the email is about
	Next, get to the point why it matters	Shift focus to why it's important to the recipient
	Close with call to actions	Make sure the reader understands what you expect of them

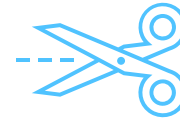
Keep it concise



Short
sentences



Simple
language



Remove
filler words



Avoid
jargon

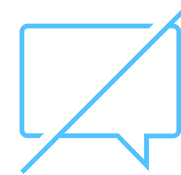
Tone that works



Professional
& warm



Direct, but
not blunt



Avoid
sarcasm or
emotion

Cues to help readers scan emails



Bullets

Tables

**Boxed
Info**

**White
Space**

Headers

**High-
lighter**

**Short
Sentences**

Highlight action and deadlines



1

Use bold for
key dates

2

Put requests
on separate
lines

3

Limit to one
main ask
per email

Let's Talk

What do you plan
to do to make your
emails ***stand out
to the advisors
you work with?***

Avoiding Common Pitfalls



Common Pitfalls



Poor
Subject
Lines



Vague
Requests



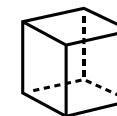
Missing
Information



Overly
Long
Emails



Bad
Tone



Blocks
of Text

Key takeaways to avoid these pitfalls



Use short,
action-
oriented
subject lines



Structure
shapes
understanding
and directs the
reader to key
information



Get to the
point quickly



Busy readers
need
scannable
content



Clarity beats
length

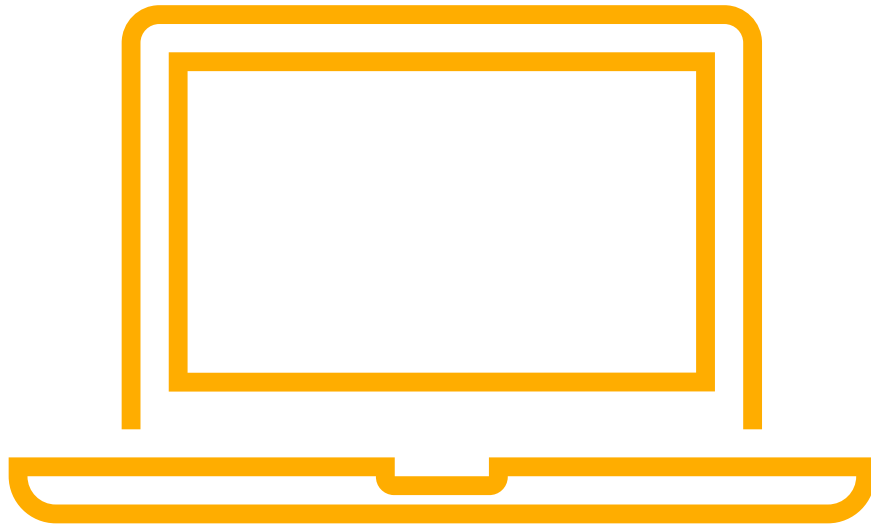


Small
improvements
create big
impact

Remember email may not be the best choice



Situation	Best Option
Emotional, sensitive	 Call
Complex or ambiguous	 Call
Urgent decision	 Call
Potential conflict	 Call
Align on details of phone call	 Email
Documentation needed	 Email
Simple update	 Email



Your Assignment

Edit the email you submitted prior to this session using the tips and techniques covered in this training.

We will review the “**Before**” and “**After**” versions in our next session