Setup Guide
For Microsoft Outlook for Windows

PASS Model Email Quick Part

Clear and directional communication can produce effective action with the minimal number of communication cycles (i.e., reduce the back and forth over email). By writing effective communication, you can reduce the number of email messages you receive in a day.

The email PASS Model consists of four questions:

P – What is the **Purpose** of your communication?

A – What **Action** is involved and is there a due date?

S – What **Supporting Information** does the recipient need?

S – Does it have a clear **Subject Line**?

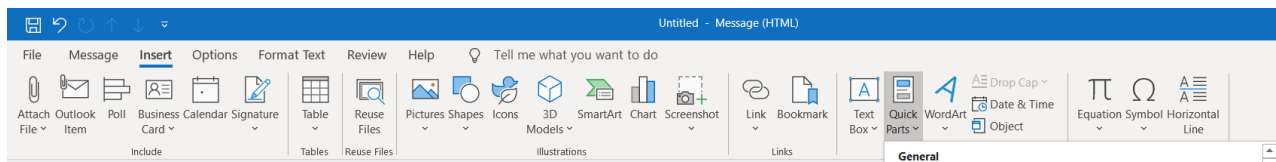**Create a PASS Model Quick Part in Outlook:**

1. Create a new email (Ctrl + Shift + M).

2. Type your desired template (e.g., PASS email model) into the body of the email.
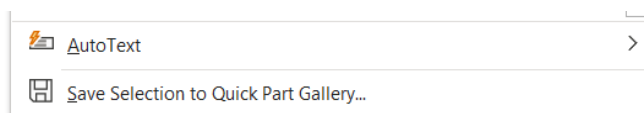
    [PURPOSE]

    [ACTIONS]

    [SUPPORTING INFORMATION]

3. Highlight the text, then click on the Insert tab and select Quick Parts.

4. Select Save Selection to Quick Part Gallery at the bottom of the window.

5. Name the Quick Part template. Click OK.

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6. Select Insert > Quick Parts and select Quick Part to use. It will insert where your cursor is.

7. You can also type the first letter of the name of the Quick Part in your email body and press Fn + F3. If no two Quick Parts names start with the same letter, your intended Quick Part should be automatically inserted.

Subject Line Best Practices

There are three elements that make a good Subject line:
1. Clarifying the objective or project that the email relates to.
2. Clearly define the action requested.
3. Identify a due date if one exists.

There are four recommend prefixes to email subject lines:

RO: Read Only – The recipient is required to read the document.
Example: RO: Performance Review enclosed for Holly Henson August 10th meeting

RR: Reply Requested – The recipient needs only to respond. No action is required.
Example: RR: When do you need the PP slides for your October vendor meeting?

AR: Action Requested – The recipient has requested action by the sender.
Example: AR: Outlook Migration – post monthly report to SharePoint starting April 5th

FYI: For Your Information – No action required. Recipient can read, file, or delete the document.
Example: FYI: Updated P&L report for your Q1 records

Using the To, Cc, and Bcc lines effectively?

The **Subject line** clarifies the action that the recipients on the To line must take. Here are two simple questions to help you filter To line recipients:

1. Does the email communication relate to the recipient's objective or project?
2. Is this recipient responsible for the action in the Subject line and in the email?

The **CC line** recipients need to read or file the email, no action or response is needed.

The **Bcc line** is reserved for distribution lists or to keep individual from receiving a Reply/Reply All.

Questions to answer before sending an email message:

1. Is there a clear Purpose, Action, and is the Supporting information included?
2. Have you written the message so that it will not come back to you with questions?
3. Do you need to track this email message in your 1:1 Meetings or SNA Waiting For task folders?

Example of a PASS Model Email message

[SUBJECT LINE]: Action Requested: Please send status of project by January 31st

Hi Mary,

Great meeting with client yesterday, looks like we're getting closer! Just a few more things we need regarding the project.

[PURPOSE]
Request an update to the status and deliverables for our project.

[ACTION]
- Please revised deliverable dates on the project document by January 31st
- See Supporting Information for Link

[SUPPORTING INFORMATION]
On December 1st we updated the timeline to accommodate our London office, based on the revised times, we need to know if there have been major milestones added or renegotiated so we can update our calendar accordingly – thanks!

You can access the project document HERE. (include hyperlink).