



## Email Protocol

This protocol establishes business email 'rules of the road' in order to leverage the value of email as an effective and efficient communication tool.

### Composing Effective Email – The “PASS” Model

The body of an effective business email provides the recipient with a clear understanding of the purpose, actions and information needed to respond accordingly.

The “PASS” model provides a common structure and sequence that helps the author to construct the body of the message in a format that is easily scanned by the recipient.

- P – Purpose:** Define the purpose of the message and related business objective
- A – Action:** Identify the action, priority and responsible individual
- S – Supporting Information:** Include information needed to complete the action
- S – Subject:** Summarize the purpose, action and due dates in the subject line

#### P - What is the **Purpose** of the communication and does it relate to a business goal and objective?

Upfront, clarify the reason for sending the email. Take time to consider how the email relates to the author and/or recipients' priorities. If the message doesn't move business goals and objectives forward, the email may not be necessary.

#### A - What **Action** is involved, what is the priority and who is responsible?

Next, clarify what actions are being asked of the recipient. Most actions fall into one of the following groupings:

- Complete a physical action, e.g., edit a proposal, schedule a meeting
- Provide a response, e.g., answer a question or make a decision
- Read the contents; no additional action or response to the email is needed
- Content is FYI; recipient is not responsible or accountable for the information

To assist the recipient in prioritizing the request, provide contextual information, e.g., a due date or description of dependent tasks.

If sending a request to multiple recipients:

- Use separate bullets or line items to identify actions specific to each individual
- When assigning an action to a group, always identify the focal responsible for providing the final deliverable

#### S - What **Supporting Information** is needed to complete the requested action?

Once the Purpose and Actions have been written, be sure to include any supporting information needed to complete the requested actions. Slowing down up-front to ensure completeness reduces the likelihood of follow-on questions and additional email volume.

Supporting information can take the form of an email chain, attachment, link or a concise summary of the relevant information.

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For more information on Email Management see the FLL website (search Boeing intranet, key word “FLL email management”)



### S - Does the “Subject” line effectively summarize the message?

The last part of the “PASS” model is the subject line which should succinctly summarize the email message, including purpose, actions and due dates.

Using a standard subject line format allows the recipient to scan the message and understand the nature of the request. Begin the subject line with one of the following<sup>1</sup>:

- **Action Requested:** Use for requesting an action; include action and due date
- **Response Requested:** Use for a response or decision; include due date
- **Read Only:** Use when email must be read; no response or action is expected
- **FYI:** Use when recipient is not accountable or responsible for the information

If the message is brief and can be contained in the subject line, use “EOM” (End of Message) at the **end** of the line.

Examples of easily scanned subject lines are:

- Read Only: Customer forecast assessment in preparation for Jul 23<sup>rd</sup> meeting
- Action Requested: Sign off time before leaving on holiday EOM.

## Populating Address Lines – Use of “To”, “Cc”, “Bcc”

After using the “PASS” model to construct the body and subject line of the email, the next step is to populate the address lines. Standard use of “To”, “Cc” and “Bcc” will reinforce the sender’s intended expectation of each recipient.

### “To”:

Each “To” line recipient is responsible for an action, as outlined in the Action and Subject line sections of the email.

When confirming the recipients in the “To” line, consider the following:

- Does the email relate to the recipient’s business goals and objectives?
- Does each individual in the “To” line have an action and can they identify it by scanning the action section?
- If using a Distribution List, expand the list to ensure that all “To” addressees have an action, otherwise move names to the “Cc” line or remove completely.

### “Cc”:

Each “Cc” line recipient needs to be aware of the email contents, but no action or response is expected; the email only needs to be read. Only include “Cc” line recipients if the information is relevant to, and/or impacts, their business goals, objectives or projects.

Be thoughtful when adding ‘chain-of-command’ to discussion threads. Include them only at specific points (e.g., potential point of concurrence or impasse).

### “Bcc”:

“Bcc” should be rarely used and is only recommended in the following situations:

- To protect contact information from being disclosed to recipients of the email (e.g., customers or competing suppliers)
- To shield “Bcc” recipients from receiving “Reply all” responses

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<sup>1</sup> When a team/organization has an existing documented procedure, use these subject lines to augment that procedure when possible.

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## Before Pressing “Send”

After the “PASS” model has been used to create an effective email, and the recipients have been verified, ask these final questions:

- Has the email been written so that it will not come back to you with questions?
- Have links been tested or attachments added?
- Does the message need to be tracked for follow-up?

## Responding to Email

Responding effectively is as important as writing the initial email. Be as disciplined in using the “PASS” model in the response as in the original message.

When replying, ask the following questions:

- **Is a reply warranted?**  
Avoid sending unsolicited acknowledgement / confirmation messages
- **Is email still the appropriate communication mode?**  
If an email chain contains more than three (3) replies, or if a conflict is escalating, consider a different approach (e.g., a phone call or in-person meeting)
- **Are the “To” and “Cc” recipients still relevant?**
  - Verify that all the “To” recipients still have actions
  - Only reply to those whose business objectives are impacted
  - Remove unnecessary recipients from the “To” and “Cc” lines whenever possible, including ‘chain-of-command’
  - Unless “Reply to All” was specified, do not include all recipients in the response
- **Do the original Purpose, Actions and/or Subject line still apply?**
  - If not, change them appropriately
  - Only change the “Subject” line when the email content has changed; be aware that changing the “Subject” line will impact search capability

## Formatting Email to Maximize Impact

- Short paragraphs comprised of no more than 5 or 6 lines
- Use space to separate paragraphs and areas of detail
- Avoid flags, priority settings and categorization whenever possible

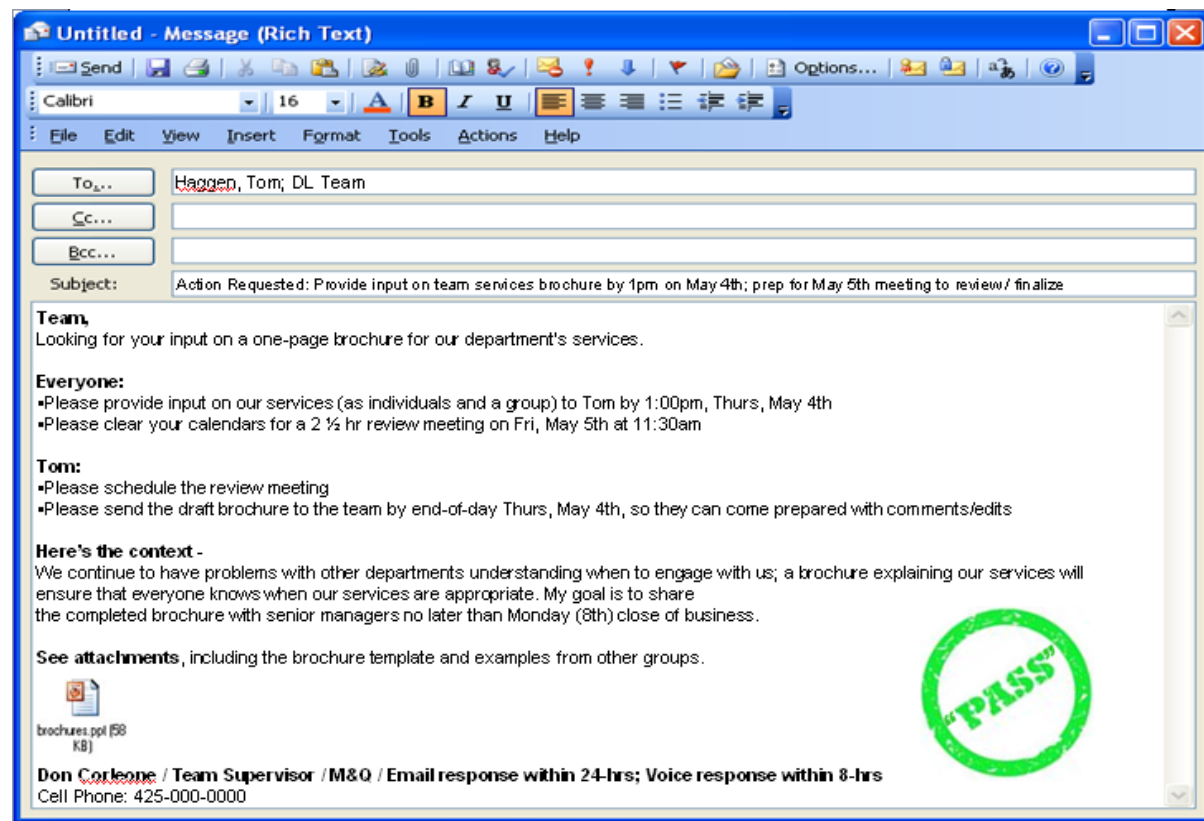
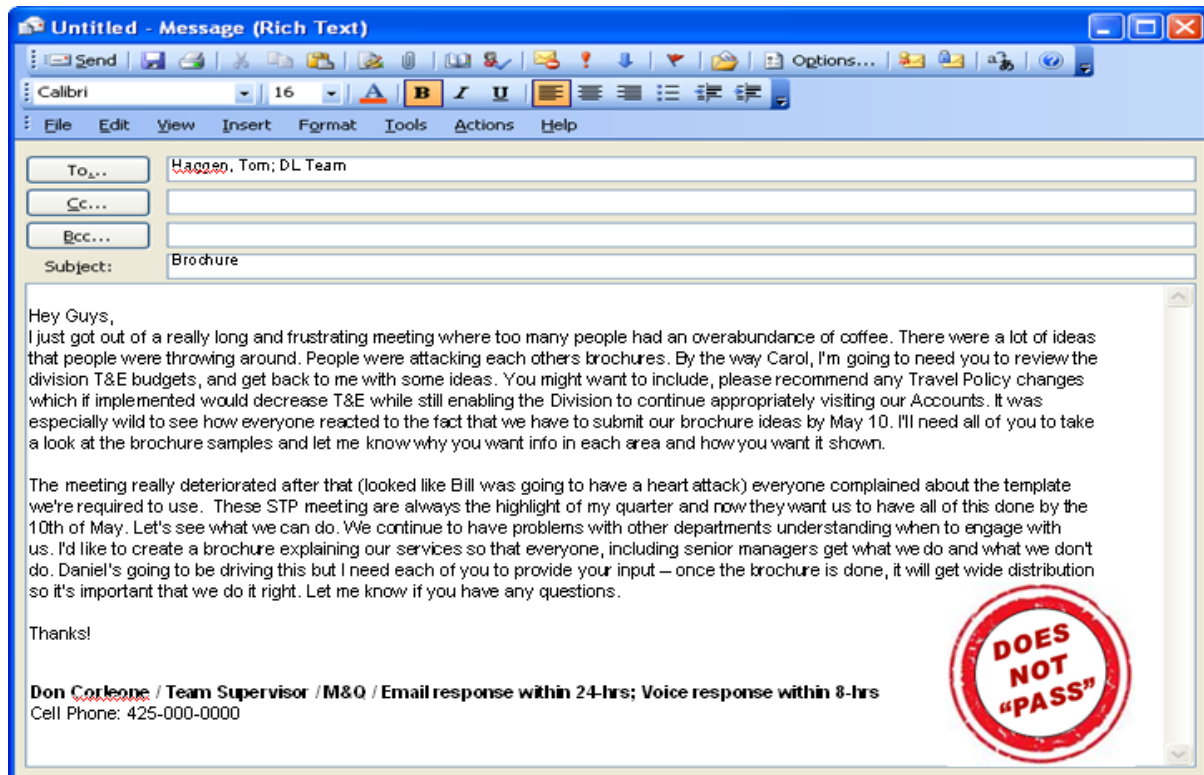
## Tips for Mobile Devices

Be aware that many email recipients view messages on mobile devices and there are limitations as to what those devices can display.

- Tables and images may not display; server links cannot be accessed
- Assume black and white text; color fonts may not be supported
- Long email chains are difficult to receive/read; summarize when possible

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