

Executive and Administrative Assistants- Tools for your toolbox

Tips on Email- Etiquette

Meeting Requests:

Before scheduling, you should know-

1. What is it regarding?
2. Does it require a meeting?
3. What type of meeting? Face-to-face, video, phone call? Can this be communicated via email, Marco Polo, by admin?
4. Is my pastor the best person for them to meet with?
5. Who are they? Look in your church's database and/or social media if they don't know them.
6. Does my pastor want to meet with them?
7. How much time would they like to have?

Request their agenda in a kind way:

Pastor _____ is very thoughtful and he likes to prepare for every meeting to make the most of your time together. Will you please send me a list of items that you'd like to discuss?

Once you know all of the above:

The next available time Pastor Alex has to meet is _____.

A gracious "pass-off":

Sometimes your executive will not or can not meet with someone. Don't just forward the email to a team member to take care of. Everything we do is relational. First, give the team member context.

1. Chat, send them a voice text, or email (last resort) if necessary- who and why they would be the best person to meet with them.
2. Ask them to tell the recipient they are reaching out on your executive's behalf.
3. Connect them via email if/when you feel it's appropriate.

Tone:

Use Grammarly. There is a free version. Make adjustments based on the tone you want to convey.

From your Executive's Email:

If you are not included in the initial email, forward it to your email. Respond from yours.
Or, reply from his, cc yourself.

Trust:

Never respond from your executive's email and disclose that it is you. There is privacy and respect that should always be maintained. You don't want to do anything that would question their trust in your executive.