

Module 7: Emails and Messages to the Right Person

Goal: Send each message to the one person who needs to act, with a clear subject line and a short, direct ask.

About 9 minutes

All names, phone numbers, addresses, and companies in this lesson are made-up examples. They are marked "(example)".

Why This Matters to the Employer

A message sent to the wrong person sits there. A message sent to everyone gets ignored, because each person thinks someone else has it. A long, unclear message gets skipped. Clear messages to the right person keep jobs moving and keep things from falling through the cracks.

Know Who Gets What

Every company is set up a little differently. Learn yours. Here's a common setup:

What it's about	Who usually gets it
Job details, schedule changes	The tech or dispatcher
Part orders, stock, pricing	Purchasing or the supplier
Quotes and bigger jobs	The estimator , who prices out work
Safety issues or injuries	The safety lead and a manager
Truck or van problems	Fleet , the person who handles company vehicles
Invoices and payment questions	Billing
Hiring and shop recruiting	The recruiter or office manager
Complaints or anything unusual	Your manager

Ask for a contact list on your first day. Keep it at your desk.

Send It to One Specific Person

Each message should have **one person who owns the next step**. Put that person in the "To" line.

- **To:** the person who has to act.
- **CC (copy):** only people who truly need to know. Not the whole office.
- If two people need to act on different things, send two short messages.

If you don't know who owns it, ask your manager. Don't send it to everyone and hope.

Write a Clear Subject Line

The subject line should tell the reader what it is before they open it. Use this pattern:

What – Where – When

- "Part pickup – 789 Demo Rd (example) – Thurs AM"
- "Quote request – 789 Demo Rd (example) – customer wants call by Fri"
- "Truck 12 flat tire – shop lot – needs fix today"
- "Change order – 123 Example Ave (example) – super needs answer by Wed"
- "Drying equipment pickup – 321 Placeholder Ln (example) – Fri AM"

Avoid subjects like "Question," "FYI," or "Hey."

Keep the Body Short

Put the ask in the **first one or two lines**. Then add only what the reader needs to act.

1. **The ask:** what you need and by when
2. **Key facts:** short bullets
3. **Where to find more:** "Photos are in the ticket"
4. **Your name**

If it takes more than a few short lines, it may be better as a phone call.

Email, Text, Phone, or Ticket?

- **Phone call:** emergencies and anything urgent. Don't rely on email alone for an emergency.
- **Text or team chat:** quick updates to a tech in the field, if your company uses them.
- **Email:** requests that need a record, like quotes, orders, and billing.
- **Ticket notes:** anything about the job. Even if you call or text, update the ticket too.

Never put gate codes, payment details, or other private info in a group message.

Follow Up

If you don't hear back by your deadline, follow up. Reply to the same message so the history stays together. If it's urgent, call.

Say This, Not This

Instead of this...

Say this...

Subject: "Question"

Subject: "Quote request – 789 Demo Rd (example) – by Fri"

Three paragraphs of background, then the ask at the end

"Can you call the customer by Friday with a quote?" in the first line

Email to the whole office: "Can someone handle this?"

Email to Sam (example), the estimator, by name

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

It's Thursday. Andre (example), an HVAC tech for Example Heating & Air (example), is back at Tom Ellis's (example) home to put in the fan motor from Module 5. He calls the office. He found a cracked part in the old furnace. It isn't safe to keep running, and he has shut it off following company procedure. Tom wants a price on a new system.

Chris thinks about who owns each piece:

- The **quote** goes to Sam Reyes (example), the estimator.
- The **safety issue** goes to the safety lead and manager, by phone, per company procedure.
- The **ticket** gets updated with everything.

Chris calls the manager first about the safety issue. Then Chris sends one email to Sam:

To: Sam Reyes (example)

Subject: Replacement quote – 789 Demo Rd (example) – customer wants call by Fri

Hi Sam,

Can you call the customer by Friday with a replacement quote?

- Customer: Tom Ellis (example), (619) 555-0187
- Andre (example) found a cracked part in the furnace today and shut it off. Manager has been notified.
- Photos and Andre's notes are in the ticket.
- Tom prefers calls on weekdays after 4 PM.

Thanks,
Chris

Friday at noon, Chris hasn't seen an update. Chris replies on the same email: "Hi Sam, checking in on this one. Tom is expecting a call today."

What went right: Chris split the safety issue from the quote, called about the safety issue instead of emailing, and sent the quote to one named person. The subject line follows What – Where – When. The ask is in the first line. And Chris followed up before the deadline passed.

Quick Tips

- Learn who gets what. Keep a contact list.
- One person in the "To" line: the person who acts.
- CC only those who truly need to know.
- Subject line: What – Where – When.
- Put the ask in the first one or two lines.
- Emergencies get a phone call, not just an email.
- Update the ticket, no matter how you sent the message.
- Follow up on the same thread if you don't hear back.

Quiz

1. A tech's truck has a flat tire. Who should you message?

- a) Billing
- b) Fleet, and the dispatcher so the schedule can change
- c) The whole office

Answer: b. Fleet fixes the truck. Dispatch moves the jobs.

2. Which subject line is best?

- a) "Hey"
- b) "Part order"
- c) "Part order – 456 Sample St (example) – needed Mon"

Answer: c. It tells the reader what, where, and when before they open it.

3. Where should the main ask go in an email?

- a) At the end
- b) In the first one or two lines
- c) In the subject line only

Answer: b. Busy readers may only read the top. Lead with what you need.

4. A tech reports a safety issue at a job. What's the best first step?

- a) Email the whole office
- b) Wait until the end of the day
- c) Call the safety lead or manager, following company procedure

Answer: c. Urgent and safety issues need a person on the phone, not an inbox.

5. You emailed the estimator Monday asking for a quote by Wednesday. It's Wednesday morning with no reply. What do you do?

- a) Reply on the same email to follow up, or call if it's urgent
- b) Send a brand-new email to everyone
- c) Wait and see

Answer: a. Following up on the same thread keeps the history together and the job moving.