

How to Create a Daily Update Email

What is the task?

Sending a daily update email to the client and/or immediate supervisor.

Why does the task need to be completed?

This will let the training manager have visibility on the status of the tasks assigned, the steps taken to achieve an outcome, what the actual outcome is, and next steps to be taken for uncompleted tasks.

This will also provide a real picture of how productive a staff member has been and whether there are roadblocks the staff member had while working on the tasks.

Who is in charge of completing the task?

Virtual assistant or staff member.

When does it need to be done?

This needs to be done daily. The template should be created first thing in the morning when the staff member starts. Then as they are completing tasks throughout their day, they should fill in their daily update template. This will be more efficient than letting them create this at the end of the day which could take them ten times longer because they will need to remember everything they did the entire day.

How does the task need to be done?

The daily update must contain the following:

- 1.) WIP (Work in progress) - These are open cases that need to be managed.
 - Indicate the name of the client (first name, surname initial i.e. John D)
 - Current status of the case
 - The next steps that need to be taken for pending cases (include date to follow up or timeline)
 - For resolved cases, indicate that it is closed.



2.) Client Queries - These are daily tasks assigned to staff.

- Indicate the name of the client (first name, surname initial i.e. John D)
- Steps taken to resolve the query
- If unresolved, indicate what the next steps will be.

3.) Process Works – These are systems or processes that need to be documented for future reference and training.

- Indicate the title or name of the system
- Current status of the system
- Time allocated to create the guide or expected time to finish
- File location

The email has to be formatted as shown below.

ⓘ You are not responding to the latest message in this conversation. Click here to open it.

To... EMAIL ADDRESS OF CLIENT OR IMMEDIATE OVERSEER

Cc...

Send Subject Daily Update

WIP

- Name of the client – status of the case, the next step needed(if task is not completed).

Client Queries

- Name of the client – steps taken, the next step needed (if task is not complete).

Process Works

- Title of the system guide – status of the system guide, the allocated time to create the guide and expected time frame to finish.

All the best,

Staff's email signature

