



Email Templates and Signatures: Stop Retyping the Same Message

Outlook signatures done right, and three ways to reuse the emails you send constantly

You send the same handful of emails all week. The "here is what I need to start your estate plan" email. The "your documents are ready to sign" email. The "we received your payment" email. You retype them, or you dig through Sent to copy an old one. Meanwhile your signature looks different depending on whether you replied from your desktop or your phone.

Both problems have clean fixes in Outlook.

Signatures: set them once, correctly

File > Options > Mail > Signatures. Create a signature, then set which one is the default for new messages and which for replies. You can keep several, a full one for first contact with a client and a short one for internal replies, and switch per message from Insert > Signature.

Put in it what a professional legal signature needs: name, firm, address, phone, and any confidentiality notice your practice uses. Keep it plain; heavy images and colored HTML often break on the recipient's end.

The catch: signatures do not sync

A signature you set in desktop Outlook lives on that computer. It does not appear on your phone or in webmail on its own. Set the signature separately in the Outlook mobile app and in Outlook on the web, or your messages will look inconsistent depending on where you sent them from. If your firm is on Microsoft 365, an administrator can set an organization-wide signature that applies to everyone automatically; worth asking about.

Reusable emails: three ways, fastest first

Quick Parts. The same feature from the Word tip works in an email body. Select the text, Insert > Quick Parts > Save Selection. Next time, Insert > Quick Parts and drop it in. Best for chunks: a paragraph, a set of instructions, a standard closing.

My Templates. Outlook ships with a My Templates panel. In a message, open it from the ribbon (Message tab, "View Templates," or the "..." overflow menu in newer Outlook and on the web). Save a whole message body and insert it with one click. Best for full emails you send often.

Outlook Templates (.oft). For a complete email including subject and formatting: compose it, then File > Save As, and choose "Outlook Template (*.oft)." Reuse it via New Items > More Items > Choose Form > "User Templates in File System." More steps, but it saves the entire message, not just the body.

Why this matters for a legal practice

Client communication should be consistent and fast. The intake response that tells a new client exactly what to send you, the "documents ready" note, the payment confirmation: standardize them and every client gets the same clear, complete message, while you stop rewriting the same paragraph for the hundredth time. Consistent signatures also put your firm's contact information and any required notice on every message without a thought.

The trap

Do not bury a specific client's details in a saved template and then forget to change them. Templates are starting points, not finished emails; read before you send. Keep them generic, with obvious blanks like "[CLIENT NAME]" that you fill each time.

Using AI to help with this. Draft the reusable version for you: "Write a professional, warm email I can save as an Outlook template that tells a new estate planning client exactly what documents and information to send me to get started. Leave bracketed blanks for anything client-specific." Save the result as a My Template or a Quick Part.