

Mail Merge Part 1: Data Source and Template

60 minutes

ICT Specialism 1: Word processing

Outcome M1.U2.2

Outcome M3.U1.4

WHAT THIS LESSON DOES

Learn the basics of mail merge by creating a data source spreadsheet with recipient details and a template letter that includes merge fields. This prepares you to send personalised letters efficiently for your project.

CURRICULUM OUTCOMES

Outcome	What the specification asks for
M1.U2.2	Work with a word processing document, apply different formats and insert tables and images.

WHAT STUDENTS SHOULD BE ABLE TO DO

- Explain what mail merge is and why it saves time
- Build a data source with one row per recipient
- Create a template letter with merge fields for name and one project-specific field

BEFORE THE BELL

- Prepare any printed example materials for the key concepts discussion if required.
- Confirm students have Project_Portfolio/09_specialism/sm1 ready; catch-up students need the folder before the step-by-step.
- Decide whether you will give a teacher-only desktop Mailings or Google add-on preview; students stay on visible placeholders today.
- Optional support scaffold: pre-place a two-row starter sheet (headers + blank rows) in a shared class folder, or paste a minimal header row students can copy into sm1_doc4_mailmerge_source.
- Optional rescue: a ready EXAMPLE letter students can open and rename if more than about 5 minutes behind on the letter build.
- Have a sample recipient list and a short template letter ready on the classroom screen. Confirm whether desktop Word Mailings or a Google Docs mail-merge add-on will be used next lesson. Students need cloud access to Project_Portfolio. Optional: pre-place a two-row starter sheet (headers + blank rows) in a shared class folder for support students.
- No prep needed beyond the sample table already in the lesson content
- Students need Microsoft 365 or Google Workspace access and their Project_Portfolio/09_specialism/sm1 folder. Optional support: shared two-row starter sheet with headers ready to copy.
- Optional teacher-only desktop Word Mailings demo. Ready EXAMPLE letter file available for students more than about 5 minutes behind.
- Circulate to confirm Something Real recipients are vocationally plausible, official filenames land in sm1/, and EXAMPLE practice files were not overwritten. Support scaffold: shared two-row starter sheet or copyable header row for students who need it.

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HOW THE LESSON RUNS

5 min	introduction	Introduction
5 min	content	Key concepts
8 min	activity	Step-by-step: data source
8 min	activity	Step-by-step: template letter
4 min	content	Common issues
20 min	activity	Independent practice
5 min	content	Reflection
5 min	summary	Lesson summary

TEACHING MOVES

- Model the spreadsheet then the letter on the projector; paste « » once on the board before students type.
- Project-type the letter body once and let students paste then edit markers; keep data entry as the hands-on core.
- Lead concept names orally; dwell on the Aoife table and exact header/field match (FirstName vs First Name).
- Open IP with a 60-second filename chant (EXAMPLE stays; official names for Something Real).
- Circulate during independent practice: folder + header match first, content second.
- Encourage real project contacts where possible; realistic role + first name is fine for privacy.
- End IP with a 1-minute portfolio bank check: sm1_doc4_mailmerge_source.xlsx and sm1_doc4_mailmerge_letter.docx are the VET / portfolio artefacts. In summary, only spot-check two portfolios and log catch-ups.

WHAT TO WATCH FOR

- Students place files in the wrong folder; direct them to the Specialism Module 1 folder.
- Merge fields do not match headers exactly; check spelling and use copy-paste for markers.
- Blank rows in data source cause errors; ensure one row per recipient with no gaps.
- Students overwrite EXAMPLE practice files instead of creating a new Something Real pair under the official names.

DIFFERENTIATION

- Support: Provide a partially completed data source (shared two-row starter with headers, or copyable header row) for students needing extra help.
- Support: Allow use of the alternate Work Experience opening and field ideas list; minimum viable guided path is headers + two rows + Dear «FirstName» opening with three markers.
- Extension: Challenge students to include additional merge fields beyond the minimum.